



CLARITY
HUMAN SERVICES

Configuring the HMIS for Coordinated Intake

The Importance of Usability and Configurability

CASE STUDY

June 2015

(702) 614-6690 x211
(888) 866.1533

www.clarityhumanservices.com



THE CHALLENGE

Continuums of Care share two things in common...

1. Dedication to their clients
2. Mastering Coordinated Intake challenges

The Challenge...

The practical hands-on demands of Coordinated Intake are challenging enough; trying to wrangle with a cumbersome HMIS only makes service provision that much more difficult.

CoCs urgently need user-friendly HMIS capabilities...

...but how can they get there?

Coordinated Intake is the primary tool for helping clients experiencing homelessness or those who are at-risk for homelessness. Each CoC has adopted a Coordinated Intake system that is uniquely tailored to their community needs.

Despite these differences in service structure, every CoC nationwide shares a common denominator: The Homeless Management Information System - every CoC uses the HMIS.

Due to the heavy demands of Coordinated Intake, every CoC needs their HMIS to be user-friendly. The practical hands-on demands (e.g. street outreach, assessment, etc.) are challenging enough; trying to wrangle with a cumbersome HMIS only makes service provision that much more difficult.

This poses the question...

How can the HMIS meet the demands of Coordinated Intake?

The remainder of this case study discusses how Clarity Human Services configured the HMIS to make it a premier tool for Coordinated Intake.

More specifically, this case study addresses how the Clarity Human Services HMIS met the need for real-time data entry for accurate bed availability with VI-SPDAT referrals.

THE SOLUTION

Summary

Clarity Human Services leveraged the **capacity for configuration** to enable real time, accurate HMIS data entry and VI-SPDAT referral management.

What is the VI-SPDAT?

The VI-SPDAT is a pre-screening, or triage tool designed to be used by all providers within a community to quickly assess the health and social needs of homeless persons and match them with the most appropriate support and housing interventions that are available.

The VI-SPDAT is a brief survey that allows homeless service providers to similarly assess and prioritize persons who are homeless in their community and identify whom to treat first based on the acuity of their needs.

The following provides a brief overview of the VI-SPDAT Referral System for Coordinated Intake that Clarity Human Services developed to meet the challenges of Coordinated Intake.

Following this overview is a breakdown of the specific features that Clarity Human Services made configurable to the HMIS System Administrator so that the HMIS System Administrator could customize their Clarity Human Services HMIS installation to meet the unique needs of their end-users.

Overview of the Clarity Human Services VI-SPDAT Referral System for Coordinated Intake

After the caseworker conducts the VI-SPDAT, the Clarity Human Services HMIS automatically processes the VI-SPDAT score and generates a rank-ordered list of appropriate interventions, with the 'best fit' located at the top of the list. The caseworker can then select the potential program to generate the referral in real-time.

From here the caseworker can view real-time bed/unit availability. They can also reserve beds/units (shown in dynamic chart format) in real-time directly from the referral screen while simultaneously placing the referral. This prevents other staff from conducting other referrals based upon an inaccurate number of available beds/units.

If there is a waitlist, the caseworker will be able to see details, such as the length of time before the client is accepted. This can then guide their decision regarding whether they should place the client elsewhere.

The VI-SPDAT is complexly pre-configured (by Clarity Human Services software developers) in a way that certain scores correspond with certain types of services and programs.

The caseworker has two options when referring a client based on their VI-SPDAT score:

1. Refer the client to the Community Queue, where they will be placed on a list along with their VI-SPDAT score.
2. Use the VI-SPDAT score to determine which type of service or program is most accurate for the client based on the different domains within the VI-SPDAT. They can then refer the client directly. If referred directly, the client will not be placed into the community queue.

Should they refer to a program directly from the same screen, a caseworker can send a secure in-system message to the target agency staff to relay any pertinent information.

Once the client arrives at the agency, that agency staff has access to client information based upon secure and configurable inter-agency share settings between them and the referring agency.

After placing the referral, the caseworker can print out directions (by foot, car, bicycle, or public transportation) and print out a checklist with items/documents required by the program to which the client has been referred; this functionality is simple, yet it drastically helps to ease the client's already heavy burden.

After the client is placed into the correct program...

...caseworkers have countless customizable assessments to further delineate how to meet the client's needs. Caseworkers also have a host of case management functionality and powerful sophisticated reporting capabilities at their fingertips.



Configurable VI-SPDAT Referral Features

In order to meet the Coordinated Intake demands of our CoC customers, Clarity Human Services made the following VI-SPDAT referral features and functionalities fully configurable to HMIS System Administrators.

The following tables present the configuration capabilities that are available to HMIS Administrators using the Clarity Human Services HMIS:

Real-Time Bed/Unit Reservations

The HMIS System Administrator can configure the reservation system to allow for real-time reservations for bed/unit placements; as soon as a reservation is made, the HMIS updates in real-time to instantaneously make that bed/unit unavailable for placement for another client.

The HMIS System Administrator can also configure the following bed/unit reservation features:

'Slot' Management

The HMIS System Administrator can fully configure slot information (e.g. bed/unit) information for programs and services to allow for accurate, real-time availability information.

Mass Edit

The mass edit settings allow the HMIS System Administrator to edit more than one reservation at a time, including the ability to simultaneously delete numerous entries. This functionality shows all Pending Reservations, which are reservations for which the client was not 'Present'. This enables the HMIS System Administrator to easily clear obsolete reservations in a timely fashion.

Expense Item Documentation

The HMIS System Administrator can configure Expense Item Documentation settings to allow customized documentation with each placement.

Housing Services/Program Enrollment Linkages

When setting up housing services and programs, the HMIS System Administrator can link housing services to a program enrollment, requiring the user to complete the Assessment and Referral processes before entering that client into the bed/unit slot. These processes update in real-time, preventing duplicate bed/unit reservations.

The HMIS System Administrator can also configure the following service/program features:

Program Template Management

Ability to create and manage all Program Templates. For example, the HMIS System Administrator is capable of managing any non-HUD programs that use completely separate Enrollment, Status, and Exit screens. These templates are customizable and defined to provide standardized workflow.

Goal Template Management

Ability to create and manage Program Goal Templates. The Goals Editor is highly configurable, and allows for Pass/Fail of goals to be automatically assigned to client-enrolled programs. Goals can consist of items such as "Receive Mental Health Services within 90 Days," or "Obtain Permanent Housing within 30 Days".

Real-Time Service Placement

The HMIS System Administrator can configure services to enable service placements to be calculated in real-time, so when a client is placed into a service, the count is adjusted immediately.

The HMIS System Administrator can also configure the following service placement features:

Link a Service to a Particular Program

HMIS System Administrator can configure programs to force end-users to issue the service only if the client is enrolled in the program.

Service Item Configuration

HMIS System Administrator can configure all aspects of multiple Service Items within a single service (e.g. HUD service category, geocode, group placement option, and more).

Configurable Housing Service features

Housing Service items are fully configurable to the HMIS System Administrator (e.g. Information Date, Service Type, Household Type, Inventory Type, Bed/Unit Type, etc.).

Configurable Funding Types

Fully configurable funding information can be linked to each service.

Community Queue Waitlist Functionality

The HMIS System Administrator can fully configure the VI-SPDAT Community Queue waitlist functionality. Clients are placed into a community queue so they can be referred to any participating agency based on the client's needs. If an agency has no beds/units available they can be removed from the list, but placed back on the list when beds become available.

The HMIS System Administrator can also configure the following VI-SPDAT referral system features:

Pending Referrals

Allow end-users to view/manage all referrals sent to an agency that are pending.

Community Queue Referrals

Allow end-users to view/manage all pending referrals within the system.

Completed Referrals

Allow end-users to view/manage all referrals completed by their agency (i.e. client was enrolled into a program in their agency).

Denied Referrals

Allow end-users to view/manage all referrals denied by their agency.

Sent Referrals

Allow end-users to view/manage all referrals sent by their agency (to both outside agencies and to programs within their agency) that are either pending, completed, or denied depending on the option chosen.

Fully Customizable System Setup and HUD-Compliant Forms

Numerous aspects of the Clarity Human Services HMIS are fully, and easily, configurable to the HMIS System Administrator.

The HMIS System Administrator can configure the following system setup features:

Screen Designer

The HMIS System Administrator can use the completely customizable, easy to use, and powerful screen designer to create custom assessment screens and program management screens (i.e. profile, enrollment, status, exit, follow-up screens).

Field Editor

The HMIS System Administrator can use the field editor to create and manage custom database fields. Text, checkbox, pick-list, number, dollar, and other additional data formats are available. The Clarity Human Services HMIS automatically creates and translates the management to the relational database.

General Settings

The HMIS System Administrator can fully configure system variables, such as session idle limits, maximum password attempts, Area Median Income (AMI), Poverty Guidelines, email templates, client forms, file categories, and other additional customizations are available.

User Setup and Management

The HMIS System Administrator can create new end-users, edit existing end-users, reset passwords, disable end-users, manage client PKI certificate, manage IP Whitelist addresses, manage PDF user policies, set access roles, create default profile screens, force password changes, grant additional agency access, and other additional user level management functions.

Secure Data Sharing & Access Roles

The Sharing section of the Clarity Human Services HMIS enables the HMIS System Administrator to control how their agency shares data. These features allow the HMIS System Administrator to create default share settings (including sharing groups) and departments. It also allows for the creation of 'agency exceptions' for any agency that requires sharing capabilities that differ from the default settings.

The Sharing functionality of the Clarity Human Services can be presented in 4 categories:

Sharing Defaults

Sharing defaults allow the HMIS System Administrator to configure how their agency shares information with other agencies. These configurations serve as default settings, meaning they are applicable to every agency.

Agency Exceptions

If there is a particular agency that requires sharing options that are different from the Sharing Default, the HMIS System Administrator can create an 'Agency Exception'. This will allow them to tailor the Sharing settings to fit the specific agency.

Sharing Groups

Sharing Groups enable the HMIS System Administrator to assign separate Sharing Groups within Clarity Human Services, allowing these separate network groups to have further autonomy within the system. This eliminates the need to create multiple individual sharing exceptions for multiple agencies.

Departmental Sharing

Departmental Sharing enables the HMIS System Administrator to regulate information such as program/service history, case notes, and client files. If an end-user within the same agency is not granted departmental access, then they will not be able to see program/service history for the associated program in the client history, nor will the program appear in the available list of programs in the program tab of the client record, even though they are in the same agency. The HMIS System Administrator can then assign any combination of departmental data restrictions to end-users with departmental access.

DISCUSSION

The Benefits

As a result of the user-friendly, configurable features discussed above, each CoC utilizing a Clarity Human Service HMIS installation has benefitted greatly from its configurability in the following ways:

- Drastically improved bed/unit placement accuracy
- Enhanced reporting accuracy
- Improved service provision

As a result of its immensely easy and accessible system configuration capabilities, the Clarity Human Services HMIS has proven that usability and configurability are vital to Coordinated Intake systems.

Another benefit is the increased satisfaction and morale of the HMIS end-users. Per the norm, Clarity Human Services end-users report immense appreciation for the user-friendliness of their HMIS installations.

HMIS System Administrators are also highly satisfied. They truly enjoy feeling a part of the development of the Clarity Human Services HMIS.



How Did Clarity Human Services HMIS Achieve User-Friendliness?

In order to ensure the user-friendliest HMIS experience, the Clarity Human Services HMIS is designed in accordance with the **User-Centric Design Paradigm**.

But what exactly does this mean, and why is it so important to us?

The User-Centric Design Paradigm approach puts the end-user, rather than the system, at the center of the software design process.

This means that the Clarity Human Services end-users are at the helm of the development of the Clarity Human Services HMIS. Feedback from the end-user regarding their experiences with our HMIS is the leading reason why our software is the user-friendliest system available in the industry.

The **User-Centric Design Paradigm** approach puts the end-user, rather than the system, at the center of the design process.

What makes our HMIS software particularly usable?

...The secret lies in its configurability.

Configurability (i.e. the ability to customize a software application) is the primary element of user-friendly software.

Configurability and usability share a symbiotic relationship - one cannot exist in the absence of the other.

In order for an HMIS to be user-friendly, it must be easy to configure in ways that fit the needs of the CoC and its end-users.



It's not enough for the software to be configurable, however.

What really sets a user-friendly HMIS apart is if the **system is configurable to the HMIS System Administrator** - they have control over how their particular HMIS installation is configured in order to meet the needs of their end-users, and they can do so with little to no help from Technical Support staff.

Configurability loses its value if the HMIS System Administrator must rely heavily upon IT staff, or even their HMIS vendor, to customize their system. Nobody knows service needs better than the HMIS System Administrator. Thus, it is infinitely important that they be empowered to customize their own system with minimal guidance from outside resources.

Therefore, an effective HMIS, one that can withstand the demands of Coordinate Intake, should be built with autonomous end-user customization in mind.

Clarity Human Services is proud to be an integral part of the Coordinated Intake system of each of our CoC's. Our configurable, user-friendly software is not only making waves in the industry, it is also changing the lives of the clients - and that's the primary benefit gained from our efforts.

(702) 605.6870
(888) 866.1533

www.clarityhumanservices.com



CLARITY
HUMAN SERVICES