



# Homeless Services

## Client Portal Help Guide for Staff

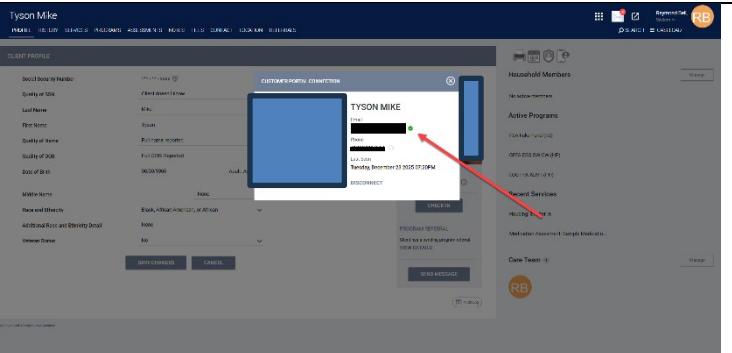
The purpose of this quick reference is designed to Help staff with the client portal.

### 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

The screenshots show the 'CLIENT PROFILE' screen for three different clients: Doe1 John, Doe2 John, and Tyson Mike. Each profile includes fields for Social Security Number, Date of Birth, Last Name, First Name, Qualify of Name, Qualify of Job, Date of Birth, Marital Status, Home and Street, and Additional Race and Ethnicity Detail. A 'SEND INVITES' button is visible on the Doe1 John and Doe2 John screens. A modal window titled 'SEND INVITATION TO THE CUSTOMER PORTAL' is shown for Doe2 John, prompting the user to enter an email address ('John.Doe@clarity.com') and check a box ('I am the person deciding the client or the person associated with the San Bernardino County agency invited the client to use the Customer Portal'). The final screenshot shows the Tyson Mike profile with a red arrow pointing to the 'Connected' status indicator next to the client's name.

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

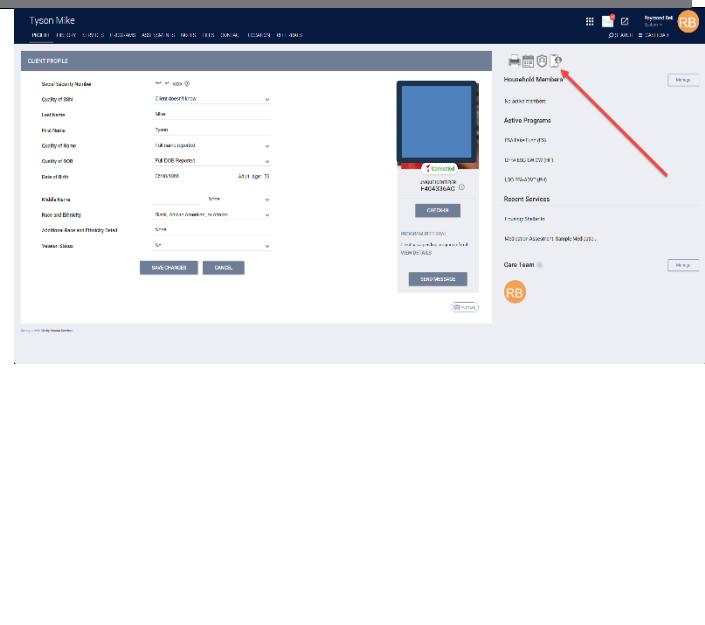


## 2.0 Messaging the client

- 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

The image contains two side-by-side screenshots of the Encampment Program Customer Portal interface.

**Screenshot 1: Request History**

This screenshot shows a table of document requests:

Requester	Type	Name	Date	Note
Homeless System	Document	Family & Social Services - ATTEND AGREEMENT	2023/03/23 10:05:24	Pending
Homeless System	Document	City Clerk Office - City Clerk Annex	2023/03/23 10:05:24	Canceled
Homeless System	Document	Person Identification - BIR Certificate	2023/03/23 10:05:24	Complete
Homeless System	Document	Finance and Income - Financial Statement	2023/03/23 11:18:55	Complete
Homeless System	Document	Other City-Run - Other City-Run	2023/03/23 11:18:55	Complete
Homeless System	Document	Finance and Income - Bank Records	2023/03/23 11:18:55	Complete
Homeless System	Document	Person Identification - BIR Certificate	2023/03/23 10:05:24	Complete

A red arrow points to the "SEND NEW REQUEST" button at the top right of the table.

**Screenshot 2: Request Document**

This screenshot shows a modal dialog titled "SEND REQUEST TO THE CUSTOMER PORTAL". It includes dropdown menus for "Document", "Location", and "Reason of Request".

## 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 reinvoke them by clicking invite. From here just type their preferred email and hit send

The screenshots illustrate the steps for disconnecting and re-inviting a client:

- Screenshot 1: Client Profile - Disconnect**  
The "Connected" status is shown next to the client's name. A red arrow points to the "DISCONNECT" button.
- Screenshot 2: Client Profile - Disconnected**  
The "DISCONNECTED" status is shown next to the client's name. A red arrow points to the "REINVITE" button.
- Screenshot 3: Client Profile - Change Successful**  
A green banner at the top indicates "Changes successfully saved".
- Screenshot 4: Client Profile - Edit Invitation**  
A modal window titled "Edit Invitation to the Customer Portal" is open. It shows the client's information and a checkbox for "Client Email Address". A red arrow points to this checkbox.

## 5.0 What's in the client portal

### 5.1 A dashboard with a summary of your information

The dashboard features a top navigation bar with links for Dashboard, Home, Assessments, Activities, Community Info, Services, Locations, Message Center, Privacy, Help, and Resource Directory. Below the navigation is a "Welcome" section for Mike Tyson. It includes a "Programs you're enrolled in" card with a map of Los Angeles and a "Community Info" card with a weather forecast for Los Angeles.

### 5.2 Programs you're enrolled in

A table titled "Programs you're enrolled in" shows two entries: "2023 Safety Patrol (2)" and "2023 Safety Patrol (1)". Both entries have a status of "Active".

Program Name	Start Date	Status
2023 Safety Patrol (2)	2023-01-01	Active
2023 Safety Patrol (1)	2023-01-01	Active

### 5.3 Select assessments you've done

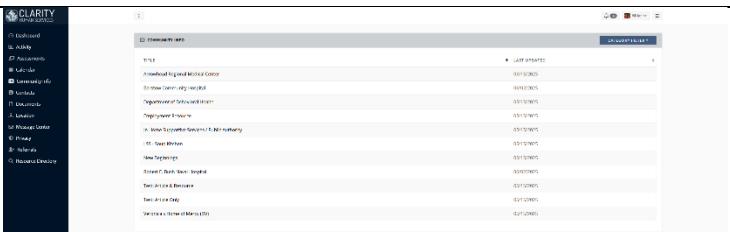
A table titled "Assessments" shows one entry: "No results yet".

No results yet
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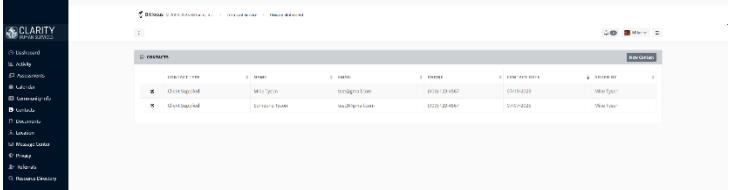
### 5.4 A Calendar managed by your care team

A calendar titled "Schedule Appointment" for December 21-27, 2025. The calendar grid shows several scheduled appointments across different days and times. The sidebar includes links for "Dashboard", "Home", "Assessments", "Activities", "Community Info", "Services", "Locations", "Message Center", "Privacy", "Help", and "Resource Directory".

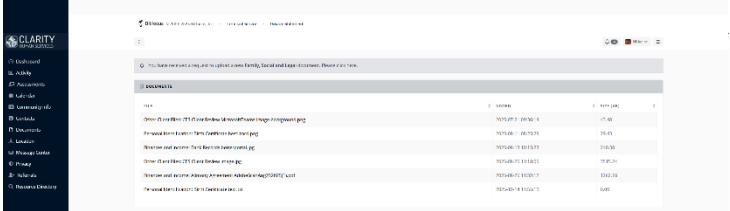
## 5.5 Community info for definitions of resources



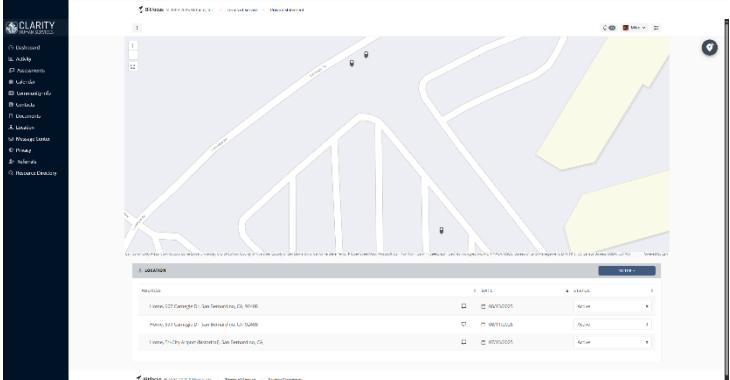
## 5.6 Contact information you've provided for your care team. Which you can update



## 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**

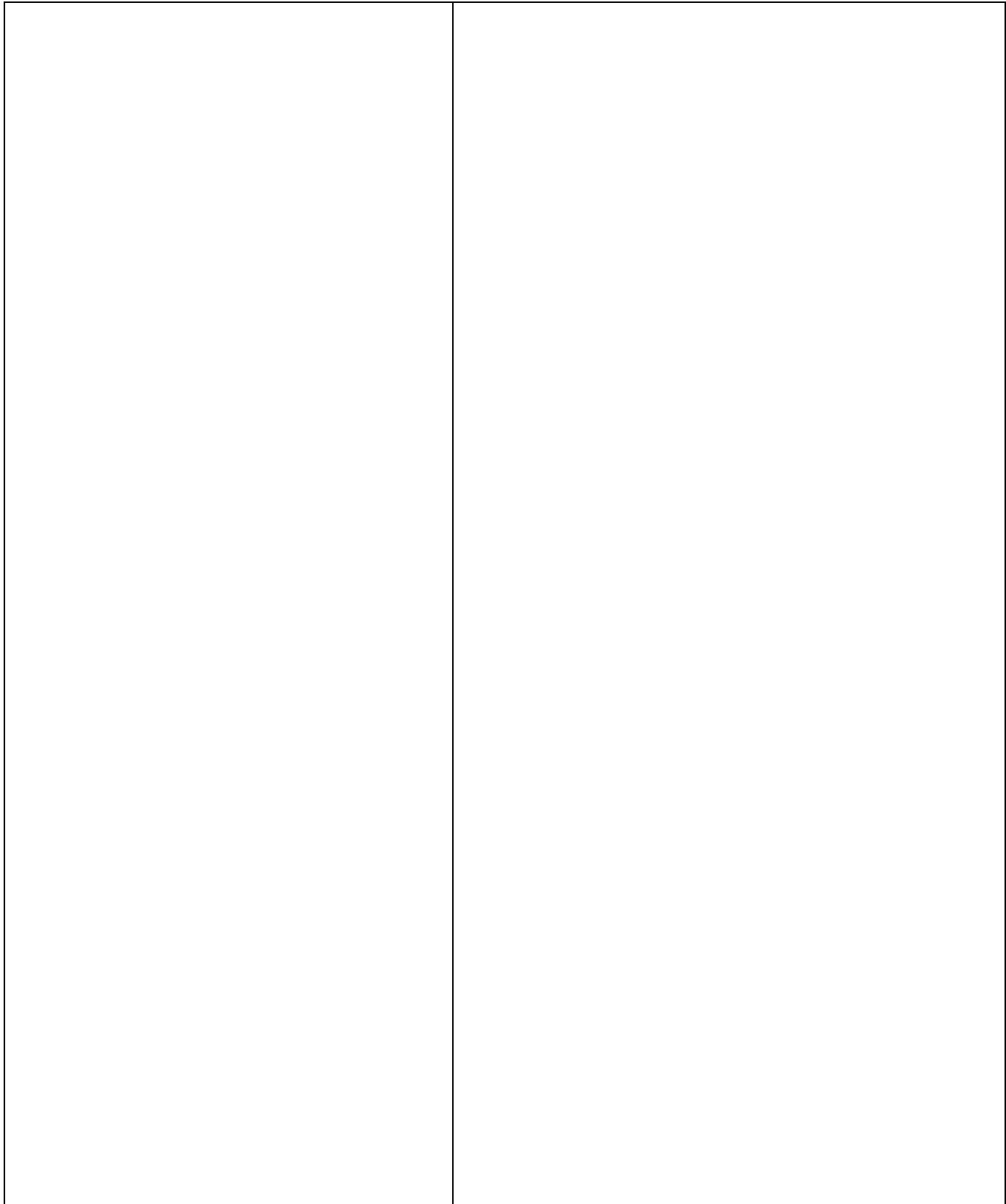


**5.12 The resource Directory allows you to see what resources are close to you**



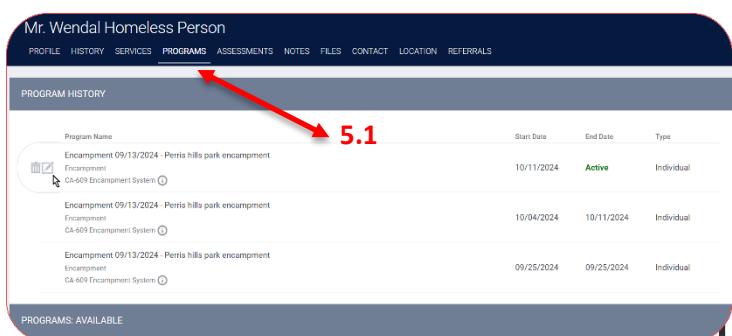
**For unique issues please contact us via email:  
[help@ohs-hmis.on.spiceworks.com](mailto:help@ohs-hmis.on.spiceworks.com)**





## 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.



Mr. Wendal Homeless Person

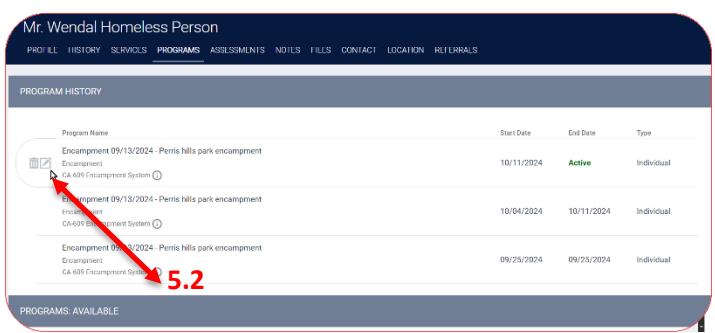
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

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

5.1 Click the edit tool next to the active encampment program



Mr. Wendal Homeless Person

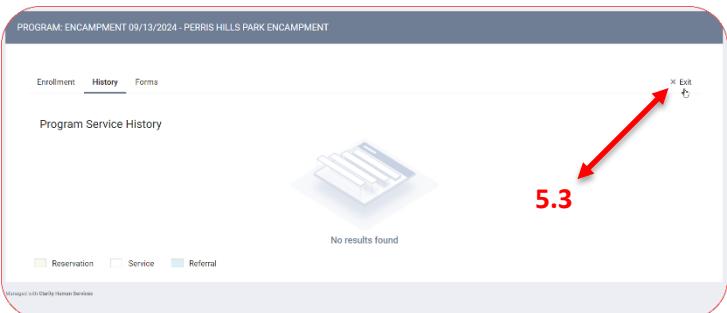
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PROGRAMS AVAILABLE

5.2 In the program service history window, click Exit



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

Enrollment History Forms

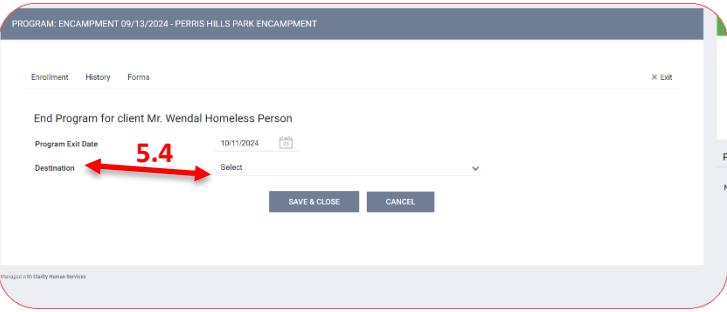
Program Service History

No results found

Legend: Reservation Service Referral

X Exit

5.3 Select a destination from the dropdown



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

Enrollment History Forms X Exit

End Program for client Mr. Wendal Homeless Person

Program Exit Date: 10/11/2024

Destination:  5.4

SAVE & CLOSE CANCEL

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