



Housing and Income Pathways HMIS Workflow

Log into Clarity HMIS. Locate the client profile. Next, click on the Assessments tab, then click on the “add” icon.

A screenshot of the Clarity HMIS web application. The top navigation bar is light purple and contains 'Client Search', 'Martha Test', and 'Assessments'. On the right of the bar are icons for refresh, search, and a user profile for 'Jennifer McCloskey-Haas' from 'TEST Agency'. Below the navigation bar, the client's name 'Martha Test' is displayed with a subtext 'Expand this section to view more details about the client that this program enrollment is for.' A left-hand sidebar lists various tabs: Profile, Privacy, Household, Units/Beds, Care Team, History, Programs, Assessments (highlighted with a blue arrow), Notes, Files, and Contacts. The main content area is titled 'Client assessments' and 'Assessment history for Martha Test'. It features a search bar and a message stating 'No results yet! Results will be displayed here when they are available.' A blue arrow points to a plus icon in the top right corner of this section. A bottom right corner contains a blue speech bubble icon with a red notification badge.



The list of available assessments will appear. Click on the “Housing and Income Pathways” assessment, click “Next”.

Add the assessment date.



Housing Pathways:

The Housing Pathways section has several options. These are multi-select.

Housing Pathways

Based on today's conversation, which permanent housing options would you like to explore? (Check all that apply. Selection does not guarantee eligibility or assistance.)

Independent Housing

Select

Family & Community-Based Options

Select

Specialized Housing

Select

Recovery Housing

Select

Other Housing Option(s)

Target Housing Move-In Date

Select the appropriate options.

Housing Pathways

Based on today's conversation, which permanent housing options would you like to explore? (Check all that apply. Selection does not guarantee eligibility or assistance.)

Independent Housing

Market Rate Housing, Subsidized housing (CMHA or other Affordable Housing Programs)

☒ Market Rate Housing

☐ Permanent Supportive Housing (PSH)

☐ Shared Housing

☒ Subsidized housing (CMHA or other Affordable Housing Programs)

☐ Tiny Home Community

☐ Home Ownership (Homeport or Other Home Ownership Programs)

Select

Other Housing Option(s)

Target Housing Move-In Date



The Housing Pathways section has additional options other than independent housing. Select these options as appropriate.

The image displays two side-by-side screenshots of the CSB client portal interface. The left screenshot shows the 'Martha Test' client profile, including a 'Program assessments' section with a 'No results yet!' message. The right screenshot shows the 'Housing Pathways' section, which includes a dropdown menu for 'Independent Housing' (Market Rate Housing, Subsidized housing (CMHA or other Affordable Housing Programs)), a 'Family & Community-Based Options' section with a 'Select' dropdown and a checkbox for 'Family Reunification (Permanent)', a 'Recovery Housing' section with a 'Select' dropdown, and an 'Other Housing Option(s)' text input field. Below these, there is a 'Target Housing Move In Date' section with a date input field and a 'MM/DD/YYYY' label.



Market Rate Housing, Subsidized housing (CMHA or other Affordable Housing Programs)

Family & Community-Based Options

Select

Specialized Housing

Select

Recovery Housing

Select

☐ Alcohol or Drug Inpatient Treatment

☐ Sober Living/Recovery Housing

Target Housing Move In Date

MM/DD/YYYY

Date the Housing Pathway Ended (successful completion)

MM/DD/YYYY

If none of the above options reflect the housing pathway, choose “Other” and describe the other housing pathway in the pop up text box.

Select

Specialized Housing

Select

Recovery Housing

Select

Other Housing Option(s)

Test

Target Housing Move In Date

MM/DD/YYYY

Date the Housing Pathway Ended (successful completion)

MM/DD/YYYY

If unable to complete the Housing Pathway, describe why.



Enter the target Housing Move In Date.

The screenshot shows the 'Specialized Housing' form for Martha Test. The form includes the following fields:

- Specialized Housing:** A dropdown menu with 'Select' as the current value.
- Recovery Housing:** A dropdown menu with 'Select' as the current value.
- Other Housing Option(s):** A text input field containing 'Test'.
- Target Housing Move In Date:** A date picker showing '12/11/2026'.
- Date the Housing Pathway Ended (successful completion):** A date picker showing 'MM/DD/YYYY'.
- If unable to complete the Housing Pathway, describe why:** A text input field.

Income Pathways:

There are two options available in the Income Pathways section, Employment and Benefits. Choose the appropriate options. These are multi-select.

The screenshot shows the 'Income Pathways' form for Martha Test. The form includes the following fields:

- Income Pathways:** A section header.
- Employment:** A dropdown menu with 'Referral to Aspyr or other employment program' as the current value.
- Already working/maintain or increase income:** A checkbox.
- Referral to Aspyr or other employment program:** A checked checkbox.
- Workforce Development:** A checkbox.
- Education/Training:** A checkbox.
- Vocational Rehabilitation:** A checkbox.
- Other:** A text input field.
- Buttons:** 'Cancel', 'Save', and 'Back' buttons.



Martha Test

TEST ES Shelter
TEST Agency
Other

9/11/26 - Active
1 days ago

Home History Group

Program assessments
TEST ES Shelter assessment history for Martha Test
Assessment due every year

No results yet!
Results will be displayed here when they are available.

Employment
Referral to Aspyr or other employment program

Benefits
Select

- ☐ Supplemental Security Income (SSI)
- ☐ Social Security Disability Insurance (SSDI)
- ☐ Social Security Retirement
- ☐ SNAP benefits
- ☐ Child support
- ☐ Ohio Works First (OWF)/TANF cash assistance

Cancel Save

Back

Completed

When all appropriate options are selected, click “Save”.

Martha Test

TEST ES Shelter
TEST Agency
Other

9/11/26 - Active
1 days ago

Home History Group

Program assessments
TEST ES Shelter assessment history for Martha Test
Assessment due every year

No results yet!
Results will be displayed here when they are available.

Income Pathways

Employment
Select

Benefits
Select

Date the Income Pathway Ended (successful completion)
MM/DD/YYYY

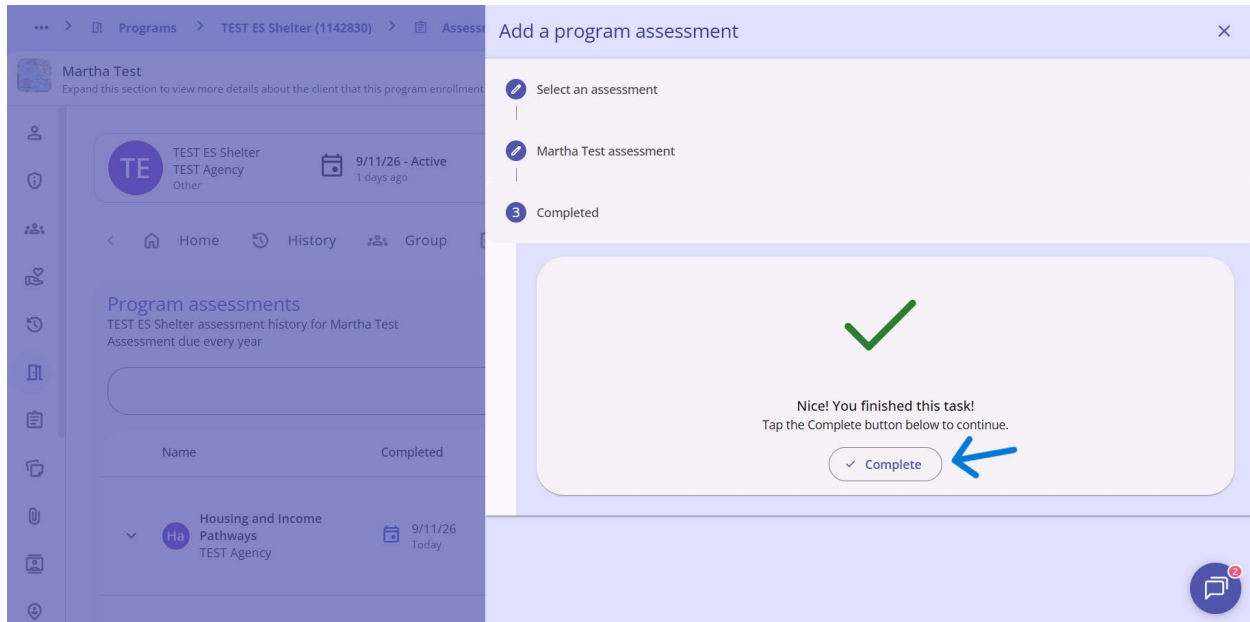
If unable to complete the Income Pathway, describe why.

Cancel Save

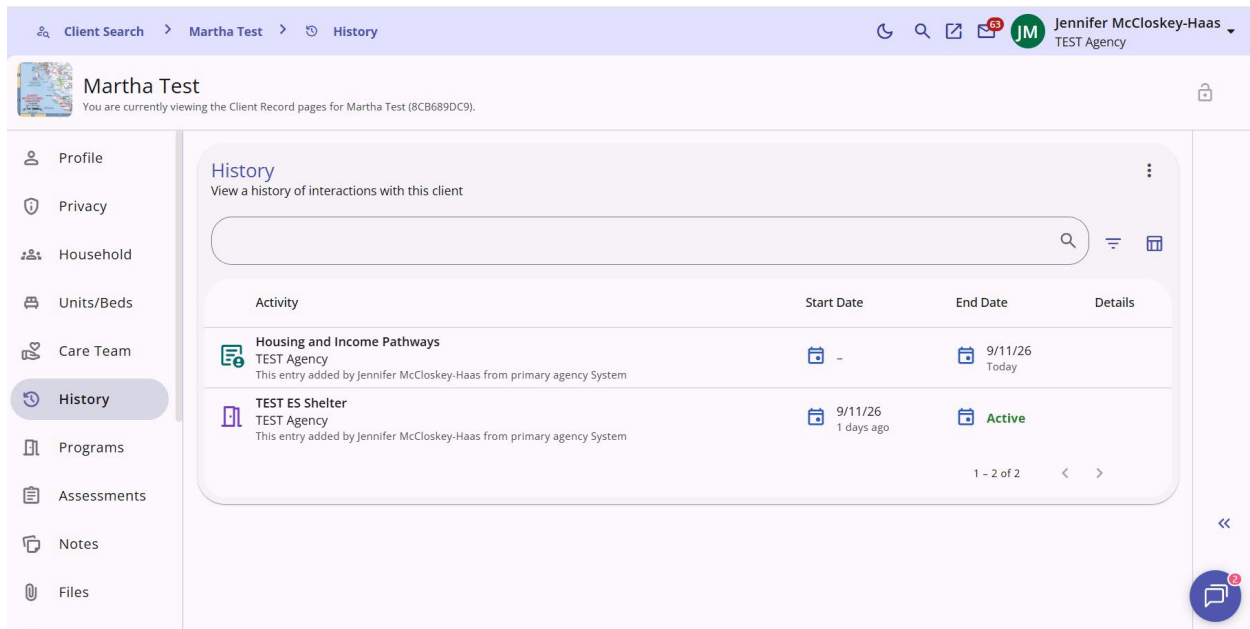
Back



Next, click “Complete”.



In the client history, you will now see the completed Housing and Income Pathways Assessment.





Updating the Housing and Income Pathways Assessment:

When the Housing Pathway has been completed, add the completion date. If unable to complete the Housing Pathway, add additional information to the textbox.

The screenshot shows the 'Housing Pathway' assessment form for Martha Test. The left sidebar displays the client's profile and program details. The main form area includes the following fields:

- Specialized Housing:** A dropdown menu with 'Select' as the current value.
- Recovery Housing:** A dropdown menu with 'Select' as the current value.
- Other Housing Option(s):** A text input field containing the word 'Test'.
- Target Housing Move In Date:** A date picker set to 12/11/2026.
- Date the Housing Pathway Ended (successful completion):** A date input field with a placeholder '___/___/___'.
- If unable to complete the Housing Pathway, describe why:** A large text area for additional information.

Similarly, when the Income Pathway has been completed, add the completion date or a description of why the Pathway was not completed.

The screenshot shows the 'Income Pathway' assessment form for Martha Test. The left sidebar is identical to the previous form. The main form area includes the following fields:

- Employment:** A dropdown menu with 'Referral to Aspyr or other employment program' as the current value.
- Benefits:** A dropdown menu with 'Select' as the current value.
- Date the Income Pathway Ended (successful completion):** A date input field with a placeholder '___/___/___'.
- If unable to complete the Income Pathway, describe why:** A large text area for additional information.

At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Back'. A status bar at the very bottom indicates '3 Completed'.

Click "Save".