HMIS Training Guide

Columbus & Franklin County Continuum of Care

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Administered by Community Shelter Board (CSB)
HMIS Lead, Collaborative Applicant, and Unified Funding Agency

Table of Contents

Table of Contents 2

Introduction 3

- What is Clarity? 3
- Training Process Overview 3

Step 1: HMIS Governance Documents 3

Step 2: New Clarity Interface training course 4

- Client Intake 4
- Privacy 4
- Working at the Client Level 4
- Working in Programs 4
- Caseload 5
- Case Management 5
- Referrals (Optional) 5

Step 3: HMIS Training Site 5

Appendix: HMIS Training Site Practice Instructions 6

- Before You Begin (All Program Types) 6
- Program Types Covered in This Appendix 7
- Homelessness Prevention (HP) 7
- Resilient Housing Initiative (RHI) 8
- Outreach 8
- TAY CARR 9
- Homeless Hotline 10
- Emergency Shelter (ES) 10
- Transitional Housing (TH) 11
- Rapid Re-housing (RRH) 12
- Permanent Supportive Housing (PSH) 12
- Supportive Services Only (SSO) 13
- When You're Finished 14

Introduction

This guide outlines the required training process for new HMIS end users at Columbus & Franklin County Continuum of Care (CoC) provider agencies. It walks through each step, from reviewing CoC governance documents through completing a hands-on practice assignment in the Clarity HMIS training site, so users can enter accurate, consistent data before receiving access to the live HMIS.

This guide applies to all HMIS end users, regardless of their agency's CSB funding relationship.

CSB follows a train-the-trainer model: new users should reach out to their HMIS Agency Administrator first with questions about this process. The HMIS Agency Administrator can contact the CSB HMIS Database Manager if further assistance is needed.

What is Clarity?

Clarity is a Homeless Management Information System (HMIS) used to collect, monitor, and evaluate housing and homeless services in Columbus and Franklin County CoC. The United States Housing and Urban Development Department (HUD) requires each local Continuum of Care (CoC) to have an HMIS that complies with HUD standards, is used by all HUD funded entities in the continuum and is able to produce aggregate reporting at system and community level.

Currently, over 380 users in 40 agencies are using HMIS to collect data for over 100 housing and homeless related programs throughout Franklin County. HMIS is supported by Community Shelter Board (CSB) through a Data and Evaluation Department staffed by a full time HMIS Database Manager, Senior Data Analyst, Project + Data Analyst, and Deputy Chief, Housing + Data Systems.

Training Process Overview

The Columbus and Franklin County CoC's HMIS training process includes three steps: review of CoC HMIS Governance documents, completion of training videos, and completion of a practice assignment in the Clarity HMIS training site. Steps 1 through 3 below are required for all new users. Only users who have completed all of the required steps will be granted access to the live HMIS.

Step 1: HMIS Governance Documents

New users must review the following documentation on our website https://www.csb.org/providers/hmis/

HMIS Governance Documents

- HMIS Policies & Procedures
- HMIS Local Data Dictionary
- HMIS Agency Agreement

HMIS Agency Forms

- HMIS Privacy Posting (this must be posted at every location where clients provide information for HMIS)
- HMIS Client Acknowledgement for Data Collection

- HMIS User Agreement (signed electronically upon first log-in to Clarity HMIS)

New users designated as HMIS Agency Administrators must also schedule a meeting with the CSB HMIS Database Manager to review the HMIS governance documents in detail and discuss the roles and responsibilities of serving as an Agency Administrator.

Step 2: New Clarity Interface training course

Our HMIS vendor, Bitfocus, has provided on-demand courses that are prerecorded and delivered online. New users must individually register for the New Clarity Interface training course. https://learn.bitfocus.com/clarity-human-services-new-interface

- Click on "Register Free"
- You will see two options, "Sign In" and "Sign Up", click "Sign Up".
- Use your work email to register individually for the training course.
- By using an individual login, users are able to track their progress.

Client Intake

- Home Page
- Search for a Client
- Create a Client
- Add Client Photo
- Location Tab
- Contact Tab

Privacy

- Privacy Tab
- Marking Data Private
- Client Consent Toggle

Working at the Client Level

- Household Tab
- Exiting a Household
- History Tab
- Services Tab
- Assessment

Working in Programs

- Program Enrollment
- Current Living Situation Assessment (Outreach projects)

- Prior Living Situation
- Working in an Enrollment
- Exiting a Client Enrollment
- Reopen Client Program (HMIS Agency Admin only)

Caseload

- Active Enrollment Widget
- Status Due Widget
- Accessing the Care Team Tab (Optional. Discuss with your HMIS Agency Admin)
- Maneuvering the Care Team Tab (Optional. Discuss with your HMIS Agency Admin)

Case Management

- Forms Tab (Optional)
- Client Notes and Public Alerts
- Client Files Tab

Referrals (Optional)

Note: These videos are useful for providers who work with the community queues, waitlists, RRH pools, etc.

- Navigator Widget
- Client Level Referrals
- Global Referrals Tab
- Incoming Referrals
- Outgoing Referrals
- Snoozed Referrals

Step 3: HMIS Training Site

New users will be given access to the HMIS training site/sandbox environment (https://columbus-train.clarityhs.com/) and basic training will be conducted by their HMIS Agency Administrator, tailored to the new user's role. The user will then complete a practice assignment to gain access to the HMIS.

The practice assignment will consist of the user in training completing a mock data entry record in the HMIS training site using specific instructions found in the Appendix of this document. Upon completion of the practice assignment, the user will email HMIS@CSB.org to inform us the assignment is ready for review.

The practice assignment should take approximately 10 to 20 minutes, depending on program type.

The CSB Database Manager will then review the completed mock record and assess the user's proficiency level with the system. If the practice assignment is completed successfully, the CSB Database Manager will notify the user and HMIS Agency Administrator and provide login information for the live HMIS. If errors are identified on the practice assignment, the user will be notified and given a chance to correct the errors. If correction attempts fail and it is deemed that the user is not yet proficient enough to have access to the live site, the user will need to be retrained by their HMIS Agency Administrator.

Users whose accounts have been inactive for one year or longer are also required to repeat Step 3 before regaining access to the live HMIS.

Appendix: HMIS Training Site Practice Instructions

Complete the shared setup steps below, then find your program type and follow its enrollment, assessment, and exit steps.

Before You Begin (All Program Types)

- Reach out to your HMIS Agency Administrator (or the CSB HMIS Database Manager, if directed) for login credentials. https://columbus-train.clarityhs.com/login
- Login to the Clarity HMIS Training Site.
- Create a new client profile.
- Set the client's first name equal to your first name.
- Set the client's middle name to your last name.
- Set the client's last name equal to "Test." Ex: Martha Smith Test.
- Enter test data (not real information) for all HUD-required and CoC local data elements.
    - SSN
    - Quality of SSN
    - Quality of Name
    - Quality of DoB
    - DoB
    - Gender
    - Race and Ethnicity
    - Veteran Status
- Click Save.
- Add a Release of Information (ROI).
    - Set the permission to Yes.
    - Set the Entry Date equal to 5 days before today.
    - Set the documentation to Electronic Signature. (Homeless Hotline only: set to verbal)

- Sign in both places (squiggle for testing, no real signature please).
- **Note**: In the real world, the client signs first, then the staff member in the next box.

Program Types Covered in This Appendix

- Homelessness Prevention (HP)
- Resilient Housing Initiative (RHI)
- Outreach
- TAY CARR
- Homeless Hotline
- Emergency Shelter (ES)
- Transitional Housing (TH)
- Rapid Re-housing (RRH)
- Permanent Supportive Housing (PSH)
- Supportive Services Only (SSO)

Homelessness Prevention (HP)

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set client's Income from Any Source to "No."
  - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.
  - Set client's Covered by Health Insurance to "No."
  - Add any long-term disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Complete a Direct Client Assistance (DCA) Referral.
- Create a Status (Update) Assessment.
  - Set Assessment Date equal to 2 days before today.
  - Client should now have Earned Income to $1000/month.
  - Client should now have no Non-cash Benefits.
  - Client should now have Medicaid Health Insurance.
  - Client still has their disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Add any service.
- Add a program-level note.

- Exit the client from your program.
  - Set Exit Date to today.
  - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
  - Client should now have an Earned Income of $1200/month.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Resilient Housing Initiative (RHI)

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set client's Income from Any Source to "Yes."
  - Set client's Income Type to Earned Income of $1200.
  - Set client's Risk Level to 3.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Exit the client from your program.
  - Set Exit Date to today.
  - Show a decrease in the client's Risk Level compared to the Enrollment Assessment.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Outreach

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set the type of Residence to "Place not meant...".
  - Complete the length of stay question.
  - Assign a homeless start date.
  - Complete the number of times homeless question.
  - Complete the number of months homeless. (Note: Any single day in a calendar month equals one month. Ex. Start date of 5/31/2026 is one month.)
  - Set the Disabling Condition to "Yes".
  - Select an answer for Sex.
  - Click "Save", then "Complete".
- Create a Current Living Situation assessment.
  - Click the plus sign next to program level assessments.

  - Select "Current Living Situation" and click "Next".
  - Set the date of contact to two days ago.
  - Select the current living situation "Place not meant".
  - Enter location test notes in the Location Details box.
  - Click Save & Next.
  - Click Complete.
- Exit the client from your program.
  - Set Exit Date to today.
  - Client agreed to go to shelter. Select "Emergency Shelter..." for the destination.
  - Click Save & Next.
  - Click Complete.

TAY CARR

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set client's Income from Any Source to "No."
  - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.
  - Set client's Covered by Health Insurance to "No."
  - Add any long-term disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Complete a Rapid Rehousing Prioritization Tool (RPT) assessment.
- Create a Status (Update) Assessment.
  - Set Assessment Date equal to 2 days before today.
  - Client should now have Earned Income to $1000/month.
  - Client should now have no Non-cash Benefits.
  - Client should now have Medicaid Health Insurance.
  - Client still has their disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Complete a Current Living Situation Assessment using the same date as the above Status Assessment.
- Add a program-level note.
- Exit the client from your program.
  - Set Exit Date to today.

  - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
  - Client should now have an Earned Income of $1200/month.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Homeless Hotline

- For Homeless Hotline, set the ROI documentation to Verbal instead of Electronic Signature, consistent with the program's phone-based intake.
- Enroll the client in your program.
  - Set the Entry Date equal to today.
  - Set Contact Resolution to "Needs Shelter Tonight."
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Create a Shelter Referral and add the client to the "3 - Family Standby" List.
- Complete another Shelter Referral and add the client to any shelter that makes sense based on their demographics.

Emergency Shelter (ES)

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set client's Income from Any Source to "No."
  - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.
  - Set client's Covered by Health Insurance to "No."
  - Add any long-term disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Complete a Rapid Rehousing Prioritization (RPT) assessment and RRH Pool referral w/ any values.
- Complete a DCA Referral.
- Create a Status (Update) Assessment.
  - Set Assessment Date equal to 2 days before today.
  - Client should now have Earned Income to $1000/month.
  - Client should now have no Non-cash Benefits.
  - Client should now have Medicaid Health Insurance.
  - Client still has their disability.

    - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Add any service.
- Add a program-level note.
- Exit the client from your program.
    - Set Exit Date to today.
    - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
    - Client should now have an Earned Income of $1200/month.
    - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Transitional Housing (TH)

- Enroll the client in your program.
    - Set the Entry Date equal to 5 days before today.
    - Set client's Income from Any Source to "No."
    - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.
    - Set client's Covered by Health Insurance to "No."
    - Add any long-term disability.
    - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Create a Status (Update) Assessment.
    - Set Assessment Date equal to 2 days before today.
    - Client should now have Earned Income to $1000/month.
    - Client should now have no Non-cash Benefits.
    - Client should now have Medicaid Health Insurance.
    - Client still has their disability.
    - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Add any service.
- Add a program-level note.
- Exit the client from your program.
    - Set Exit Date to today.
    - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
    - Client should now have an Earned Income of $1200/month.

  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Rapid Re-housing (RRH)

- Enroll the client in your program.
  - Set the Entry Date equal to 5 days before today.
  - Set client's Income from Any Source to "No."
  - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.
  - Set client's Covered by Health Insurance to "No."
  - Add any long-term disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Complete a DCA Referral.
- Create a Status (Update) Assessment.
  - Set Assessment Date equal to 2 days before today.
  - Client should now have Earned Income to $1000/month.
  - Client should now have no Non-cash Benefits.
  - Client should now have Medicaid Health Insurance.
  - Client still has their disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Add any service.
- Add a program-level note.
- Exit the client from your program.
  - Set Exit Date to today.
  - Client successfully completed the program and Exit Destination should be Rental w/ RRH or Equivalent Subsidy.
  - Client should now have an Earned Income of $1200/month.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Permanent Supportive Housing (PSH)

- Enroll the client in your program.
  - Set the Entry Date equal to 2/1/25.
  - Set client's Income from Any Source to "No."
  - Set client's Non-Cash Benefits to SNAP (Food Stamps) only.

  - Set client's Covered by Health Insurance to "No."
  - Add any long-term disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.
- Create an Annual Assessment Record.
  - Set Assessment Date within the allowable window for Annual Reviews, any year.
  - Client should now have Earned Income to $1000/month.
  - Client should now have no Non-cash Benefits.
  - Client should now have Medicaid Health Insurance.
  - Client still has their disability.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values. (Hint: Employment Status).
- Add any service.
- Add a program-level note.
- Exit the client from your program.
  - Set Exit Date to today.
  - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
  - Client should now have an Earned Income of $1200/month.
  - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

Supportive Services Only (SSO)

- Enroll the client in your program.
  - Set the Project Start Date equal to 2/1/26.
  - Set the Relationship to Head of Household to "Self (Head of Household)".
  - Select any response for Type of Residence.
  - If the Length of Stay questions populate:
    - Set the Length of Stay in Prior Living Situation to "One month or more, but less than 90 days".
    - Set the Approximate date of this episode of homelessness started to 12/15/2025.
    - Set the Number of times on the streets... to "One Time".
    - Set the Total number of months homeless... to "Three Months". (Note: Any single day in a calendar month equals one month. Ex. Start date of 12/15/2025 is one month.)

    - Set the Disabling Condition to "Yes".
    - Select an answer for Sex.
    - Click "Save", then "Complete".
- Add a program-level note.
- Exit the client from your program.
    - Set Exit Date to today.
    - Client successfully completed the program and Exit Destination should be Rental w/ No Ongoing Subsidy.
    - Answer all other field values as you'd like, ensuring the values make sense when considering the rest of the assessment values.

When You're Finished

Email HMIS@csb.org to let us know you've completed your practice assignment. Results will be emailed to you in the next few days.

The mock client record you created does not need to be deleted; the test data may be used for additional training purposes.