FY23

HMIS Training Guide

[COMMUNITY SHELTER BOARD]

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TABLE OF CONTENTS

Introduction

What is Clarity?

Clarity is a Homeless Management Information System (HMIS) used to collect, monitor, and evaluate homeless and housing services in Columbus and Franklin County. 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 345 users in 20 agencies are using HMIS to collect data for over 100 homeless and housing related programs throughout Franklin County. HMIS is supported by Community Shelter Board (CSB) through a Data and Evaluation Department staffed by a full time Database Administrator, Senior Data Analyst, Data Analyst, Data and Grants Coordinator, and Associate Director.

Training Process

New users will be given access to the HMIS training site (https://columbus-train.clarityhs.com/) and basic training will be conducted by their Agency Administrator. Following basic training, their Agency Administrator will grant access to specialized training videos tailored to the project type(s) in which the user will be working. The user will then complete a certification test to gain access to the HMIS.

The certification test will consist of the user in training completing a mock data entry record in the HMIS training site using specific instructions found in the final video of the training series. The CSB Database Administrator will then review the completed record and assess the user's proficiency level with the system. If the certification test is passed, the CSB Database Administrator will notify the user and Agency Administrator and provide login information for the live HMIS. If errors are identified on the test, 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 Agency Administrator. Only users who have completed and passed the certification test will be granted access to the live HMIS.

Intro Training Videos

Required for all users

The first few training videos are the same for each user and cover the basics of HMIS. All users are required to watch these videos. The videos are:

- Intro
- Resources & Security
- Login & Homescreen Navigation

Intro

This video explains what HMIS is and why it is important. It also walks through the training process outlined in the subsequent videos.

Resources & Security

This video provides the user with helpful resources found on the CSB website and walks through best practices for maintaining client privacy and security.

Login & Homescreen Navigation

In this video, the user will learn how to login to HMIS, navigate between the sections of the homescreen within the system and about each section's functions and features.

Coordinated Entry

For Coordinated Entry projects, the following training videos need to be viewed after the intro videos:

- Searching & Creating Client Profiles
- Profile Navigation
- Homeless Hotline Screening
- Hotline Shelter Referral
- Coordinated Entry Events
- Hotline DV HAST Referral

Searching & Creating Client Profiles

This video teaches the user how to use the universal search bar to find a client using a number of different criteria and how to create a new profile for a client if one does not already exist.

Profile Navigation

In this video, the user learns how to navigate the many different screens found on a client's profile and about the functions and features of each screen.

Homeless Hotline Screening

This video walks the user through the Homeless Hotline call screening assessment. This is the first assessment a client receives and sets the groundwork for data collection as the client moves through the homeless system. This assessment is used to determine if a client should be referred to an emergency shelter, homeless prevention program, or diverted to outside resources.

Hotline Shelter Referral

This video teaches the user how to create an Emergency Shelter referral for a client who is in immediate need of shelter.

Coordinated Entry Events

In this video the user learns about Coordinated Entry events, which are an important element for tracking a client's engagement, prioritization, and referrals as they move through the homeless system.

Hotline DV HAST Referral

In rare cases, a client who is a victim of domestic violence calls into the homeless hotline from a designated DV shelter seeking access to Rapid Re-housing (RRH) services. This video walks the hotline user through the process for completing the Housing Assistance Screening Tool (HAST) and creating a referral to the RRH prioritization pool.

Crisis Intervention Specialist

For users with the Crisis Intervention Specialist role, the following training videos need to be viewed after the intro videos:

- Searching & Profile Navigation
- Crisis Intervention & De-escalation Assessment

Searching & Profile Navigation

In this video the user will learn how to use the universal search bar to find a client using a number of different criteria. They will also learn how to navigate the many different screens found on a client's profile and about the functions and features of each screen.

Crisis Intervention & De-escalation Assessment

This is the assessment completed by Crisis Intervention Specialists. This video walks through how to complete the assessment and the various scenarios.

All Other Project Types

For all other project types, the following training videos need to be viewed after the intro videos:

- Searching & Creating Client Profiles
- Profile Navigation
- Household Management
- Adding a Release of Information
- Enrolling a Household into a Program
- Program Record Navigation
- Supplemental Assessments
- Adding a Service
- Coordinated Entry Events
- Notes & Files
- Exiting a Household from a Program

[Searching & Creating Client Profiles]

This video teaches the user how to use the universal search bar to find a client using a number of different criteria and how to create a new profile for a client if one does not already exist.

[Profile Navigation]

In this video, the user learns how to navigate the many different screens found on a client's profile and about the functions and features of each screen.

[Household Management]

This video walks users that work with families through how to create and manage households and client relationships.

[Adding a Release of Information]

While our homeless system operates on inferred consent, it is important that every client be presented with notice that we collect and enter certain information into our HMIS and participation in a homeless program consents to this data collection. This video explains the process for how to upload a copy of a signed Client Acknowledgement of Data Collection form, sign the acknowledgement directly in the system, or what to do when someone refuses to sign.

[Enrolling a Household into a Program]

This video goes through the process of enrolling an individual or family into a program and how to complete the primary assessment for their project type.

[Program Record Navigation]

This video walks the user through navigation of the different screens within their program's enrollment record and the various uses and functionality of each screen.

[Supplemental Assessments]

This video reviews the many different types of supplemental assessments and when they are needed, such as a DCA Referral, Housing Assistance Screening Tool (HAST), Severity of Service Needs Assessment (SSNA), and others.

[Adding a Service]

In this video the user learns how to create and edit service records for financial assistance, case management, employment services, legal services, transportation, etc.

Coordinated Entry Events

In this video the user learns about Coordinated Entry events, which are an important element for tracking a client's engagement, prioritization, and referrals as they move through the homeless system.

Notes & Files

This video teaches the user how to upload, maintain, and organize files, notes, and public alerts for a client.

Exiting a Household from a Program

This video goes through the process of exiting an individual or family from a program once they have completed their stay and how to complete the exit assessment for their project type.

Final Training Video

Required for all users

- Certification Test

Certification Test

In this video the user is presented with instructions for how to complete and submit their HMIS certification test and expected next steps.

Reporting Videos

Optional

In addition to the required training videos there is a playlist of reporting videos that all users will find useful. It consists of the following videos:

- Report Section Overview
- Running a Built-In Report
- Running the QA Report
- Building a Custom Report

Report Section Overview

This video takes the user on a tour of the various reporting sections and their differences. There are three reporting menus – the Report Library (built-in reports), Explorer (custom report building), and Data Analysis (CSB-created reports).

Running a Built-In Report

In this video the user learns about the Report Library, the various types of reports found here and the process for running a report, though the report criteria will vary between reports. All users have access to this reporting section.

Running the QA Report

This video discusses how to run and interpret the QA report as well as how to identify errors flagged in the report. Running the QA Report requires access to the Data Analysis reporting section via a special reporting license. This video is especially useful for Agency Administrators.

Building a Custom Report

In this video, users will learn the basics of creating their own custom reports via the Explorer menu. Access to this area requires a special reporting license.

Resources

Helpful resources are available at https://www.csb.org/providers/hmis including:

- HMIS Policies and Procedures
- HMIS Data Reference & Dictionary
- Project-Specific Data Collection Forms
- Various form templates, such as the Agency Privacy Notice
- Meeting schedules and notes

When in doubt, your best resource is your Agency's HMIS Administrator.