Clarity Human Services
Customer Portal

Alameda County
Provider Training Guide

CONTENTS

ABOUT THE PORTAL

The Customer Portal is connected to Clarity Human Services, Alameda's Homeless Management Information System (HMIS). The Portal provides people experiencing homelessness or receiving services or housing with access to components of their HMIS records, tools to communicate with providers, and information and resources to empower them in their journey to permanent housing.

Participant-Centered Tools

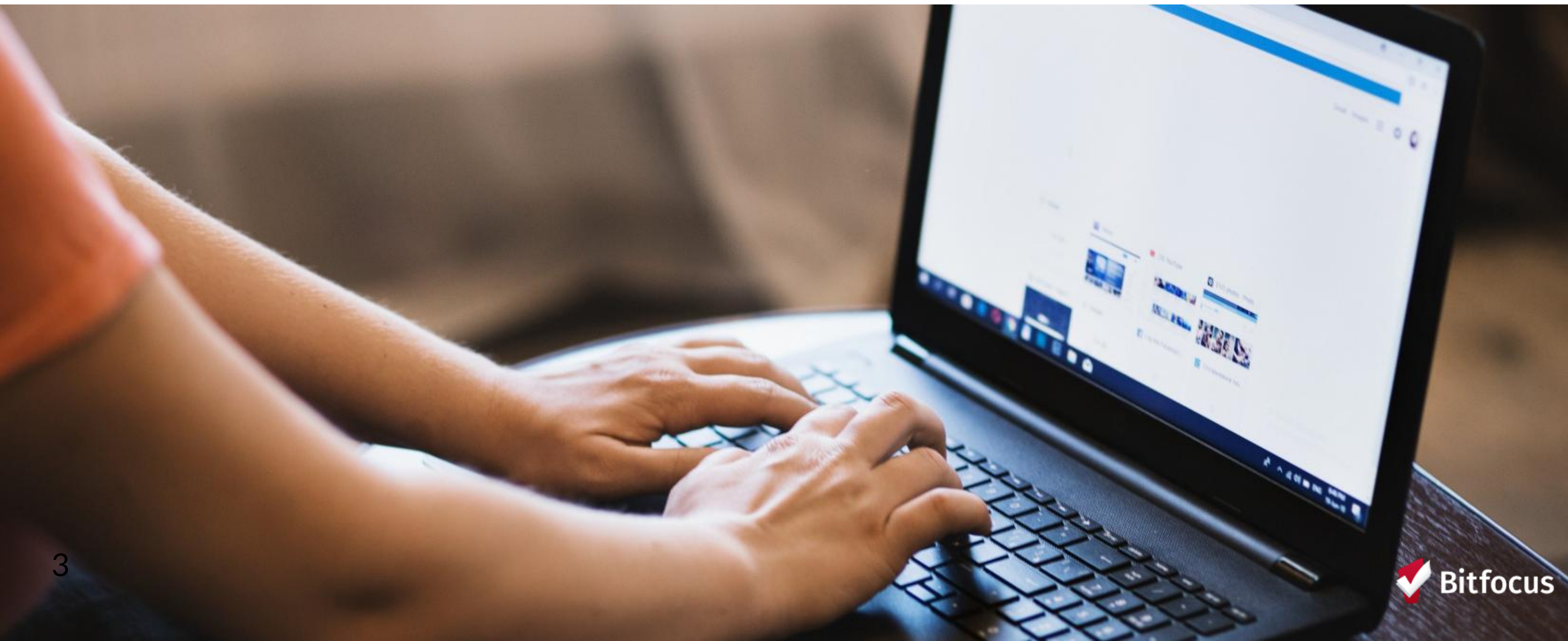
The Portal introduces new participant-centered tools designed to support participants in the case management and housing navigation process by increasing access to services and improving communication methods between participants and their care team members. Key features of the Portal include a secure message center, the ability to upload documentation, complete assessments, and more.

Collaborative Approach

The Portal was designed for participants experiencing homelessness with input from individuals with lived experiences of homelessness, including currently homeless individuals. The tools included can also help providers increase coordination with participants and improve the efficiency of the case management process.

Connection to Clarity Human Services

Providers can request updated information from participants through HMIS, and participants receive and respond to these requests within the Portal. When participants complete actions within the Portal, such as uploading documentation or completing an assessment, these updates are reflected and accessible on the participant record within HMIS in real- time. Many features provide the ability to track participant progress all in one centralized location. Providers can also send mass messages and requests to multiple participants at one time, saving you time and energy!



PROVIDER ROLES & RESPONSIBILITIES

Service providers who utilize the Portal will work closely with participant participants. Provider responsibilities include:

Participate in training for Portal workflow and functionality

Training will be provided for all providers participating in the Portal.

Provide training and support to your participants who participate in the Portal

Providers serve as the primary connection between participants and the Portal, and providers are responsible for delivering initial training to participant participants and offering ongoing support when necessary. Providers will receive training on the participant onboarding process, and it is anticipated that sending an invite and initial Portal training will require 10 to 15 minutes per participant.

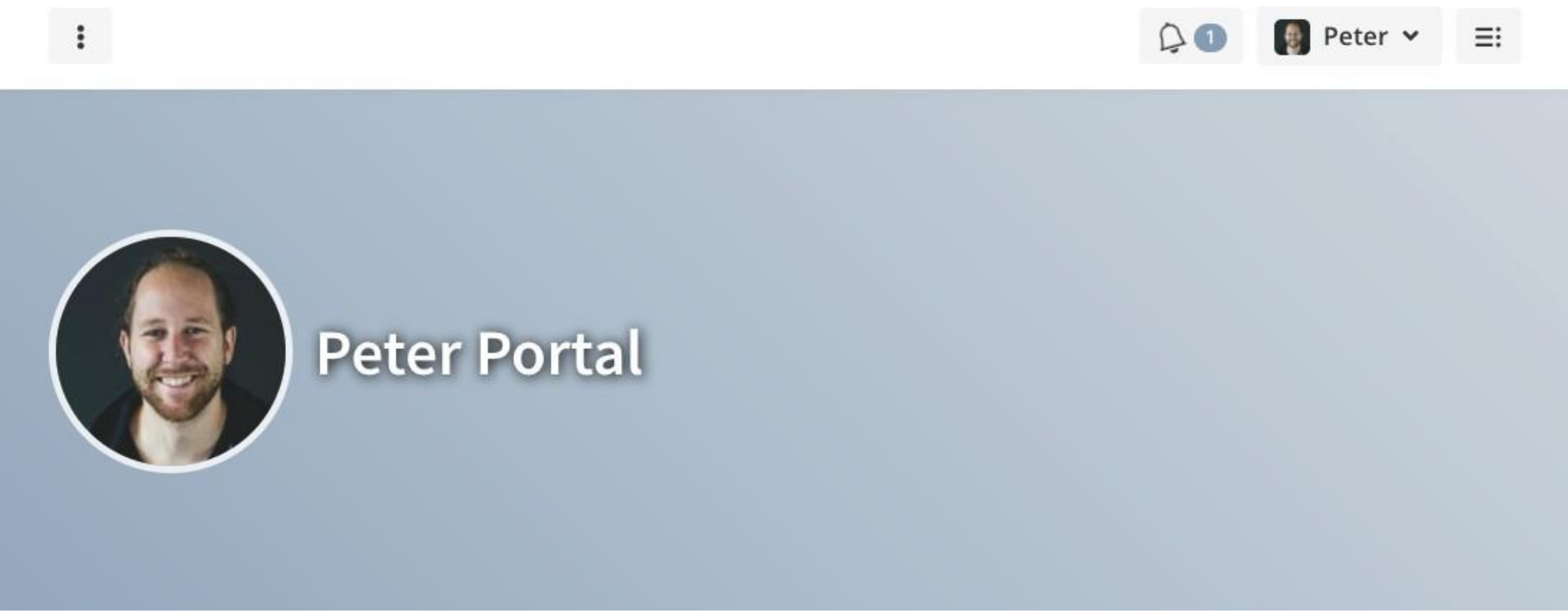
Send Portal invitation to participants through HMIS

Participating providers are responsible for sending an invitation to participants to participate in the Portal. Invitations are sent to the participants via email, and the invitation is initiated through a link on the participant's HMIS profile page. This is the first step of the account creation process. We ask providers to invite as many participants to the Portal as possible.

Utilize Portal features within the case management process

Participating providers should use the Portal regularly to support participants through the case management process. This guide provides recommended strategies for using the Portal, and participating providers will be instrumental in discovering and establishing new use cases to maximize the Portal's impact.

ACCOUNT MANAGEMENT

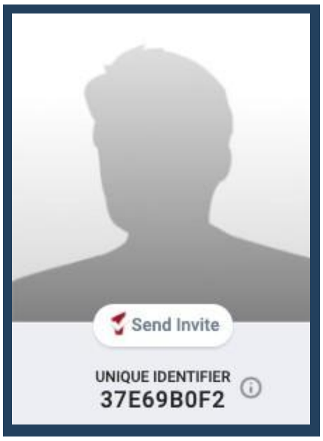


ACCOUNT CREATION: Sending Portal Invitations

The participant's account creation process includes multiple steps to ensure the safety and confidentiality of a participant's personal information. The process begins with an invitation initiated from HMIS by the service provider to the participant. It also requires the participant to complete a two-factor authentication process to gain account access. Participants without access to a personal mobile device are still eligible for an account, and additional recommendations are included in the account creation instructions for participants using a shared device.

Sending Invitations to Participants Through Clarity

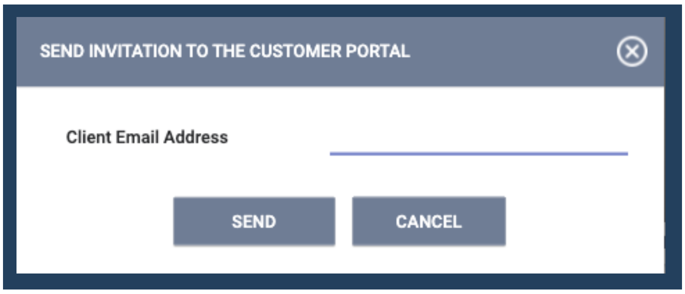
The first step of the account creation process requires a provider to initiate an invitation to join the Portal
through Clarity. Participant invitations are generated through the following steps:



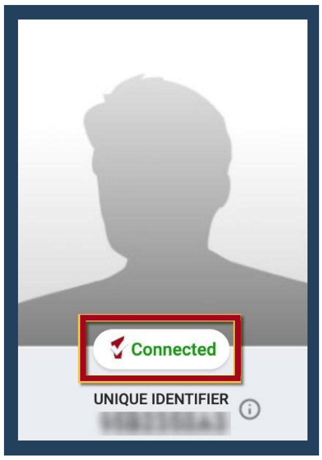
(Note: If you do not see a Send Invite button, the participant may not have a DOB in Clarity, may be under the age of 18, or your agency may not be configured for Portal Access, and you should contact your system administrator.)

Navigate to the participant profile page in HMIS and click the Send Invite button, which is located at the bottom of the participant photo section.

Enter the participant email address in the pop-up box and click Send. The invitation button will now say Invite Sent.



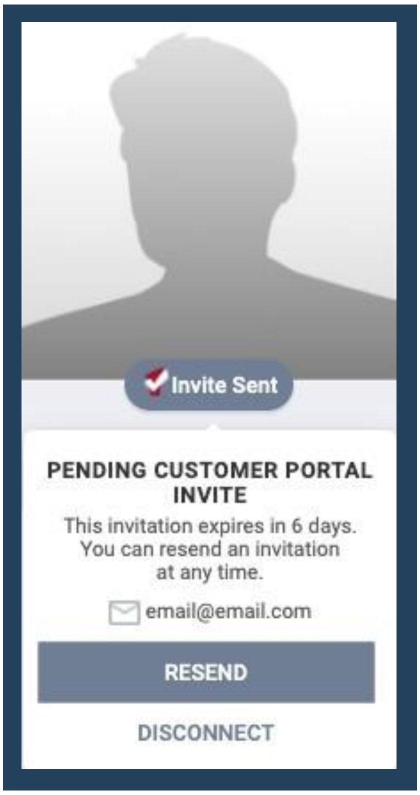
The Invite Sent button will change to Connected once the participant has followed the steps in the next section to create a Portal account. If a participant doesn't sign up right away, they'll receive emails reminding them their invitation will be expiring soon. If an account is not created from the invitation email within the number of specified days, the invite will expire and a new invitation email will need to be sent (following the steps outlined above).



ACCOUNT CREATION: Reviewing Account Status

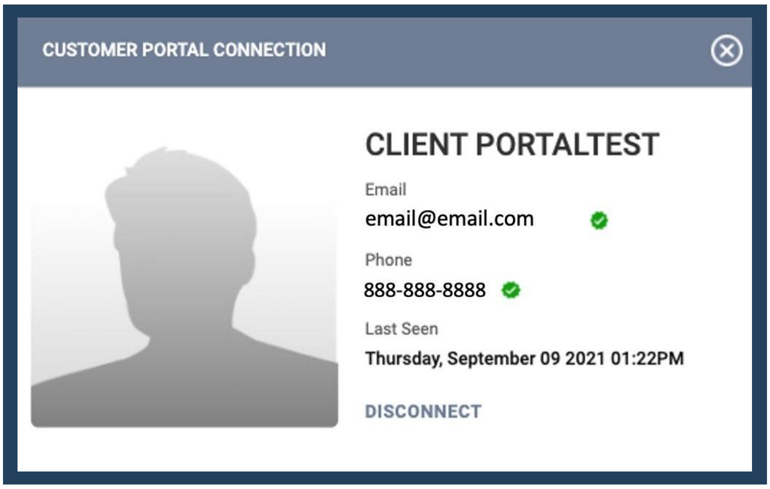
Invitation Status

Hovering over the Invite Sent button will display the number of days to invitation expiration, the email address the invite was sent to, and the options to manually Resend or Disconnect the invite.



Account Status for Active Accounts

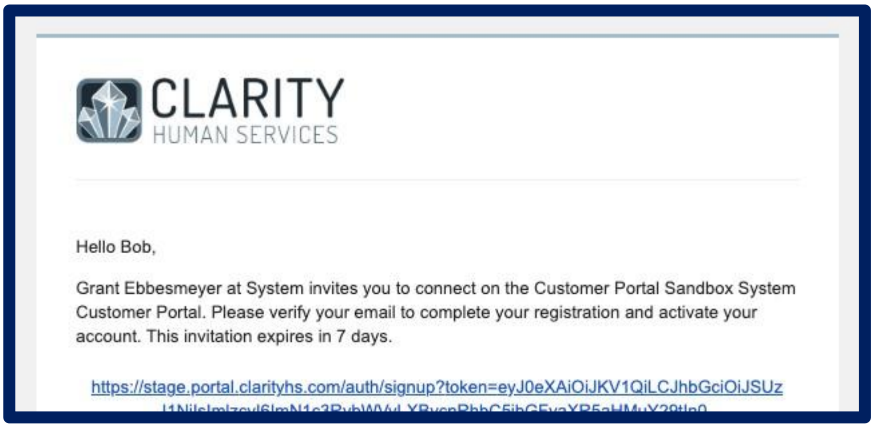
Once the participant has created their account, clicking on the Connected button will display a summary of Portal account information including the email address and phone number associated with the Portal account as well as a Last Seen date and time for when the Portal account was most recently accessed by the participant. This is a useful reference for when a participant reaches out for support accessing their account



ACCOUNT CREATION: Participant Instructions

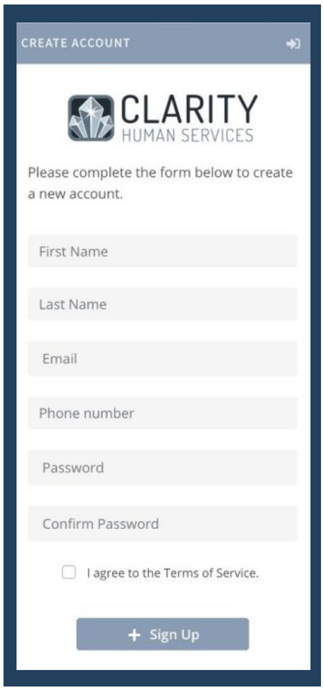
Participant Email Invitation

After a provider sends an invitation to join the Portal, the participant will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation." Clicking the link will direct the participant to the Portal site to register an account.



Participant Credentials

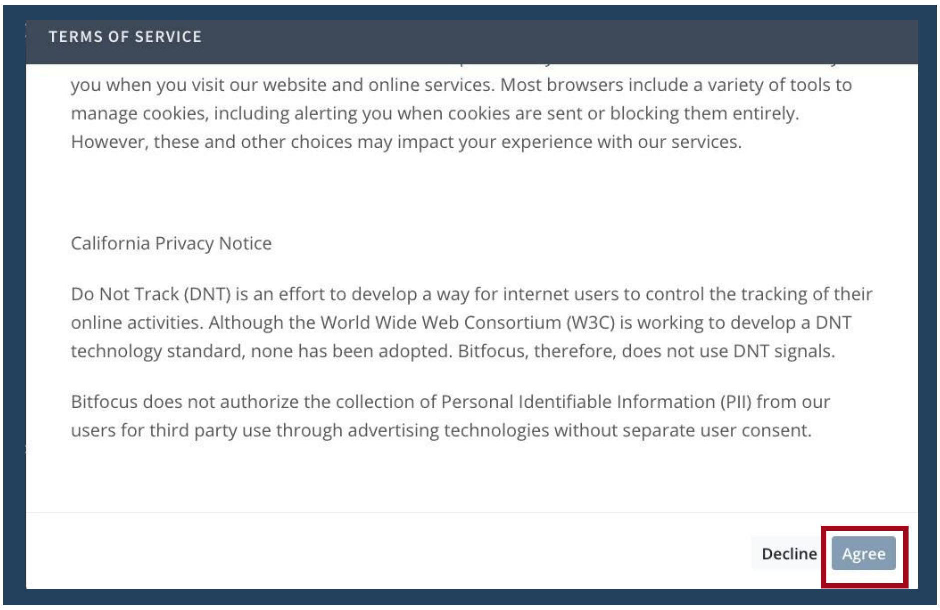
The participant enters their first name, last name, email address, cell phone number, and password to start registration. If they don’t have a cell phone number, they can leave the box empty.



Info bubbles appear to provide additional information about field requirements. The password must be at least 8 characters ling and contain at least one special character, one upper case letter, and one lower case letter.

Terms of Service

The participant will need to click **I Agree to the Terms of Service** to review the site agreement. When the Terms of Service appear, they will need to scroll to the bottom of the Terms to click the **Agree** button. Agreeing to the Terms of Service is required to access the Portal.



ACCOUNT LOGIN: Participant Instructions

To log into their Portal account at any time, participants should visit the following web address:

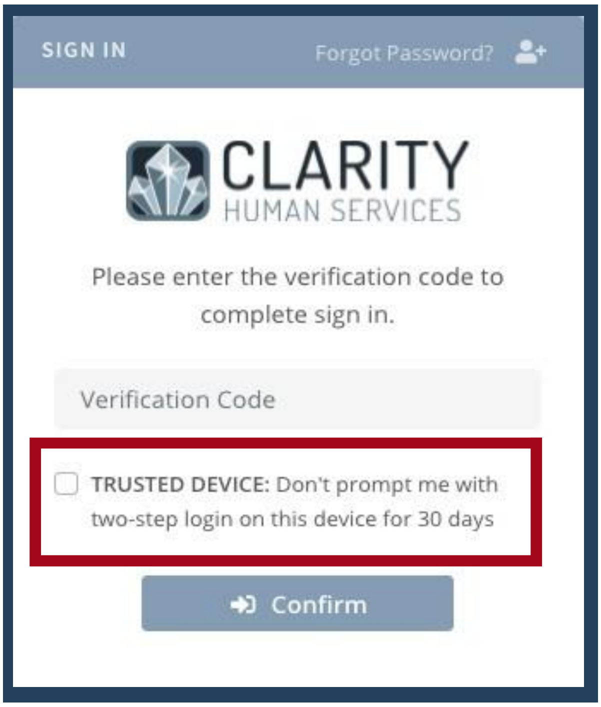
portal.clarityhs.com

Encourage the participant to write this address down or save it in their device's bookmarks to ensure it's not lost.

The participant's User Name is the email address they used when they created their Portal account.

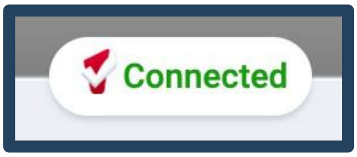
Authentication Process

The Portal is secured with multi-factor authentication. This means that in addition to entering the password, the system will send a verification code to the email address used at account creation. The code sent to the participant's email must be entered into the login screen to access the account. After authentication is complete, the account will be made active.

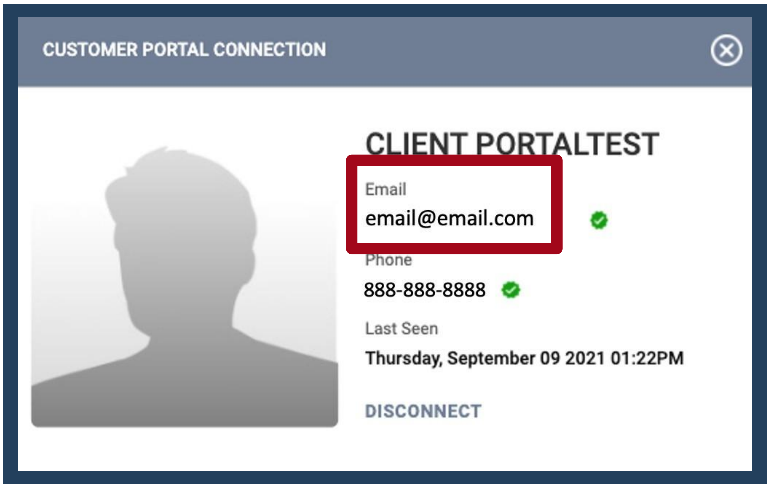


There is an option to mark a **TRUSTED DEVICE** to limit the need to enter a code from each log in to once every 30 days. It is advised ***not*** to mark a public or shared device as trusted to protect your personal information and security.

TROUBLESHOOTING LOGIN ISSUES



If a participant reports that they are having difficulty logging into their Portal account, you can start by trying the following:

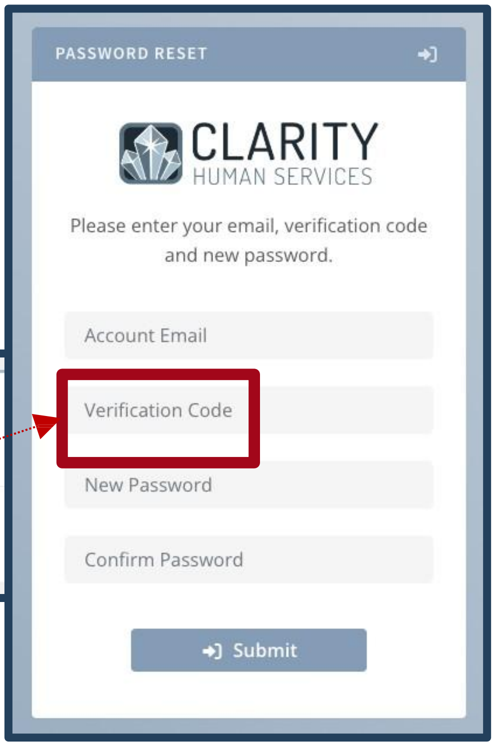


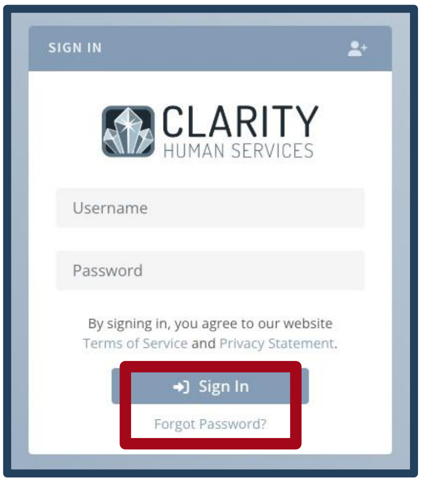
Navigate to the participant's profile in Clarity and confirm they have a Connected icon above their unique identifier.

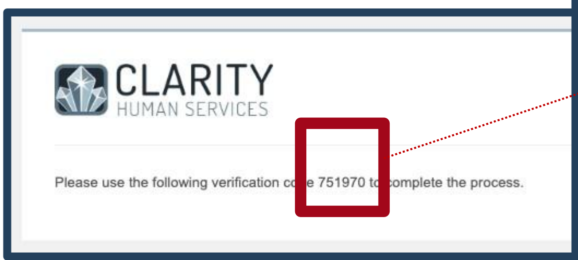
Clicking on the Connected button will display a summary of Portal account information including the email address associated with the Portal account. Confirm they are using this exact email address to log in. If they need to change their email address, click Disconnect and send a new invitation to their new email address.

Resetting Account Password

If a participant forgets their Portal password, they can easily reset it by visiting portal.clarityhs.com and clicking the "Forgot Password?" link under "Sign In." On the next screen, enter the email address connected to the Portal account; the participant will receive an email with a verification code, which they will enter on the next screen and set a new password.







If a participant with an active Portal account is still having login issues after attempting these steps, providers can submit a support request for our HMIS team to investigate further.

ACCOUNT DISCONNECTION: Provider Instructions

Account disconnection options are available for providers and participants. Reasons for account disconnection may include loss of access to the email address associated with their account, potential security breach, or participant desire to suspend access. The participant account will still exist, but the participant will not be able to access any account information after the disconnection is complete.

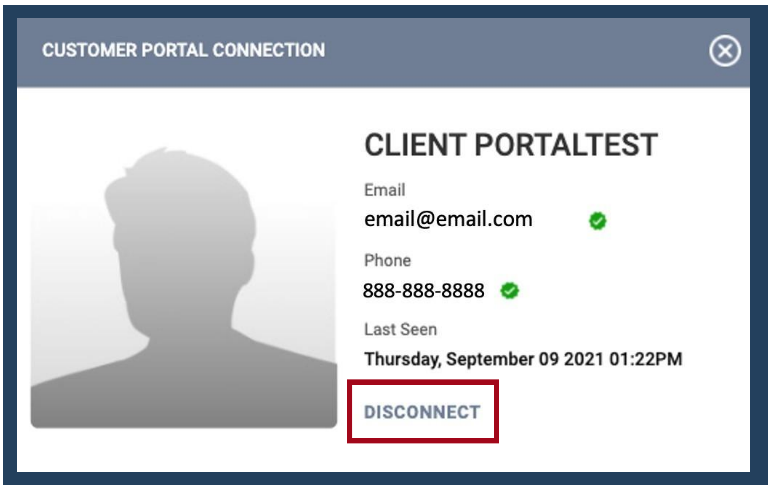
Reasons for Account Suspension

There are a variety of reasons a participant's Portal account may need to be disconnected:

- Updated Participant Email Account
  If a participant updates their email address or loses access to the email address connected to the Portal, providers will need to take steps to disconnect the current account and send a new Portal invitation to an updated email address.
- Participant Request to Suspend
  A participant may request to disconnect their account verbally or in writing. Providers are encouraged to respond to the request as soon as possible.
- Portal Account Security Breach
  If there is concern that a participant's Portal account has been compromised, their account should be immediately disconnected and the system administrator should be notified.

Instructions for Account Disconnection

Navigate to the participant profile page and click the Connected/Invite Sent button, which is located at the bottom of the participant photo section. Click Disconnect, the button display under the participant profile picture will change to Send Invite, indicating there is no longer a connection between the Clarity profile and the Portal. (Note: After a disconnection, if a participant uses the email to log into the Portal, the dashboard and navigation panel will not display any Clarity information.)



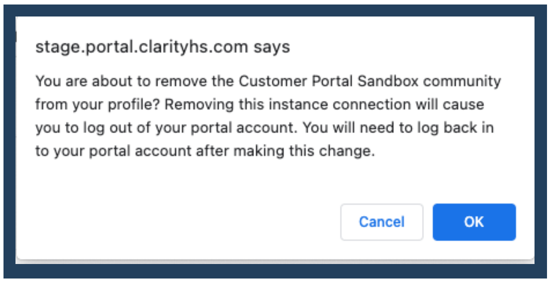
After the account is disconnected, an invite to a new email address can be sent. The participant record is stored in the Clarity database, so when a new email address is connected, historical information from the previous account will be available.

ACCOUNT DISCONNECTION:
Participant Instructions

Within the Portal, participants have the option to disconnect their account. If they opt to disconnect their account, all information will be removed from their Portal account. If participants log back into their account after disconnect, they will only have access to view the Portal dashboard and the profile settings.

Instructions for Account Disconnection

Navigate to the participant profile page within the Portal. Under the Community Management settings, participants will see the option to disconnect their account. To disconnect, participants should click the red trash can icon appearing next to the instance name. When the participant selects the trash can icon, they will receive a warning notice confirming account disconnection. Clicking OK will disconnect their account.

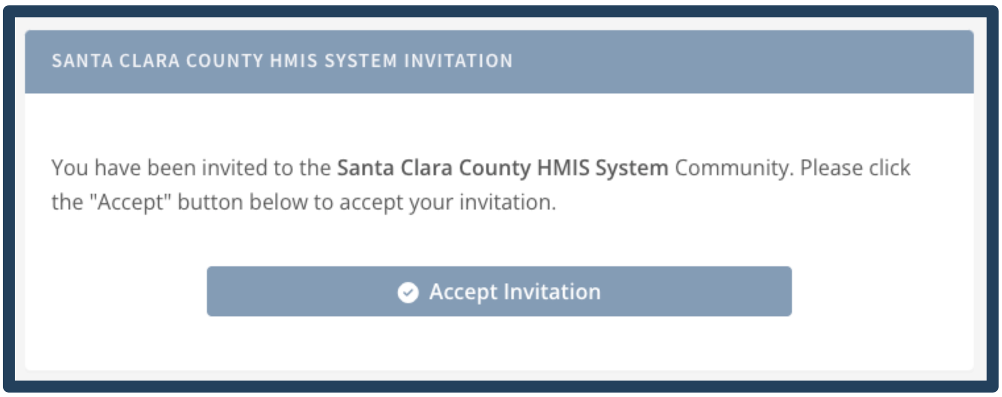


Instructions for Account Reconnection

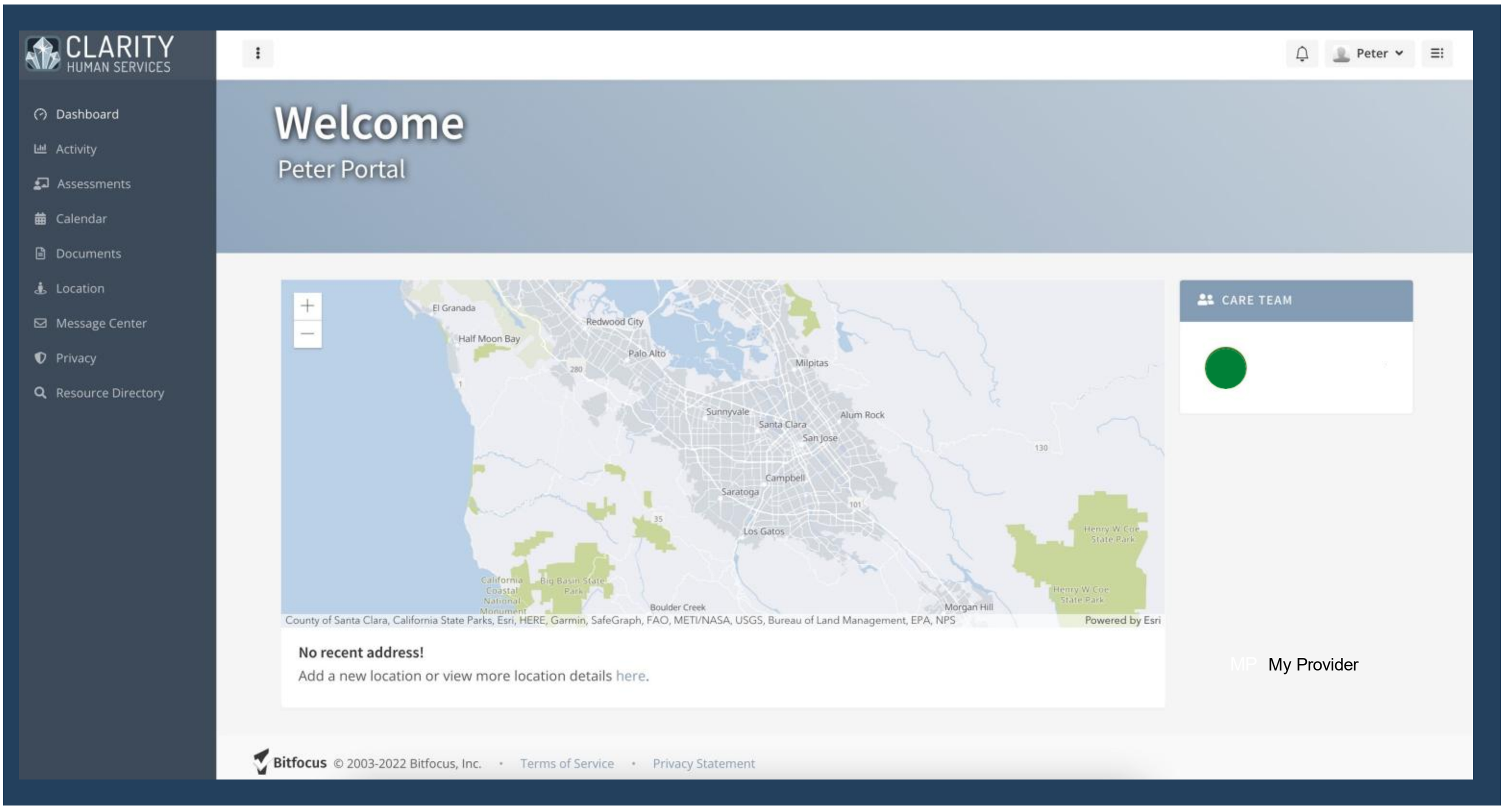
If a participant wishes to reconnect their account, it will require a new invitation from a service provider. After a provider sends the new invitation, the participant will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation."

If the participant has provided the same email that they previously used to connect to the Portal, they will be taken directly to the Portal login page. They can then utilize the same email and password they previously used to login to their Portal account. If they have forgotten their password, they can easily reset it by clicking the “Forgot Password?” link under “Sign In.” After clicking “Forgot Password?”, enter the email address connected to the Portal account; the participant will receive an email with a verification code, which they will enter on the next screen and set a new password.

After logging into their Portal account, the participant should press “Accept Invitation” to reconnect their account.



NAVIGATION


CLARITY
HUMAN SERVICES
Dashboard
Activity
Assessments
Calendar
Documents
Location
Message Center
Privacy
Resource Directory
Peter
Welcome
Peter Portal
CARE TEAM
No recent address!
Add a new location or view more location details here.
My Provider
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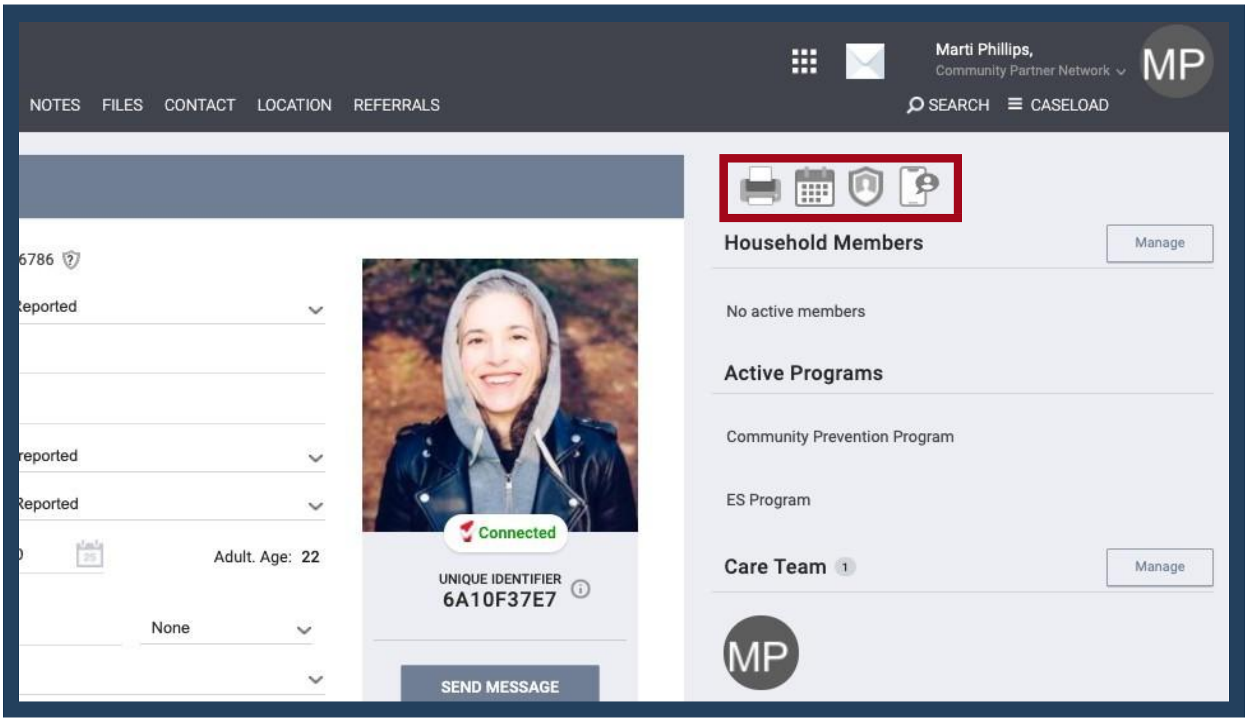
NAVIGATION: Provider Instructions

The Portal is a module of Clarity Human Services and information is easily integrated and exchanged between the Portal and HMIS. Providers can issue Portal requests to individual participants through the participant profile in HMIS, as well as send mass requests or messages to multiple participants at one time.

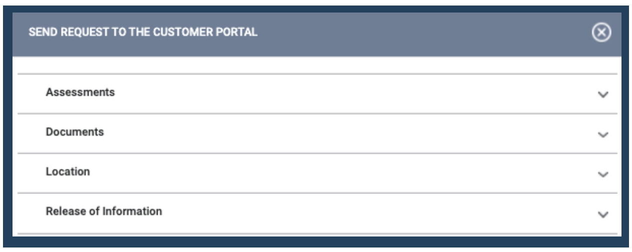
Individual Portal Requests

Portal Requests are managed through the Portal icon in the participant's HMIS profile. The icon only displays if a participant has an active Portal account. Some Portal requests, such as assessments, can also be initiated through a program enrollment.



Send & Manage Individual Participant Requests

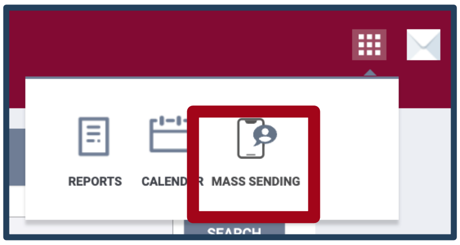
Send new Portal requests by clicking the Portal icon and Send New Request in the Portal screen. A pop-up window will display with request options. Use the dropdown to send the desired request to the participant. There are some limitations to how many requests can be sent for the same information. Requests and their status can be viewed in the Request History. Providers can cancel pending requests by clicking the Cancel button next to the request.



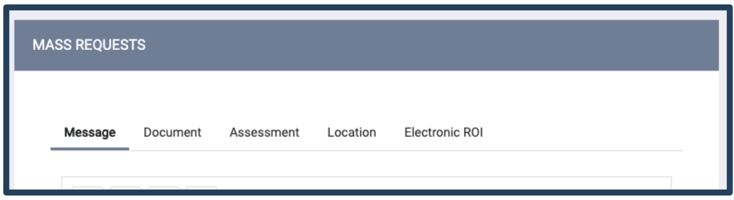
NAVIGATION: Provider Instructions

Mass Portal Requests

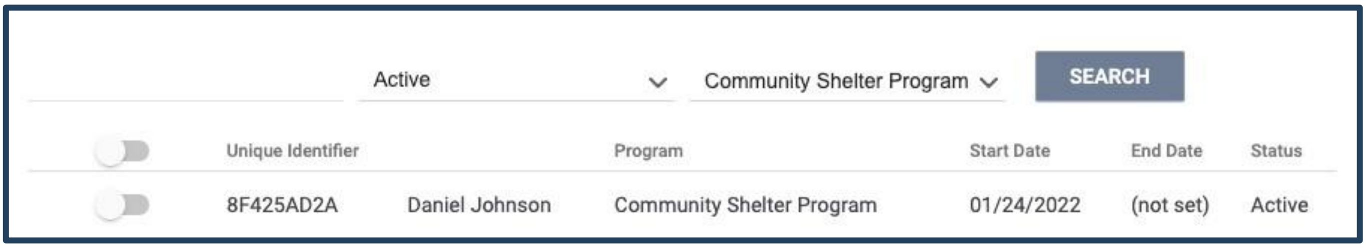
Portal requests or messages to multiple participants at one time are managed through the Mass Sending functionality, which is accessed through the navigation pad.



After clicking Mass Sending, choose either Message or the type of mass request you'd like to send (Document, Assessment, and Location). Details on specific types of requests are included in the next section (Feature Review).

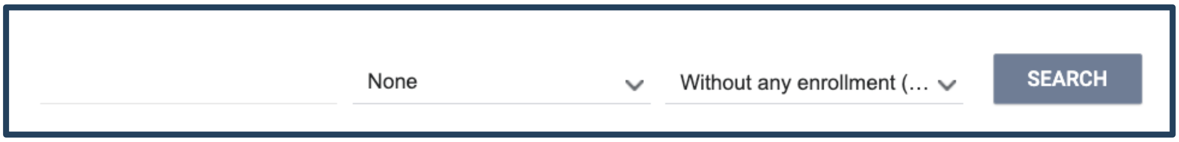


Use the dropdowns under the request information section to find a list of participants with Portal accounts who currently have an Active program enrollment (not exited) or Inactive program enrollment (previously were enrolled but exited) in the selected program(s) within your agency.

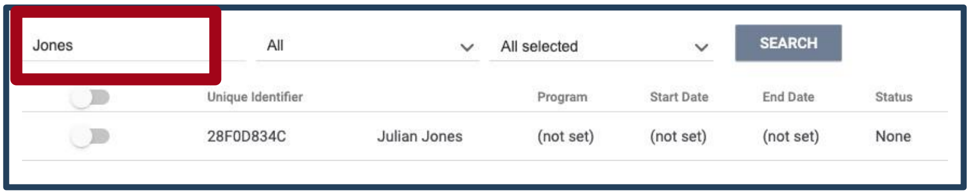


Click SEARCH to get a list of participants with Portal accounts who are currently active in the Community Shelter Program.

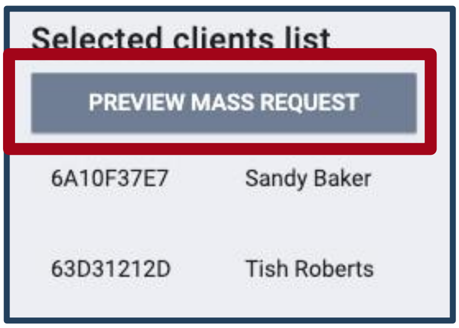
Alternatively, to find participants who are not currently or previously enrolled in programs in your agency select **None** and **Without any enrollment**:



You can also use the text box to search for a specific participant by name:



Click the top toggle button to add all participants in the current list to the Selected participants list in the right pane, or add and remove individual participants by clicking the toggle next to their name:



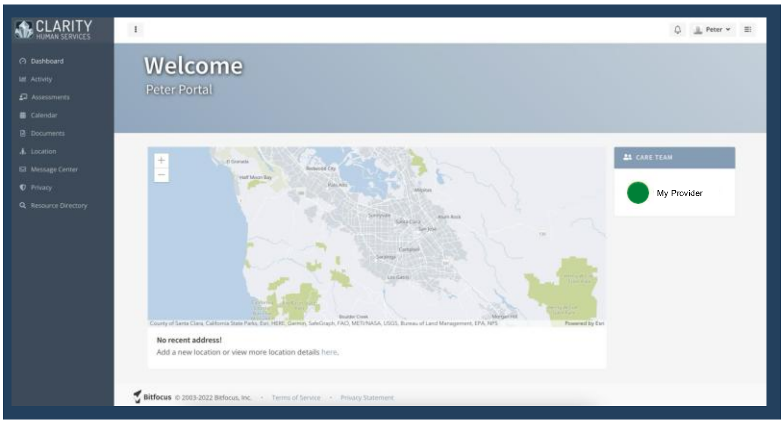
Click Preview Mass Request in the right pane to review and send your message or request.

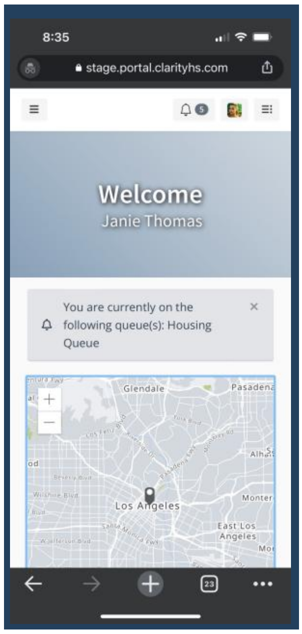
NAVIGATION & PROFILE: Participant Instructions

Portal navigation defines how participants move between the various Portal features. Navigation within the Portal is designed to be intuitive and user-friendly.

Dashboard

Upon logging in, participants will land on their personal Dashboard. Additional information about the Dashboard is available in the feature review section of this guide.



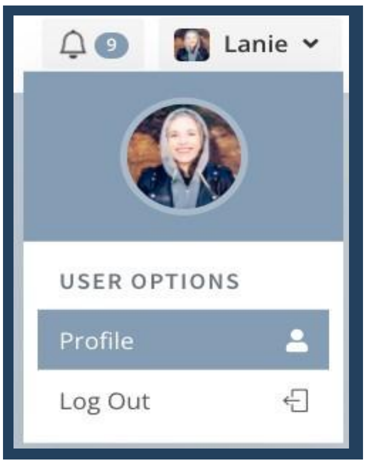


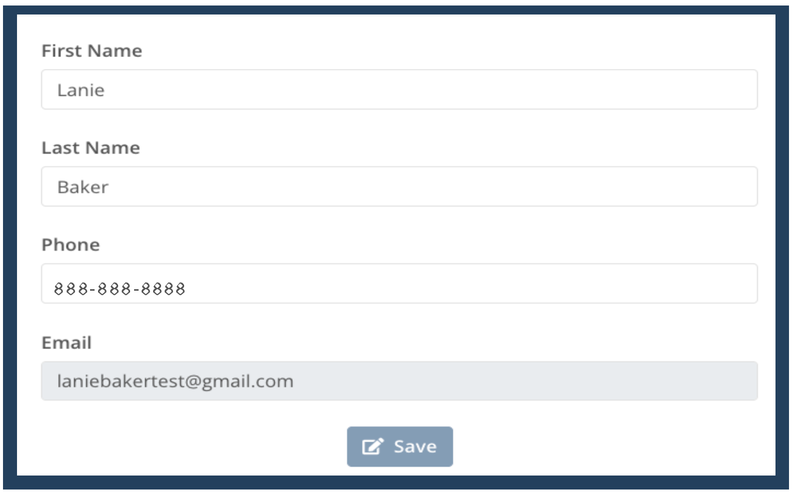
Participant Profile

The participant profile is accessed through the drop-down in the upper right-hand corner of the Portal and clicking on Profile. Participants are able to update their personal information including their name and phone number. The Participant Profile also includes Password Settings, Account Preferences, and Community Management.

Profile Information

When a participant updates their contact information, the new information is made available to providers in the Contact tab of Clarity. Portal- submitted contact information is indicated with the contact type "Participant Supplied".

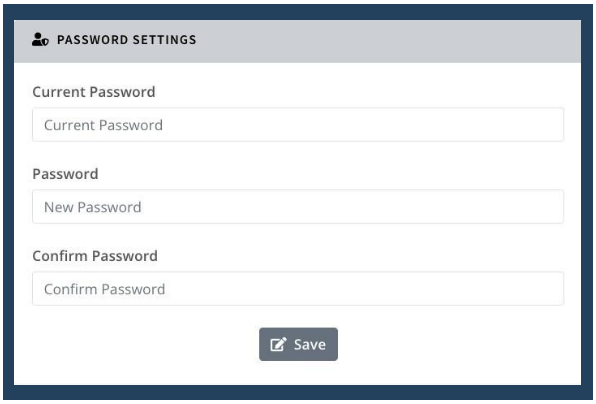




NAVIGATION & PROFILE: Participant Instructions

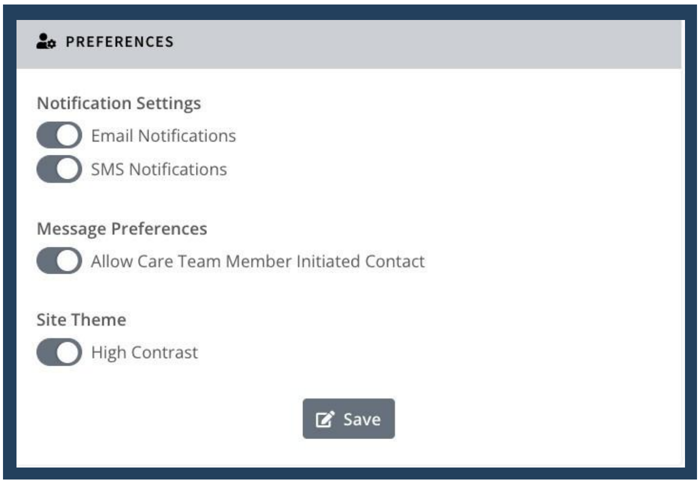
Password Settings

Participants can easily update their Portal password in the Password Settings options located within the Participant Profile. To generate a new password, the current password is required.



Account Preferences

The Account Preferences settings allow participants to select their notification preferences, message preferences, and site theme.



Notification Settings

The Notification Settings allow participants to select to receive an email notification, text message, or both whenever a provider requests information, schedules an appointment or sends a message. It is recommended that participants leave at least one of these settings enabled.

Message Preferences

The Message Preference settings allow participants to disable care team member-initiated messages. By default, this setting is turned on. If a participant disables care team member-initiated contact, it will prevent all care team members from sending them messages.

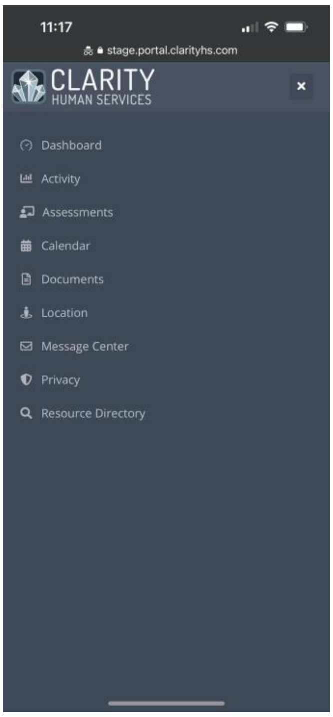
Site Theme

The Site Theme setting allows users to select a High Contrast Site theme which converts their view of the Portal to a higher contrast. This setting may be easier to view for some participants.

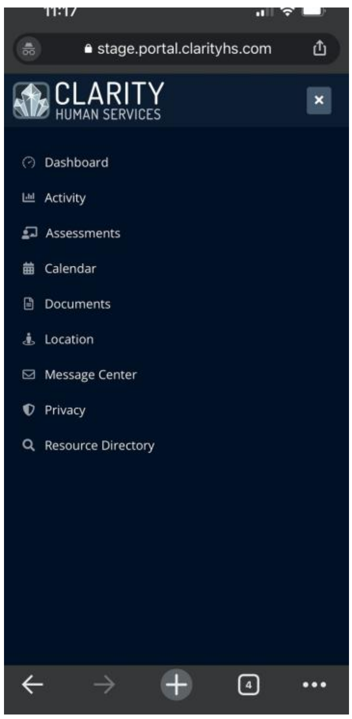
Community Management

The Community Management setting allows participants to disconnect their Portal Account. Account Disconnection will suspend the participant's access to their Portal data but not delete the account. Refer to page 11 for more information.

Regular theme:



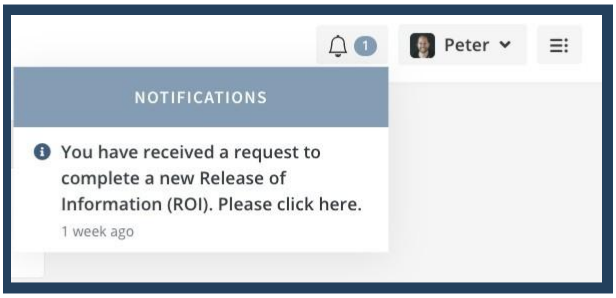
High Contrast theme:



NAVIGATION & PROFILE: Participant Instructions

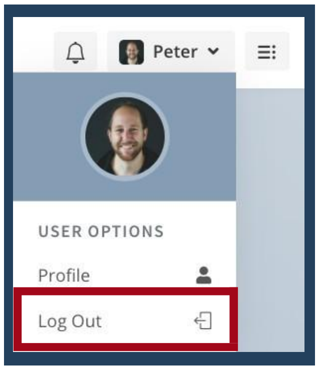
Participant Notifications

Participants will see a shaking notification bell icon at login alerting them to any new provider requests. Notifications are marked as read once a participant clicks on it and is directed to the page. The notification banners at the top of each page will remain for documentation requests, and assessments until the requested item is completed. Notifications can also be reviewed in the right- side panel of the Portal.



Log Out

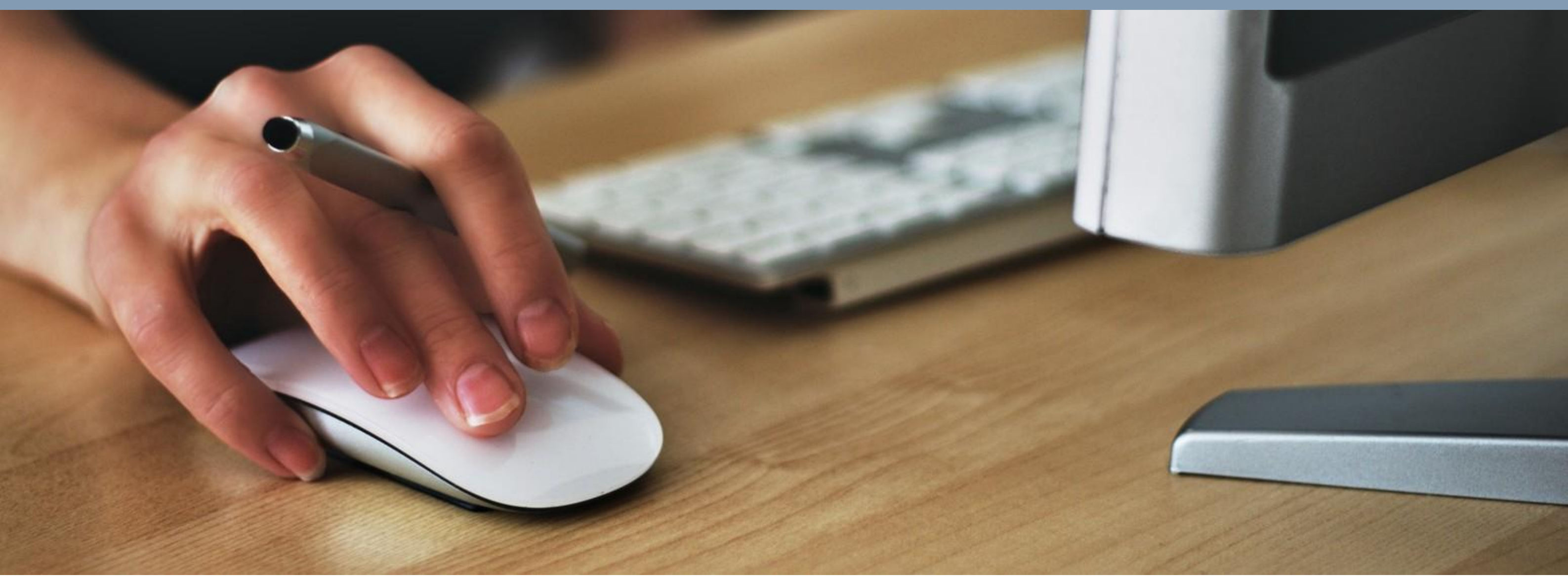
Participants can log out of the Portal through the user options dropdown. Remind participants to log out at the conclusion of each session especially when using a shared device. Participants will be automatically logged out after 20 minutes of inactivity, and a warning will display two minutes before the automated logout occurs.



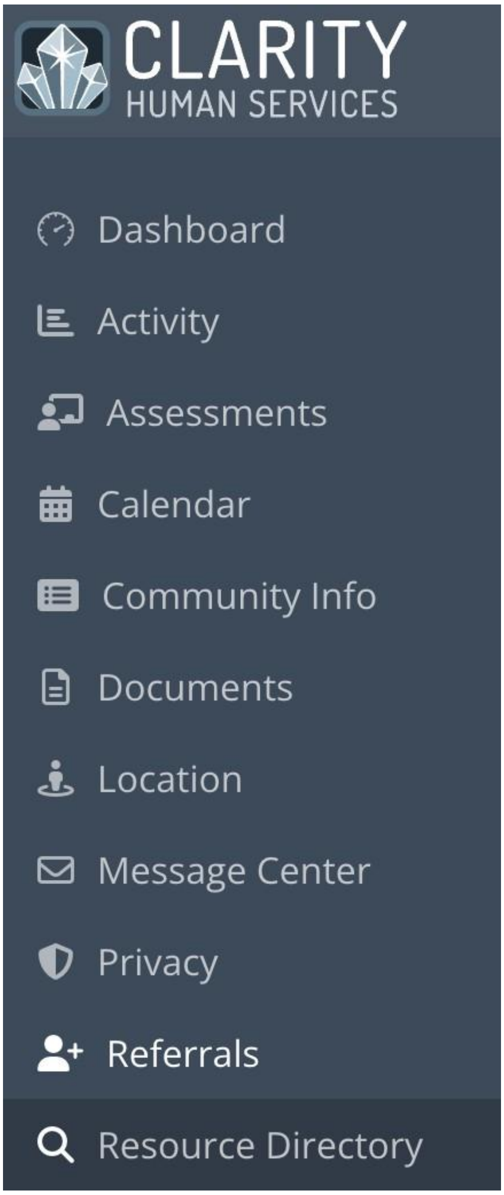
Use Case & Promising Practices

The Portal is designed to be easy and intuitive to navigate.

- Encourage participants to spend time exploring the participant Dashboard, Profile, and Navigation Pane.
- Encourage participants to review their Portal Profile for accuracy and update their contact information any time changes occur.
- Encourage participants to leave the Notification Settings enabled for email notifications and SMS notifications.
- Encourage participants to leave care team member-initiated contact enabled so they can receive messages and updates from their care team members at any time.



FEATURE REVIEW

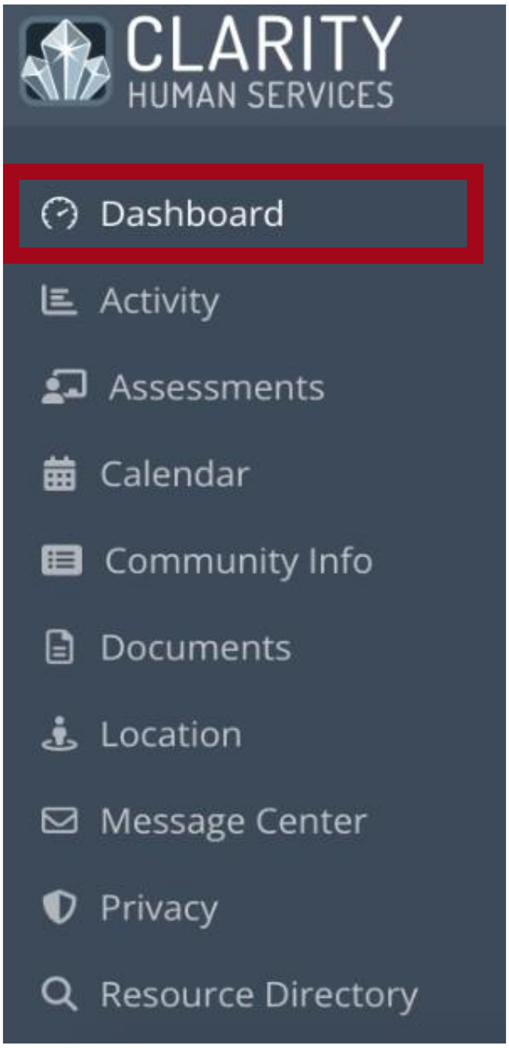


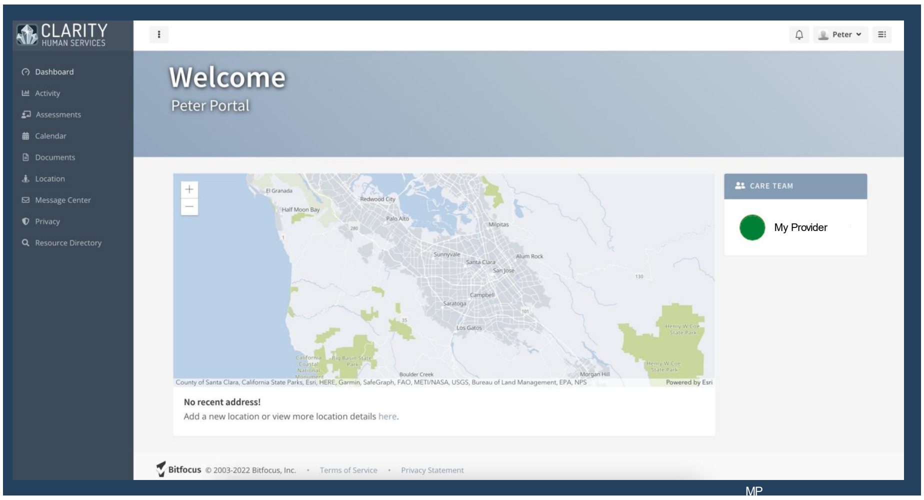
The next section of the Portal Provider Training Manual contains instructions on each of the features currently available. Each subsection includes feature details, user instructions for service providers and participants, and information on use cases and promising practices for each of the features

- Dashboard
- Activity
- Assessments
- Calendar
- Documents
- Location
- Message Center
- Privacy
- Community Info

DASHBOARD

The Dashboard is the default screen when the participant logs into the Portal and displays various relevant information.





Care Team & Household Members

The participant's Care Team members are displayed in the care team information box. Care team members must be assigned to the participant in Clarity to display on the Portal dashboard. The participant's Household members are also listed in the household information box.

Pending Referral, and Community Queue Banners

If a participant has a pending referral to a program, they will also see a yellow banner on the Dashboard. Check out the Referrals feature guide for more information.

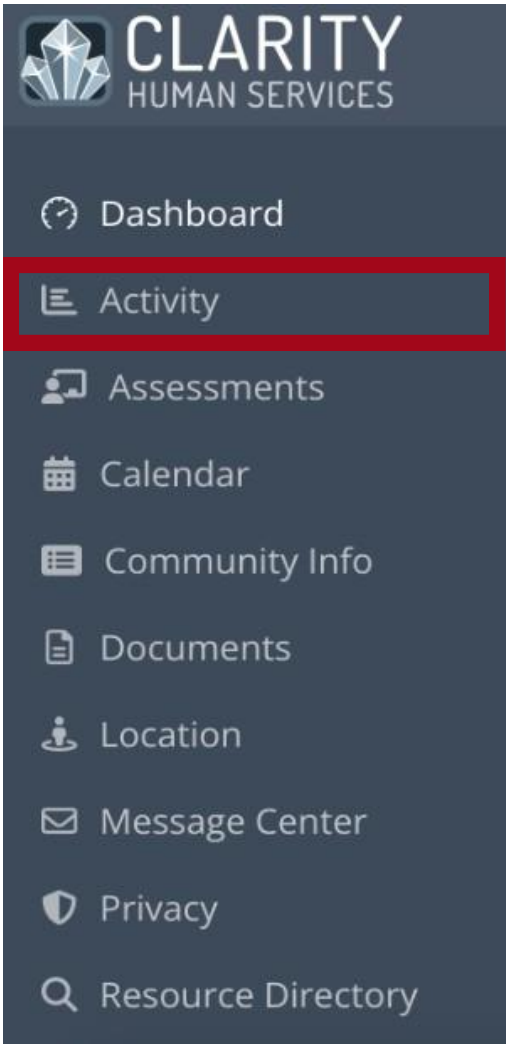
If a participant has an active referral on a Community Queue or a pending or in-process referral to a program from the Queue, a banner will display on the dashboard. No additional functionality or information is available outside of the status notification.

Upcoming Appointments

Upcoming provider appointments are displayed in the appointment information box. More information on appointments is available in the Calendar section of this guide.

ACTIVITY & HISTORY

Activity & History provides participants with a chronological listing of project enrollments, including agency name, program name, participation start date, and participation end date. A green active icon is displayed for any active enrollments, and new enrollment data is available in the participant view of the Portal in real-time. Any group or family enrollments will include an icon with the count of members enrolled.
The participant view does not include access to project enrollment or exit fields, assessments, service history, or notes.



Participant Instructions

Under the participant view in the Portal, the Activity tab includes a display of program enrollment and exit data. No additional actions are available to participants in the Activity tab. There are no required actions or instructions for providers to use this feature.

Use Case & Promising Practices

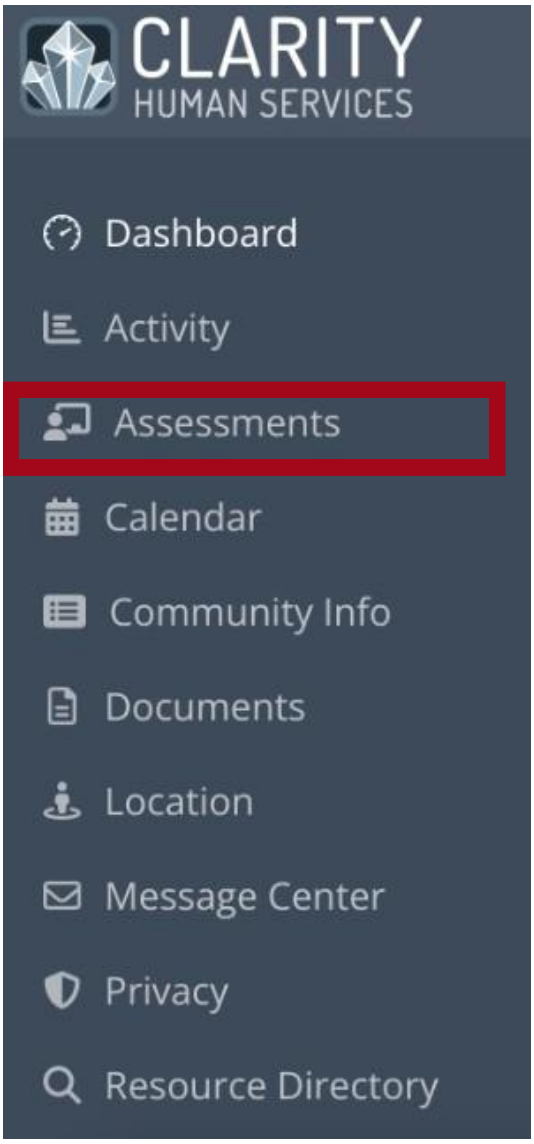
The Activity & History feature allows participants to review their program participation history for accuracy and reference purposes.

- Explain to participants how you and other providers might use this information: For example, previous and current program participation history might be used to understand a participant's past program involvement or to determine eligibility for future programs.
- Explain to participants how they might use this information: Encourage participants to review Activity & History data to ensure accuracy. Request participants to review start and end dates with attention to any active enrollments. Participants should reach out to their provider if they identify discrepancies or have questions about their service history.
- Explain that enrollment data is available in real-time. Participants can view new program enrollments or exits immediately after providers complete the actions within HMIS.

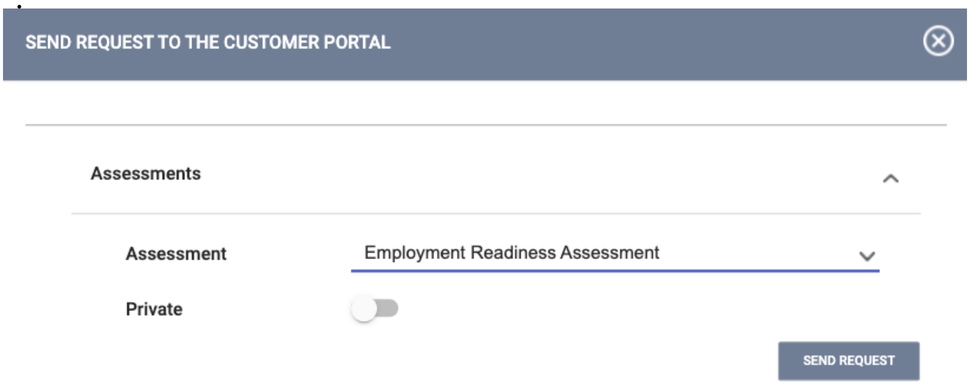
ASSESSMENTS

The Assessments feature allows participants to complete and submit provider-issued assessments directly from their personal device and at their convenience. Assessments must be reviewed and approved for Portal requests and made available for providers by the system administrator. Not all assessments are appropriate for Portal submission; some will only be completed by providers within Clarity.

Both global assessments and program-level assessments can be submitted through Portal. Participants will receive a notification when a request for an assessment has been submitted.

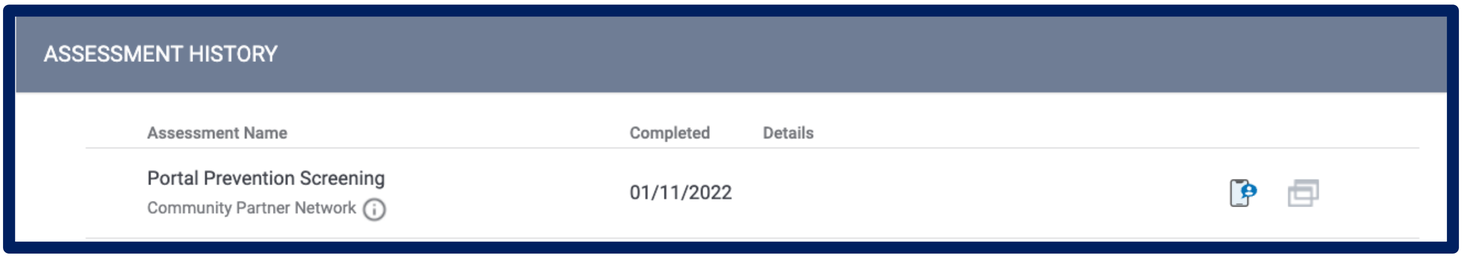


Sending & Reviewing Global Assessments
Global-level assessments are assessments that are not associated with a program enrollment. To send a global-level assessment to an individual, navigate to the participant's profile screen, open the Portal request screen, and select Send New Request. Select the appropriate assessment from the drop-down menu and press Send Request. The participant will receive an email or text message notifying them of the request, and a notification and request banner will appear in Portal at next log-



Mass Assessment Request: To send a mass Assessment request to multiple individuals at one time, follow the process for Mass Requests detailed on page 15.

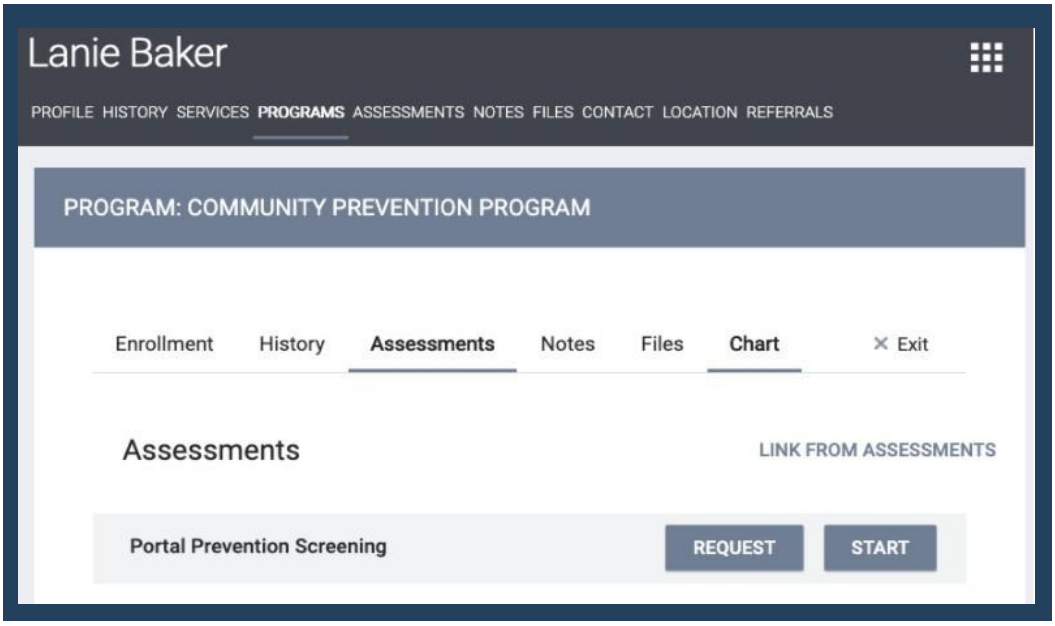
Once the assessment has been completed and submitted by the participant, it will be available for review in the participant's assessment history. The Portal icon appears in the assessment details sections to indicate the participant completed it through Portal.



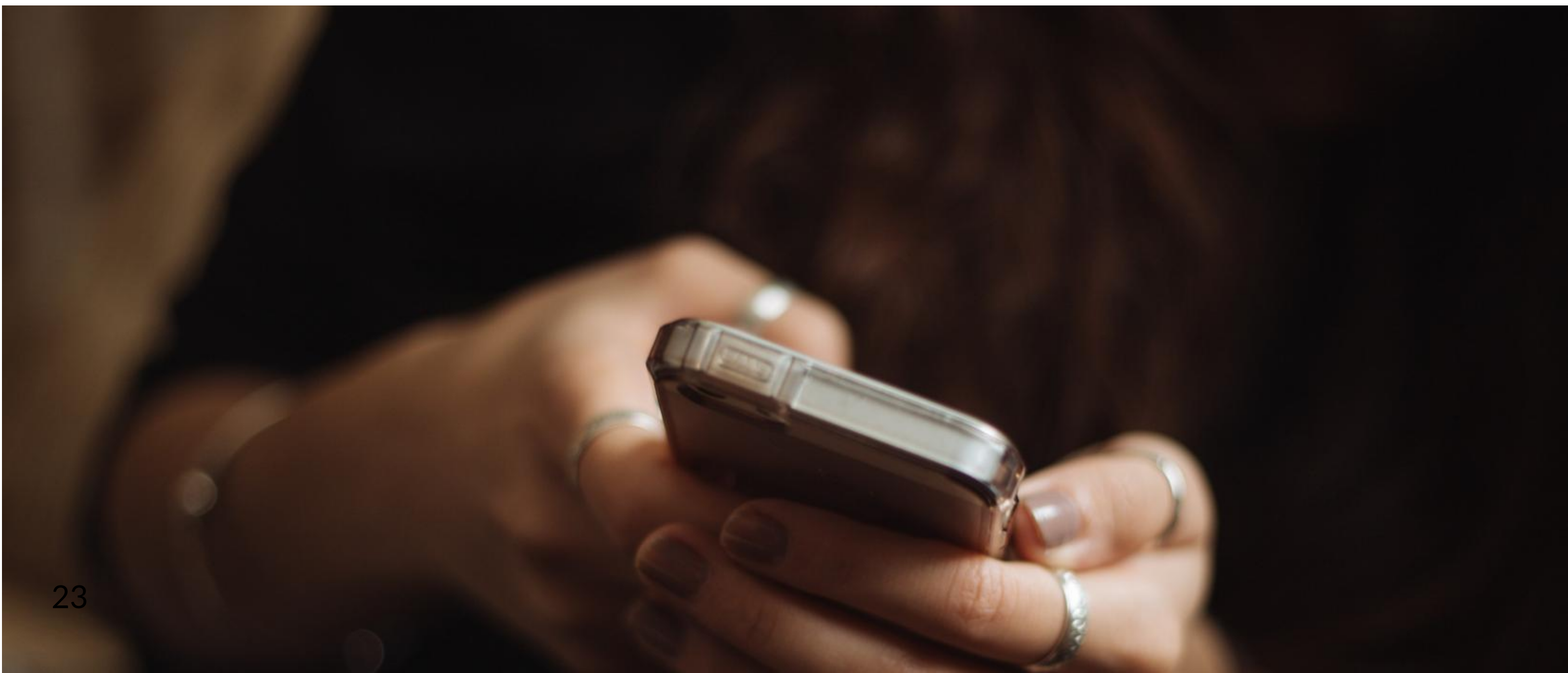
ASSESSMENTS

Sending Program-Level Assessment Requests

Program-level assessments are assessments that are completed through a program enrollment. To send a program- level assessment, open the participant’s enrollment record and navigate to the assessments tab. Assessments enabled for submission through the Portal will be indicated with a Request option. Select Request and click Send Request to complete the transaction. The participant will receive an email or text message notifying them of the request if enabled in their settings, and a notification and request banner will appear in the Portal at next log-in.



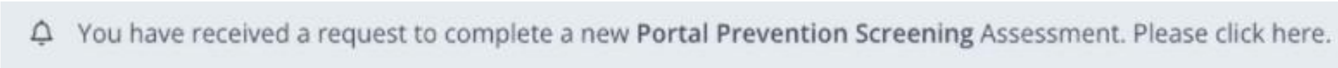
Once the assessment has been completed and submitted by the participant, it will be available for review in the participant’s program enrollment assessment history. The Portal icon appears in the assessment details section to indicate the participant completed it through the Portal.



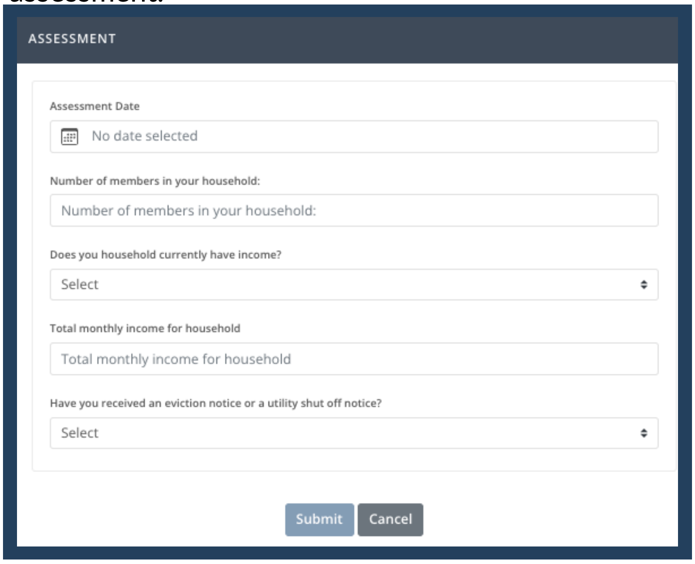
ASSESSMENTS: Participant Instructions

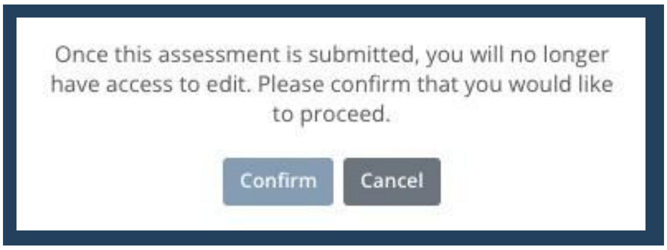
Completing an Assessment

Once a provider initiates a request for an assessment, the participant will receive a notification through the Portal after their next login and may also receive an email or SMS if enabled. Participants can respond to the request by clicking the notification or selecting the Assessment screen in the navigation pane.



Once the participant clicks the banner, the assessment will open, and participants can enter their responses and complete the assessment. After pressing Submit, the participant will receive a warning stating that the assessment cannot be edited after submission. Participants will need to press Confirm to successfully submit the assessment.





Reviewing a Previous Assessment

Participants can review previous assessments submitted through the Portal. All previous assessments are available in the assessment history pane. Participants can click on the assessment of interest and review their responses. Note: Previously submitted responses cannot be edited by the participant.

Use Case & Promising Practices

The Assessment Management feature allows participants to quickly and easily complete assessments from their personal device and at their convenience. Assessment Management provides a potential opportunity to eliminate an in-person appointment while maintaining privacy and confidentiality.

- Explain to participants how you might use this information: Advise participants that they will be receiving an assessment request before submitting a request through the Portal. Provide participants with information on why you're requesting the assessment, how you will use the information, and allow the opportunity to ask any questions.

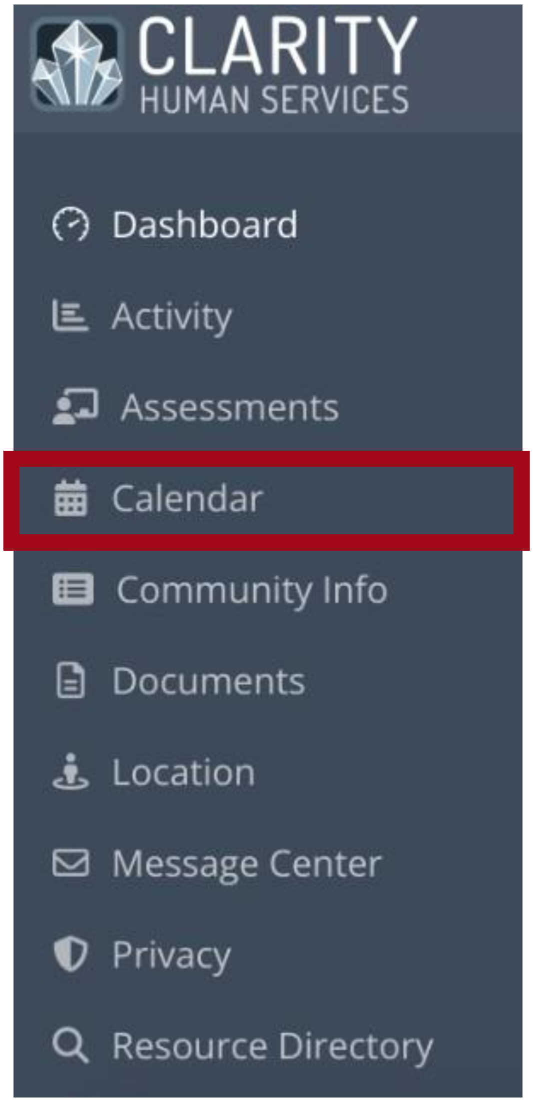
- Explain to participants that their responses remain confidential and follow the same guidelines as assessments issued by a care team member. Encourage participants to reach out to their care team members through the message center or a phone call if they have any questions about the assessment.

- Explain to participants that they have the right to request an assessment be issued by a care team member or provider.

- Encourage participants to respond to the assessment request as soon as possible so that services are not delayed.

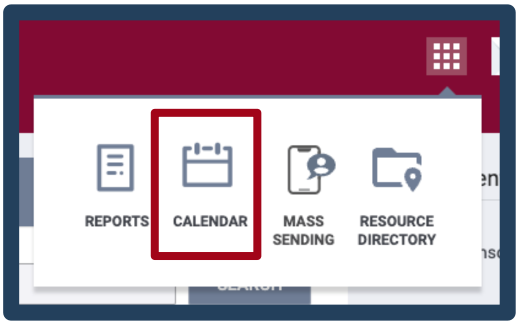
CALENDAR

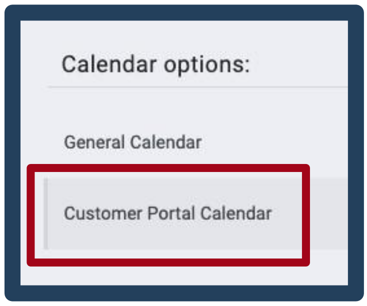
The Calendar feature allows providers to schedule participant appointments and post appointment availability directly within Clarity. Participants can schedule appointments with care team members based on their posted available time slots. Appointment details and notifications are then made available to the participant through their Portal account. The Calendar allows providers to manage all participant appointments in one centralized location and ensures participants always have access to appointment details.



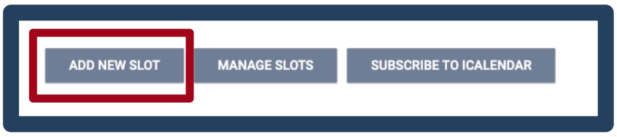
How to Post Avaiable Appointment Slots

In Clarity, navigate to the Calendar in the launchpad, and then click on "Customer Portal Calendar" in the right sidebar:

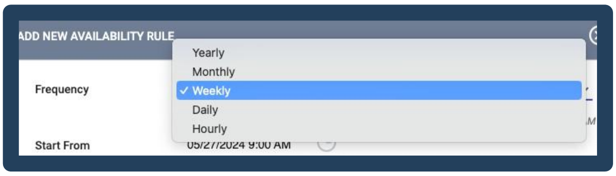




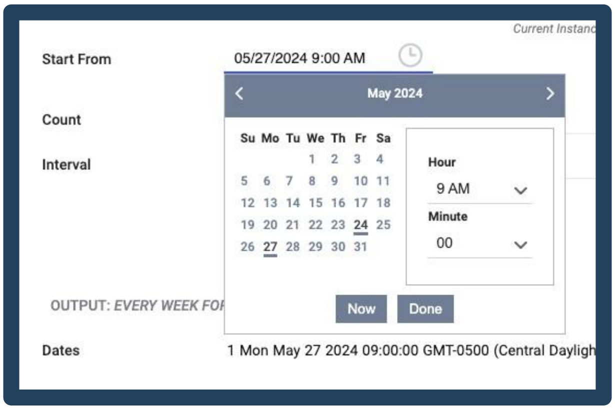
Click "Add New Slot" under the displayed calendar:



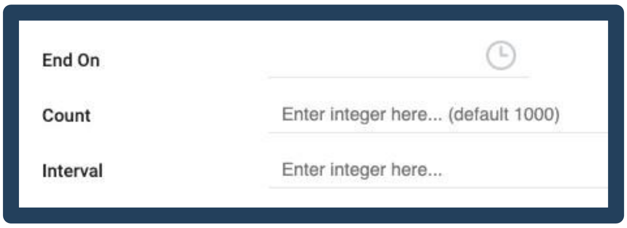
First, choose the **Frequency** for how often you want this appointment slot to repeat:



Next, choose the **Start From** date and time when you want the first appointment slot to occur:

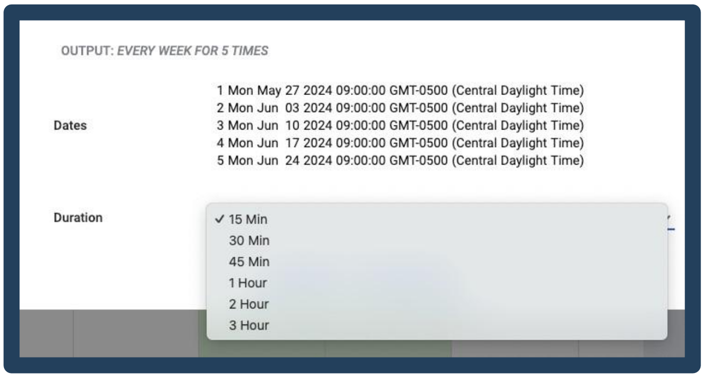


You can choose either an **End On** date when you want the series to end, *or* specify the **Count** of appointment slots you want to schedule (*Note:* only one of these options can be used, so entering in either an End On date or Count will cause the other field to disappear).



(Optional) If you want to further specify the frequency that the appointment slot repeats (e.g., every 2 weeks, or every 3 days) adjust the **Interval** to set a custom repeat pattern.

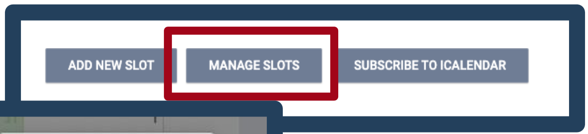
CALENDAR



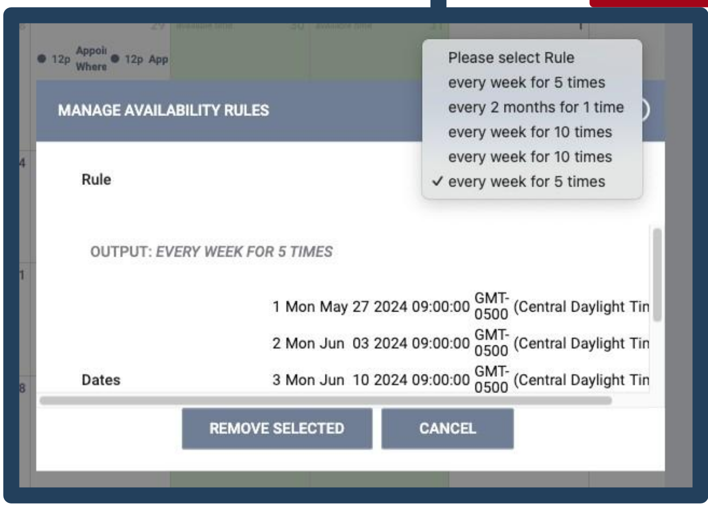
Choose a **Duration** for how long you want the appointment to be.

Review the **Output** and **Dates** preview, and then click Save to post the new appointment slots. After saving, participants on your care team with Portal accounts will be able to see your availability and directly schedule appointments with you.

You will be notified in your Clarity inbox when a participant schedules a new appointment or cancels a previously scheduled appointment.

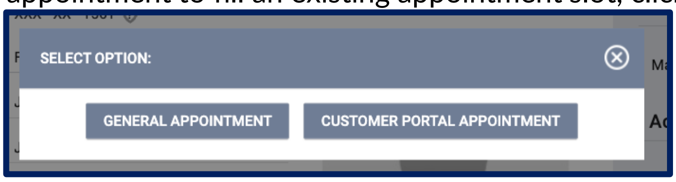


To remove an existing series of scheduled appointments, click on “Manage Slots”. The choose the series in the dropdown list and click “Remove Selected”.



How to Schedule a Participant Appointment
Schedule new appointments with participants using the calendar icon on the participant’s HMIS profile

If you’d like to schedule an appointment to fill an existing appointment slot, click Portal Appointment. If you
don’t want to schedule an appointment to fill an existing appointment slot, click General Appointment.



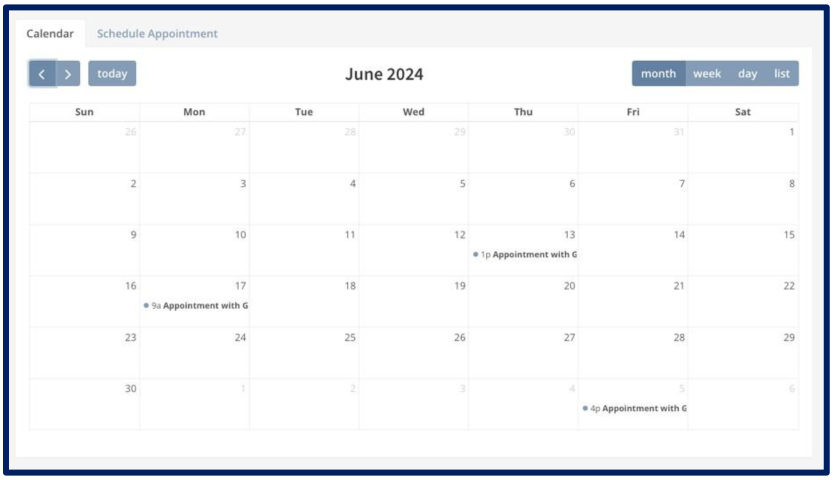
Complete the fields and click Save to save the appointment.

How to Manage or Delete Appointments
To delete an appointment, select the appointment and click the trashcan icon. Adjustments to the appointment time or date cannot be made once the appointment is set. If adjustments are required, delete the original appointment through the calendar screen, and set a new appointment with the revised appointment details. More information on Clarity’s Calendar features, including calendar integrations, can be found in our [Help Center Calendar article.]

CALENDAR: Participant Instructions

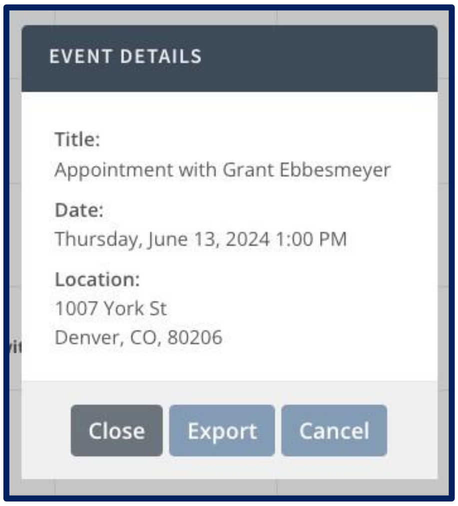
Participants can view a listing of all provider appointments scheduled through Clarity in the Calendar screen of their Portal account. Participants can select various views including an appointment list, or view by day, week, or month. Participants can also schedule appointments with care team members based on their posted available time slots.

View upcoming appointments:
Participants can view upcoming appointments by navigating to Calendar. Clicking on any scheduled appointment will show a pop-up with additional appointment details, as well as the options to Export or Cancel the appointment.



Exporting appointment information: Participants can click on Export to export the appointment information as a calendar file, which can then be added to their phone or other external calendar. The participant must agree to the Privacy and Security Warning prior to exporting the appointment information.

Canceling an appointment: Participants can click on Cancel to cancel an upcoming appointment. If an appointment is canceled, the Clarity user will be notified with a message.



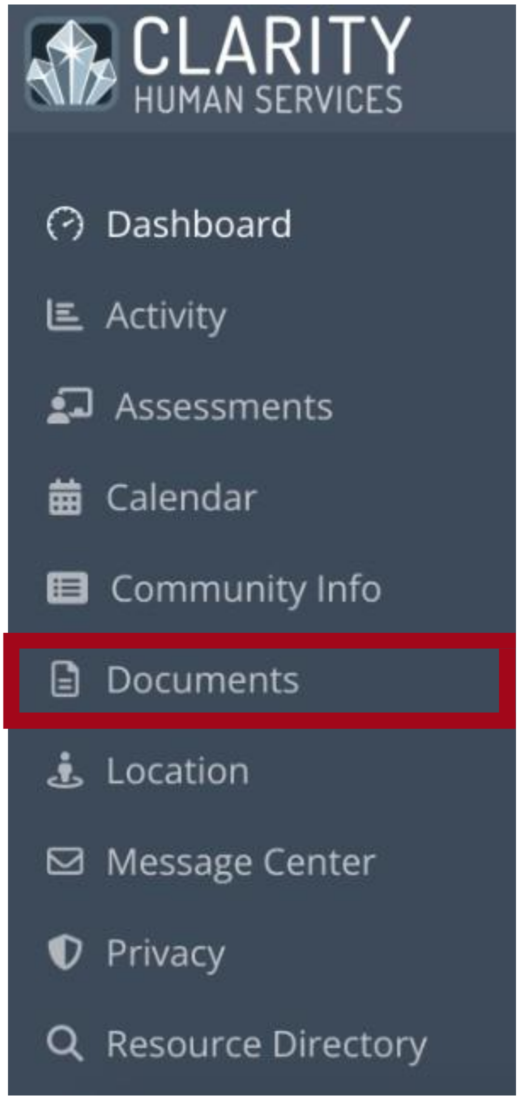
Use Case & Promising Practices

The Appointment Management feature allows providers and participants to manage appointments in a centralized location and helps ensure that participants have adequate access to appointment information.

- Explain to participants how they might use this information: The appointment management feature allows them to view all upcoming appointments with providers & care team members and can help remind them about appointments that they have scheduled with providers.
- If you have posted appointment slots, alert your participants by sending them a message through Portal so that they can utilize the appointment scheduling functionality to meet with you.

DOCUMENTS

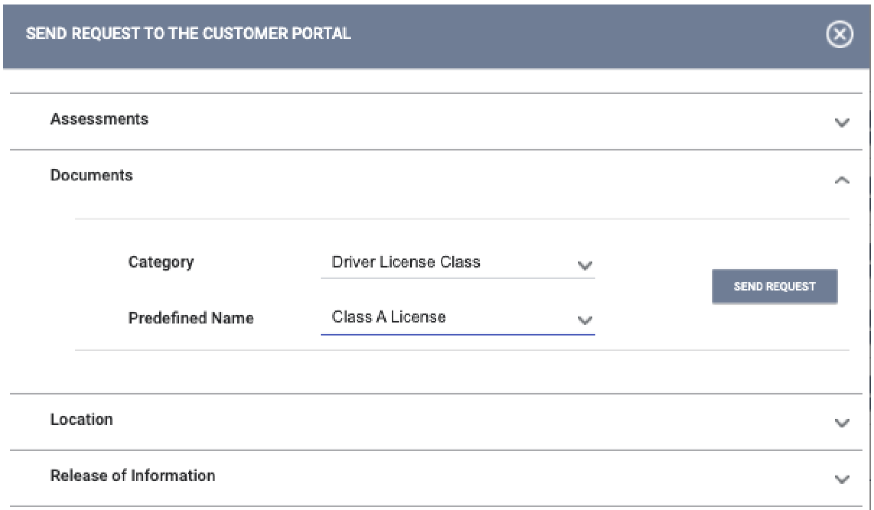
The Documentation Management feature allows participants to upload key documents at any time, and providers to request various forms of documentation from participants. Participants can then respond to the request and upload their personal documentation directly through the Portal. Participants will be able to review any documentation previously uploaded through the Portal.



How to Request Documents

Providers can send a new request for documentation to an individual through Portal using the "send new request" icon in the Portal screen. Documentation requests can also be initiated through a program enrollment. Select the documentation type requested from the drop-down screen and click Send Request.

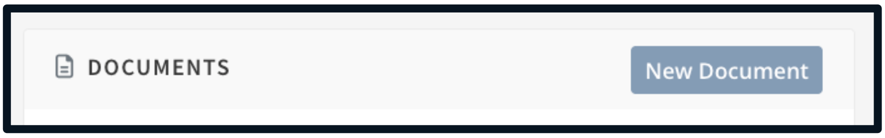
Mass Document Request: To send a mass Document request to multiple individuals at one time, follow the process for Mass Request detailed on page 15.



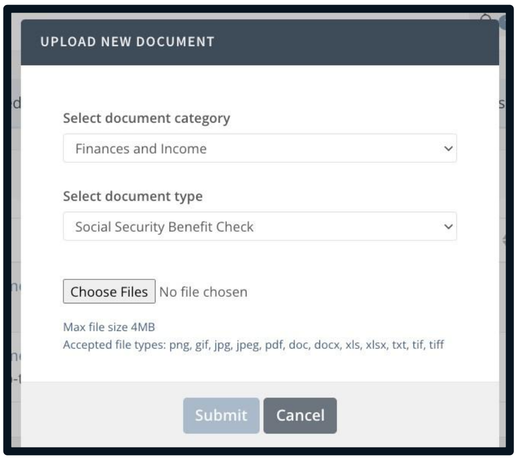
Participants can submit multiple photos per request, so to request full multi-page documents (such as leases or income verification), you will only need to send one request per document requested.

DOCUMENTS: Participant Instructions

Participants can upload a new document at any time by navigating to Documents and clicking New Document

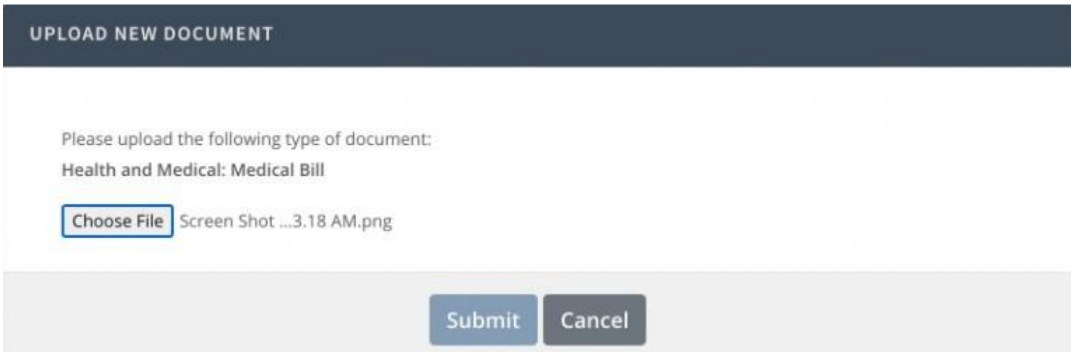


After doing so, they will use the dropdown arrows to select the document category and document type:

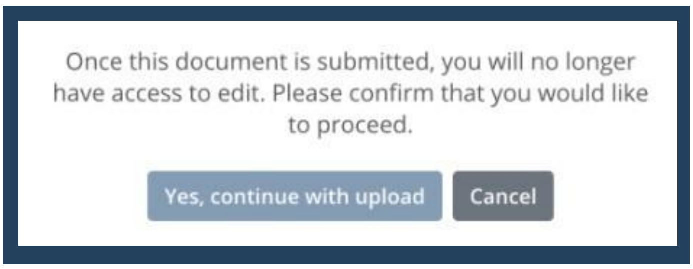


If a provider initiates a request, the participant will receive a notification through the Portal. Participants can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.

Participants can then upload the documentation requested from the provider by clicking on the request banner. Participants can upload a PDF of the document, screenshot, or upload a photo (or multiple photos) using their mobile device.



When a participant selects the file and clicks Submit, they will receive an additional notification warning stating that submitted documentation cannot be edited. Participants should click Yes, Continue to Upload to submit their documentation or Cancel to discontinue submission. Participants can view their submitted documentation by clicking on the document in the documentation history.



DOCUMENTS: Participant Instructions

Use Case & Promising Practices

The Documentation Management functionality allows participants to upload required documentation requested from their care team directly through the Portal. Documentation requests can also be issued by providers outside of the care team.

- Explain to participants how you might use this information: Advise participants that they will be receiving a document request before submitting a request through the Portal. Provide participants with information on why you're requesting the document, how you will use the information, and allow the opportunity to ask any questions.

- Encourage participants to respond to requests for documentation as soon as possible. Requests for documentation are often required for housing or services, and delays in submission could affect service provision.

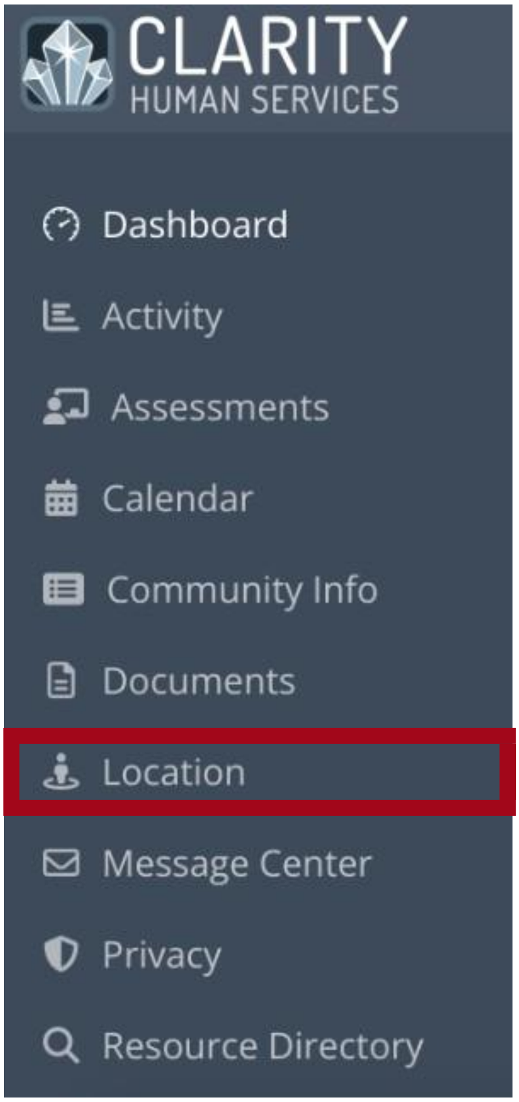
- Explain to participants that they can securely upload PDFs, screenshots, or a photo of requested documents directly through the Portal.

- Explain to participants they will be notified through the Portal when documentation has been requested, and they can also upload any documents they believe will be beneficial for their providers to be able to access.

- Explain to participants that they can view any previous documentation uploaded through the documentation history screen. Explain to participants that once a document has been submitted, they cannot modify or edit it.

LOCATION

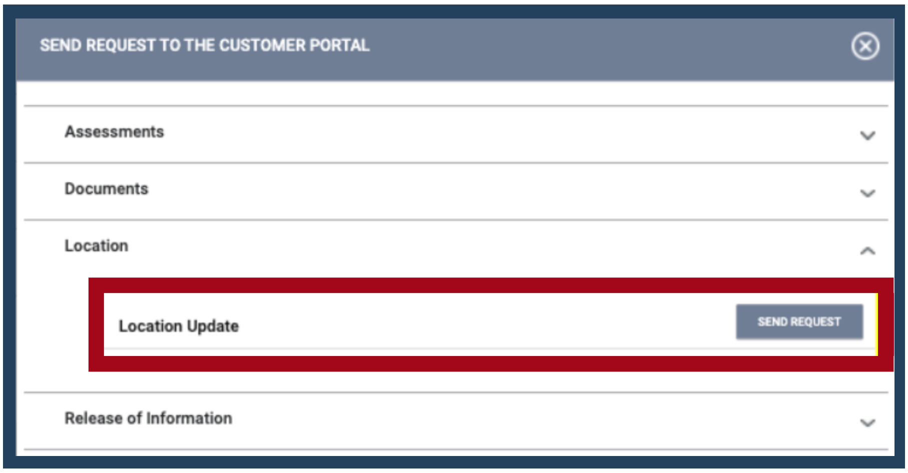
The location feature allows participants to share their address or GPS location through the Portal. Participants can add new locations at any time, and providers are able to send requests for updated location information through Clarity.



How to Request a Location Update

Send a location request to an individual through the Portal icon on the participant's HMIS profile page. Click "Send New Request" and select Location Update.

Mass Location Request: To send a mass Location request to multiple individuals at one time, follow the process for Mass Requests detailed on page 15.

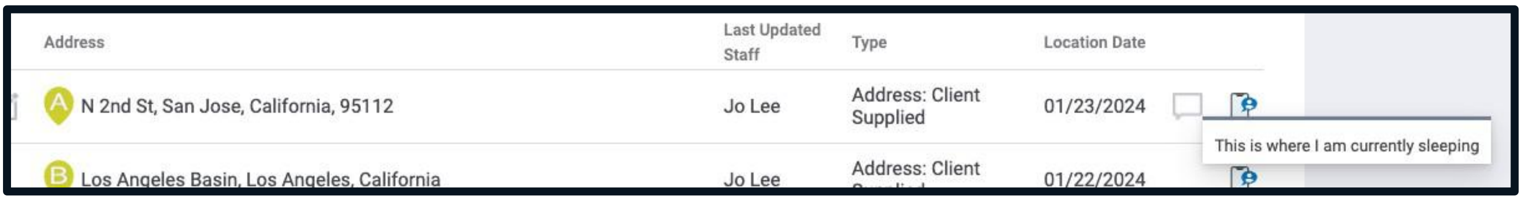


Viewing Location Updates

Once the participant submits new location information, it is available for review in the Location screen of the participant's HMIS profile.

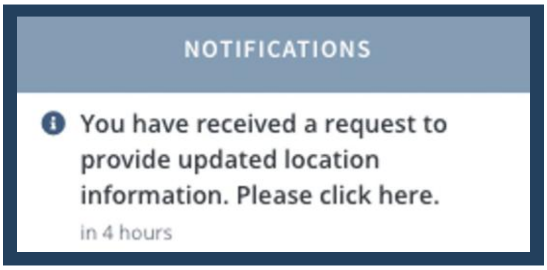
Participant-supplied location updates are marked with the Portal icon.

Additionally, if the participant has submitted a Note with their location, it will appear by hovering over the Note box icon:

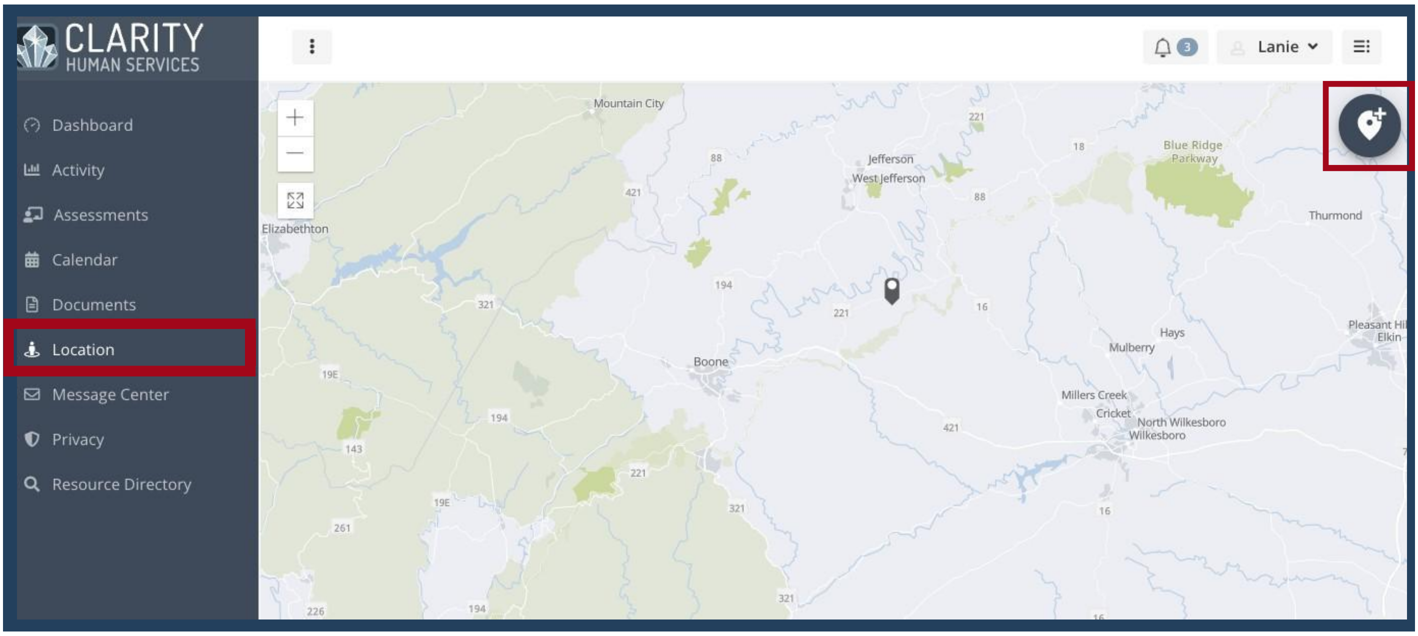


LOCATION: Participant Instructions

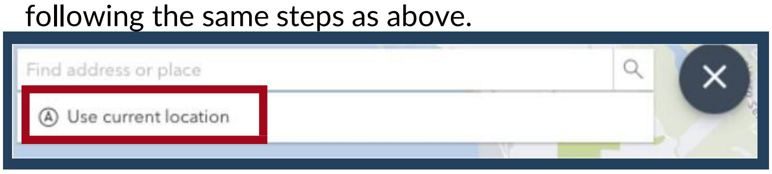
Participants can update their location at any time through the Portal's Location screen. Participants can also receive requests for location updates from providers. Participants should take the following steps to add a new location or respond to a provider request. When a location request is sent, the participant will receive a notification asking them to add a location update through the Portal.

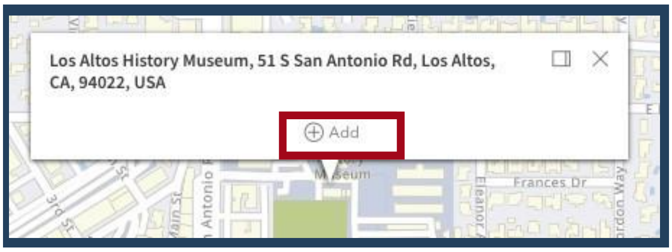


Participants can click the notification or open the location feature using the navigation pane to add a new location. Add a new address or GPS location by clicking the Add Location "Plus" icon at the top right-hand corner of the location screen.

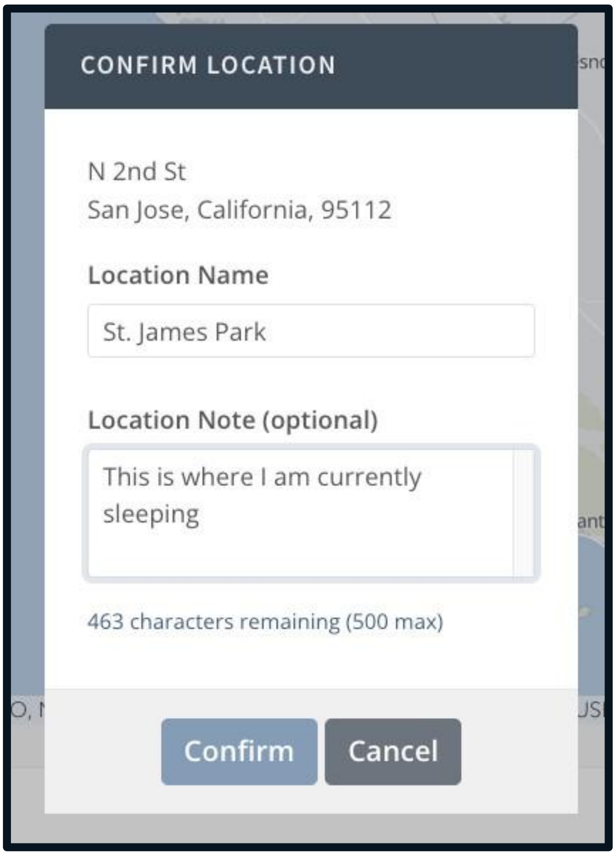


Participants can share their current location using the GPS signal associated with their device by clicking the Use Current Location visible below the search bar. Each device is different, so you may need to research how to enable location sharing for a participant's device if it is not working as anticipated. The map will orient to the participant's location and an address will be displayed. Participants can save their location by selecting the Add icon. Participants can also enter an address into the search field and save the location following the same steps as above.





LOCATION:
Participant Instructions



If a provider initiates a request, the participant will receive a notification through the Portal. Participants can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.

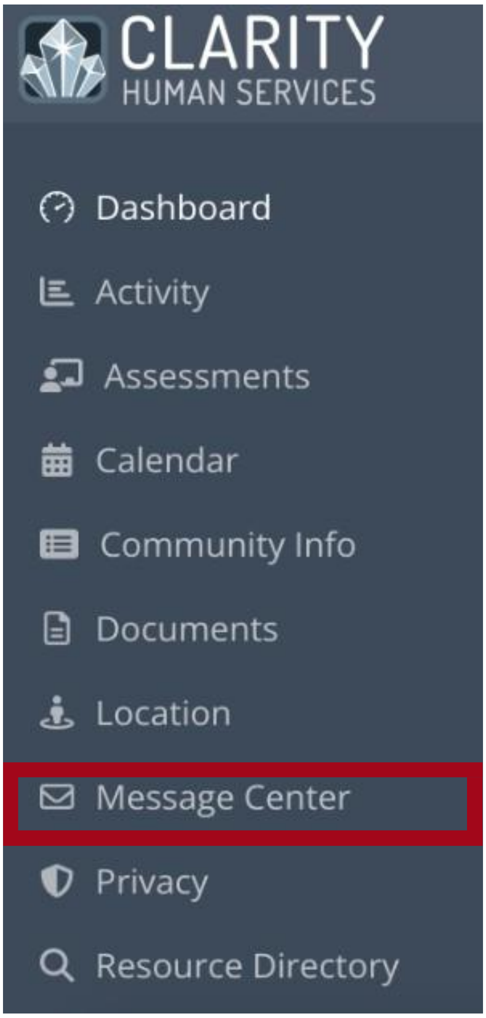
After a location has been added, it will be visible in the user's location history tab. After a location has been added, the user can choose to make it "Inactive" by selecting the option in the "Status" dropdown.
This allows participants to filter the location out, so it no longer appears on the map and in their location history.

Use Case & Promising Practices

- The Location Feature allows Portal users to share their location with their care team members. This feature can help providers quickly locate Portal users and may assist in expediting services.
- Explain to participants how you might use this information: The Location feature helps care team members quickly locate them for services or other related needs. The Location feature is NOT INTENDED to track participants but rather to assist with connection to services. Care team members can only view the locations that participants choose to share with them.
- Explain to the participant that their care team members can request a location update through the Portal. They are also able to update their location at any time.
- Encourage participants to add Notes to the Locations they choose to share to provide additional information and context.
- Explain to the participant that they must enable Location Services on their personal device to share their location using the GPS location.
- Encourage participants to update their location whenever they have a change of address, relocate their encampment, obtain a new temporary residence, or any other situation impacting location.
- Encourage participants to respond to location requests as soon as possible. It's often a sign that a care team member is attempting to make contact for services or other requests.

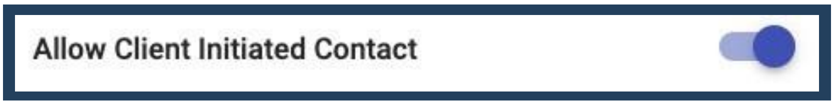
MESSAGE CENTER

The Message Center feature provides a secure communication channel between participants and care team members. Participants and providers can track conversations in a single platform, and Message Center retains the conversation history for future reference. All users also can turn off contact through the Message Center if desired.



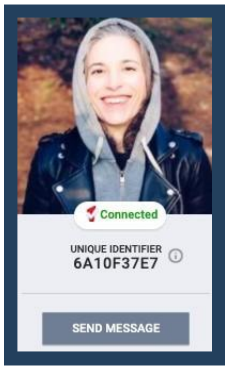
Allow Participant Initiated Contact

By default, participants and care team members can receive incoming messages but have the option to turn off incoming messages. To turn off participant-initiated contact, navigate to your account settings in Clarity and turn off the Allow Participant Initiated Contact in the My Info pane. Press Save Changes button to ensure the settings are updated.



Sending a New Message

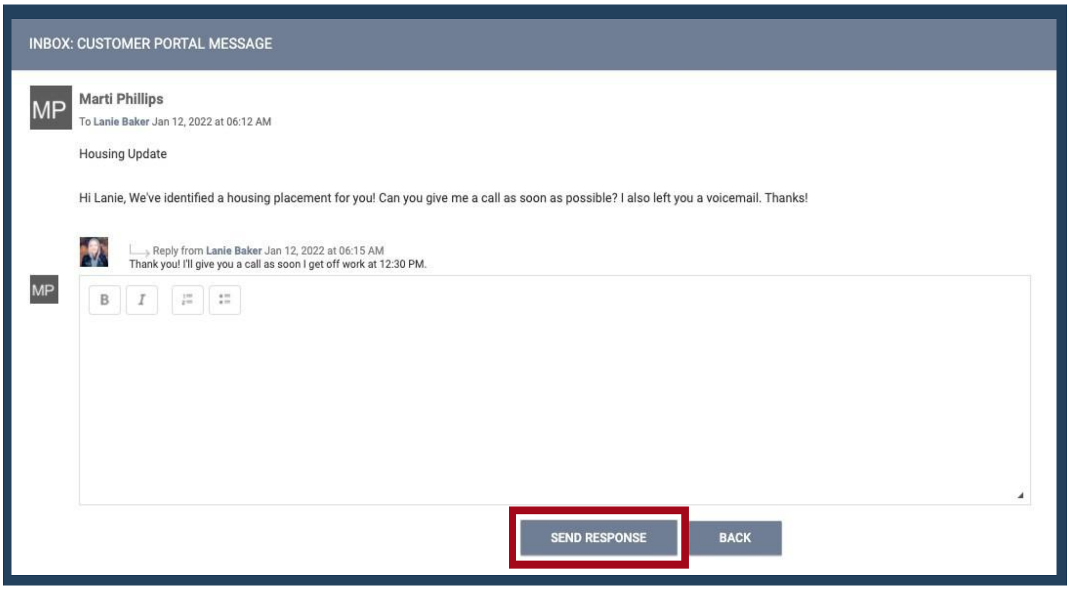
To send a new message to a single participant, navigate to the participant's Clarity profile and press the Send Message button under the participant's photo. Draft your message and select Send Message when complete. Copies of sent messages are available in the Clarity Inbox.



Mass Message: To send a mass Message to multiple individuals at one time, follow the process for Mass Requests detailed on page 15.

Responding to a Message

View and respond to incoming messages in the Clarity Inbox. An alert will appear next to the inbox icon when new messages are received, and any new messages will be displayed under unread messages. To respond to a message, open the message of choice, draft response, and select Send Response.

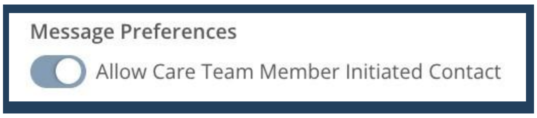


MESSAGE CENTER: Participant Instructions

The Message Center allows participants to initiate and respond to messages from care team members through a confidential and secure channel. Participants are able to conveniently track conversations will all providers and view previous conversation history.

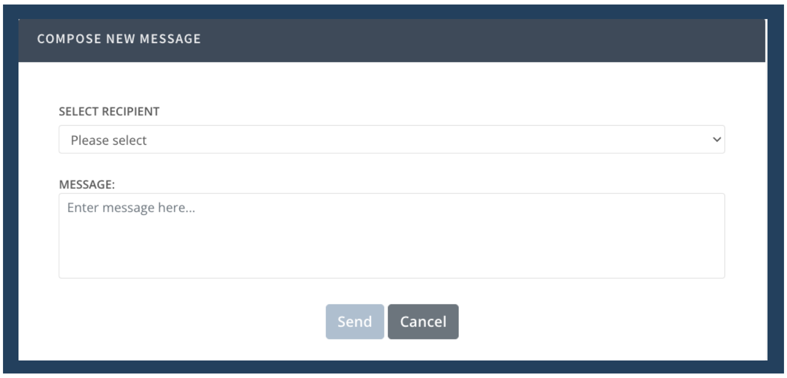
Allow Care Team Initiated Contact

By default, a participant's care team members are able to initiate contact with a participant through the Portal. Participants can opt to turn off care team initiated messages through the Portal's Profile Settings by toggling off the Allow Care Team Member Initiated Contact option under the preferences pane.



Sending a New Message

Participants can send a new message to a care team member through the Message Center pane.
Participants should select New Message, select the proper recipient, draft a message, and press Send. A copy of the message will be available for review in the participant's inbox



Responding to a Message

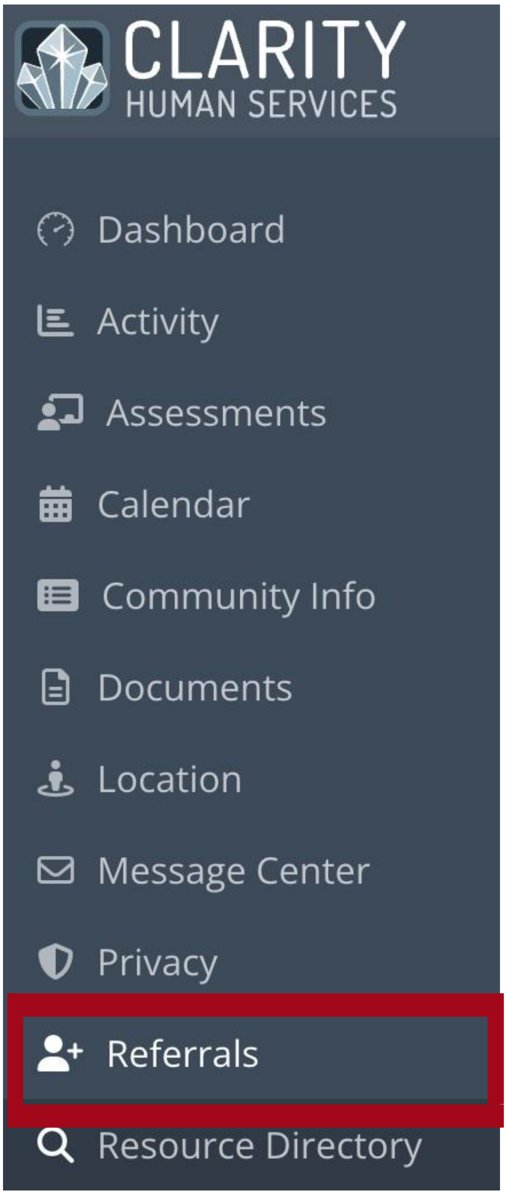
When participants receive a message from a care team member, they will receive an alert at their next login and may receive an email or SMS if enabled. Participants can view the message by clicking on the notification or navigating to the Message Center. New and unopened messages will be displayed in bold. To respond, participants should open the message, draft a response, and select Send.

Use Case & Promising Practices

The Message Center feature streamlines communication between participants and providers and keeps communication organized in a centralized location.

- Explain to participants how they might use this feature: Explain to the participant that they can send and receive messages to easily communicate with their care team members through the Message Center.
- Explain to the participant that the Message Center is a secure communication channel.
- Explain to the participant that they have the option to turn messaging off in their Portal Profile Settings. Encourage the participant to leave messaging on so that they can receive communication from their care team member. Messaging is a helpful tool for communicating updates, service needs, referral status, etc.

REFERRALS



The Referrals feature provides participants with a listing of their current and past referrals in HMIS, including the referral date, agency name, program name, current referral status, and the date when the status was most recently updated.

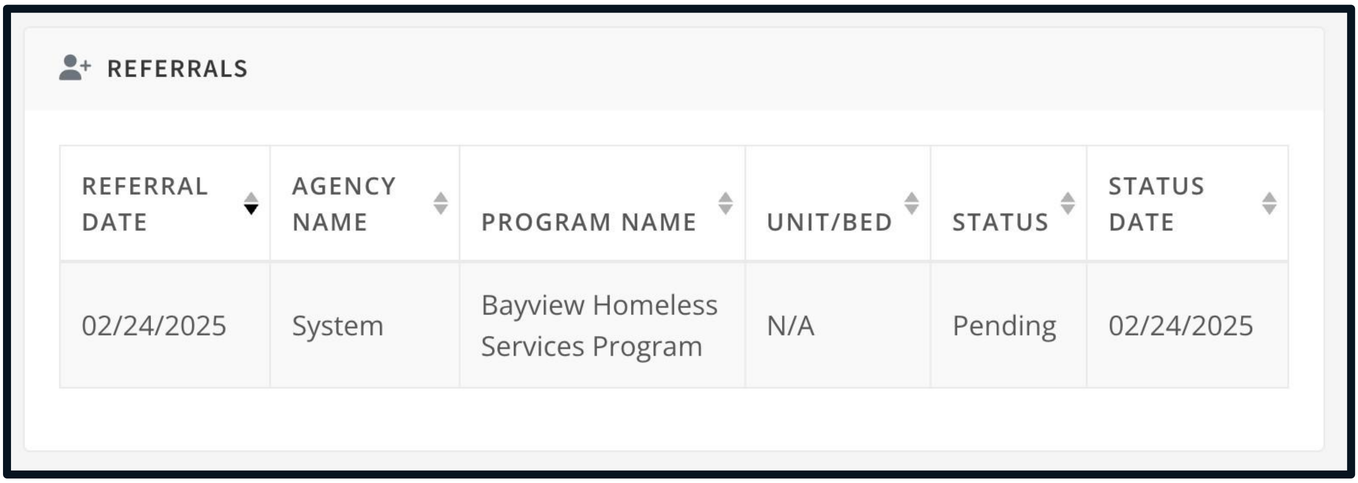
A participant may have questions for you about what their referral history means. You can use the additional information in HMIS to help answer their questions about current and past referrals.

If a participant contacts you because they see they have a Pending program referral, please help them connect with a staff member at the referred-to agency as quickly as possible. You can leave an updated referral note or send the other provider a message in Clarity. You should tell the other provider that this participant has a Portal account and can be messaged through their HMIS profile to securely communicate with them about next steps to process their pending program referral.

Participant Instructions

How to View Referrals

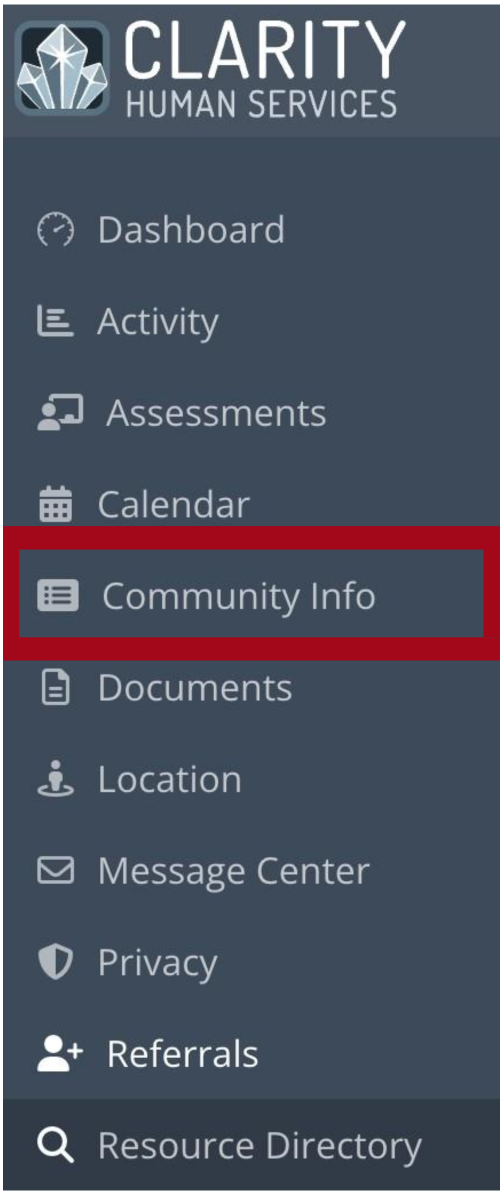
Under the participant view of the Portal, the Referrals tab includes a display of a participant's program referral history. No additional actions are available to participants in the Activity tab. There are no required actions or instructions for providers to use this feature.


REFERRALS

REFERRAL DATE	AGENCY NAME	PROGRAM NAME	UNIT/BED	STATUS	STATUS DATE
02/24/2025	System	Bayview Homeless Services Program	N/A	Pending	02/24/2025

COMMUNITY INFO

Community Info allows participants to get up-to-date local information. In Community Info, participants can view and filter articles with additional information, instructions, and/or links about services that may be available or local announcements.



Participant Instructions

Community Info
Explain to participants that Community Info articles can be sorted by Title, Date Updated, or filtered using the “Category Filter” dropdown. Click on the title to view the full article and scroll down to the bottom to close or print the information.