



Homeless Services

Client Portal Help Guide for Staff

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

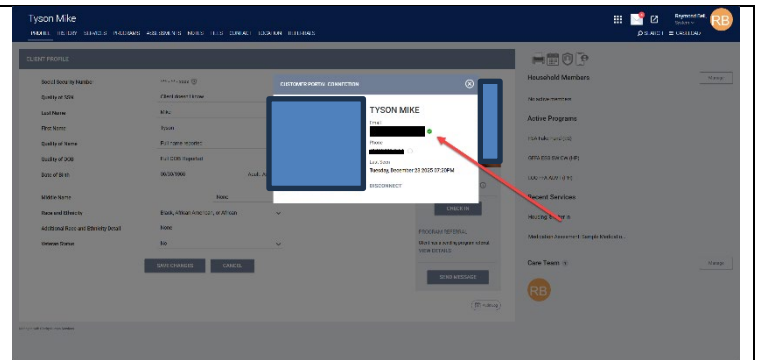
1.0 Inviting Client to use portal

- 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

The image displays three screenshots of the Client Portal interface. The top screenshot shows the 'CLIENT PROFILE' for 'Doe1 John' with fields for 'Send Invite to Member', 'Quality of Life', 'Last Name', 'First Name', 'Quality of Home', 'Quality of Job', 'Date of Birth', 'Mobile No.', 'Email and Emailing', and 'Additional Data and Identity Detail'. A 'SEND INVITE' button is visible. The middle screenshot shows a 'SEND INVITATION TO THE CUSTOMER PORTAL' dialog box with a 'SEND' button. The bottom screenshot shows the 'CLIENT PROFILE' for 'Tyson Mike' with a 'CONNECTED' status and a 'SEND MESSAGE' button. A red arrow points to the 'CONNECTED' status.

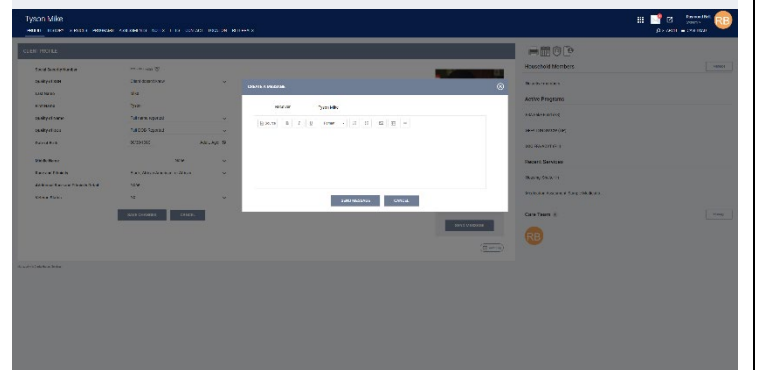
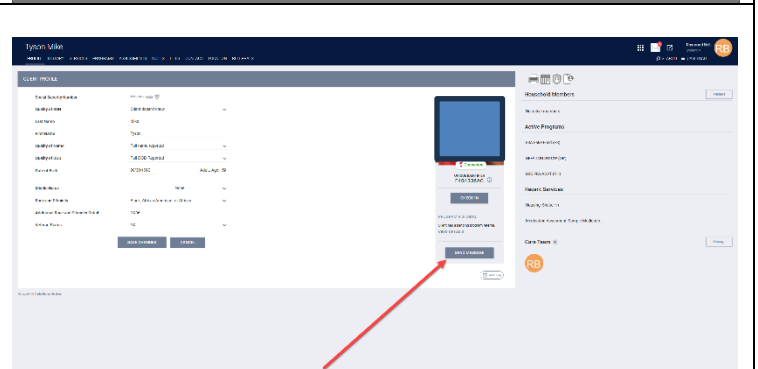
1.6 If you click on that connected it'll show their contact information they used to sign up



2.0 Messaging the client

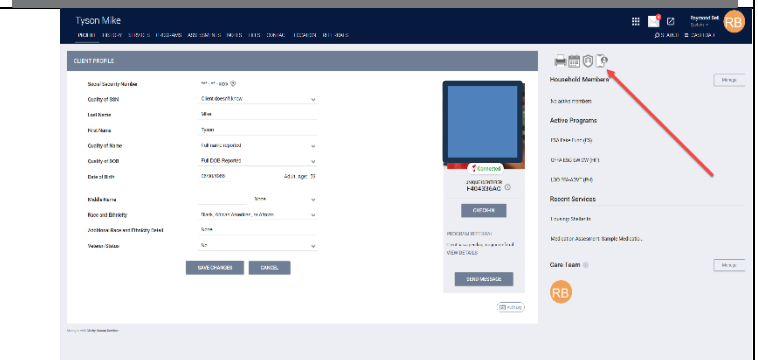
2.1 On the client profile click send message

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 icon 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

The top screenshot shows the 'Request History' table with the following data:

Requested By	Type	Name	Date	Status
Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending
Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending
Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending
Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending
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Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending
Requester of Self	Document	Family Health & Safety Agency Agreement	2019-10-23 10:00:00	Pending

The bottom screenshot shows the 'Request Documents' modal window with the following fields:

- Document:
- Location:
- Requester Information:

4.0 Can't access email or login with email

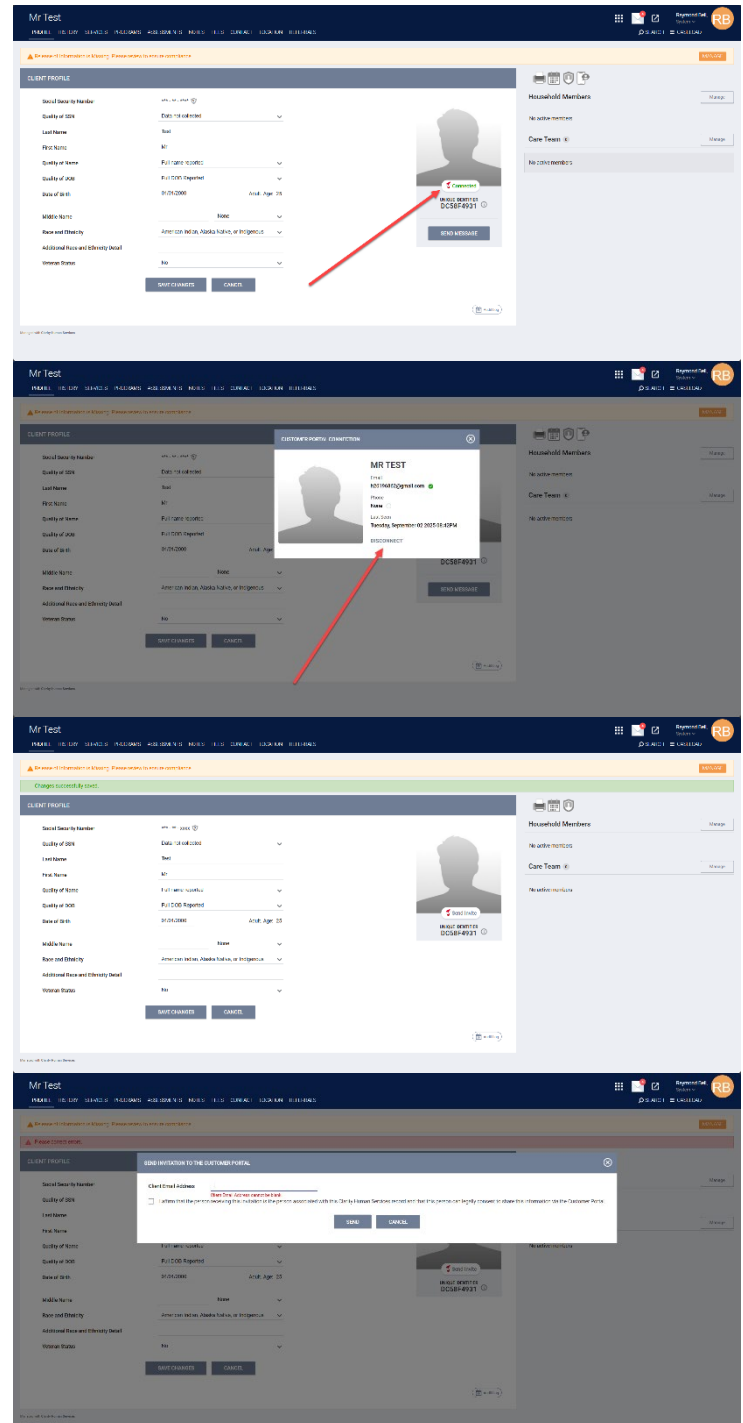
4.1 If you can't login with their email the best thing to do is to resend the invite to the client

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



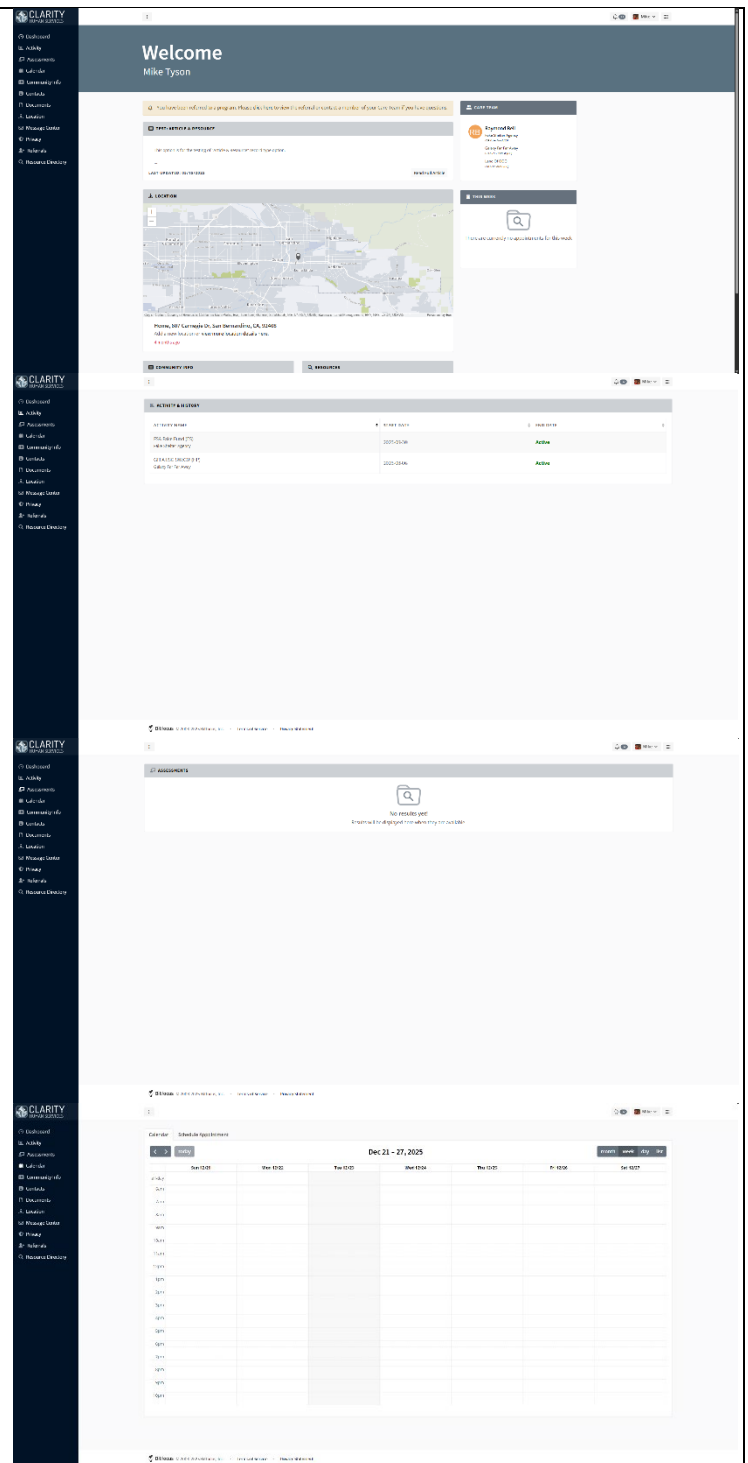
5.0 What's in the client portal

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



5.9 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

The screenshot displays the CLARITY user interface with a dark blue sidebar on the left containing navigation links: Dashboard, Messages, Referrals, Privacy, and Resource Directory. The main content area shows four different views:

- MESSAGES**: A table with columns for Name, Email, and Date. It lists two messages from 'John Doe' and 'Jane Doe'.
- REFERRALS**: A table with columns for Name, Referral Type, Referral Status, and Date. It lists two referrals: 'Mental Health' and 'Substance Use'.
- PRIVACY**: A table with columns for Name, Release of Information, and Date. It lists two releases: 'Mental Health' and 'Substance Use'.
- RESOURCE DIRECTORY**: A map view showing various locations marked with pins. A list of resources is displayed on the left side of the map, including 'Encampment Program', 'Mental Health Services', 'Substance Use Services', and 'Housing Services'.



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5.0 Exit Client 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**

Mr. Wendal Homeless Person

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Encampment 09/13/2024 - Perris hills park encampment Encampment CA-609 Encampment System ⓘ	10/11/2024	Active	Individual
Encampment 09/13/2024 - Perris hills park encampment Encampment CA-609 Encampment System ⓘ	10/04/2024	10/11/2024	Individual
Encampment 09/13/2024 - Perris hills park encampment Encampment CA-609 Encampment System ⓘ	09/25/2024	09/25/2024	Individual

PROGRAMS AVAILABLE

Mr. Wendal Homeless Person

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PROGRAMS AVAILABLE

PROGRAM: ENCAMPMENT 09/13/2024 - PERRIS HILLS PARK ENCAMPMENT

Enrollment History Forms

Program Service History

No results found

Reservation Service Referral

Exit

PROGRAM: ENCAMPMENT 09/13/2024 - PERRIS HILLS PARK ENCAMPMENT

Enrollment History Forms

End Program for client Mr. Wendal Homeless Person

Program Exit Date 10/11/2024

Destination Select

SAVE & CLOSE CANCEL