HOMELESS MANAGEMENT INFORMATION SYSTEM
(HMIS)
TRAINING MANUAL

Sacramento County Continuum of Care
&
Yolo County Continuum of Care

Revised 12.21.18

For HMIS Support

For more information, contact the HMIS Team:

Email: hmis@sacstepsforward.org
Website: http://sacramentostepsforward.org/home/hmis/

Tina Wilton, HMIS Coordinator
 (916) 993-7707
Lindsay Moss, HMIS Specialist
(916) 993-7703

Need More Training?

For more information, contact the HMIS Administrative Office:
Contact Person: Tina Wilton, HMIS Coordinator
1331 Garden Highway
Sacramento, CA 95833
Phone # (916) 993-7707
Email: twilton@sacstepsforward.org

Other Useful Resources

Clarity Human Services Help Portal
http://help.clarityhs.com/

HMIS Data Standards Manual
https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual-2017.pdf

HUD- HMIS News & Announcements
https://www.hudexchange.info/hmis

TABLE OF CONTENTS

HMIS: What it is and why we use it

To end homelessness, a community must know the scope of the problem, the characteristics of those who find themselves homeless, and understand what is working in their community and what is not. Solid data enables a community to work confidently towards their goals as they measure outputs, outcomes, and impacts.

A Homeless Management Information System (HMIS) is the information system designated by a local Continuum of Care (CoC) to comply with the requirements of CoC Program interim rule 24 CFR 578. It is a locally-administered data system used to record and analyze client, service and housing data for individuals and families who are experiencing homeless or at risk of homelessness. HMIS is a valuable resource because of its capacity to integrate and unduplicate data across projects in a community. Aggregate HMIS data can be used to understand the size, characteristics, and needs of the homeless population at multiple levels: project, system, local, state, and national. The Annual Homeless Assessment Report (AHAR) is HUD's annual report that provides Congress with detailed data on individuals and households experiencing homelessness across the country each year. This report could not be written if communities were not able to provide HUD with reliable, aggregate data on the clients they serve.

In 2010, the U.S. Interagency Council on Homelessness (USICH) affirmed HMIS as the official method of measuring outcomes in its *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness.* Since then, many of the federal agencies that provide McKinney-Vento Act and other sources of funding for services to specific homeless populations have joined together and are working with HUD to coordinate this effort.

About Our HMIS Software

In Sacramento and Yolo County, the software we are using for HMIS is called Clarity Human Services. Clarity Human Services is a powerful information management system that provides client tracking and case management, service and referral management, and reporting. This secure system allows a number of different agencies and users to continuously enter their clients' data, while being assured that the information is protected. Sacramento and Yolo County's HMIS is overseen by a Working Group that includes representatives from various organizations, advocacy organizations, and providers serving specific populations, such as youth and veterans.

Sacramento Steps Forward (SSF), with support from Bitfocus, Inc., administers all aspects of the HMIS project for Sacramento County.

Who is Bitfocus?

Bitfocus is an IT consultancy, providing custom software development, database management, report development, Technical Assistance (TA), and many other tasks not just exclusive to HMIS.

Clarity Human Services Software

The Clarity Human Services Software is a new database management system developed by Silver Spur Systems LLC, a separate firm from Bitfocus that was established when METSYS was purchased. Both Bitfocus and Silver Spur are owned by Robert Herdzik. Clarity operates as a Cloud Service: a software application that is provided as a live service through a web browser, such as Internet Explorer, Firefox, Safari or Chrome, rather than a product you need to download and install. This means, wherever you or your authorized users are, only the internet and your secure login details

are required to access the Clarity database management system.

Who Benefits?

A. Benefits for men, women, and children who experience homelessness include:
- A decrease in duplicative intakes and assessments
- Streamlined referrals
- Coordinated case management

B. Benefits for agency directors and program managers include:
- Tracking client outcomes
- Coordinating services, internally among agency programs, and externally with other providers
- Preparing financial and programmatic reports for funders, boards, and other stakeholders
- Information for program design decisions

C. Benefits for public policy makers and advocates include:
- Understanding the extent and scope of homelessness
- Unduplicated counts
- Identifying service gaps
- Informing systems design and policy decisions
- Development of a forum for addressing community-wide issues

Ongoing HMIS User Education & Communication

HMIS User Meeting: SSF conducts a monthly HMIS User Meeting (4th Wednesday of each month) to aid in community building and HMIS networking across the CoC. This meeting serves as a place for communication about HMIS/Clarity System and guides in communication, so that SSF can better address the needs of the service providers and front-line staff. Also, SSF's HMIS team provides ongoing training and support for the HMIS users via e-mail and phone. **Remember, you *drive the system!***

Agencies Required To Participate In HMIS

The HMIS Federal Partners worked collaboratively to develop the HMIS Data Standards. HUD has worked with program staff of these partners to align the data elements required for each program funding source and determine how and when data is to be collected. The federal partners and programs include:

- U.S. Department of Housing and Urban Development (HUD)
  - Office of Special Needs Assistance Programs (SNAPS)
    - Continuum of Care (CoC) Program
    - Emergency Solutions Grants (ESG) Program
    - Housing Opportunities for Persons with AIDS Program (HOPWA)
    - HUD-Veterans Affairs Supportive Housing (HUD/VASH)
    - Rural Housing Stability Assistance Program (RHSP)

- U.S. Department of Health and Human Services (HHS)
  - Administration for Children and Families (ACYF) – Family and Youth Service Bureau (FYSB)
    - Runaway and Homeless Youth (RHY)
  - Substance Abuse and Mental Health Services Administration (SAMHSA)
    - Projects for Assistance in Transition from Homelessness (PATH)

- U.S. Department of Veteran Affairs (VA)
  - Supportive Services for Veteran Families Program (SSVF)
  - Community Contract Emergency Housing (HCHV/EH)*
  - Community Contract Residential Treatment Program (HCHV/RT)*
  - Domiciliary Care (HCHV/DOM)*
  - VA Community Contract Safe Haven Program (HCHV/SH)*
  - Grant and Per Diem Program (GPD)*

- Compensated Work Therapy Transitional Residence (CWT/TR)*

*Participation in HMIS is not required as part of a funding requirement, except for SSVF. The federal partners recognize that communities record Project Descriptor Data Elements and Universal Data Elements in order to facilitate completion of the HIC and PIT.

In order to gain as comprehensive a picture of homelessness as possible, many other agencies are strongly encouraged to use HMIS, but are not required to do so. These include agencies that provide housing services (e.g., transitional housing, supportive housing, emergency shelters), as well as auxiliary services (e.g., food shelves and outreach programs). The system has the potential of being a powerful tool to track what is happening with individuals who are experiencing homelessness, as well as tracking people who are in danger of losing their housing. So, all agencies that provide services related in one way or another to persons experiencing homelessness are encouraged to use HMIS.

What data is collected?

Universal Data Elements

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source. The Universal Data Elements establish the baseline data collection requirements for all contributing projects. They are the basis for producing unduplicated estimates of the number of people experiencing homelessness, accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homeless, and patterns of service use, including information on shelter stays and homelessness over time.

The following are the Universal Data Elements:

3.1	Name	3.10	Project Entry Date
3.2	Social Security Number	3.11	Project Exit Date
3.3	Date of Birth	3.12	Destination
3.4	Race	3.13	Personal ID
3.5	Ethnicity	3.14	Household ID
3.6	Gender	3.15	Relationship to Head of Household
3.7	Veteran Status	3.16	Client Location
3.8	Disabling Condition	3.17	Length of Time on Street, in an ES or Safe Haven
3.9	Residence Prior to Project Entry		

Program Specific Data Elements

Program Specific Data Elements differ from the Universal Data Elements in that no one project must collect every single element in this section. Which data elements are required is dictated by the reporting requirements set forth by each Federal partner for each of their programs. A Partner may require all of the fields or response categories in a data element or may specify which of the fields or response categories are required for their report.

The following Program Specific Data Elements are required by more than one Federal Partner:

4.1	Housing Status	4.11	Domestic Violence
4.2	Income and Sources	4.12	Contact
4.3	Non-Cash Benefits	4.13	Date of Engagement
4.4	Health Insurance	4.14	Services Provided
4.5	Physical Disability	4.15	Financial Assistance Provided
4.6	Developmental Disability	4.16	Referrals Provided
4.7	Chronic Health Condition	4.17	Residential Move-In Date
4.8	HIV/AIDS	4.18	Housing Assessment Disposition
4.9	Mental Health Problem	4.19	Housing Assessment at Exit
4.10	Substance Abuse		

For more details on these elements, please refer to the 2017 HMIS Data Standards (link in back).

Privacy & Security

Potential risks of HMIS, like any system for managing data about individuals, include risks to personal privacy. Data privacy and security has been emphasized at every step in developing and implementing Sacramento and Yolo County's HMIS, from choosing software, to designing client notices, and crafting see client information that they have permission to see. Additionally, before being able to use the system, agencies and end-users within agencies must sign User's Agreements indicating that they will uphold rigorous data privacy standards. No information that would enable the federal government to identify particular individuals is sent to HUD via Sacramento and Yolo County's HMIS.

Please review the End-User's agreement included in this manual and signed prior to enrollment to this training.

HMIS Computer Requirements/ Workstation Security

Do not share your Account

⚠ Data security goes beyond your computer. You need to ensure that the PPI that is gathered and input into the HMIS needs to be secure at all times.

- Each HMIS user is also required to submit a signed receipt of the HMIS User Agreement prior to system access.
- Passwords are only known by the individuals, which are not even known by the HMIS Administrator Agency or Lead Agency.

Everything in the system is tracked and may be audited. You, as the user, are solely responsible for what happens under your account. Do not share.

Working from Home

- Agency's Privacy Policy should cover a **"work from home"** policy if staff is allowed to work at home. The security setting should match the professional work environment.
- Download of client data on home computers:
  - ○ If completing work at home/approved remote locations, plan for the process, control/restrict downloads, and ensure hard drives are properly cleaned.

Application Security

The following standards must be observed when working with the HMIS system in Clarity.

- Written information specifically pertaining to user access (e.g., username and password) may not be stored or displayed in any publicly accessible location.
- You may not log on to more than one workstation at a time.
- You may not log on to the network at more than one location at a time.

Workstation Security

Access to the HMIS system in Clarity must be secured at all times.

- Computers in public areas used to collect and store HMIS data must be staffed at all times.
- When workstations are not in use and staff is not present, steps should be taken to ensure that the computers and data are secure and not usable by unauthorized individuals.
- After a short period of time, workstations should automatically turn on a password protected screensaver when the workstation is temporarily not in use.
- If staff will be gone for an extended period of time, staff should log off the data entry system and computer.

- Written information pertaining to user access should not be stored or displayed in any publicly accessible location.

HUD Workstation security standards

Lock Workstation	**Anytime** you leave your workstation unattended, for any amount of time, **LOCK YOUR WORKSTATION**.
Password-Protected Screensaver	**Password-protected screensavers** should be set to **activate** within **5 to 8 minutes** when the workstation is not in use.
Log-Off for Extended Periods	- If you will be gone from your workstation for 30 minutes or more, **log-off Clarity**. - If you will be gone from your workstation for 4 hours or more, **log-off your computer**.

Disposing of Confidential Client Information

Printing and Disposing of Hard Copy Data
- Hard copy data containing Personal Protected Information (PPI) may only be printed from the HMIS system at the physical agency/jurisdiction location(s) and only on printers secured from public access.

- An agency/jurisdiction is responsible for disposing of documents that contain PPI by shredding paper records.

HMIS Technology Equipment Re-Use and Disposal
All technology equipment with hard drives that are used in conjunction with HMIS will be handled according to the following guidelines:
- **Re-Assigned Equipment**
  All technology equipment (including computers, printers, copiers, and fax machines) used to access HMIS and which will no longer be used to access HMIS, will have **their hard drives reformatted multiple times.**

- **Non-Functional Equipment**
  All technology equipment (including computers, printers, copiers, and fax machines) used to access HMIS and is now non-functional, must have their **hard drives pulled, destroyed, and disposed of in a secure fashion.**

- **Leased Equipment**
  When leasing technology equipment, the lease agreement shall include provisions for either the leasing company or the agency to (1) reformat the hard drive multiple times, or (2) destroy the hard drive.

Client Consent & Notification

Important steps to follow when collecting data from clients
- Clients **MUST** be given a notification form that explains HMIS and why their personal information is

being collected.
- Clients **MUST** also be given a consent form, which they must sign and agree to.

Consumer Notice

- "HMIS **Consumer's Notice**" must be posted and clearly visible to clients at every location that HMIS Intake is being conducted.
  - All outreach workers and case managers who are conducting HMIS intake off-site must carry the "Consumer's Notice" with them and clearly post at the station where intake is being conducted.
  - **Be sure to review the notice to make sure they understand they key points**

Written Informed Consent

At entry into the program, the Agency will provide a verbal explanation of both the HMIS and the terms of consent. The client will complete, sign, and date the HMIS "Consumers Informed Consent & Release of Information Authorization." The agency will not divulge confidential information without informed client consent. Clients cannot be denied services that they would <u>otherwise qualify for</u> based on a refusal to share information.

1. **NEVER** add a new client to Clarity until you have reviewed the "Consumer Consent Form"

2. **DO NOT** start entering client data until you have reviewed the intake forms to ensure that all questions have been answered.

3. **RETURN** incomplete intakes to the case manager or data collector for completion before entering them in the system.

List of Agencies Using HMIS System

A current List of Participating Agencies can be found at
https://sacramentostepsforward.org/resources/helpful-materials under HMIS Client Intake Forms, Sacramento & Yolo County Agencies Participating in HMIS.

Starting on Clarity

Web browsers supported by Clarity

- Microsoft – Internet Explorer 9
- Mozilla – Firefox 10
- Google – Chrome 17
- Apple – Safari 5.1.3

HUD Mandated Password Guidelines

Clarity enforces HUD's password guidelines to ensure security:

- At least 8 characters in total length
- Contain an upper-case letter (e.g., H)
- Contain a lower-case letter (e.g., h)
- Contain a Number (e.g., 9)
- Contain a Symbol (e.g., $)
- Passwords **CANNOT** use or include; - the username - the HMIS name - the HMIS vendor's name (Bitfocus/Clarity)

- Passwords **CANNOT** consist entirely of any word found in the common dictionary, or any of the above, spelled backwards. Your password should not even contain any common word.

Password Expiration

Your password will expire every 90 days. You will receive a reminder e-mail, 10 days prior to expiration. When your password has expired, a prompt window will appear when you try to log-on to Clarity. You will need to choose a new password and enter it in the prompt window. You will not be able to re-use your current password.

Browsers and Passwords
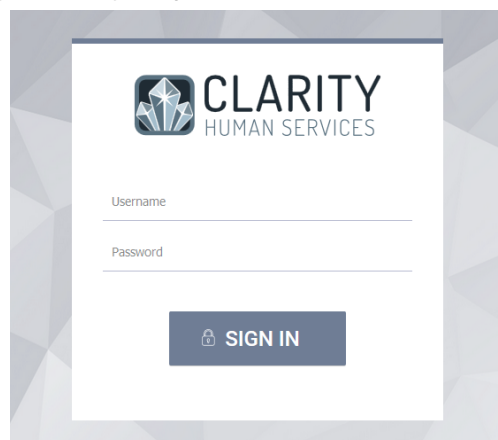
NEVER let your Internet Browser store your login or password. Your browser may give you the option of storing your login or password on "this computer." NEVER USE THIS OPTION. It can give anyone using your workstation access through your browser. So, NEVER allow your computer to store your login or password.

HMIS Login Expiration

Your login will expire every 30 days. You will receive a reminder e-mail, 10 days prior to expiration. If you let your log-in expire, it will send you an e-mail letting you know that your login has expired. To reactivate your login, you must send an e-mail to the SSF HMIS staff.

Logging On To Clarity

1. Open your web browser (e.g., Internet Explorer, Firefox, Chrome, etc.)
2. **TURN OFF ANY "POP-UP BLOCKERS"!**
3. Go to Website: **https://sac.clarityhs.com/**
4. Add your assigned **username** in the username field.
5. Add your assigned **password** in the password field.
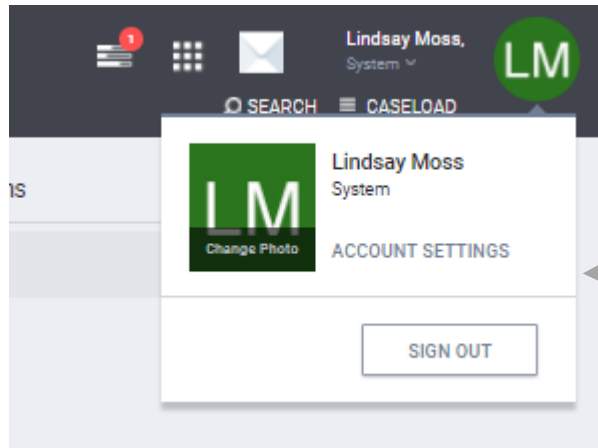6. Click on: 🔒 SIGN IN

⚠ **If you attempt to log-in FOUR consecutive times with the wrong password, your account will become inactive. To reactivate your account, contact the HMIS Administrator.**

Note: The first time you log in, you will be prompted to choose and confirm a new password. Select a new password following the guidelines on the previous page of this manual. When you have entered and confirmed your new password, click on: 🔒 SIGN IN

Updating Password and E-mail Address

Lindsay Moss,
System ⌄

SEARCH **CASELOAD**

Lindsay Moss
System

LM
Change Photo

ACCOUNT SETTINGS

SIGN OUT

1. Select your initials

2. Select 'ACCOUNT SETTINGS'

MY INFO

First Name	Lindsay
Last Name	Moss
Email	mynewpassword@my.org
Password ⑦	
Confirm Password	
Profile Override	Agency Default ⌄
Recent Services	Show ⌄
Auto Suggest	Enabled ⌄
Enable 2FA	⬤
Assessment Due Warning	⬤

TO UPDATE E-MAIL
1. Enter new e-mail address

TO UPDATE PASSWORD
1. Enter new password
2. Confirm password

AUTO-SUGGEST
If "Enabled", system will **auto suggest** a password. If you want to pick your own

SAVE CHANGES

ALWAYS SAVE CHANGES TO COMPLETE UPDATE

Automatic Log off

If you are logged into Clarity, but have been inactive for 30 minutes, you will be automatically logged off after 5 minutes of warning. A message like this will be displayed:
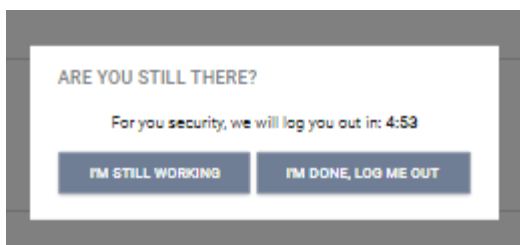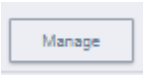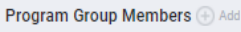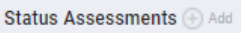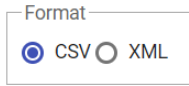

⚠ NOTE: If you are automatically logged off by Clarity for inactivity, the last page you accessed will remain visible onscreen. There is potential for a breach in client confidentiality.

Common Clarity Icons

Clarity uses icons to assist you in completing tasks. The table below lists the most common icons you will encounter.

Icon	Name	Description / Actions
LM	**HMIS User's Initials**	Edit your **profile**, change your **password**, **update e-mail address**, or **sign out**
⊞	**Launchpad**	Located in upper-right hand corner of site, menu for Manage, Reports, Calendar, etc. options
🔍 SEARCH	**Client Search**	**Search** for a client It will also bring up the **Referrals tab.**
ADD CLIENT ⊕	**Add New Record**	Add a **new client** into the database.
🔀 REFERRALS	**Referrals Tab**	Access your agency's referrals
🖨	**View as Printer-Friendly**	Opens a **printer-friendly version** of the page or document. (See Privacy Standard below.)
✎	**Edit**	**Edit** the record. Often appears on hover.
🗑	**Delete**	**Delete** a record. You may delete a service, however you will not be able to delete any enrollment/program history. Program Enrollment/History can only be deleted by the Lead

		Agency's HMIS Staff.
Manage	**Manage Household**	Add, Join, and Exit **Household members** from Client sidebar
Program Group Members ⊕ Add	**Enroll Group Members**	Click on ⊕ next to 'Program Group Members' view on Programs screen sidebar to **Enroll** Program group members.
Status Assessments ⊕ Add	**Add Status Update**	Click on ⊕ next to 'Status Assessments' from within a specific program to **Add/Update** client's Program status at appropriate interval: **Emergency Shelters** every 3 months **Transition Housing Programs** every 6 months **Permanent Supportive Housing Projects** annually
📅 25	**Choose Date**	Choose a date using the calendar tool.
▶ RUN	**Clear Date**	Click on Icon to RUN reports
Format ◉ CSV ○ XML	**Report Format**	Select the Report format **before clicking** SHOW REPORT Note: Some "Web" reports allow you to drill down to see client list.

Step 1 - Searching For A Client

Reduce Duplications in HMIS

Each agency must do its due diligence to reduce duplicate client records by conducting a thorough search for the client in HMIS before creating a new client record. Maintaining multiple, duplicate records for a single client causes confusion and inaccuracies.

Please keep in mind that if a client was entered by another provider in the HMIS system, It is possible that an alias was used, or the name could be spelled differently.

⚠️ **DO NOT SEARCH ON FULL NAMES - LESS IS MORE!**

The fewest letters used in searches will find the most possible matches.
This helps prevent duplicate clients being entered due to misspellings!

Search for Clients from the Search option (top right-hand corner)

Search Criteria

Before entering a NEW client, you must search to ensure that the client does not already exist in the database. To search for a client in Clarity, complete these **separate** searches in the order listed below:

Step 2 - Editing or Adding Clients

Editing a Client found in Search

Update the profile screen with current information. ***Note*** If a client has changed their last name, update the record and include the previous last name on the "Alias" line. In the "Notes" tab, indicate the old last name and the documentation you saw to validate the name change (DL, SSC, etc.)
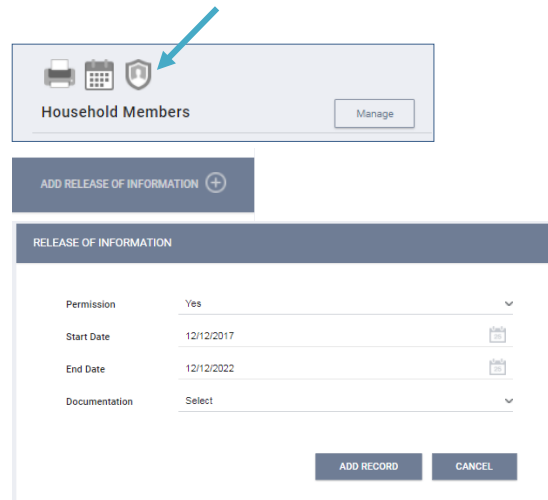
If a Release of Information (ROI) is Missing

If Clarity cannot find an ROI for the Client, a yellow banner will appear on the profile page to alert you to this.

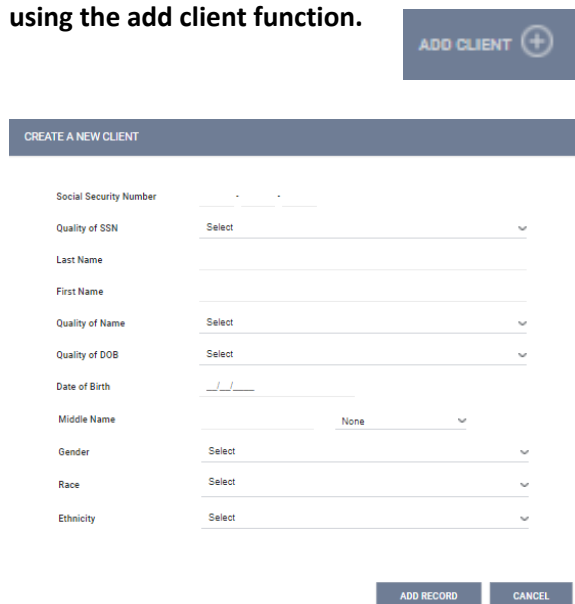⚠ Release Of Information is Missing. Please add one to ensure compliance (Click here)

To add an ROI :

1. Select the security shield in the upper-right hand corner

2. Select 'Add Release of Information' on 'Release of Information' bar

3. You can affirm approval by:
   - ➢ Allowing your client to sign electronically
   - ➢ Uploading a PDF
   - ➢ Indicating proxy consent via a group/family member

Adding a New Client

If you are unable to find the client, you may add a new client from the client search screen, using the add client function.

● Complete <u>ALL</u> fields on the Intake screen with the proper response and click "Add Record" at the bottom of the page when you are finished. All fields <u>REQUIRE</u> complete data.

● If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention

● Complete the missing fields and click "Add Record" to create the file.

● If you do not have the complete Zip Code of Last Address, you may estimate the zip code, and complete the remainder with 0's (e.g., 95000 for Sacramento/Yolo).

● **Please review your intake to ensure accuracy and completeness.** ●

● Add the **Release of Information** from the dialogue on the upper-right hand side of the 'Create a New Client' screen (**required!**):

- If the client does not consent, select **Permission: No**
- Otherwise, you can affirm approval by:
  - ○ Allowing your client to sign electronically
  - ○ Uploading a PDF
  - ○ Indicating proxy consent via a group/family member

● Most data elements include a 'Client doesn't know' or 'Client refused' response category. These are considered valid responses if the client does not know or the client refuses to respond to the question. It is not the intention of the federal partners that clients be denied assistance if they refuse or are unable to supply the information. However, some information may be required by projects or public or private funders to determine eligibility for housing or services, or to assess needed services.

● The 'Client doesn't know' or 'Client refused' responses should not be used to indicate that the case manager or data entry person does not know the client's response, response category *"Data not collected"* must be used. In such cases, that response category will be treated as missing data for reporting purposes.

Adding a Client Who Does not Consent

If your client does not feel comfortable sharing their identifying information per the Release of Information guidelines, please create an anonymous profile for them. This is a profile which does not contain any information that can specifically identify them as an individual (birthday, SSN, etc.). Demographic information such as race, ethnicity, and often veteran status do not necessarily reveal their identity within the community, so are OK to log.

1. Add your client from [SEARCH] >> [ADD CLIENT]

2. Set the 'Release of Information' Permission to 'No'

3. Enter the following anonymous info:

SSN	000–00–0000
Quality of SSN	Client Refused
Quality of DOB	Approximate
DOB	Jan 1 actual year of birth +/- 1 year*
Gender, race, ethnicity, veteran status	Actual is OK, so long as it's not a give-away
First name	Your agency's internal ID if you have one, or Consent
Last name	Refused

Step 3 (Households and Families ONLY - SKIP for Individuals)

When adults or unaccompanied minors are seeking services together, they can be entered as a **household** in Clarity. A couple or people seeking services together do not need to be married to be entered in a **household**. For example, an adult, sibling, and grandmother may seek services together. They would be entered as a **household**.

A parent seeking services with his/her children are always entered as a **household**.

These are two key situations for entering clients as a household. **In order to be counted as "Family Members" in the HUD APR, clients must be entered in a household** BEFORE **enrolling in the Program.**

Types of households

- **Head of Household:** data collection is limited to the head of household. Head of household is the term used in these standards for consistency with other guidance previously developed and does not necessarily indicate the individual's status in the household. CoCs and HMIS Lead Agencies may elect to further define the head of household for their jurisdiction or may also substitute the concept of "primary client" for the term.

- **Head of Household and Adults**: data must be collected about the head of household and each additional adult in the household. If the household is composed of an unaccompanied child, that child is the head of household. If the household is composed of two or more minors, data must be collected about the minor that has been designated as the head of household.

  Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 may be provided by the head of household who is applying for services. The children are not required to be present at the time the head of household applies for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the project on the same day as the head of household. Information for these children should be recorded when the children join the project. Information on any other adults (18 years of age or older) who are enrolled in the project as part of the household should be obtained directly from that adult. As a general rule, one adult should not provide information for another adult. A project should edit the project entry record of a client who turns 18 after entry, but before exit, to add a response for data elements only relevant to the head of household and other adults in the household in order to improve the reported overall data quality for the project or if required by a funder.

- **All Clients**: data must be collected about each adult and child in a household

Creating Family/Household Groups

1. Verify that each family/household member exists in the HMIS. If they do not exist, complete the above steps for **"Adding a New Client"** to create a profile for each family member.

2. Open the profile for the "Head of Household", corner, under the header "Household Members", select "Manage".
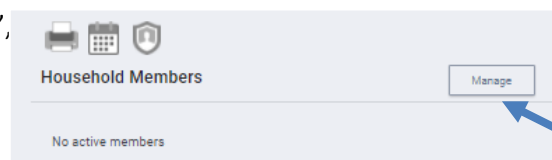
3. If you have recently accessed the family member profiles, they will be listed on the right-side menu under the header, "Your recent client searches accessed". If the family member is listed there, hover over the member's name to produce a ⊕ to Add them to the head of households group.

Household Members	
Emily Test	Mother ✱
Babyemily Test	Daughter

Your recent client searches accessed:

John Test	0000

NOTE: Two Ways to Group _____

When a listed client has ≫ **(Join)** as an option instead of ⊕ **(Add)**, that person is already part of an existing family/household group. Rather than adding them to your client's group, you are being given the option of joining your client to the *existing* group (ie, in above image, we can either add Client X to John's existing household, or we can add Jane to Client X's household, where Client X is the active profile and the head of household).

Your recent client searches accessed:

John Test	0000	≫ **JOIN**
Jane Test	4626	⊕ **ADD**

---

4. You also have the option of searching for members directly from the Family/Household screen, which you can access from the Client profile > "Manage" Household Members. From the search results, mouse over the client name to produce the "Add" (or "Join") option.

`

HOUSEHOLD MANAGEMENT

Search for a Household Member

test   SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
⊕ Add Lorraine Test	01/28/57	6919	11/28/12

5. Enter the **Member Type** and **Start Date** (date the client became a member of the family/household) and save.

6. Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper-right corner of your screen. (The Head of the Household will be indicated with a star next to their name)

★ Head of household

Household Members		
Emily Test	Mother ✱	☐
Babyemily Test	Daughter	

If a member leaves the household, clicking

When a Member Leaves the Household

"Edit" from the Household Members list in the Household Management screen. This will allow you to enter an End Date to remove them from the group.

This will remove them from the household and retain a historical record of their time in the group.

Step 4 - Enrolling Clients into Programs

The **Programs tab** in the client file contains the following sections:

Program History: A list of programs your client is either currently enrolled in or has been enrolled in the past.

Programs: Available lists current programs provided by your agency that are available for client enrollment.

Enrolling a Client/Household into a Program

1. Select the down arrow ⌄ next to the applicable available program to expand program details.
2. If the client is part of a group, you will be given the **option add group members**. Toggle on those group members you wish to include, if applicable. (Note: If the enrollment is the result of a referral, the toggle will already be on - please keep this toggle position to ensure the referral results are properly tracked.)
3. Select "Enroll"

4. Complete ALL fields in the enrollment page for your client and click "Save & Next". If any other group members were included in this program, their Enrollment page will automatically come up next until each member has been completed. Continue to click "Save & Next" after completing each group member's Enrollment. Enrolled group members will be listed in the right side bar under "Program

Group Members".

-
  NOTE: Program Data Quality_____

  It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

  In the example below, required program fields were left blank illustrating required data elements in order to save the client enrollment. If a required field is left unanswered, the enrollment will not save and message shown below will appear.

⚠ Changes have not been saved. Please correct your entry and try again.

Enroll Program for client Emily Test

Project Start Date	12/11/2017
Agency Conducting VI-SPDAT Assessment	Select
Homeless Outreach Contracts	Select
Name of Case Manager/Housing Specialist	
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response)

LIVING SITUATION

Housing Status at Entry	Category 3 - Homeless only under other federal statutes
Reason For Homelessness	Select

Enrolling a Group Member Mid-program

What if a family member joins the family/individual later during the program stay?

- All additional members must be enrolled through the "Head of the Household"
- To Enroll the additional member to the group:
  1. Select the Head of Household profile
  2. Select the 'Programs' tab
  3. Hover over the appropriate program name under 'Programs History' and select the Edit icon

4. Select 'Add' next to 'Program Group Members'

5. You will be prompted to toggle on any additional group/household members on profile. Select any members and then 'Enroll'.

6. **Complete ALL fields in the enrollment page**(s) for your new enrollees and click **'Save & Next'**. As before, if there is more than one group member selected, their Enrollment page will automatically come up next until each member has been completed.

Making a Program Private

In the event a client doesn't want to share their information with other agencies, it's the responsibility of the user to make their program (enrollment information) private.

To make the program private:

1. Select the 'Program' tab
2. Hover over the appropriate program name and select the Edit icon 📝
3. From the program screen, locate the program details box in the upper-right hand corner. Next to 'Assigned Staff', select the Edit icon 📝
4. Toggle on the "Make Program Private" box and then "Save Changes". You must follow the same steps for all household members

Step 5 - Linking Program Services

When all Enrollments are complete, the "Provide Services" tab will appear for your main client (head of household) within that program

PROGRAM: SSF OUTREACH

Enrollment **History** Provide Services Notes Files Forms

- Select this tab to explore various services offered by the program

- After selecting the service you are providing, enter the **Start** and **End Date**, as well as any expense associated with the service. If applicable, verify that the proper funding source is selected and checkmark any group members who should also receive this service.

PROGRAM: SSF OUTREACH

Enrollment History **Provide Services** Notes Files Forms   ✕ Exit

Services

Alcohol and other Drug Services   Alcohol and Drug Abuse ∧

Referred

Start Date: 12/12/2017   End Date: 12/12/2017
Expense Amount: 0.00   Expense Date: 03/01/2017
Funding Source: No Funding Source ∨

Service Note

B Bold *I* Italic ⅛ Numbers ⅛ Bullets

SUBMIT

- If the service has an **"End Date"** field, it is recommended to **project the End Date into the future** to avoid being disabled prior to client exit. For example, if your program is 90 days and gives extensions, it's safer and best practice to extend the services *a few additional months* upon program entry. **All services "End Date" MUST be updated and should not exceed client's actual program exit date. All active services will appear at the bottom of the exit screen.**

- Select the 'Submit' button to save changes and add any further services from previous steps

- When you have finished, both the program enrollment and associated services should be visible from the Program History:

PROGRAM: SSF OUTREACH

Enrollment **History** Provide Services Notes Files Forms   ✕ Exit

Program Service History

Service Name	Start Date	End Date	
Alcohol and other Drug Services:Referred Sacramento Steps Forward	12/12/2017	12/12/2017	ⓈⒹ

☐ Reservation   ☐ Service   ☐ Referral

Managed with Clarity Human Services

- If further services need to be added, return to the 'Programs' tab and repeat the above steps

From the right side menu of the client profile, you can also access the existing program entry

to place services and complete. Under the header, "Active Programs," locate your program and click "Edit".

## Step 6 - Completing Status / Annual Assessments

You will be required to complete Annual Assessments at regular intervals for all active clients. Annual Assessments are to be completed anytime from 30 days prior to 30 days after the anniversary of the Head of Household's project entry date. Status Assessments are required to capture significant changes for the client and can be completed at any time.

1. From the client's Programs tab, select the 'Edit' option for your program. In the next screen, locate the menu containing the header "Status Assessments" on the right-hands side of the screen.

Select ⊕ to Add an assessment.
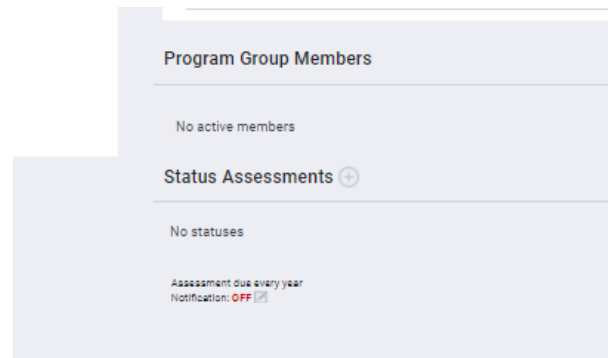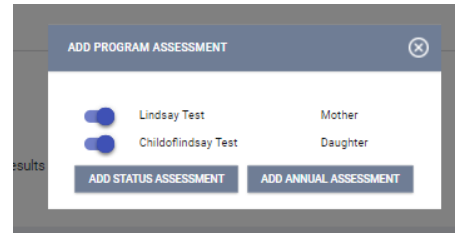
2. Click "Add". A box will appear asking if you want to complete either a **Status** or **Annual**
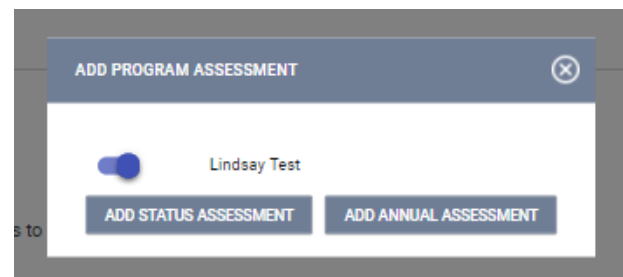
Group "Status Assessments"

If this is a **group case**, you will be prompted to select which household members you would like to provide an assessment for. In most cases, this will be all members.
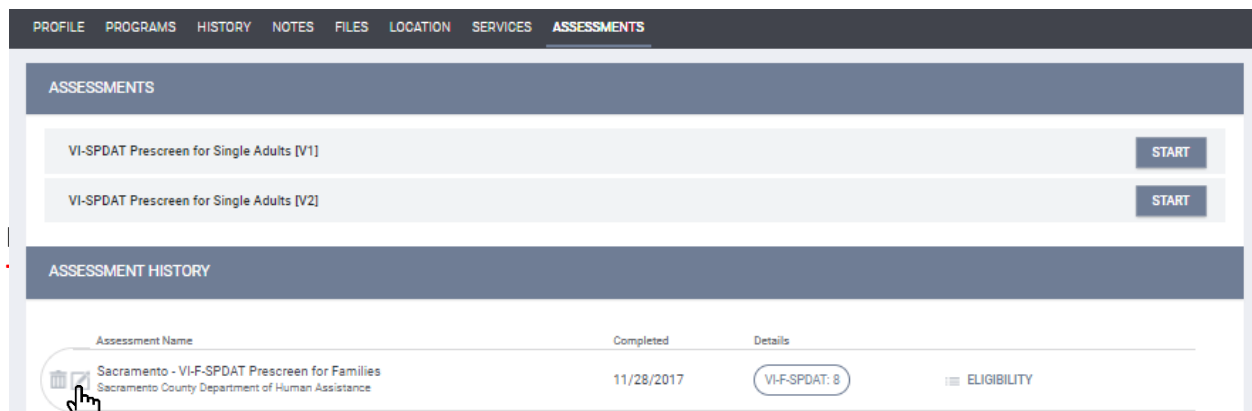
3. Complete all data fields on the **Program Status** screen and be sure to enter the correct date the assessment was conducted. Click **"Save & Next"** when you are finished. **If this is a group case**, additional members' assessment/program status screens will appear until each has been completed.

Making changes to completed assessments "Status Assessments"
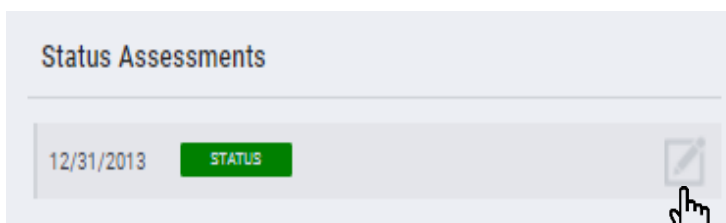
Completed assessments can be viewed and/or edited in two ways:

1. You can access historical assessments from either the Client 'Assessment' tab > 'Assessment History', then hover to the left of the assessment you'd like to edit and select the edit icon.

 - OR-

2. From the Client's program page, hover to the right of the assessment you'd like to edit under the 'Status Assessment' menu
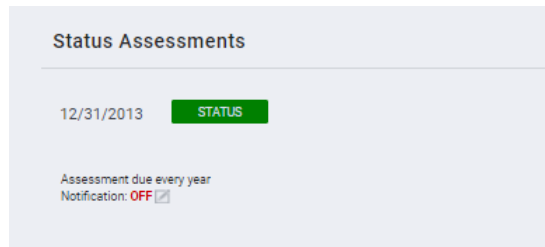
Notifications for Assessment Due Dates
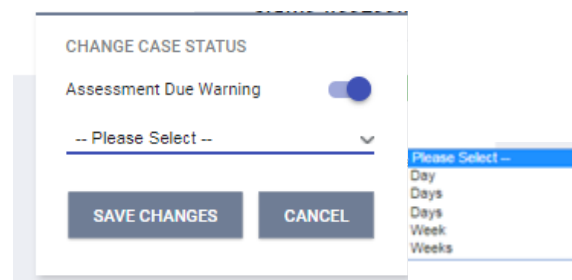
You can receive notification when your clients are due for another program assessment. It will contain your client's searchable Unique Identifier in Clarity.

1. From the Client's program page, hover to the right of the assessment you'd like to edit under the 'Status Assessment' menu

Select the edit ✎ option next to 'Notification:'

Status Assessments

12/31/2013 [STATUS]

Assessment due every year
Notification: **OFF** ✎

2. Toggle on the 'Assessment Due Warning' and select your preferred alert period (how much time before the due date you'd like to receive an email notification)

CHANGE CASE STATUS

Assessment Due Warning ●

-- Please Select -- ⌄

[SAVE CHANGES] [CANCEL]

-- Please Select --
Day
Days
Days
Week
Weeks

Step 7 – Rapid Re-Housing Special Requirements

Rapid Re-Housing (RRH) programs have additional steps to complete after they have enrolled a client into their program (enrollment date is the date you've been working with the client to find housing):

1. Conduct a Status Assessment
2. Update Rental Assistance information
3. Add any additional fees paid (deposit, etc.)
4. (Ongoing) Add monthly fees (rent, etc.)

1. Conducting an Assessment

Once a client or a family finds a rental and they have signed a lease to move in, it is required to complete a program **Status Assessment** (for all family members if the program serves families, See Step 6.)

Enter the date they were able to move in.
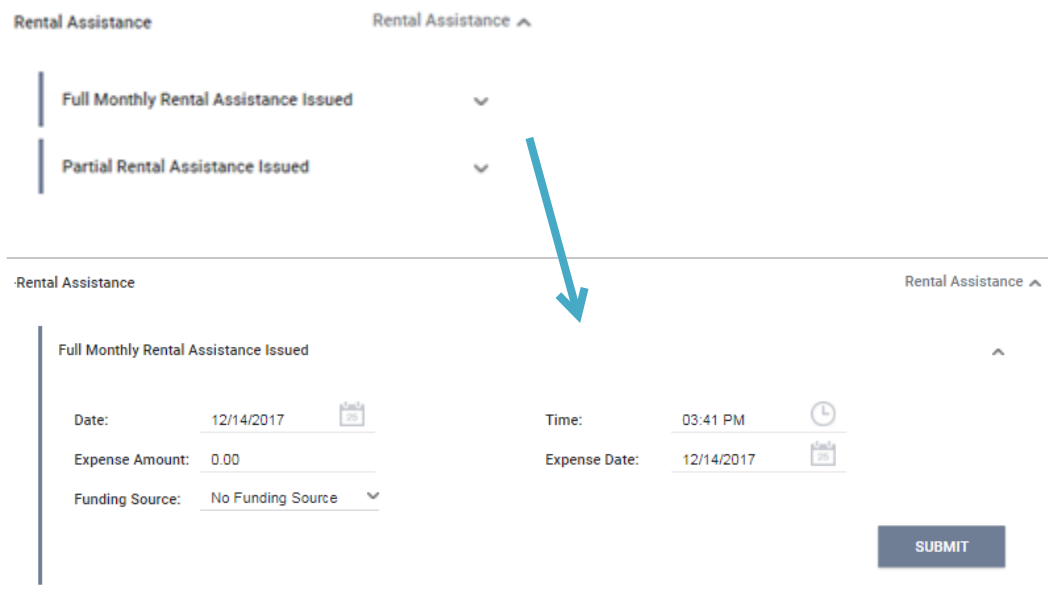
Project Status Date	__/__/____ 📅

Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response) ⌄

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date	__/__/____ 📅

2. Update Rental Assistance information

Next, you are required to set their "Rental Assistance" service to show a bed is being paid for by your program (again, set for all family members if the program serves families).

This option can be found under the program's 'Provide Services' tab (See Step 5 for additional information). When you expand the service information by clicking the down arrow, you may have to select from several assistance types. Select the assistance being provided, and enter the date the client moved in, as well as an end date.

For the end date, ALWAYS select an option for further out then your program provides. This will keep the service active until you exit the client from your program. This is also where you will enter the amount of rent your project paid for that first month. After you have entered the information and selected your family members (if applicable), click submit.

3. Add any additional fees paid

Also from the client's program 'Provide Services' tab, capture any other fees for your program paid (security deposit, application fee, utilities, etc.).

Making Home Habitable Costs	Financial ⌄
Moving Costs	Moving Cost Assistance ⌄
Other Financial Assistance	Financial ⌄
Rental Assistance	Rental Assistance ⌄
Security Deposit	Security Deposit ⌄
Utility Deposit	Utility Deposit ⌄
Utility Payment	Utility Payments ⌄

4. (Ongoing) Add monthly fees

Going forward, to add the rent your project pays each month, you will go into the 'History' tab of your client's project, and then edit the existing Rental Assistance Service.

Enrollment **History** Notes Files Forms   ✕ Exit

Program Service History

	Service Name	Start Date	End Date	
✎	HUD RRH -Rental Assistance:Families Family Promise of Sacramento	08/01/2016	08/31/2016	$

In the service screen, select 'Add Expense' on the Expenses ribbon and submit the new expense.

EXPENSES ($7,027.00)   ADD EXPENSE ⊕

Funding Source	Agency Name	Expense Date	Amount
No Funding	Family Promise of Sacramento	11/01/2017	$507.00
No Funding	Family Promise of Sacramento	10/01/2017	$507.00

Step 8 - Exiting a Client from a Program and Services

All clients must be properly exited upon completion of the program.

From the **Programs tab** in the client file, find the program you wish to exit your client from and select the Edit ✎ option.

Next, select 'Exit' on the right-hand side of the program menu.

Enrollment **History** Notes Files Forms   ✕ Exit

If this is a group case, you will be prompted to select which household members you would like to exit from the program.

Complete **all data** on the 'End Program' screen. Entering full exit data for all clients is extremely important to reporting outcomes for your programs and community.

Step 9 - Ending Open Services

If your client has any services scheduled for after the exit date, you'll see an 'Open Services' section on your exist screen so that you can end them before or on the actual program exit date.

- If you had check marked any group members to also be exited from this program, their End Program page will automatically come up next until each member has been completed. Continue to click **'Save & Next'** after completing exit information for each group members.
- **Rapid Re-Housing Projects** will need to put in the correct end date for their Rental Assistance Service. If you chose an exit date further out when you set the service, it should appear for you at the bottom of the screen and will pre-populate with the date prior to the program exit date you entered, signifying the last night the client occupied a bed paid for by your Agency.

Referrals Tab

How to View a Client from the Pending Tab

The referrals tab can be accessed from the Client Search option.

When a referral is sent to your agency and you are the person that has been identified to receive the referrals for a project in the system, you will receive an email notice that includes the Unique Identifier (UI) of the client that is being referred. Paste the UI in the search box in the Pending tab.

To work with that client in the Pending tab of the Referrals section, mouse over the Client Name.

The Edit 📝 option will take you to the actual referral, where you can view the referral and any notes, as well as place the person as "Pending - In Process," or deny the referral and send it to the Community Queue tab.

Selecting the **client name** will take you to the Profile screen of the client record. This is where you will enroll the client into your project once you have housed them.

	Client	Referral Date	Qualified
🗑 📝	A Client Name Program: SHRA Shelter Plus Care - HUD TRA (735) Referred By: Sacramento Steps Forward	07/15/2015	Reassigned

Changing a Referral Status to 'Pending – In Process'

After opening the referral by selecting the Edit 📝 option, use the drop-down to change the status to "Pending – In Process', then save changes.

Next, scroll down to the 'Notes' section and write a brief note. Select the 'Send Note' button to save it. **Enter a note weekly during the process between your intake appointment and when you secure them housing and enroll them into your project.**

VI-SPDAT score	7
Referred by Staff	Lindsay Moss
Case Manager	Select ⌄
Last Activity	12/15/2017 [CHECK-IN]
Status	Pending ⌄
	Pending
	Pending - In Process
	Denied
	Expired
Private	

[SAVE CHANGES]

NOTES

SU   └→ Reply from **Sacramento User** @ Sacramento County Dec 4, 2017 at 08:24 AM   🗑

This is a test referral

LM   └→ Reply from **Lindsay Moss** @ Sacramento County Dec 14, 2017 at 05:40 PM   🗑

Client is a good fit for our program. Waiting for a unite to open up.

[B Bold] [I Italic] [Numbers] [Bullets]

[SEND NOTE]

Note: Please do not use the 'Referral Connections' section of the referrals page; it is currently not implemented in the system.

REFERRAL CONNECTIONS   ADD CONNECTION ⊕

There are no results to display

Denying a Referral

If you need to deny a referral, including because a client is refusing your services, go into the Pending tab in the referral screen and open the referral by selecting the edit option

Use the drop down **to change the status to "Denied,"** which will trigger the additional boxes to appear: Send to Community Queue, Denied Reason, Denied Message, and Private.

Case Manager	Select ⌄
Last Activity	12/18/2017 **CHECK-IN**
Status	Pending ⌄
	Pending
	Pending - In Process
	Denied
	Expired
Private	

Set the "Send to Community Queue" box to Yes. All denied referrals must be referred back to the Queue in order for them to be referred to another project.

Status	Denied ⌄
Send to Community Queue	-- Select -- ⌄
	-- Select --
Denied Reason	Yes
	No
Denied Message	

Then, at "**Denied Reason**," select the answer from the drop-down menu that fits best for why your Agency is denying the referral.

Write a note in the "Denied Message" section to provide additional information as to why the client is being denied

| Status | Denied ⌄ |
Send to Community Queue	Yes ⌄
Denied Reason	Client refused services ⌄
Denied Message	Client has pet
Private	

Do Not Check the "Private"
box.

Save Changes.

You will also need to upload a denial letter that can be given to the client. Upload this in the "Files" tab of the client's profile page.

Working With the Other Referral Tabs

In addition to the Pending tab, you will also see four additional tabs that are available to view data.

REFERRALS

Pending   Community Queue   Completed   Denied   Sent
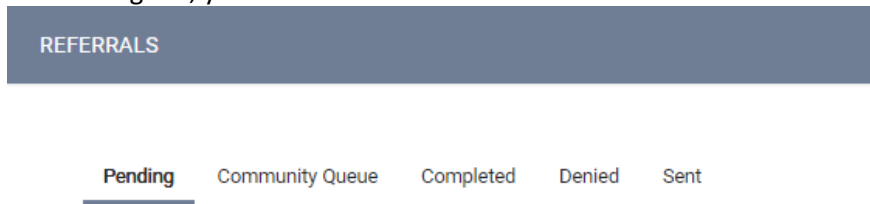
Community Queue: This tab shows the name of every client in the *full* Community Queue and is managed by SSF in Sacramento County and your regional admins in Yolo . ***You will never need to work in this tab****

Completed: This tab shows the name of every client that was referred to you and that you have accepted into your project by completing an enrollment in the system.

Denied: This tab shows the name of every client that was referred to you and that you have denied in the system.

Sent: This tab shows the names of clients that your Agency referred. We *do not* have direct referral between Agencies at this time and we are only using the Community Queue that is managed by SSF. ***You will never need to work in this tab****

Additional System Features

Adding a Client Photo

Your client may consent to sharing a photo in their Release of Information (ROI). Uploading photos to your client files can provide a quick method of identification.

Within your client's profile, hover over the image box and select 'Update Profile Photo'

Adding a Photo

If you have a **web/device camera**, you may take a picture instantly or after 3 seconds from that device.

Otherwise, **take a photo externally** (with a camera or camera phone) and upload the photo to your computer. Select the file from the 'Upload Photo' portion and hit the 'Upload' button.
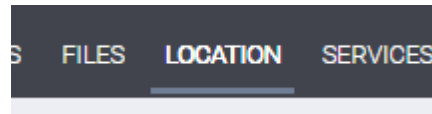
Refocusing the Photo

You may wish it re-center of the photo to fit the dimensions of the image box. Use your cursor in the 'Original' box to redefine the focus of the image.
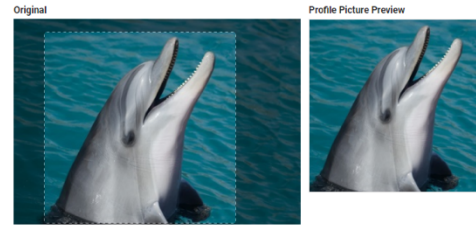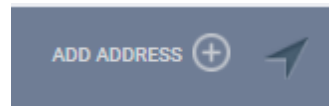

Adding a Client's Active Address or Contact Information

Select **'Location'** on the main menu bar.

Select **'Add Address'** in the upper-right hand corner

(You can select the pointer icon to allow your device/browser to find your current location – but it will not be added as a client location)
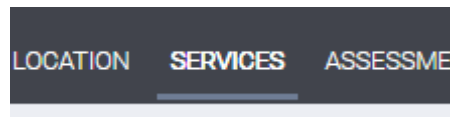

Add the details for your client's location type in the next screen and save.

Your client's location will now appear on the map.

General Service Transactions

A general service transaction is placed through the "Services" tab. It records the provision of **a service to a client that is not part of a Program**.

Click on the **"Services"** tab in the client file.

**Select the service** you wish to provide outside the context of a program.

(To appear as an option, the service must be eligible to be provided outside of a program)

Important: If your client is part of a family/household group, you have the option to check family members who should also receive this service placement. Checking any family members listed will place an identical service placement in that member's HMIS history.

NOTE: All service placements **MUST have a valid end date**. Failure to enter an end date will produce a one day service placement, which may not be accurate for all of your service placements. It is **"Highly Recommended"** that you project the service end date way out into the future.

Daily Attendance Transactions

If your agency provides services on a day-by-day basis, allowing a large number of clients to be checked in for services very quickly, you may find an 'Attendance' option from the main menu.
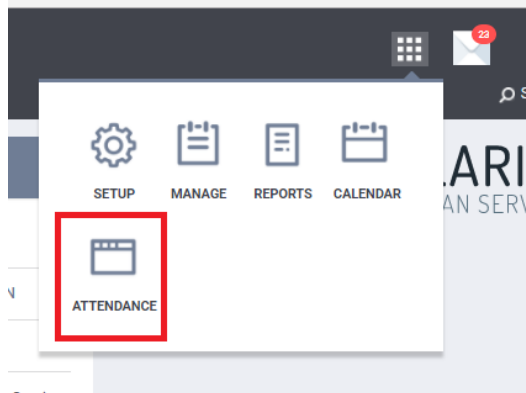
If you'd like to mark a client's daily attendance, **select this option and then the appropriate service name**

The Attendance Screen shows you who has already been marked in attendance (you can be marked as in attendance after being enrolled into the service). You will automatically be brought to the current date, but you can use the date picker in the upper-left hand corner to switch dates

Date 01/09/2018

Add an attendee from a list of recent attendees from the last four months or from the side panel / client search.
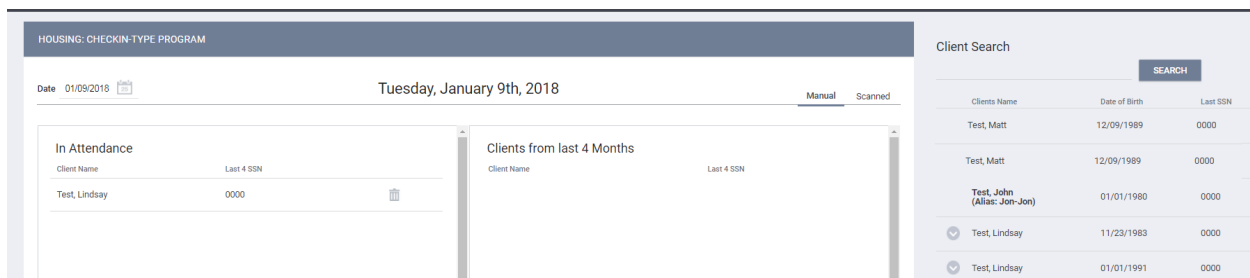
To remove an attendee, select the Trash Can icon to the right of the attendee.

The Service Attendance screen is divided into 3 sections:

- The '**In Attendance**' box is located on the left side of the screen. This is where you will place the clients who received the service on the given date.

- To the right of this box is the list of clients who have **received this service at any point in time during the past 4 months.**

- On the far right side of the screen is the **client search box**; here you can enter a client name or part of the name for clients who have not received the service within the past 4 months. You can also easily manage household attendance here, as well.

  NOTE: Clients **who are not found** in your search results do not exist in HMIS. Please follow the steps for **"Adding a Client"** to create a file for your client prior to attempting to place them into attendance for services.

You can also manage attendance from within a client's service history, under the 'Attendance' box within the service screen.

Adding a Cost to Services

In some cases, when you add a service you will be prompted to enter a cost at the time of placement.

When adding a service

The service may have a default value associated with it, such as in the case of the example of the 'Bus Pass' below. The service may be configured to have this default value and/or it may be fixed, but in other cases you may be able to alter the expense amount in the 'Expense Amount' field:

Adding detail to an expense or adding additional expenses

If you would like to add more detail to the expense, such as check number or funding source, you can access the service from the client's 'Active Services' or 'Recent Services' sidebar, or from the 'History' tab.

Locate the expense bar and select (edit) an existing expense or add a new expense

EXPENSES ($5.00)			ADD EXPENSE ⊕
Funding Source	Agency Name	Expense Date	Amount
No Funding	Admin Only Test Agency	01/09/2018	$5.00

Add / update the appropriate information for the expense

MODIFY EXPENSE	⊗
Funding	No Funding ⌄
Amount	$ 5.00
Expense Date	01/09/2018 📅
Check Number	
Vendor	
Notes	

SAVE

Program Tab Overview

After selecting a client's enrollment into a particular program, you will have a number of options to view the service and enrollment history, as well as provide services for your client within that program.

PROGRAM: ADMIN ONLY TEST PROGRAM 1

Enrollment   History   Provide Services   Assessments   Goals   Notes   Files   Chart   Forms   ✕ Exit

Program Service History

Service Name

Referral: Admin Only Test Program 1
Admin Only Test Agency referral to Admin Only Test Agency

☐ Reservation   ☐ Service   ☐ Referral

Enrollment	**History**	**Provide Services**	**Files**
Opens the	Shows the history of the	Allows placement	Allows you to add files

enrollment screen completed upon entry	client's services associated with this specific program	of services associated with the program	that can only be seen by your Agency
Forms	**Notes**	**Exit**	** Do NOT use these options to upload files for Coordinated Entry*
Allows you to add forms that can only be seen by your Agency*	Allows you to enter case notes that can only be seen by your Agency	Opens the exit documentation for when the client leaves your program.	

Program Status Box

Current status, type, state date

List of current group members, with option to add new members

List of current group members with option to add new members or edit existing.

History Screen Overview

The History screen is a color-code view into your client's **Services, Programs, Assessments, and Referrals**. It also provides you an easy option to find and select one of these activities.

Advanced Search Options   View ⌄

Service Name	Start Date	End Date	
Referral: Admin Only Test Program 1 Admin Only Test Agency referral to Admin Only Test Agency	01/09/2018	12/31/2017	▤
Housing:Checkin-Type Program Admin Only Test Agency	01/09/2018	01/10/2018	
Transportation:Bus Pass Admin Only Test Agency	01/09/2018	01/09/2018	▤ Ⓢ
Transportation:Bus Pass Admin Only Test Agency	01/09/2018	01/09/2018	Ⓢ
Admin Only Test Program 1 Admin Only Test Agency	12/31/2017	**Active**	🔗
Clothing:Provided Sacramento Steps Forward	12/07/2017	12/07/2017	▤ Ⓢ

Service **transactions with attached expenses** are marked with a **$** icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.

		Lindsay Mom	12/15/17	**Active**
01/09/2018	Ⓢ			

Expense Date: 01/09/2018
Expense Amount: $5.00

Assessment due every month

If your client has a very large history spanning multiple pages of results, the **"Show advanced search options"** feature provides an excellent interface to narrow down your results.

By selecting the 'Edit' option to the left of a service name, you will be able to add service notes, adjust dates, add additional expenses, and add household members from within the program management screens.

Adding Case Notes

To add a case note, click on the **"Notes"** tab in the client file. In the upper right corner, click on **"Add Note"**

Enrollment	History	Provide Services	Assessments	Goals	Notes	Files	Forms	✕ Exit

Client Program Notes   ADD NOTE

Uploading Files

The file section allows you to upload important documentation to your client's account.

-

NOTE: Files v. Forms_____

A **form** is typically something offered by an agency or HMIS that can be signed electronically, such as the Release of Information. We have an electronic version on file that is built out for your client to sign easily. It is a standardized form required by an agency.

With Forms, you will be prompted to identify a specific document name, such as 'Revocation of Consent'.

A **file** is something non-standard and non-templated such as a copy of a license.

With Files, you will be prompted to identify a category and name for this file type.

Most of the time, you will be uploading files when keeping track of your client's documents, the exception being HMIS-specific agreements.

1. Select the 'Files' tab from the Programs screen
2. **Select** a **category** and **name** from the drop down menus that closest resembles the type of file you are uploading.
3. Upload your file and 'Save Changes'

UPLOAD A FILE

Category	Achievements/Awards ⌄
Name	Completions of AOD Program ⌄
File	**Select File**
	Trouble attaching files? Switch to the Basic Uploader

ADD RECORD　**CANCEL**

How to Work With the Report Library

Running a Report

To run (or schedule) a report, select ⊞ >
'Reports'
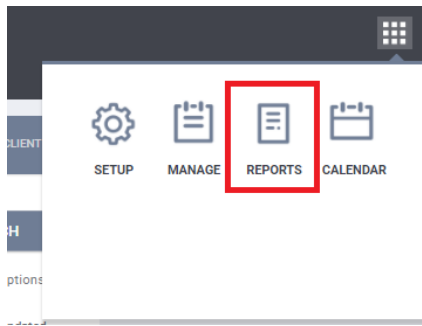
This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization.

Select the down arrow next to the reporting category to expand your options.

Some reports give you the option to view 'More Info'

To run a report, select 'Run', then enter the parameters for the report, such as services, programs, or funding types.

Because each report is different, some of the parameter options will vary depending on the report.

You will be prompted to select an output format.

- **Web Page**: A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.
- **PDF**: The PDF is a good option for official reports, grants, etc.
- **Excel file**: If you download the excel file, you can use excel to manipulate and organize the data (e.g., Sort/Check for duplicates, etc.)
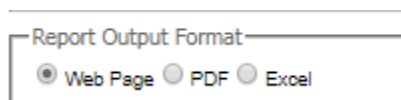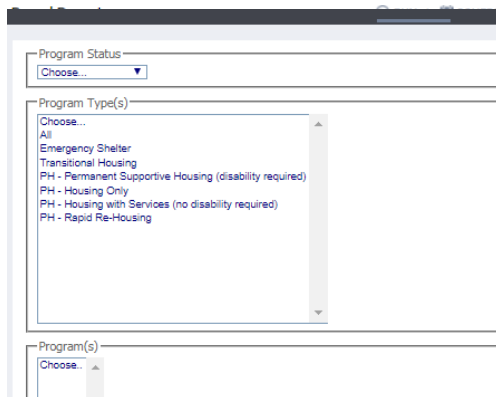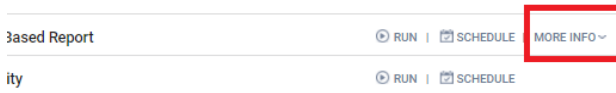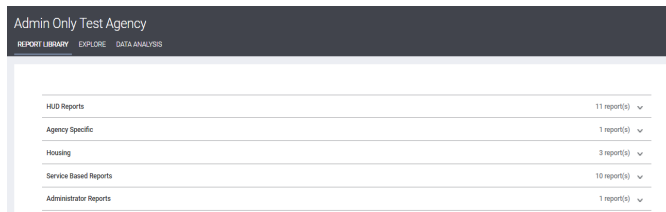
Once you're ready to run your final report, select the 'OK' button.

You'll be notified that the report is being
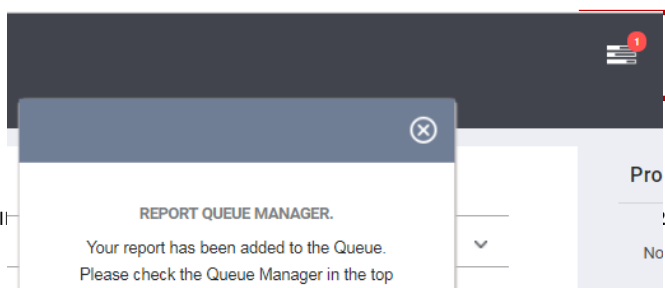
queued, and you'll also be alerted when it's ready in the queue manager in the top right-hand corner of your screen.

Click on the queue manager to

Scheduling a Report

Reports can be run immediately, or they can be scheduled to run at specified times. To schedule a report, select the 'Schedule' link instead of the 'Run' link.

Select the date you'd like to have the report automatically run in the 'Scheduled Process Date', Include the start and end date period for your report to reference, and save.