SAN BERNARDINO COUNTY

Homeless Services

Client Portal Help Guide for Staff

The purpose of this quick reference is designed to Help staff with the client portal.

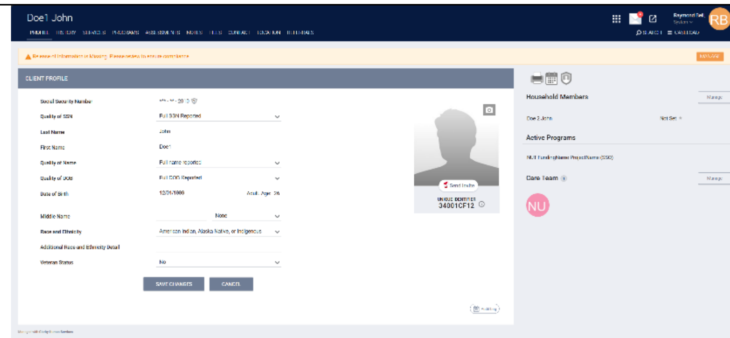
1.0 Inviting Client to use portal

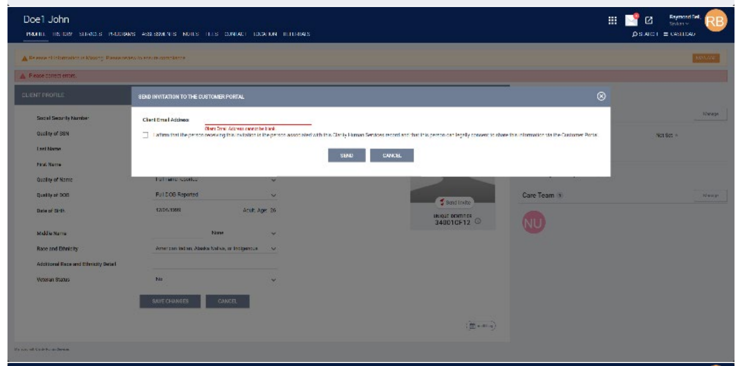
1.1 From Clarity navigate to your client's profile

1.2 Hit the button below their profile that says Send Invite

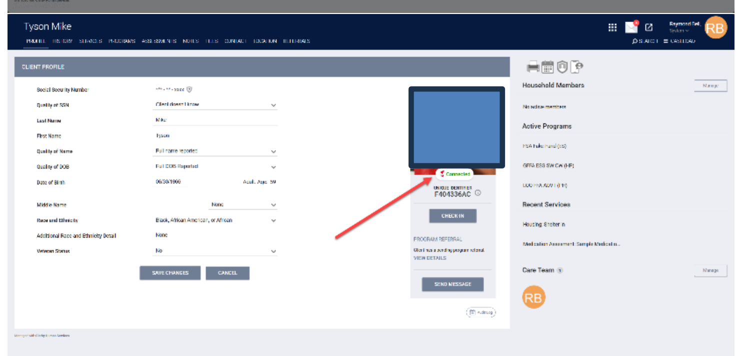
1.3 Enter their email

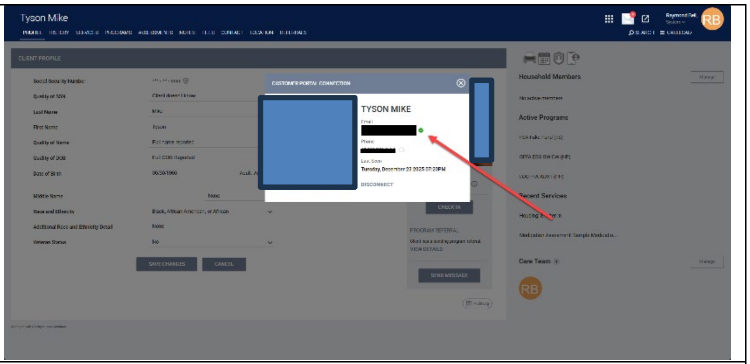
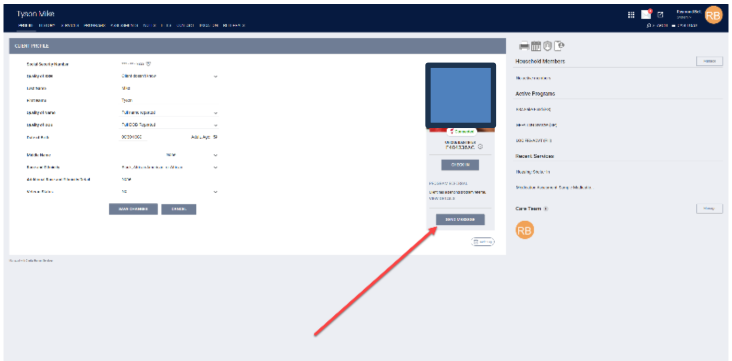
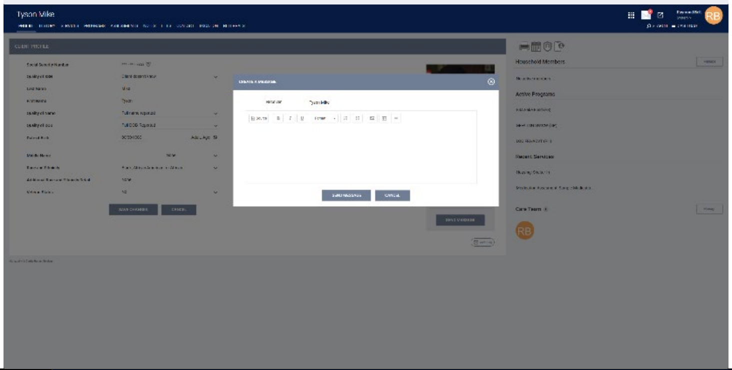
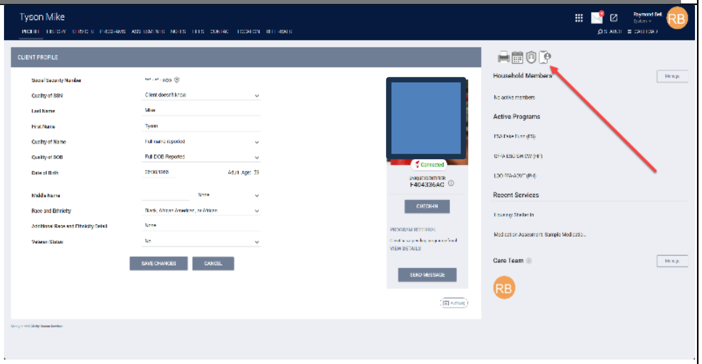
1.4 They will then receive an email to set up their account

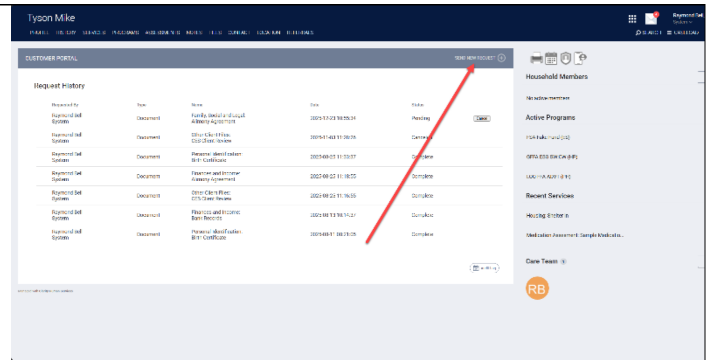
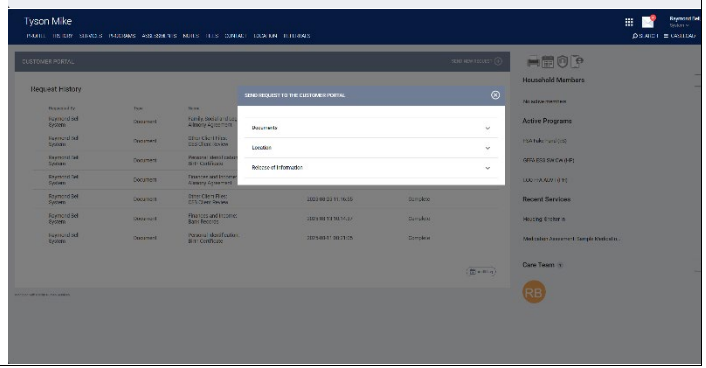




1.5 Once they've set up their account it'll now reflect that on their profile and say Connected

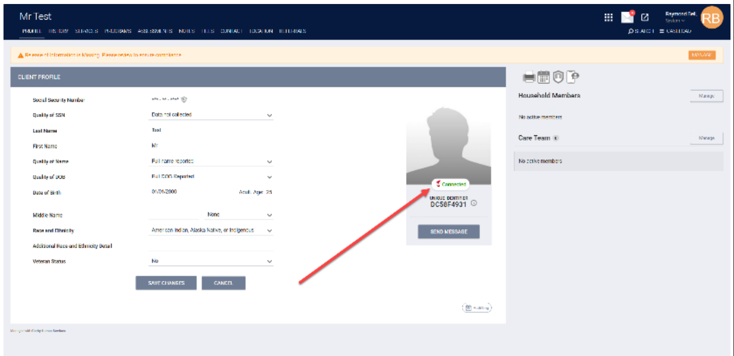


1.6 If you click on that connected it'll show their contact information they used to sign up	
2.0 Messaging the client 2.1 On the client profile click send message 2.2 Type out the message you'd like to send and hit send message	 
3.0 Requesting Documents, location, or ROI 3.1 On the client's profile there is a phone on the top right. Click on it	

3.2 Here is a history of what's been requested from the client and by who 3.3 To request documents, click on the button on the top right of the light blue banner that says request documents	
3.4 From here you can request specific documents, the client's location, or ROI	

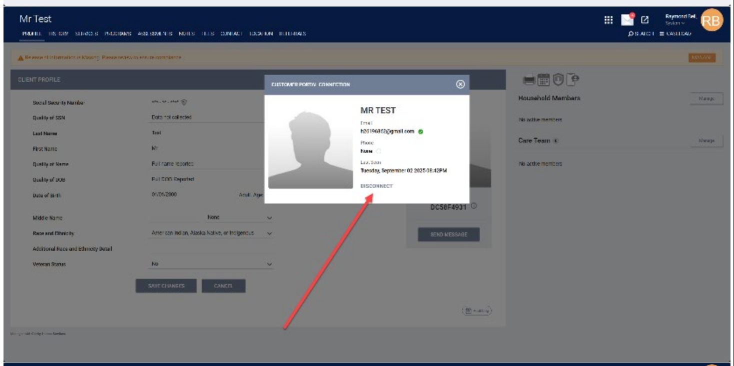
4.0 Can't access email or login with email

4.1 If you can't login with their email the best thing to do is to resend the invite to the client

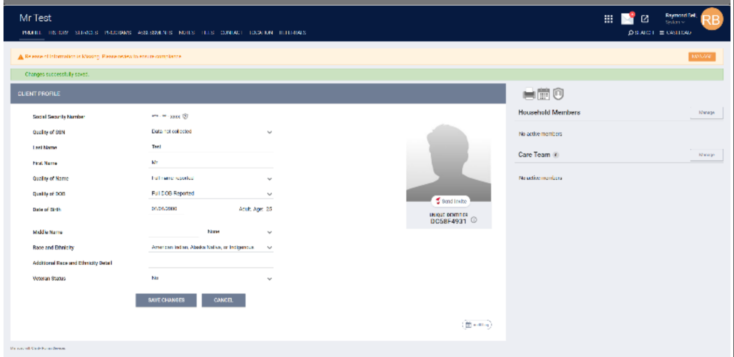


4.2 To resend the invite go to the client profile and click connected

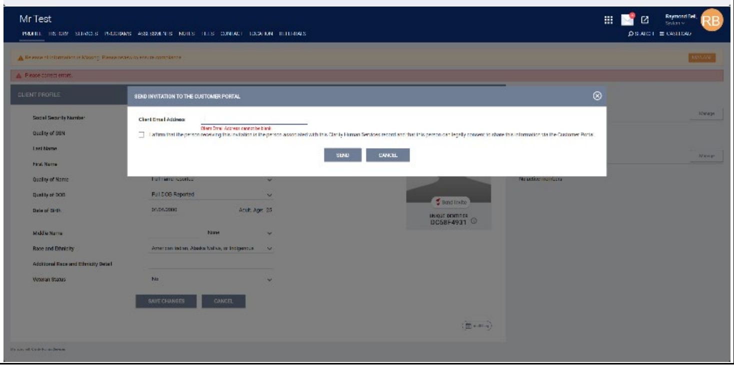
4.3 The select disconnect



4.4 If successful, you'll be greeted with a green banner stating change successful saved

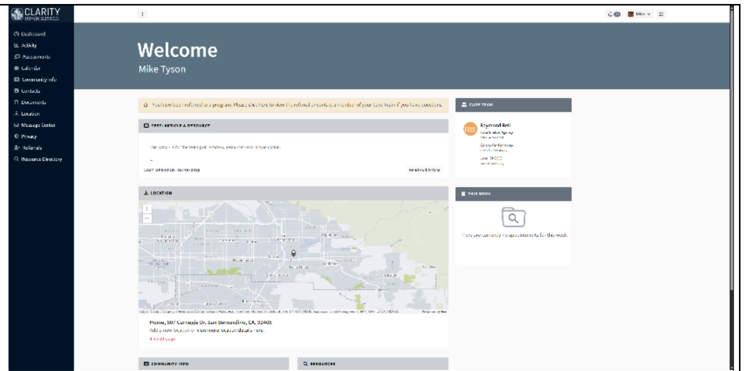


4.5 Now you can reinvite them by clicking invite. From here just type their preferred email and hit send

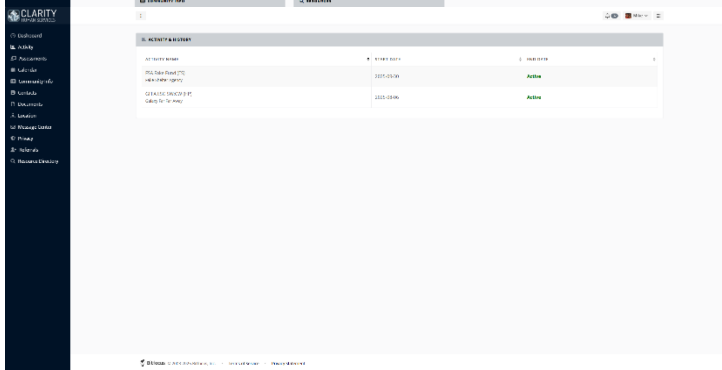


5.0 What's in the client portal

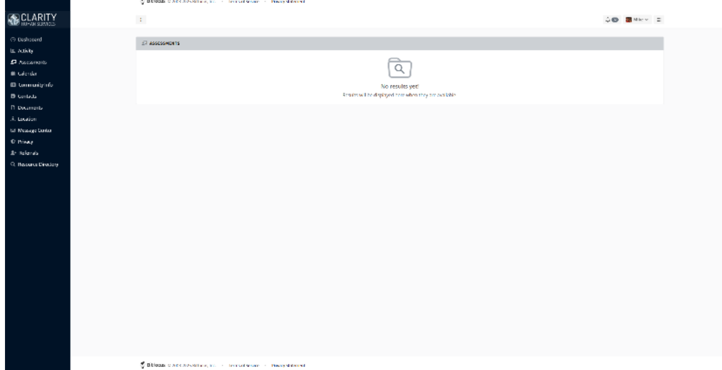
5.1 A dashboard with a summary of your information



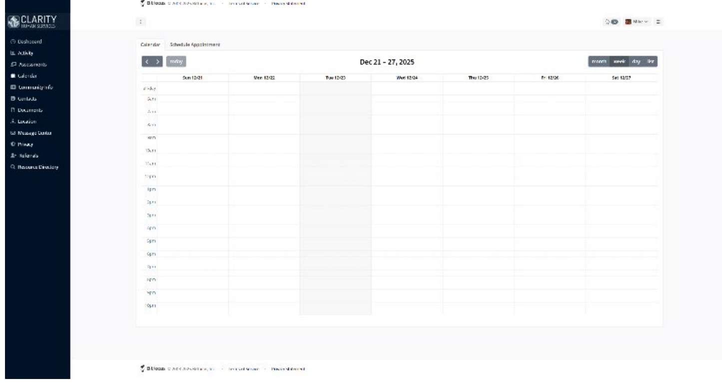
5.2 Programs you're enrolled in

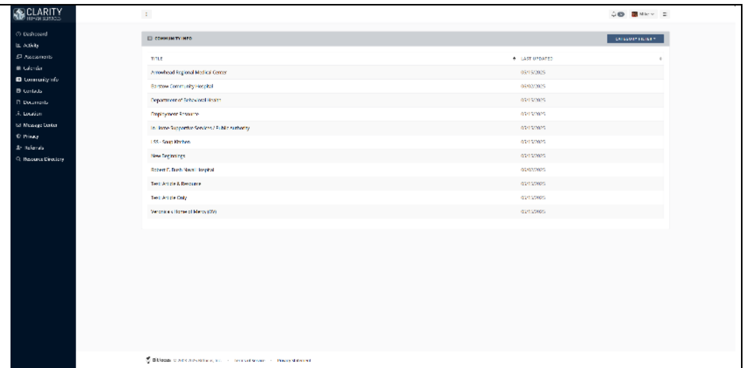
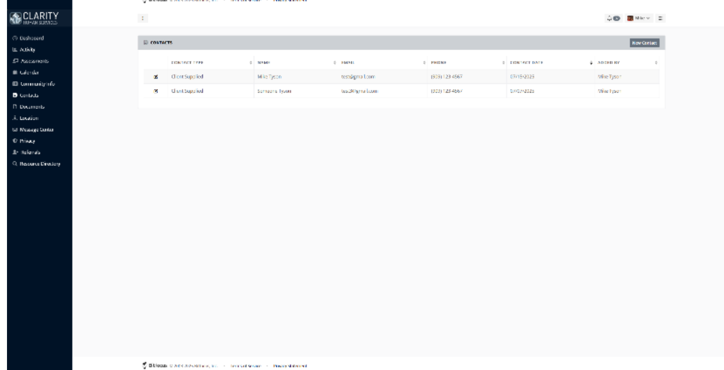
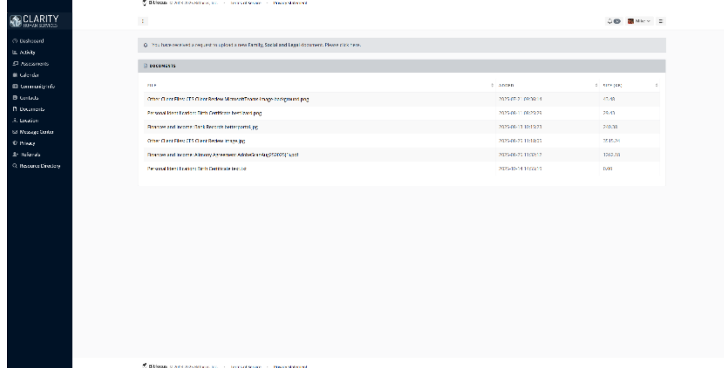
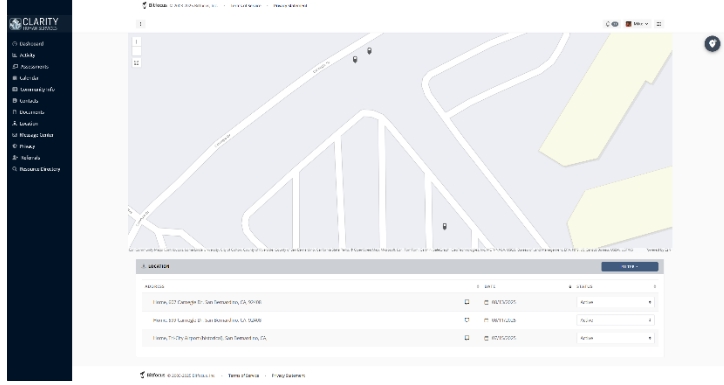


5.3 Select assessments you've done

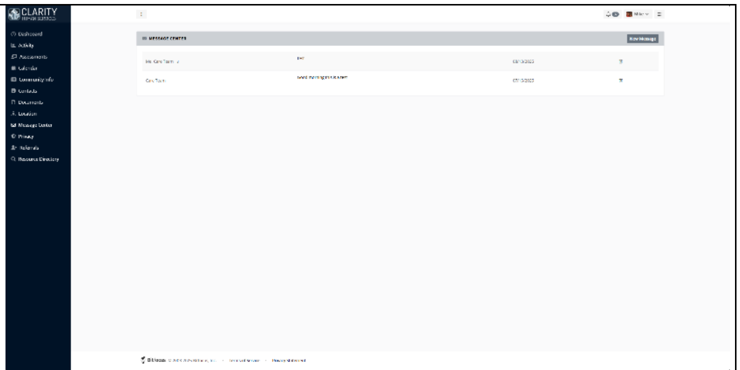


5.4 A Calendar managed by your care team

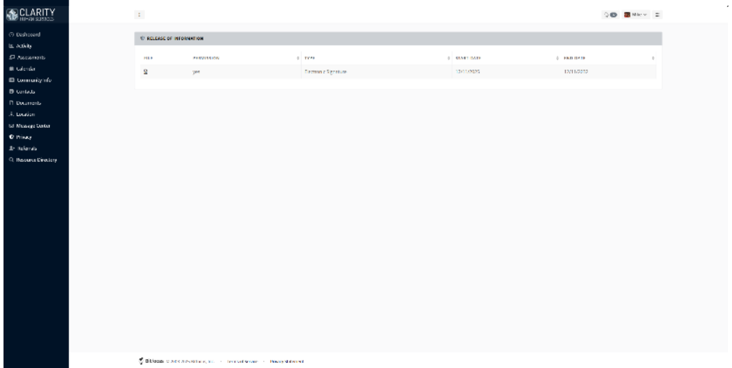


5.5 Community info for definitions of resources	
5.6 Contact information you've provided for your care team. Which you can update	
5.7 Documents you've uploaded for your care team. You can also upload documents to your care team requests	
5.8 Location allows you to keep your care team updated with your location in case they need to find you	

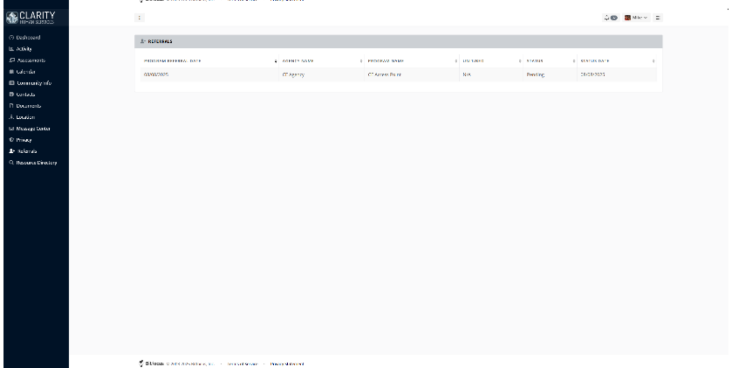
5.9 Message center for contacting your care team



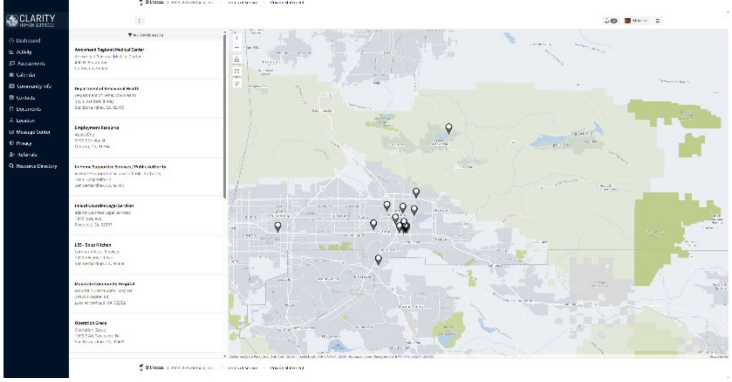
5.10 Referrals you can see the status of your referral. It'll keep you up to date with your referral status (Work in progress)



5.11 Privacy you can see your release of information



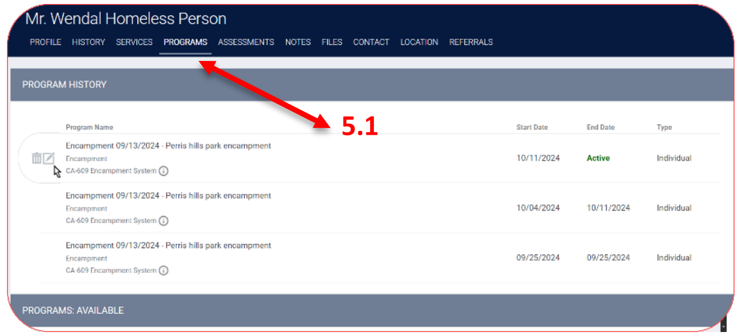
5.12 The resource Directory allows you to see what resources are close to you



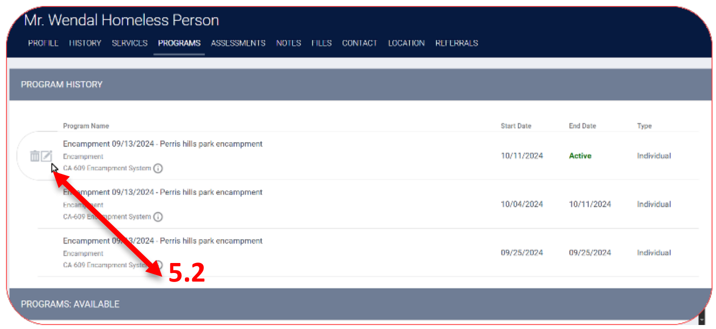
For unique issues please contact us via email: help@ohs-hmis.on.spiceworks.com

5.0 Exit Cient from Encampment program

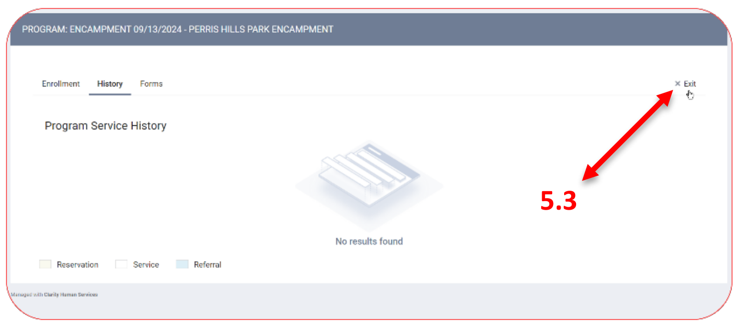
5.0 from the client's profile window select Programs from the top menu items to view the programs the clients is or was enrolled in.



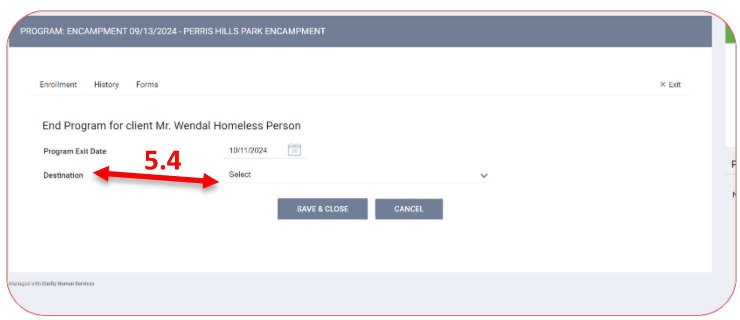
5.1 Click the edit tool next to the active encampment program



5.2 In the program service history window, click Exit



5.3 Select a destination from the dropdown



****If you have any problems, please submit an OHS-Spiceworks helpdesk ticket:**
help@ohs-hmis.on.spiceworks.com