Alameda County
Clarity HMIS
Customer Portal

Provider Training

Bitfocus

Agenda

- **About the Portal & Pilot**
- **Client-Facing Functionality**
  - Feature Overview & Demos
- **Provider Functionality**
  - Sending Invites
  - Sending Requests
  - Posting Appointment Slots
  - Account Disconnection Process

About the **Clarity Customer Portal**

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About the Portal

Provides program participants access to:

- **Components** of their HMIS record
- **Tools** to communicate and share updated info with you and other providers
- **Information and resources** to empower them in their journey to permanent housing

The Portal was developed, rolled out, and tested alongside **individuals with lived experience** of homelessness in Santa Clara County, CA

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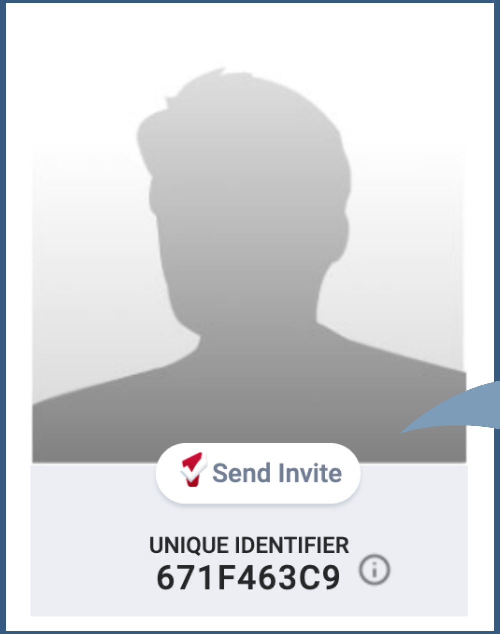
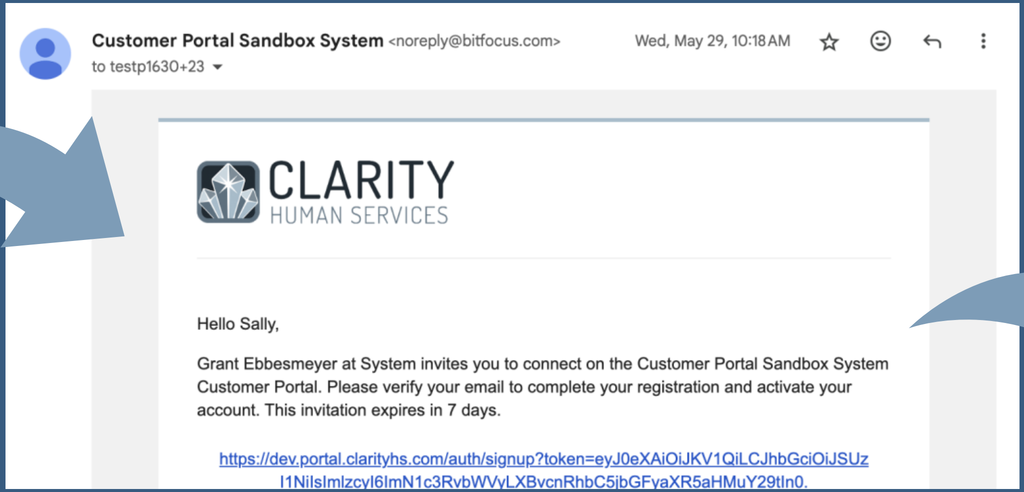
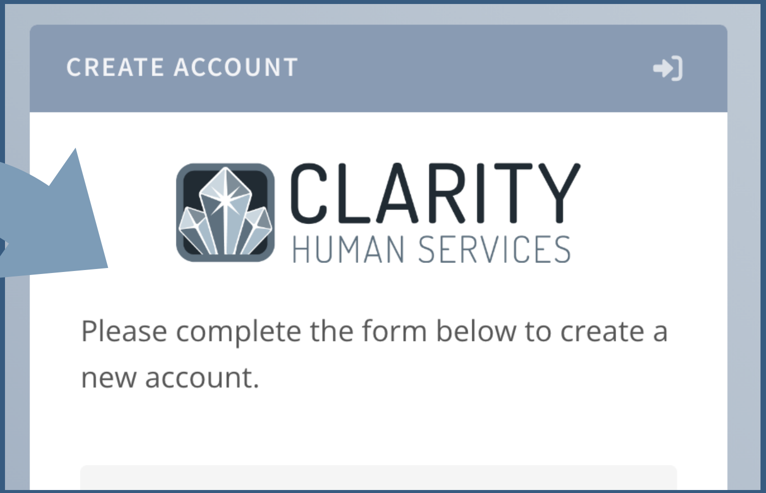
About the Portal

A participant is **invited** to create an account by a provider from their Clarity client profile







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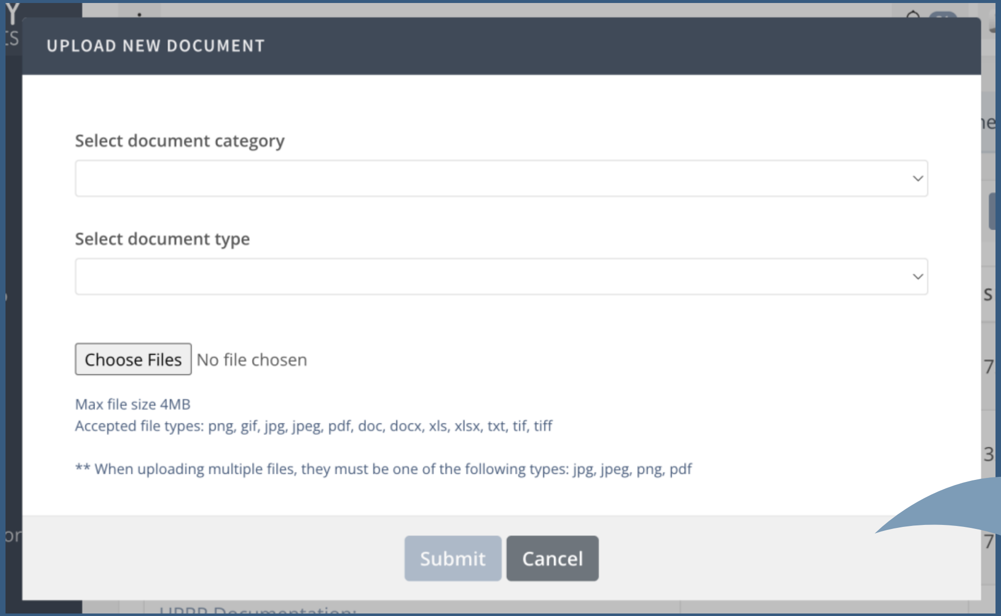
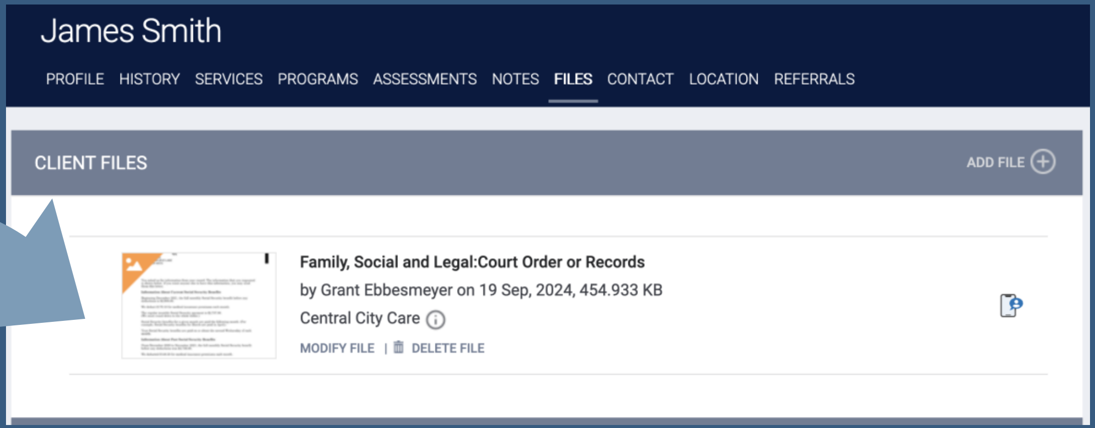
About the Portal

After creating their account, any actions taken in the Portal are **automatically reflected** on their Clarity profile in real time





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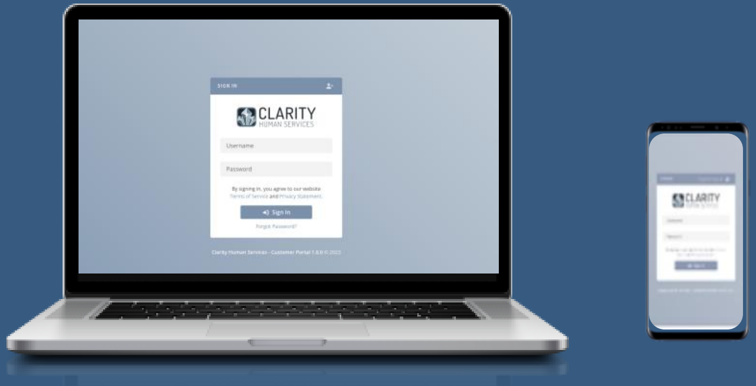
Feature Review:
Client-Facing Functionality



What do clients need to use the Portal?

Personal email account

Access to a personal or shared device

Internet connection

Invitation from Clarity user

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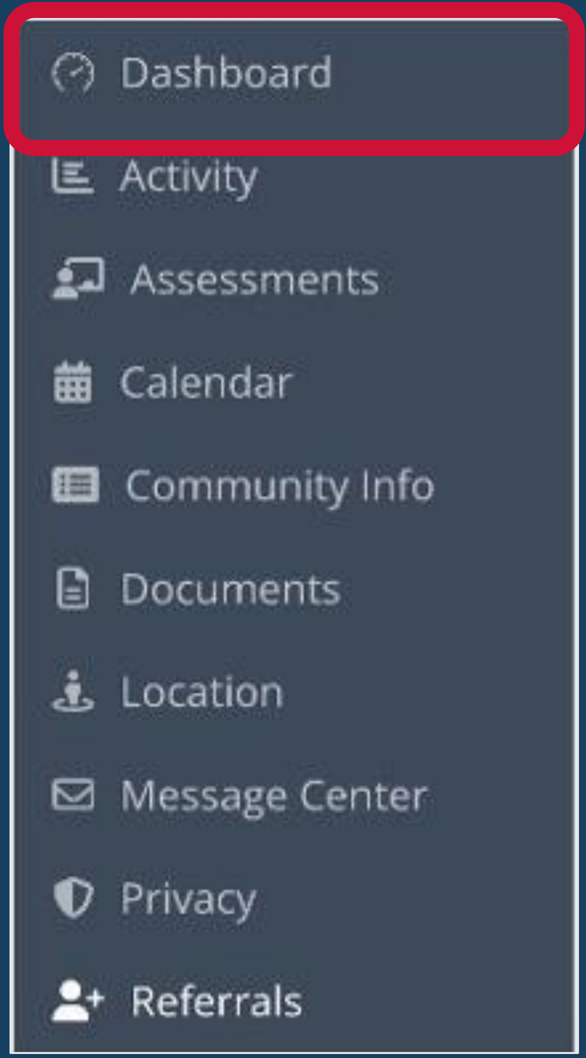

Dashboard

Functionality Overview

- Home screen at login
- Shows Household members, Care Team members, Community Queue status, pending referrals, and upcoming appointments

Recommendations

- Encourage clients to review their household members & care team assignments

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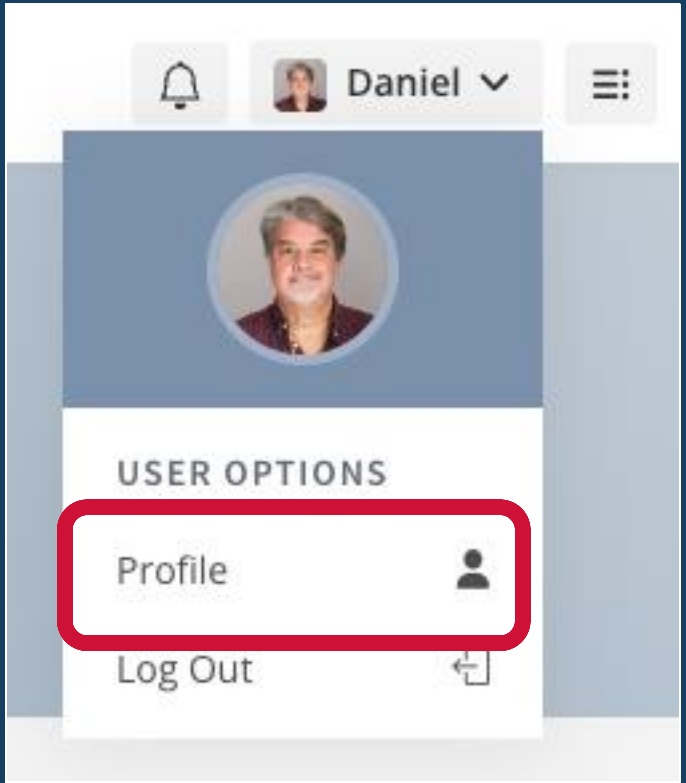


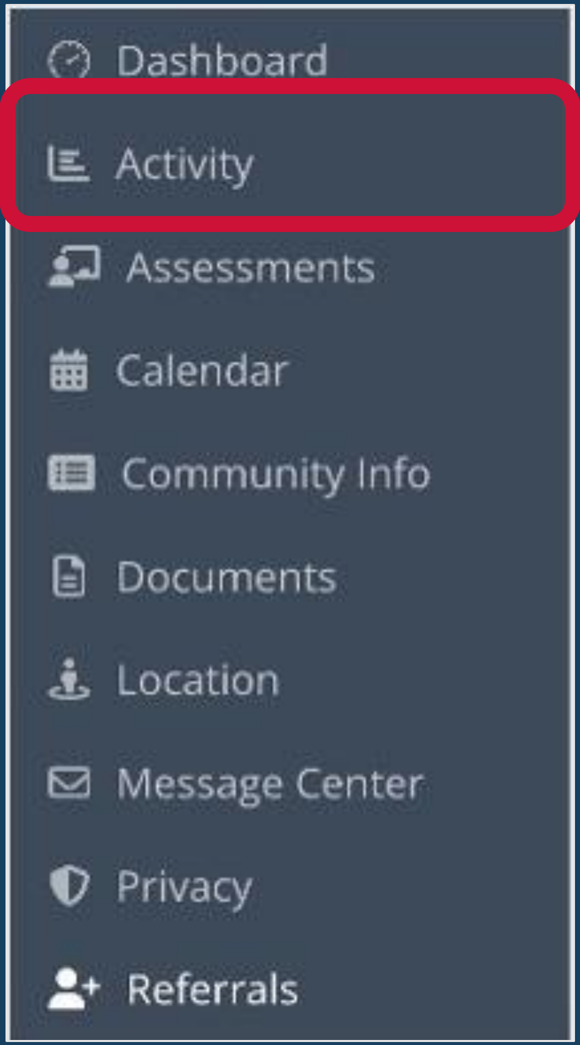
Client Profile

Functionality Overview

- Update personal contact information
- Account settings & preferences
- Client option to disconnect account

Recommendations

- Encourage clients to keep their contact info up to date
- Encourage clients to set their account preferences at account creation



Activity

Functionality Overview

- Listing of program enrollments and participation dates
- Clients won’t see details of program records (such as case notes or screen details)

Recommendations

- Encourage clients to review their program enrollment history

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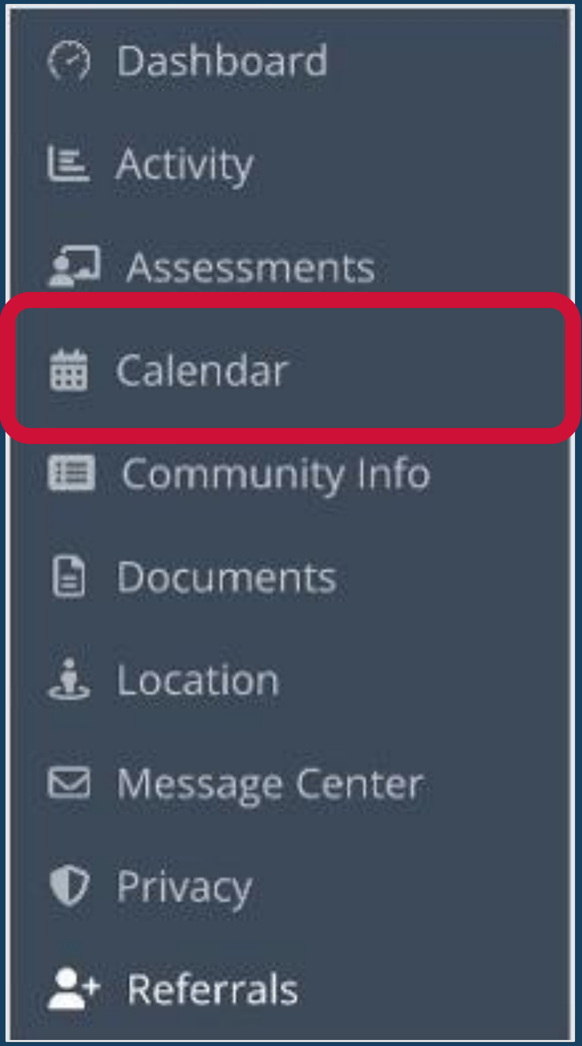

Calendar

Functionality Overview

- Schedule appointments with care team members based on their posted available time slots
- View any appointments scheduled through Clarity

Recommendations

- Post appointment slots so your clients can easily schedule time to meet with you
- Encourage clients to use the appointment scheduling feature to find a time to meet with you or cancel upcoming appointments

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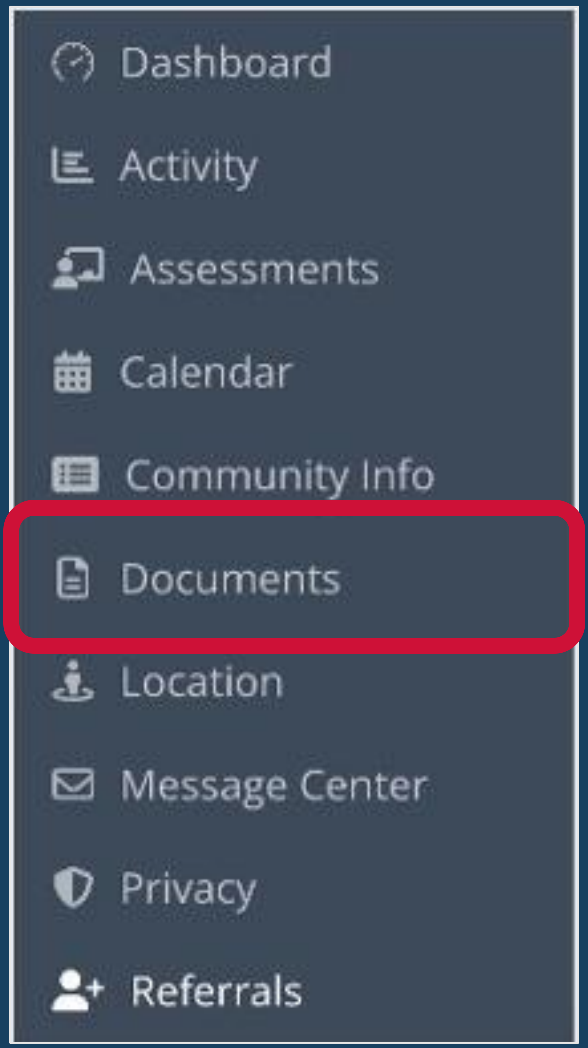


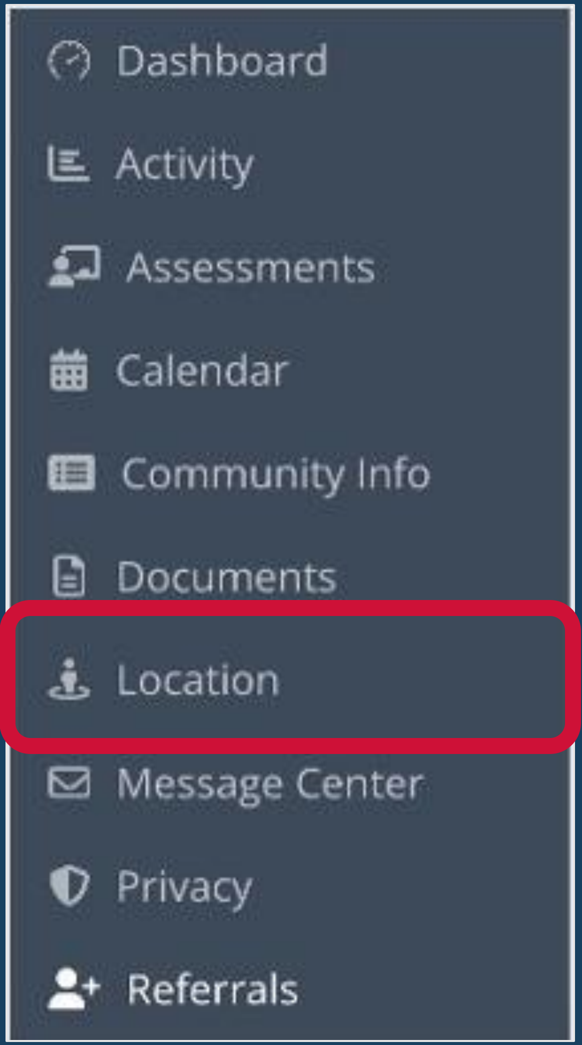
Documents

Functionality Overview

- Upload key documents at any time *(pictures, screenshots, or PDFs)*
- Providers can request specific documents from clients
- Review previously submitted documents

Recommendations

- Explain which documents may be useful for clients to submit without a request
- Explain that submitted documents are safely and securely stored
- Explain to clients once a document is uploaded, they cannot modify or edit it through the Portal



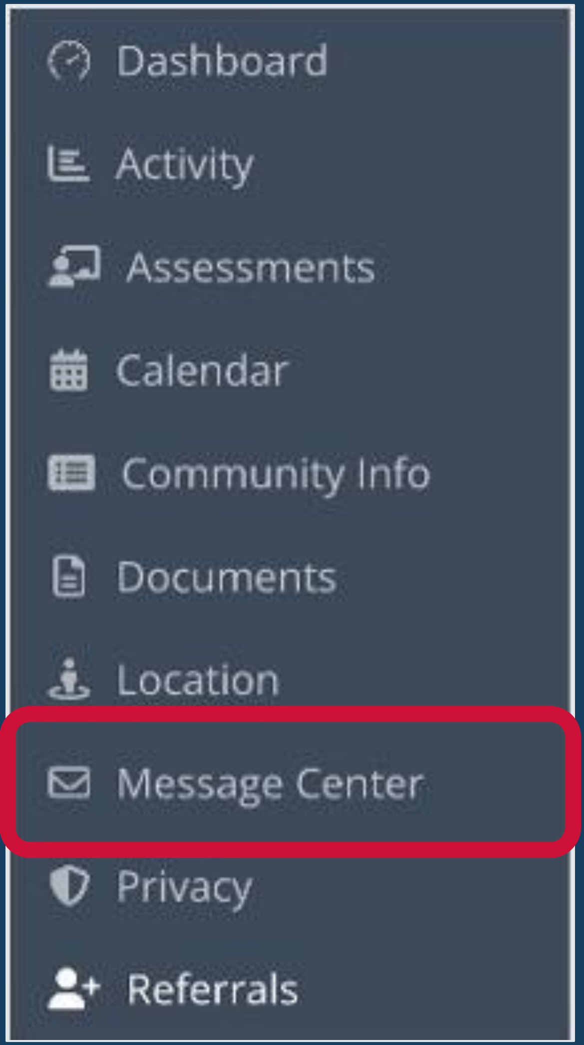
Location

Functionality Overview

- Share a location at any time (address, map pin, or GPS)
- Providers can request location updates
- Can add a location name and notes to provide additional info about the location they're choosing to share

Recommendations

- Emphasize to clients that location requests help with providing services and ***will not be used for tracking purposes***
- Encourage clients to add location notes to provide additional context to providers, and to mark locations as "Inactive" if they're no longer there



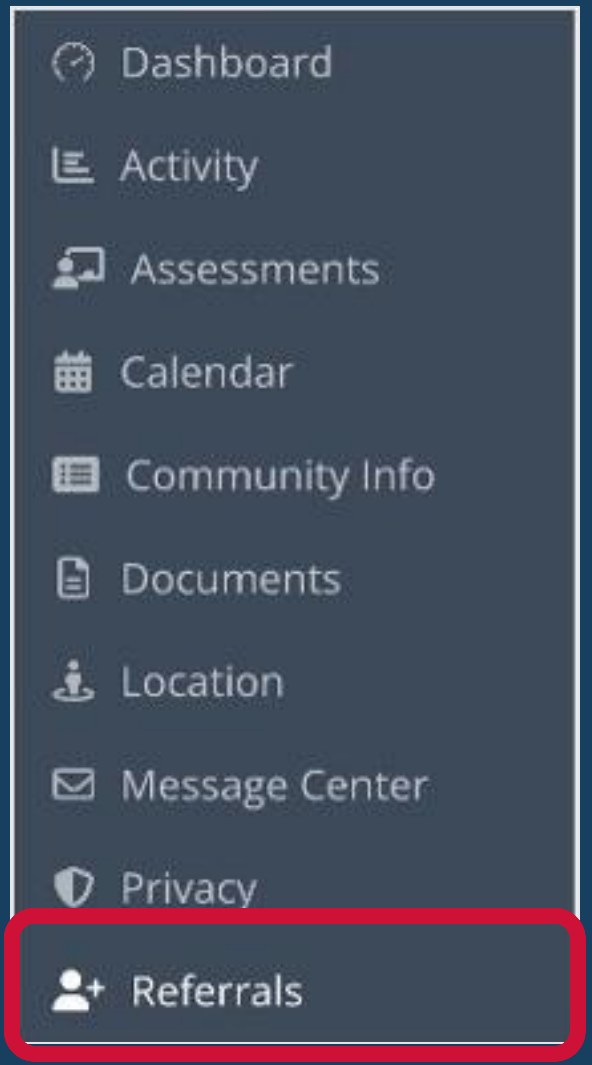
Message Center

Functionality Overview

- Send and receive messages with care team members
- Review previous messages and responses

Recommendations

- Encourage clients to use the Message Center to request updates or information



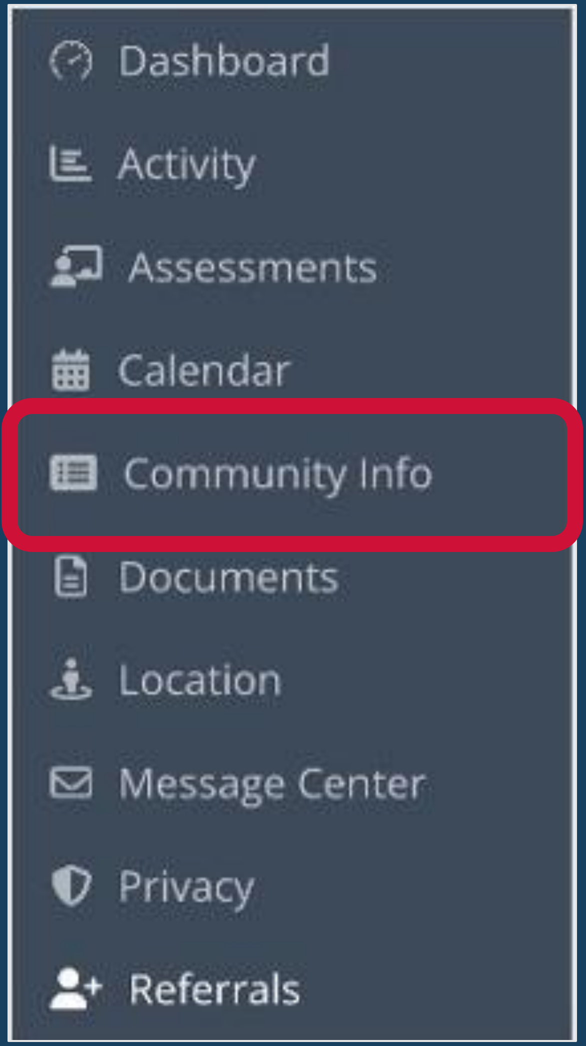
Referrals

Functionality Overview

- Listing of current and past program referrals
- Clients won't see referral notes

Recommendations

- Encourage clients to review their program referral history
- Encourage clients to reach out to you or another member of their Care Team right away when they are notified of a pending program referral



Community Info

Functionality Overview

- Allows clients to get up-to-date local information
- Includes link to participant Portal training resources
- View and filter articles by category

Recommendations

- Explain to clients that articles should be reviewed often to stay up-to-date
- Explain to clients that they can see the "Last Updated" date for each article to identify new and updated information

Provider Functionality & Workflows

Portal Invitations

Verify Eligibility

- 18 years of age or older *(with DOB in HMIS)*
- Consent to participate

Verify Identity

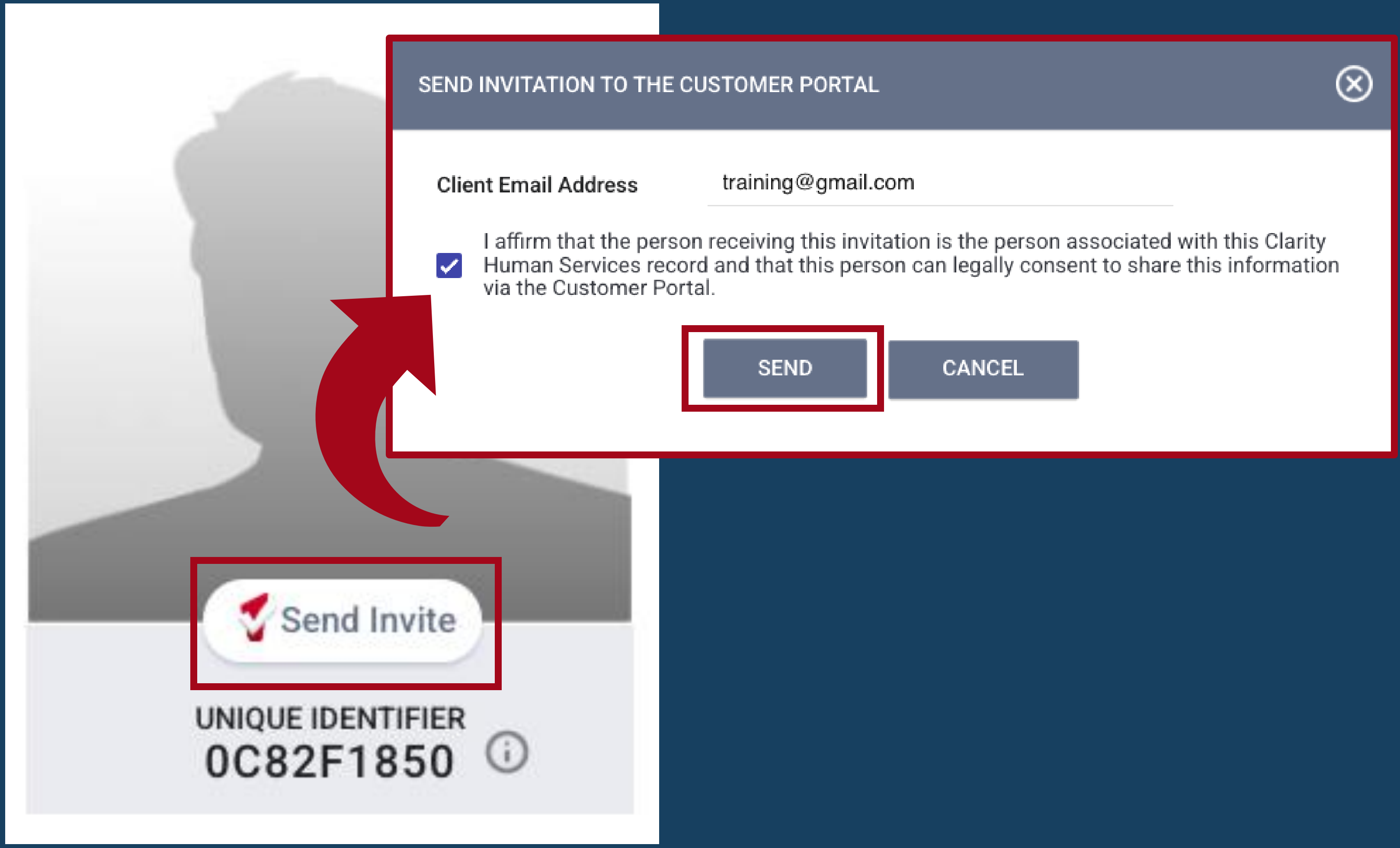
- Confirm full name
- Confirm two identifying pieces of information:
  - DOB
  - SSN
  - Contact info
  - Recent program/service history
  - Photo

Send Invitation

- Send invite through Clarity profile
- Invitations expire in 14 days
- Clients will receive 2 reminders before the invitation expires
- Manually resend invitation at any time

Portal Invitation

1. Click on the button under profile photo
2. Type in client's email
3. Check the box
4. Click Send



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Invitation & Account Creation

Demo

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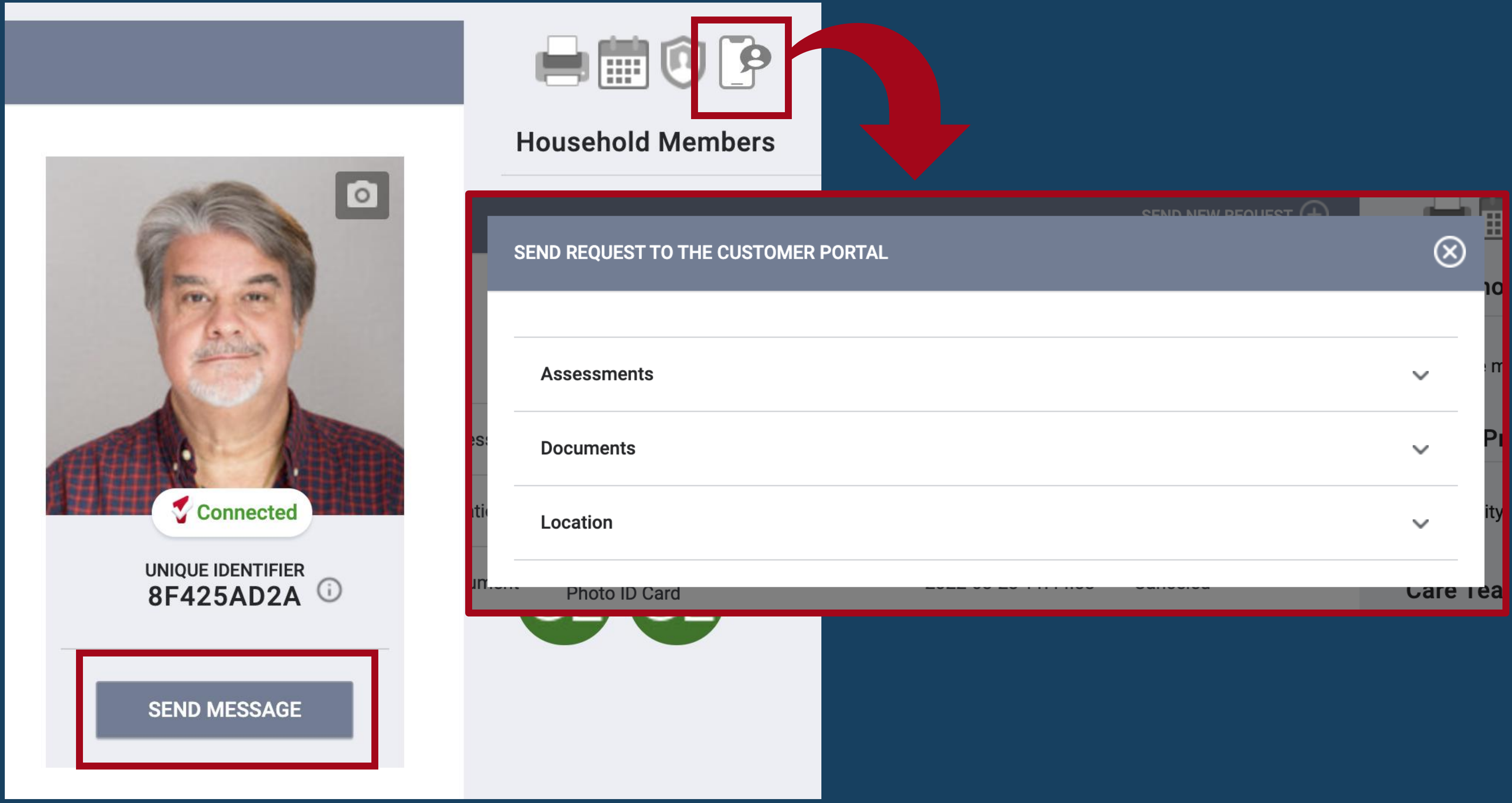
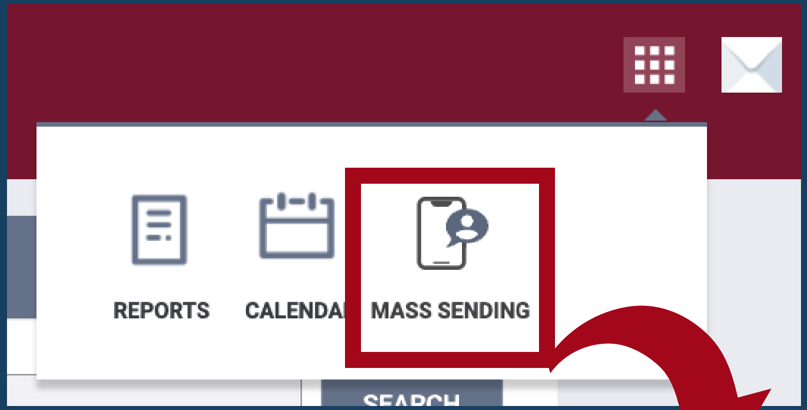
Sending Requests and Messages

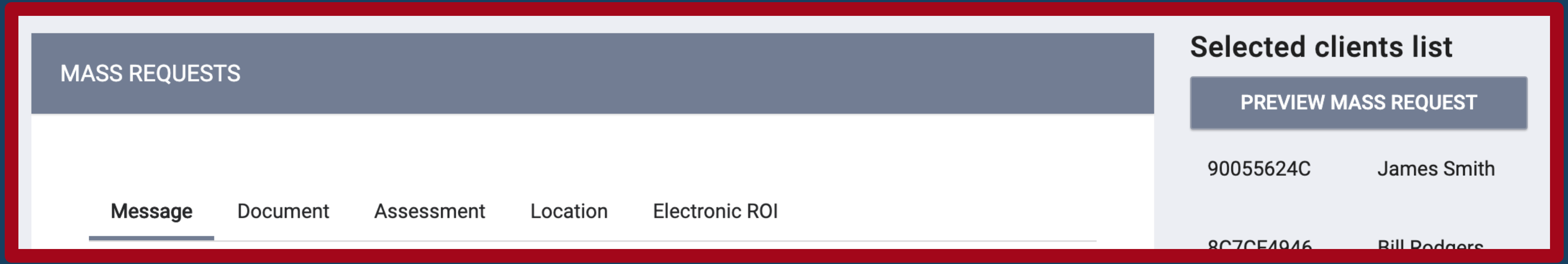
Send **individual** requests or messages to a client's Portal account through their Clarity profile



Sending Requests and Messages

Send requests or messages to **multiple** clients at one time using the **Mass Sending** functionality





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Sending Requests & Messages

Demo

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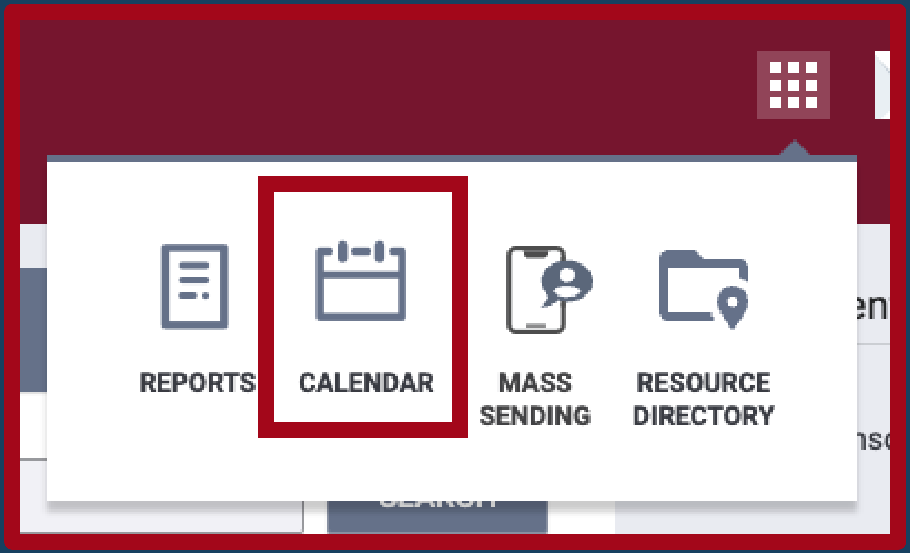
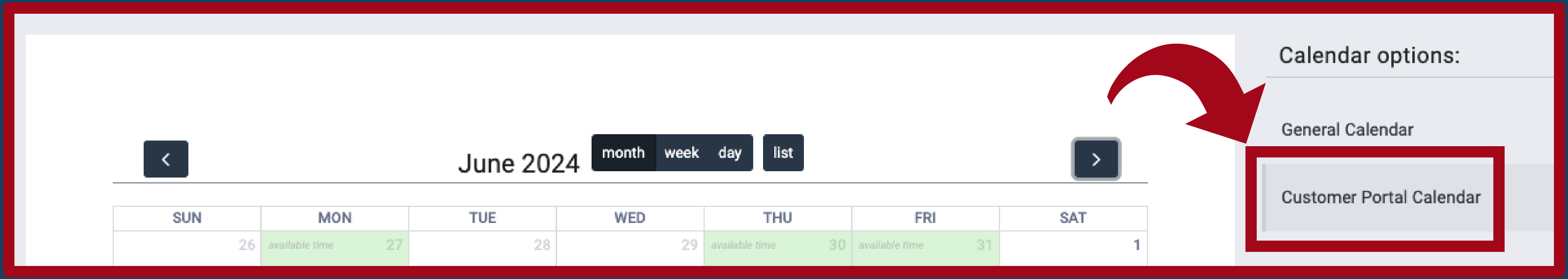
Posting Appointment Slots

Post times you're available to meet as **appointment slots** so that participants can schedule time with you directly through the Portal

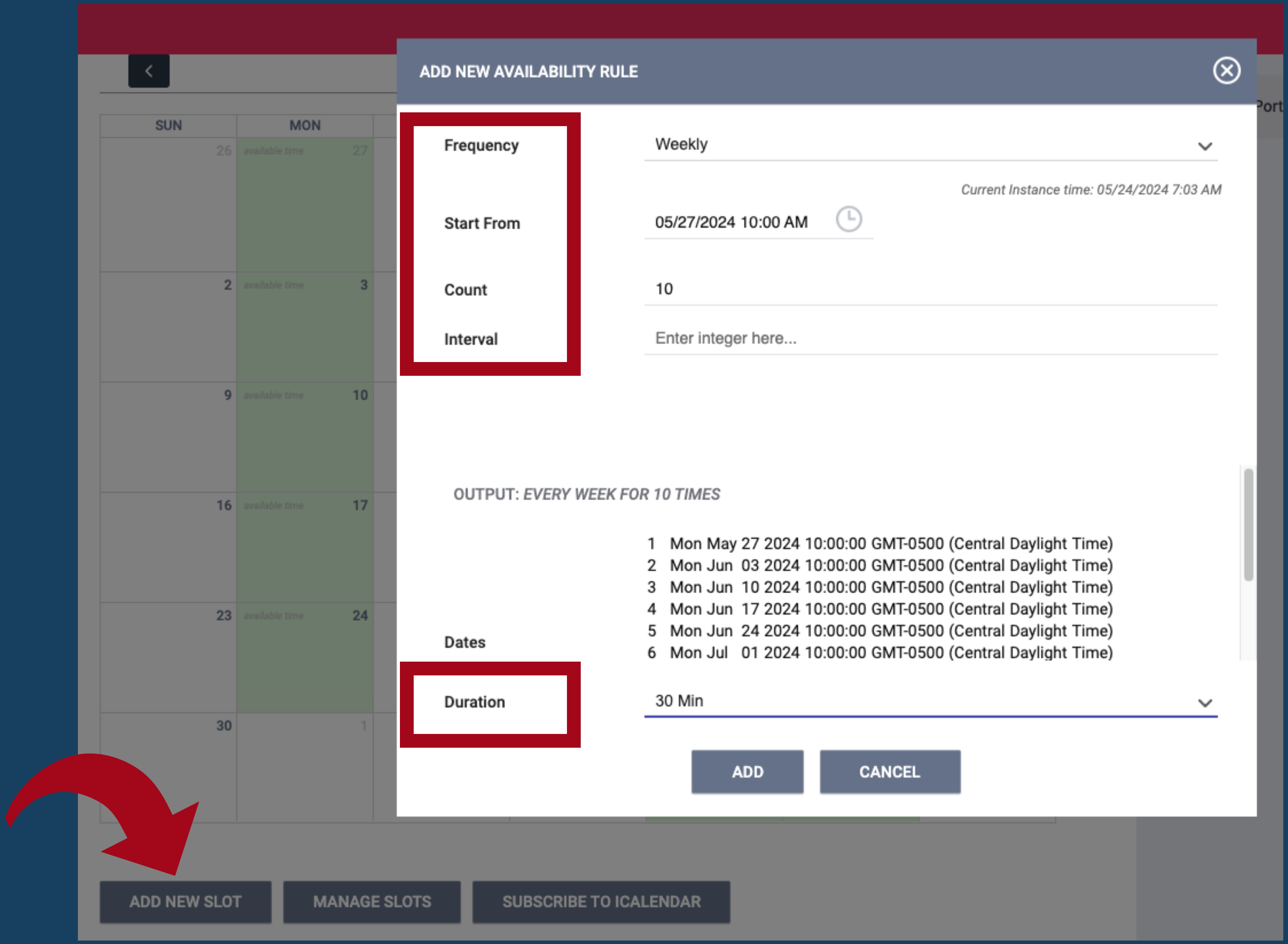




Posting Appointment Slots

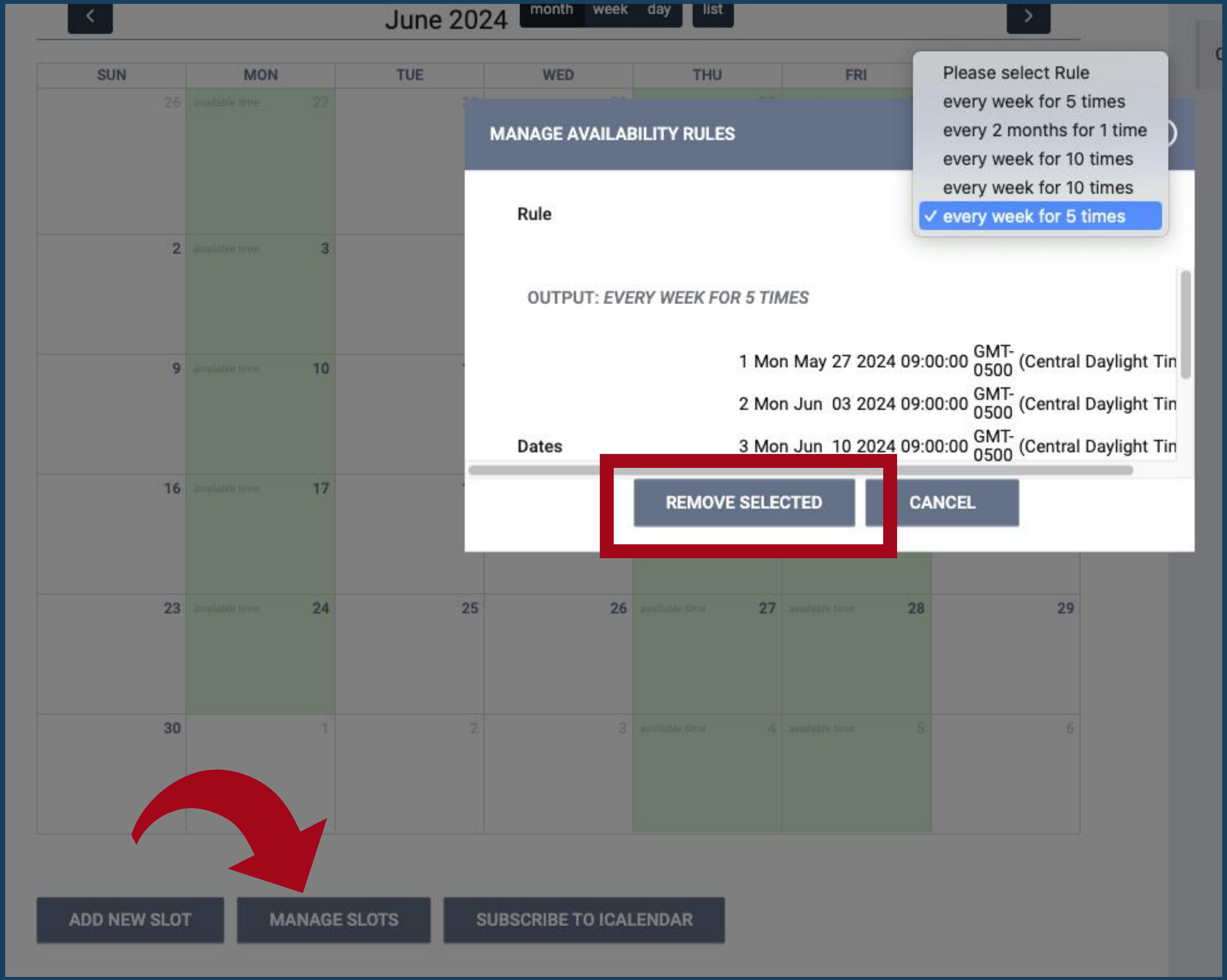
Click "Add New Slot" and choose:

- Frequency
- Starting date and time
- End date ***or*** count of slots to schedule
- Interval *(optional)*
- Duration



Posting Appointment Slots

Click “Manage Slots” to remove an existing recurring schedule of appointment slots



Posting Appointment Slots

Demo

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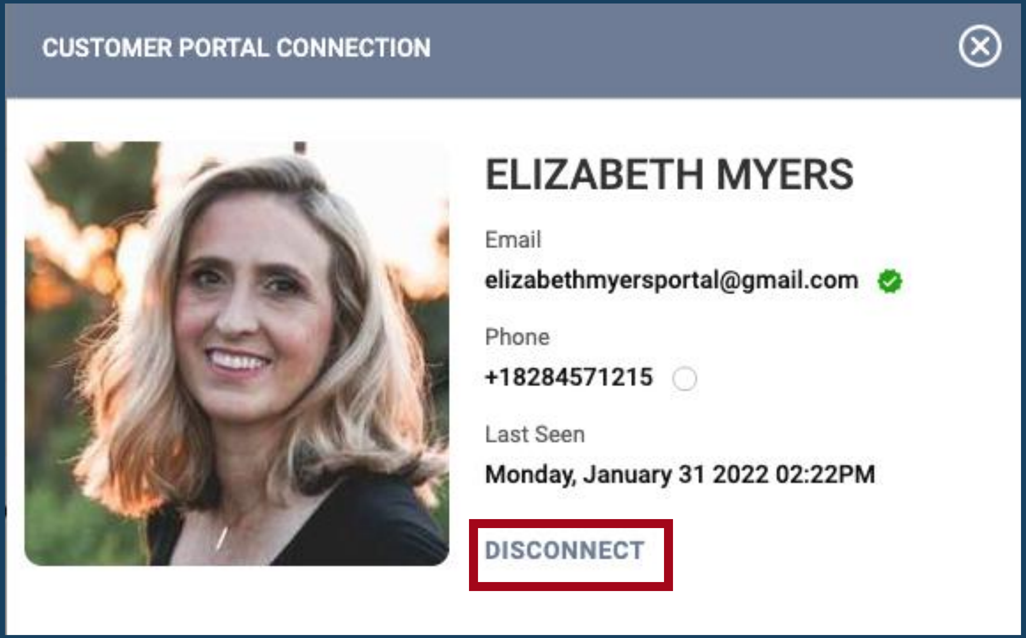
Account Disconnection

A Portal account should be disconnected if any of the following occur:

- Client lost access to email
- Client’s email has been compromised
- Client has changed their personal email address
- Portal account has been compromised

Account disconnection suspends access to a client’s personal information within the Portal.

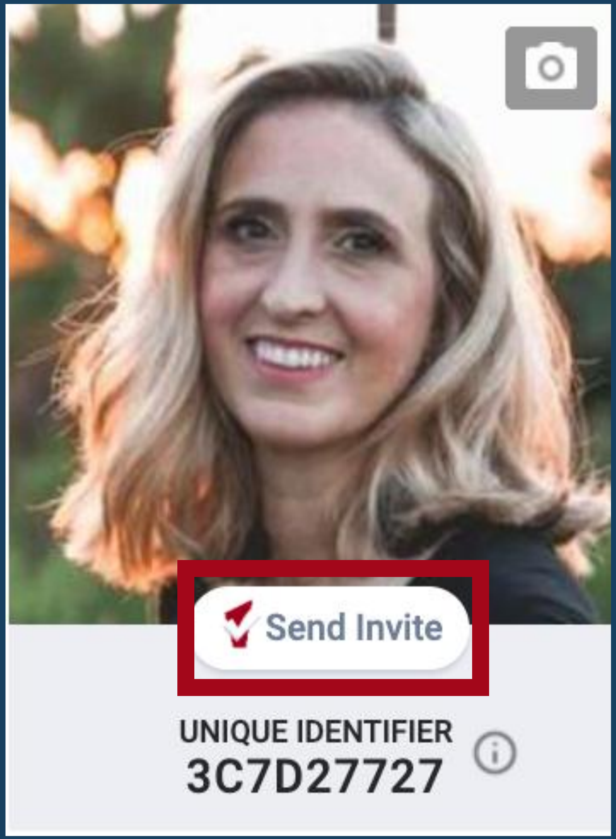
If a client has only forgotten their Portal password, they can use the “Forget Password” button on the login page to receive a code to reset their password.



Account Reconnection

If an account has been disconnected due to a client losing access to their email account:

- Encourage client to create a new email address
- Send an invite to a client's new email address using the same method used to invite the client initially



Provider Expectations

- Review training and support materials
- Provide support to clients
- Send Portal invitations through HMIS and build excitement
- Utilize Portal features and provide feedback

Client Support Expectations

- Direct clients to info & training resources
- Help create an email address (if necessary)
- Help create their Portal account
- Escalate any technical issues

Inviting Clients

- Extend invitations through Clarity
- Talk about the Portal with your new clients
- Talk with as many existing clients as possible
- Share your excitement with clients

Points to Emphasize with Clients

Designed to increase access and empowerment

New tools designed to give more control!

Developed in collaboration

Developed in collaboration with individuals with lived experience of homelessness

Secure connection

Developed with the security of individuals and their personal information in mind

Key security features: multi-factor authentication, auto log out

Utilize Features & Provide Feedback

- Send and respond to messages
- Send Document, Location, and Assessment requests
- Use the Clarity calendar and appointment slots

Portal Resources

Provider Training Resources

- Slides + Recording
- Provider Training Guides

https://alameda.bitfocus.com/other-training

Participant Training Resources

- Short Training Videos
- Client Training Guides

https://alameda.bitfocus.com/client-record

Local HMIS Support Contacts

- hmissupport@acgov.org

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Q&A

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