



Alameda County
Clarity HMIS
Customer Portal

Provider Training

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



About the Portal

Provides program participants access to:

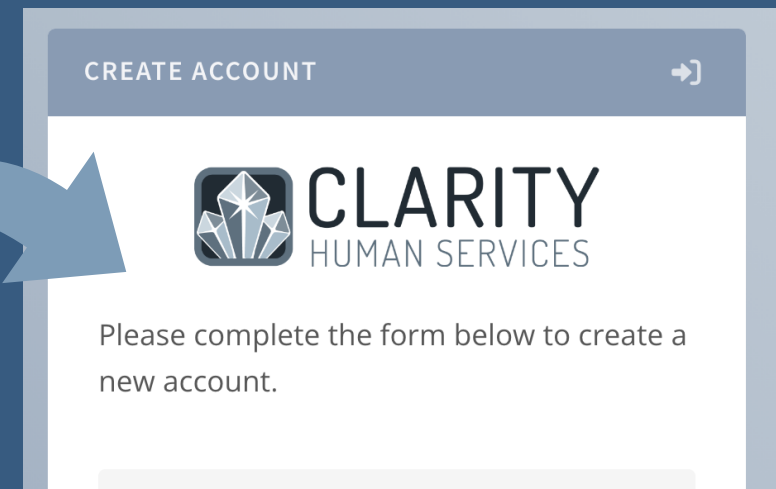
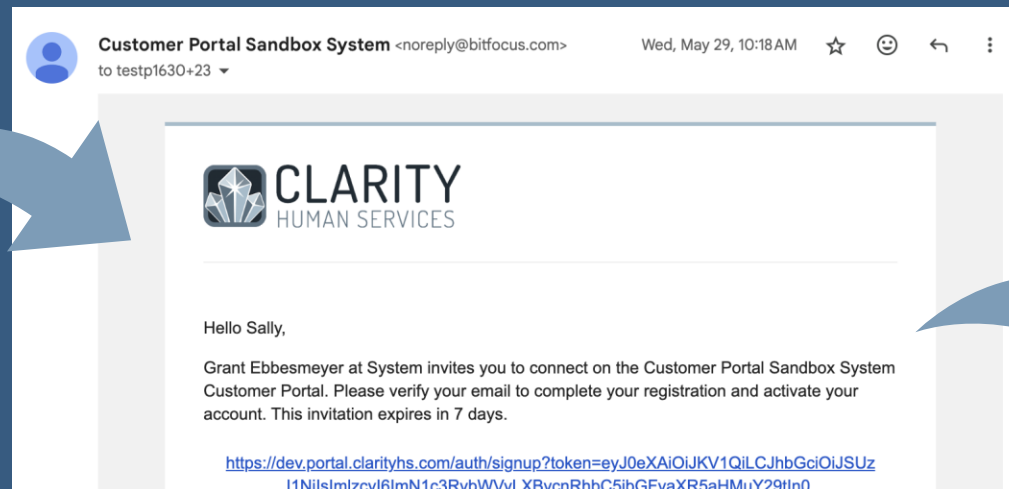
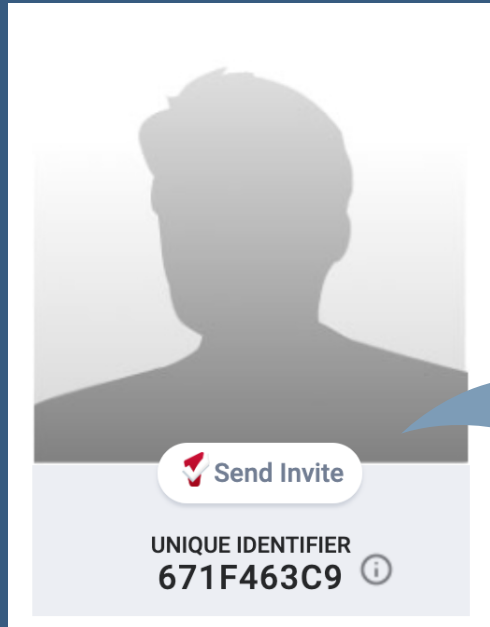
- **Components** of their HMIS record
- **Tools** to communicate and share updated info with you and other providers
- **Information and resources** to empower them in their journey to permanent housing



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

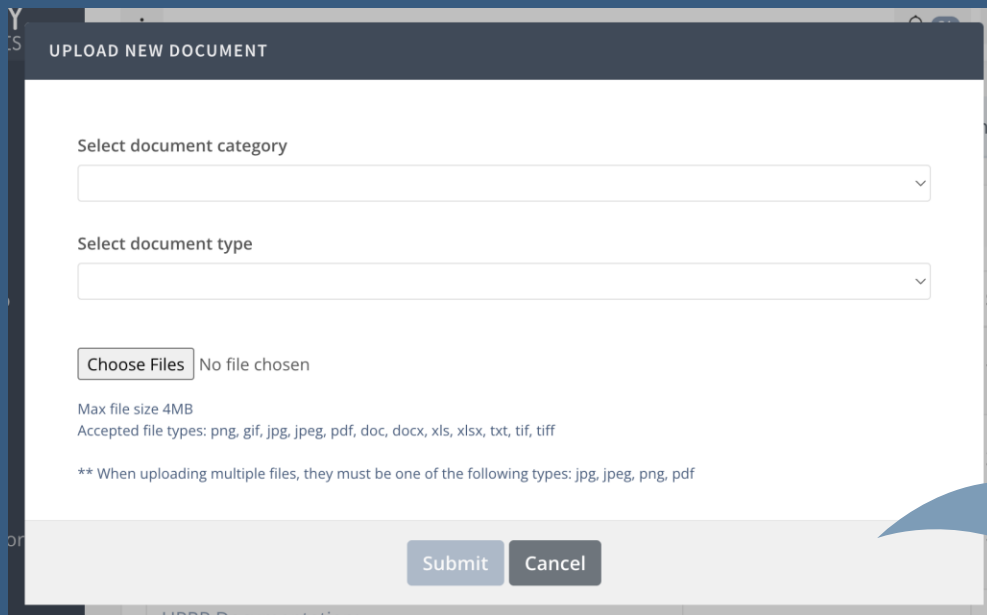
About the Portal

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



About the Portal

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



UPLOAD NEW DOCUMENT

Select document category

Select document type

Choose Files No file chosen

Max file size 4MB
Accepted file types: png, gif, jpg, jpeg, pdf, doc, docx, xls, xlsx, txt, tif, tiff

** When uploading multiple files, they must be one of the following types: jpg, jpeg, png, pdf

Submit Cancel



James Smith

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES **FILES** CONTACT LOCATION REFERRALS

CLIENT FILES ADD FILE (+)

 **Family, Social and Legal: Court Order or Records**
by Grant Ebbesmeyer on 19 Sep, 2024, 454.933 KB
Central City Care ⓘ

MODIFY FILE | DELETE FILE

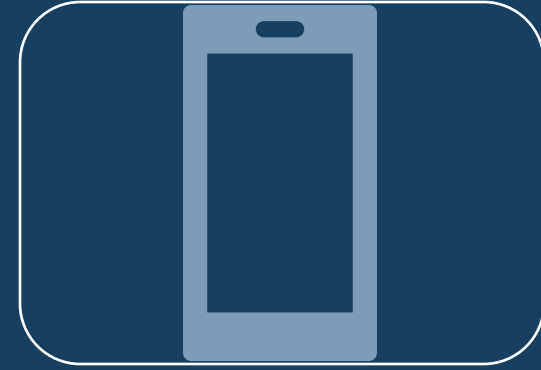
Feature Review: Client-Facing Functionality



What do clients need to use the Portal?



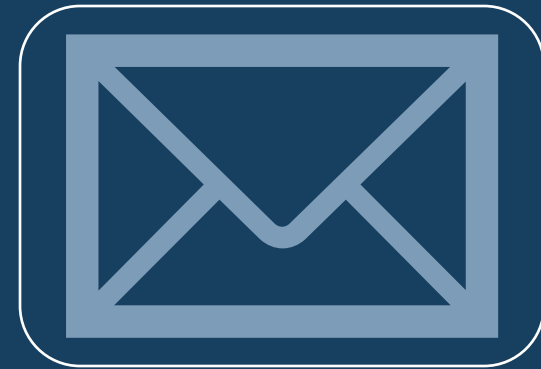
Personal email account



Access to a personal or shared device



Internet connection



Invitation from Clarity user

 Dashboard

 Activity

 Assessments

 Calendar

 Community Info

 Documents

 Location

 Message Center

 Privacy

 Referrals

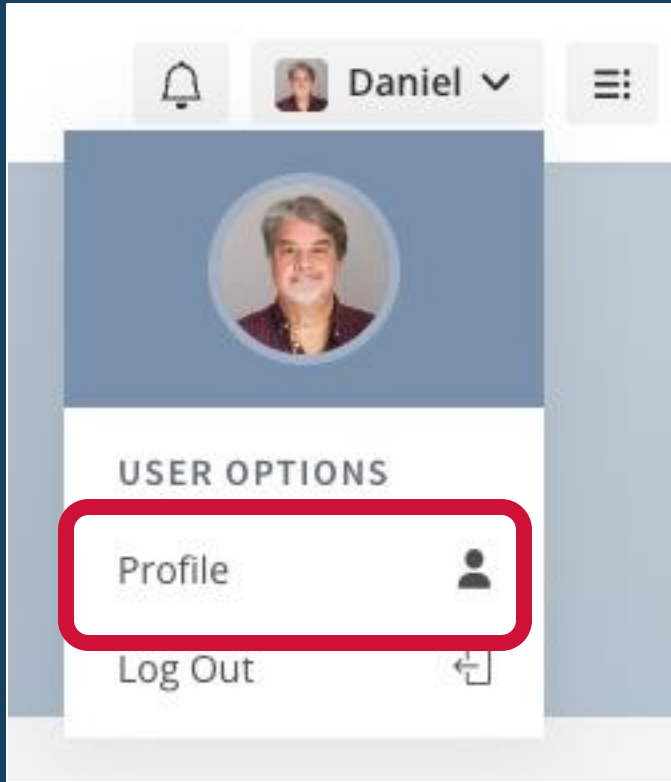
Dashboard

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



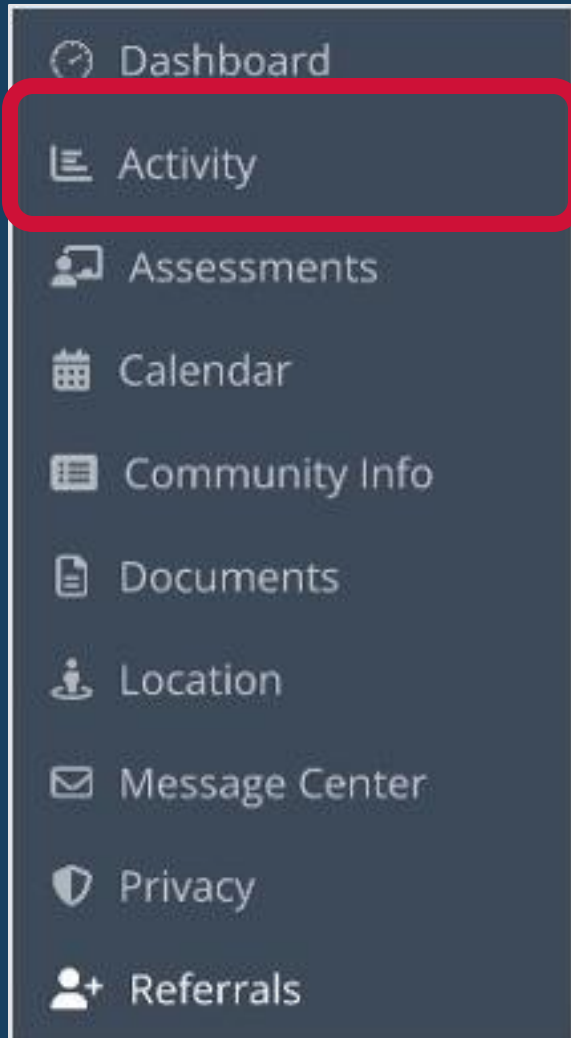
Client Profile

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



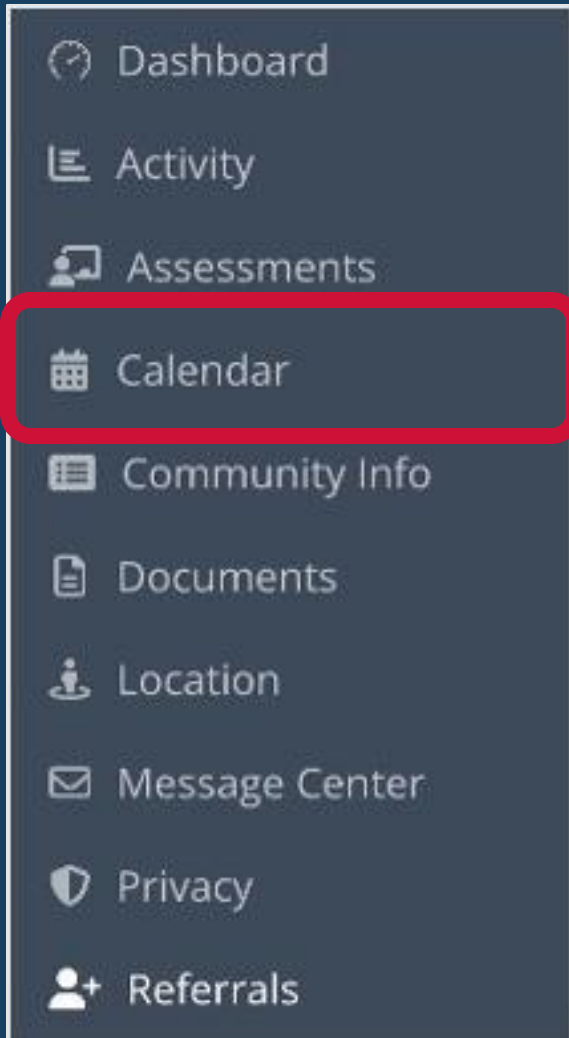
Activity

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



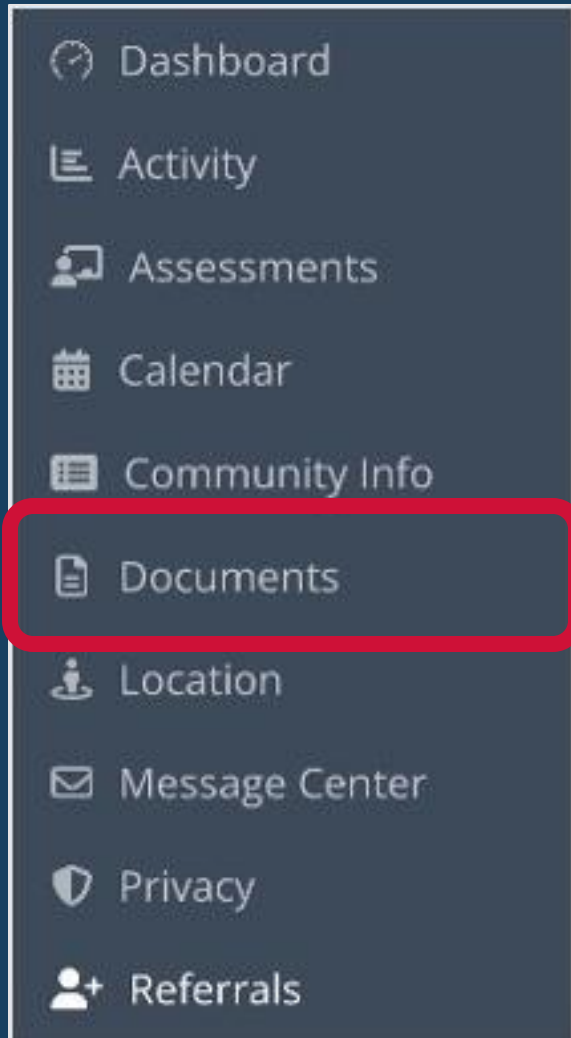
Calendar

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



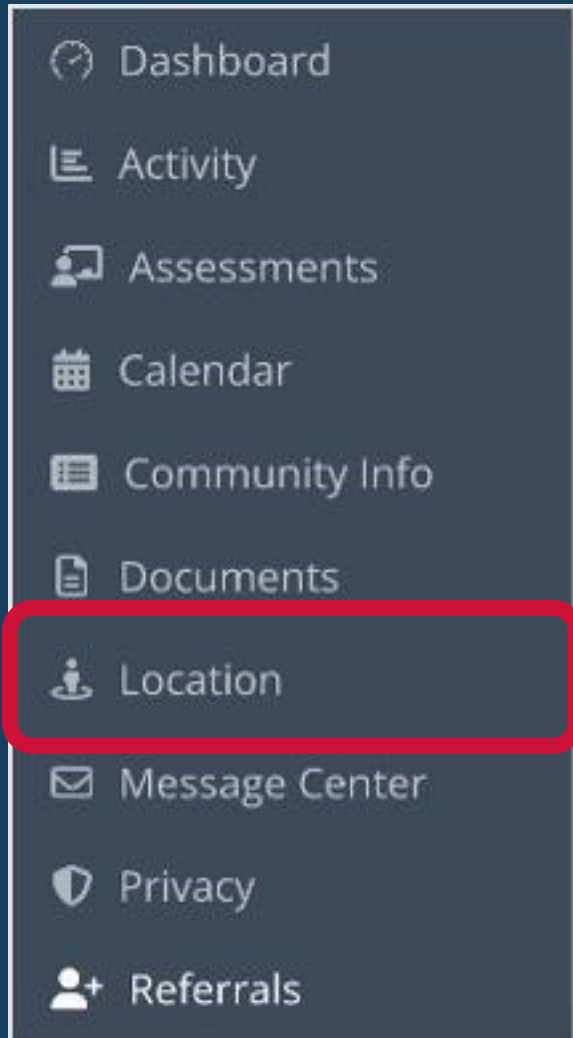
Documents

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

 Dashboard

 Activity

 Assessments

 Calendar

 Community Info

 Documents

 Location

 Message Center

 Privacy

 Referrals

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

 Dashboard

 Activity

 Assessments

 Calendar

 Community Info

 Documents

 Location

 Message Center

 Privacy

 Referrals

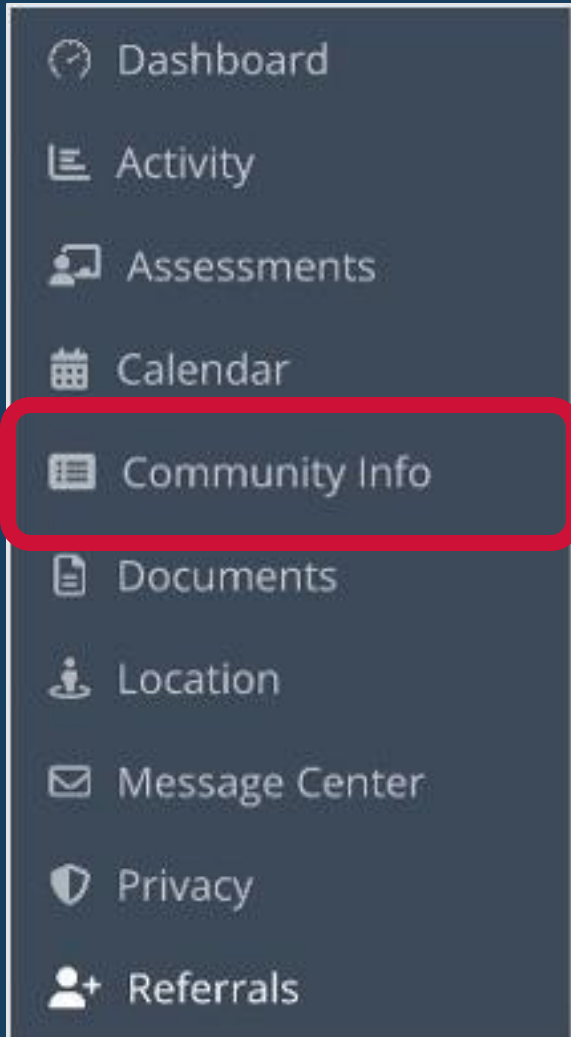
Referrals

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

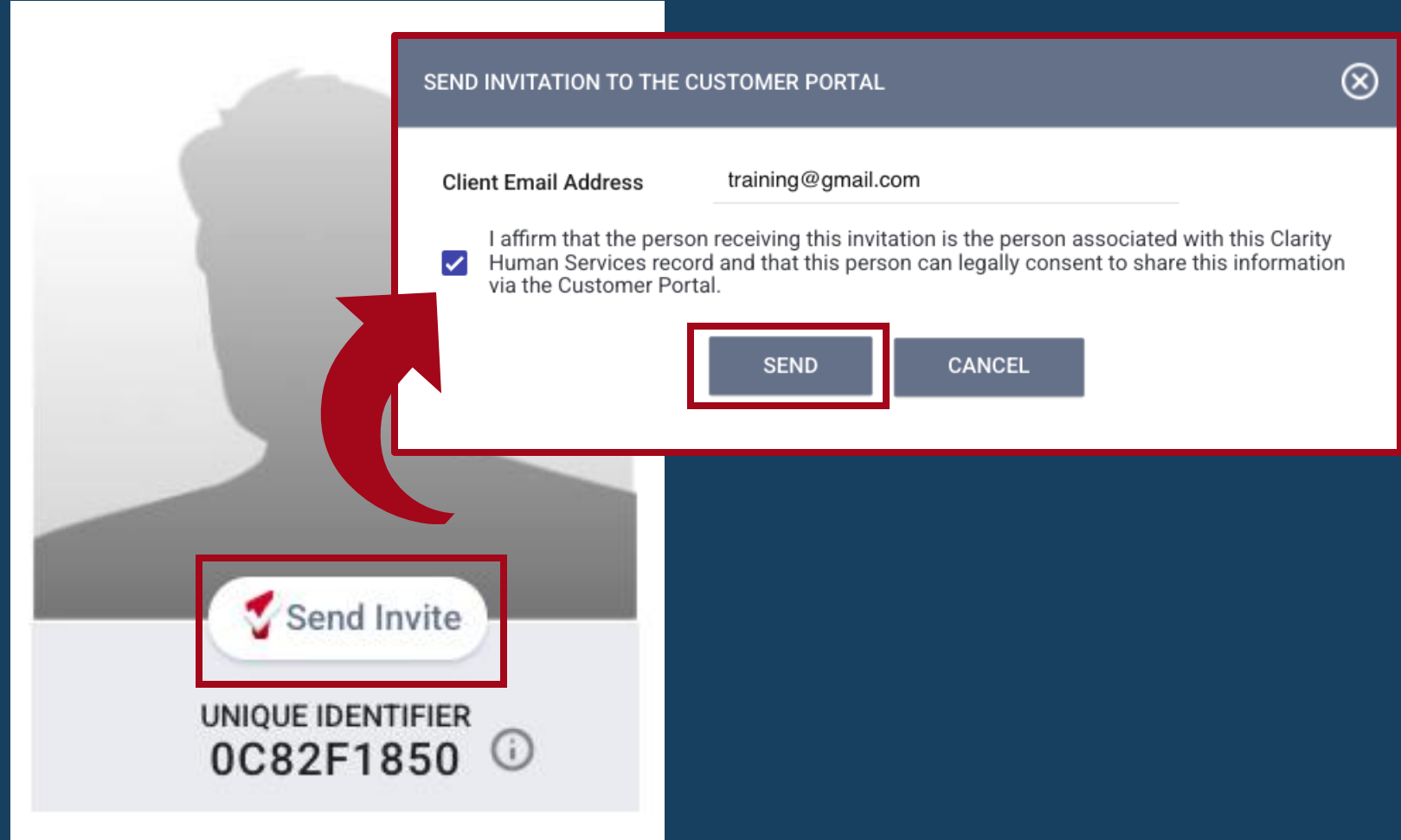
- Confirm full name
- Confirm two identifying pieces of information:
 - DOB
 - SSN
 - Contact info
 - Recent program/service history
 - Photo

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



SEND INVITATION TO THE CUSTOMER PORTAL

Client Email Address

☒ I affirm that the person receiving this invitation is the person associated with this Clarity Human Services record and that this person can legally consent to share this information via the Customer Portal.

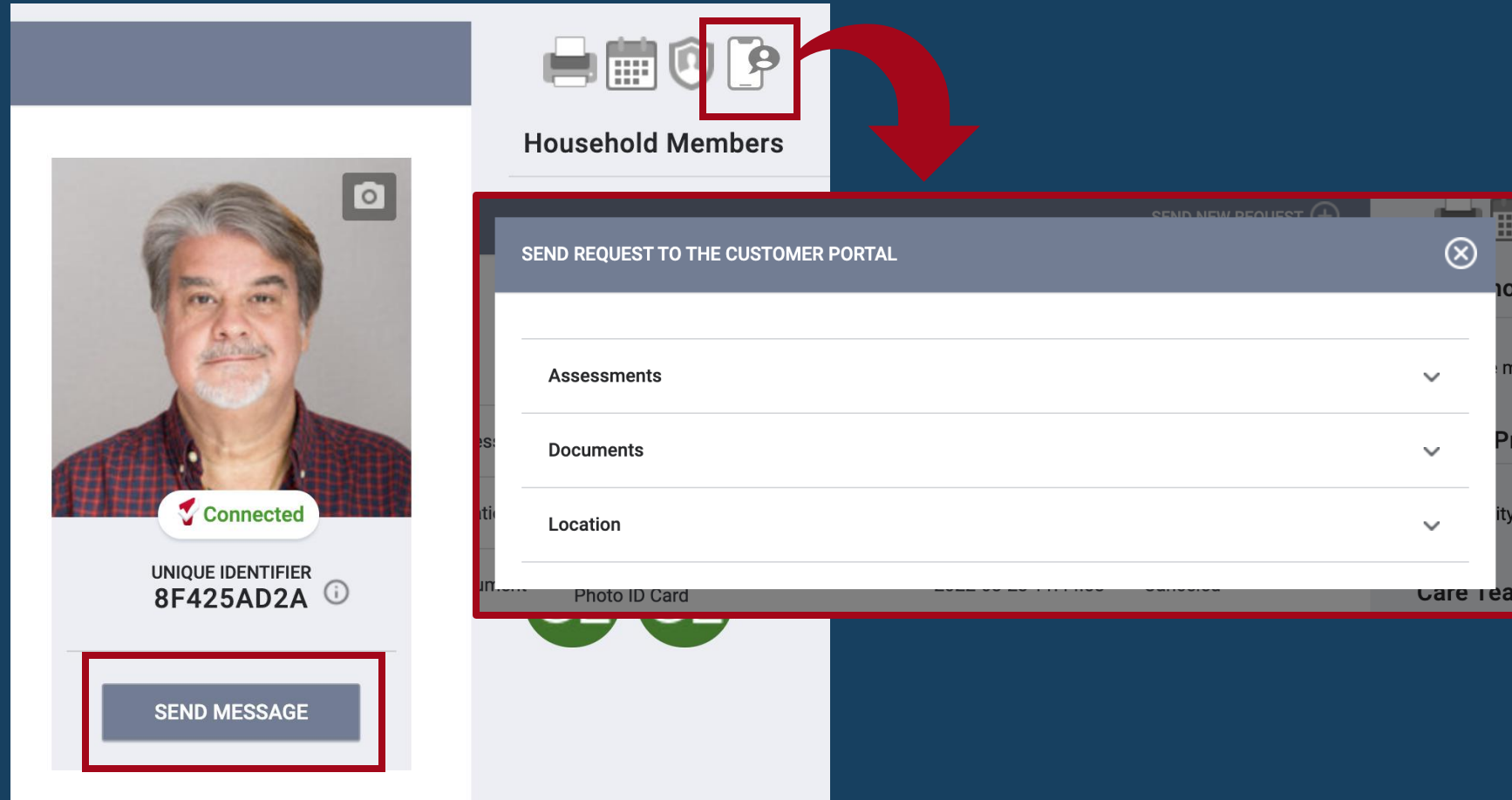
UNIQUE IDENTIFIER
0C82F1850 ⓘ

Invitation & Account Creation Demo



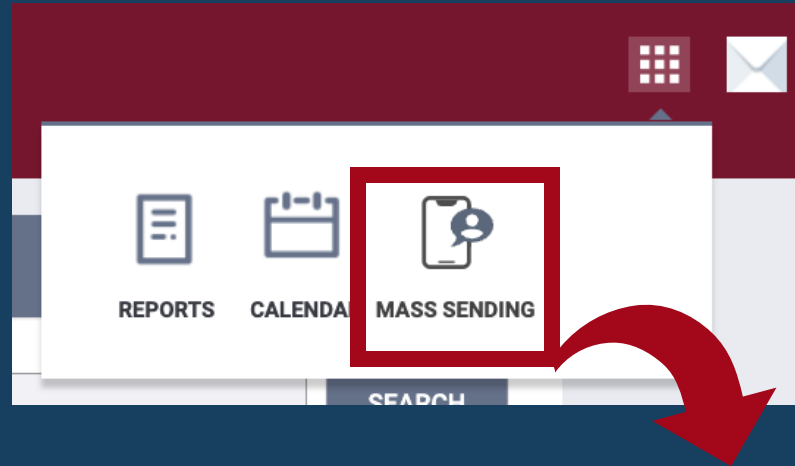
Sending Requests and Messages

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



MASS REQUESTS

Message

Document

Assessment

Location

Electronic ROI

Selected clients list

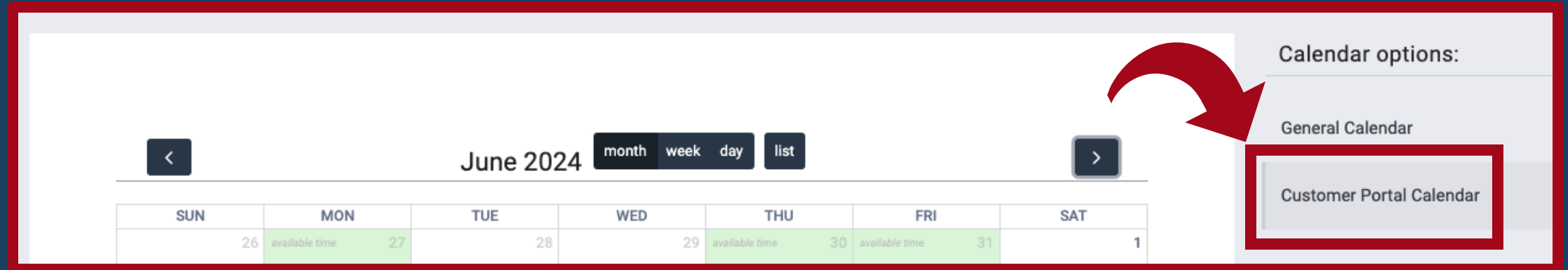
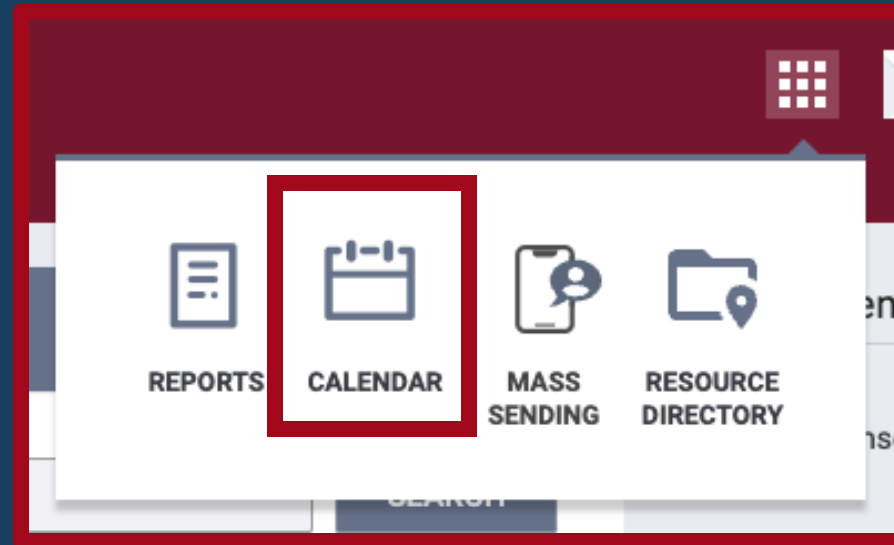
PREVIEW MASS REQUEST

90055624C	James Smith
8C7CE4946	Bill Rodgers

Sending Requests & Messages Demo

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

ADD NEW AVAILABILITY RULE

Frequency: Weekly

Start From: 05/27/2024 10:00 AM

Count: 10

Interval: Enter integer here...

OUTPUT: EVERY WEEK FOR 10 TIMES

Dates:

- 1 Mon May 27 2024 10:00:00 GMT-0500 (Central Daylight Time)
- 2 Mon Jun 03 2024 10:00:00 GMT-0500 (Central Daylight Time)
- 3 Mon Jun 10 2024 10:00:00 GMT-0500 (Central Daylight Time)
- 4 Mon Jun 17 2024 10:00:00 GMT-0500 (Central Daylight Time)
- 5 Mon Jun 24 2024 10:00:00 GMT-0500 (Central Daylight Time)
- 6 Mon Jul 01 2024 10:00:00 GMT-0500 (Central Daylight Time)

Duration: 30 Min

ADD CANCEL

Posting Appointment Slots

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

The screenshot displays a web-based appointment scheduling interface. At the top, a navigation bar shows the current month as 'June 2024' with tabs for 'month', 'week', 'day', and 'list'. Below this is a calendar grid for June 2024, with columns for SUN, MON, TUE, WED, THU, and FRI. The calendar shows several 'available time' slots. A modal dialog titled 'MANAGE AVAILABILITY RULES' is open, showing a list of rules. The first rule is selected: 'every week for 5 times'. Below the rules, the output is shown: 'OUTPUT: EVERY WEEK FOR 5 TIMES'. A list of dates is displayed: '1 Mon May 27 2024 09:00:00 GMT-0500 (Central Daylight Tin)', '2 Mon Jun 03 2024 09:00:00 GMT-0500 (Central Daylight Tin)', and '3 Mon Jun 10 2024 09:00:00 GMT-0500 (Central Daylight Tin)'. At the bottom of the dialog, there are two buttons: 'REMOVE SELECTED' and 'CANCEL'. A red box highlights the 'REMOVE SELECTED' button. A red curved arrow points from the 'MANAGE SLOTS' button at the bottom of the calendar to the 'REMOVE SELECTED' button in the dialog.

Please select Rule

- every week for 5 times
- every 2 months for 1 time
- every week for 10 times
- every week for 10 times
- ✓ every week for 5 times

Rule

OUTPUT: EVERY WEEK FOR 5 TIMES

Dates

- 1 Mon May 27 2024 09:00:00 GMT-0500 (Central Daylight Tin)
- 2 Mon Jun 03 2024 09:00:00 GMT-0500 (Central Daylight Tin)
- 3 Mon Jun 10 2024 09:00:00 GMT-0500 (Central Daylight Tin)

REMOVE SELECTED CANCEL

ADD NEW SLOT MANAGE SLOTS SUBSCRIBE TO ICALENDAR

Posting Appointment Slots Demo

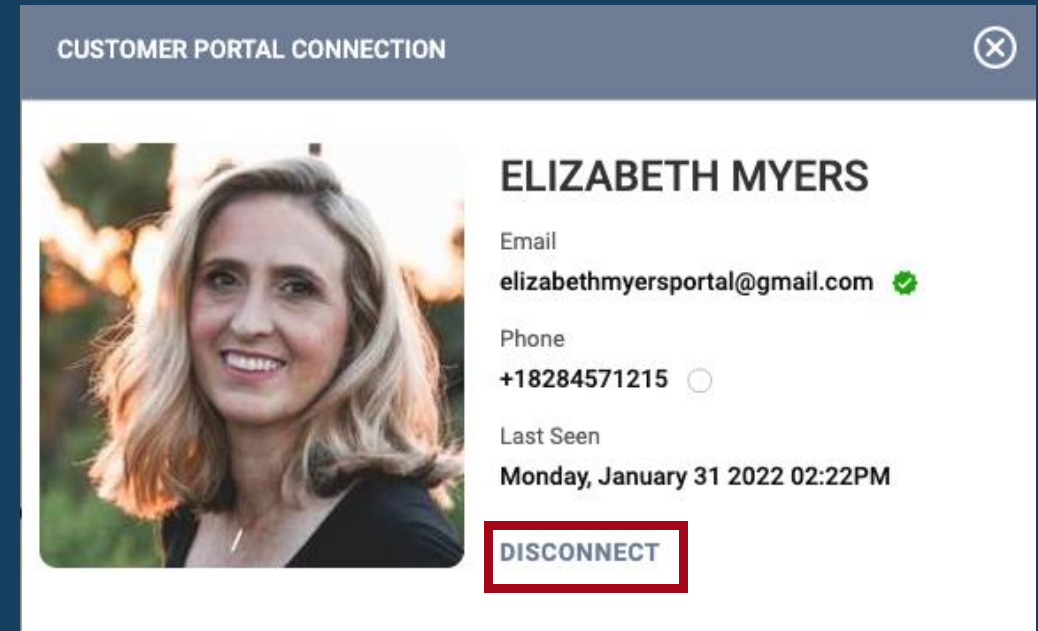
Account Disconnection

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.

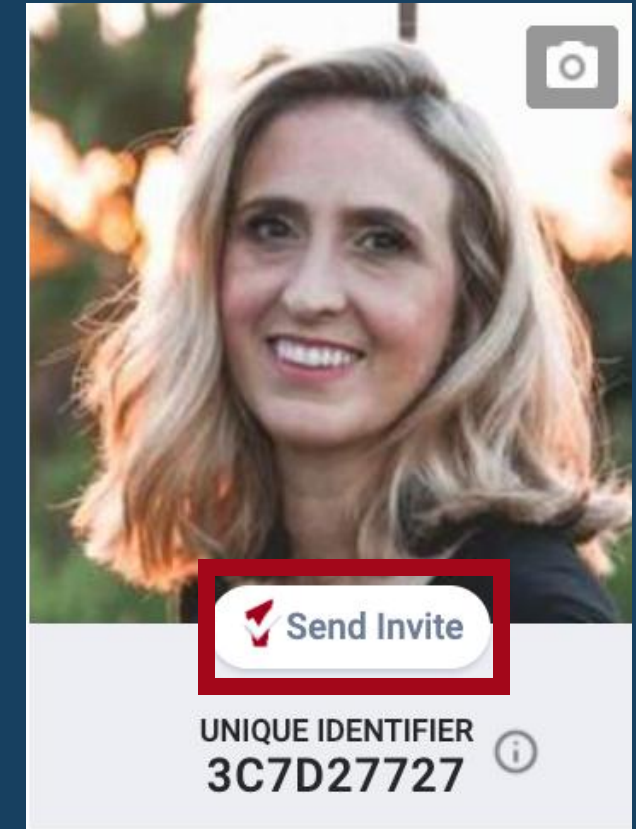
If a client has only forgotten their Portal password, they can use the "Forget Password" button on the login page to receive a code to reset their password.



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

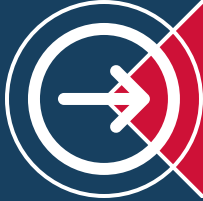


Send Portal invitations through HMIS and build excitement



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

Q&A

