



Homeless Services

Client Portal Help Guide for Staff

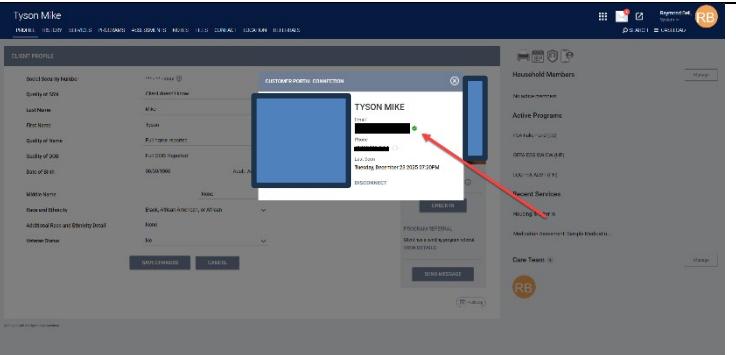
The purpose of this quick reference is designed to Help staff with the client portal.

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

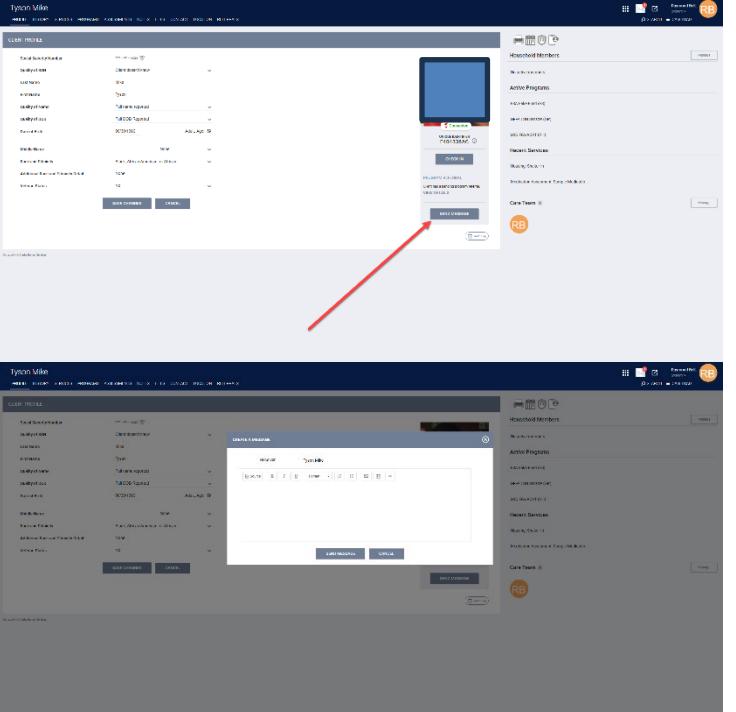
The screenshots show the 'CLIENT PROFILE' screen for three different clients: Doe1 John, Doe2 John, and Tyson Mike. Each profile includes fields for Social Security Number, Date of Birth, Last Name, First Name, Qualify of Name, Qualify of Job, Date of Birth, Marital Status, Home and Street, and Additional 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 'CLIENT PROFILE' screen for Tyson Mike, where the 'Connected' status is highlighted with a red arrow pointing to it.

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



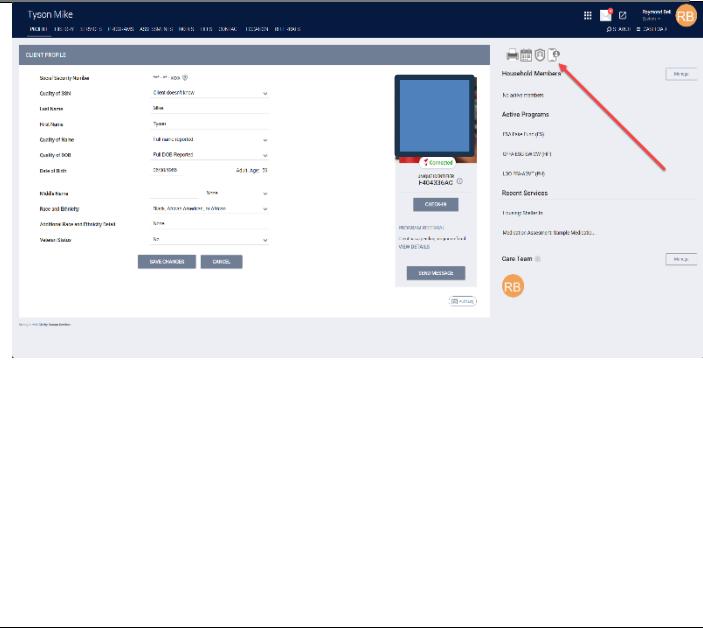
2.0 Messaging the client

- 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 screenshots of the Encampment Program Customer Portal interface, both titled "Tyson Mike".

Screenshot 1: Request History

This screenshot shows a table of document requests:

Request ID	Type	Name	Date	Note
Internal-123	Document	Family Health History - Attorney Agreement	2023-09-23 10:05:24	Pending
Internal-124	Document	My Client File - Case Notes	2023-09-23 10:05:24	Completed
Internal-125	Document	Person Identification - BIR Certificate	2023-09-23 10:05:24	Completed
Internal-126	Document	Finance and Income - Case Notes	2023-09-23 11:16:25	Completed
Internal-127	Document	Other Case File - Case Notes	2023-09-23 11:16:25	Completed
Internal-128	Document	Finance and Income - BIR Receipts	2023-09-23 10:14:27	Completed
Internal-129	Document	Person Identification - BIR Certificate	2023-09-23 10:15:25	Completed

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 screenshot shows the 'CLIENT PROFILE' section for a client named 'Mr Test'. The 'Status' dropdown is set to 'Connected'. A red arrow points to this status indicator.

The screenshot shows the 'CLIENT PROFILE' section for the same client 'Mr Test'. The 'Status' dropdown is now set to 'Disconnected'. A red arrow points to this status indicator.

The screenshot shows the 'CLIENT PROFILE' section for the client 'Mr Test'. The 'Status' dropdown has been changed back to 'Connected'. A red arrow points to this status indicator.

The screenshot shows the 'CLIENT PROFILE' section for the client 'Mr Test'. A modal dialog box titled 'EDIT INVITATION TO THE CUSTOMER PORTAL' is open. It contains a field labeled 'Client Email Address' with the value 'test1@encampment.com'. A red box highlights this field. Below it is a note: 'Please enter the email address of the person associated with the Client's Known Person record and that the user can legally choose to share the information via the Customer Portal.' At the bottom of the dialog are 'SEND' and 'CANCEL' buttons. A red arrow points to the 'Client Email Address' field.

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. The main area includes a "Welcome" section for Mike Tyson, a "Community Info" map of Los Angeles, a "Weather Forecast" for Los Angeles, and a "Community Info" section with a map of Torrance, CA.

5.2 Programs you're enrolled in

A table titled "Program Enrollment" lists two active programs: "MHS Safety Patrol (2)" and "GATE 2024". Both entries show a start date of "2023-09-01" and an end date of "2023-09-30", both marked as "Active".

Program Name	Start Date	End Date	Status
MHS Safety Patrol (2)	2023-09-01	2023-09-30	Active
GATE 2024	2023-09-01	2023-09-30	Active

5.3 Select assessments you've done

A table titled "Assessments" shows one entry: "No results yet". A note below states: "Assessments displayed here are only for the last 90 days."

Assessments
No results yet

5.4 A Calendar managed by your care team

A calendar titled "Schedule Appointment" for December 21-27, 2025. The calendar grid shows various time slots from 8:00 AM to 8:00 PM daily. No specific events are listed in the calendar grid.

5.5 Community info for definitions of resources

The screenshot shows a sidebar menu on the left with options like Dashboard, My Profile, Documents, Activities, Community Info, Contacts, Requests, Locations, Message Center, Privacy, Helpdesk, and Resource Directory. The main content area displays a table titled "Community Info" with columns for ID, Name, Description, and Last Updated. The data includes:

ID	Name	Description	Last Updated
1	Foodbank Regional Market Center	Foodbank Regional Market Center	2023-08-01
2	Food Pantry - Local	Food Pantry - Local	2023-08-01
3	Department of Health and Senior Services	Department of Health and Senior Services	2023-08-01
4	Programs & Services	Programs & Services	2023-08-01
5	5. New Supplier Services (RFP) Authority	New Supplier Services (RFP) Authority	2023-08-01
6	6. New Work	New Work	2023-08-01
7	New Requests	New Requests	2023-08-01
8	Request - Basic Health Hospital	Request - Basic Health Hospital	2023-08-01
9	Self-Assessment Requests	Self-Assessment Requests	2023-08-01
10	Self-Assessments	Self-Assessments	2023-08-01

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

The screenshot shows a sidebar menu on the left with options like Dashboard, My Profile, Documents, Activities, Community Info, Contacts, Requests, Locations, Message Center, Privacy, Helpdesk, and Resource Directory. The main content area displays a table titled "Care Team" with columns for ID, Name, Email, Phone, and Last Update. The data includes:

ID	Name	Email	Phone	Last Update
1	Overlooked	Me@Gmail.com	555-555-5555	2023-08-01
2	Unlocated	Homeless@Me.com	555-555-5556	2023-08-01

5.7 Documents you've uploaded for your care team. You can also upload documents to your care team requests

The screenshot shows a sidebar menu on the left with options like Dashboard, My Profile, Documents, Activities, Community Info, Contacts, Requests, Locations, Message Center, Privacy, Helpdesk, and Resource Directory. The main content area displays a table titled "Documents" with columns for ID, Name, Size, and Last Update. The data includes:

ID	Name	Size	Last Update
1	Overlooked_CPF and details of recent home base changes.pdf	1024KB / 10.5MB	2023-08-01
2	The usual documents from Overlooked have been shared.pdf	1024KB / 10.5MB	2023-08-01
3	Overlooked and Overlooked Homeless have been shared.pdf	1024KB / 10.5MB	2023-08-01
4	Overlooked_CPF and details of recent home base changes.pdf	1024KB / 10.5MB	2023-08-01
5	Overlooked and Overlooked Homeless have been shared.pdf	1024KB / 10.5MB	2023-08-01
6	The usual documents from Overlooked have been shared.pdf	1024KB / 10.5MB	2023-08-01

5.8 Location allows you to keep your care team updated with your location in case they need to find you

The screenshot shows a sidebar menu on the left with options like Dashboard, My Profile, Documents, Activities, Community Info, Contacts, Requests, Locations, Message Center, Privacy, Helpdesk, and Resource Directory. The main content area displays a map with several locations marked. Below the map is a table titled "Locations" with columns for Address, ID, and Action. The data includes:

Address	ID	Action
123 Main St, San Francisco, CA, 94101	1234567890	Remove
234 Elm St, San Francisco, CA, 94102	9876543210	Remove
345 Pine St, San Francisco, CA, 94103	0987654321	Remove

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

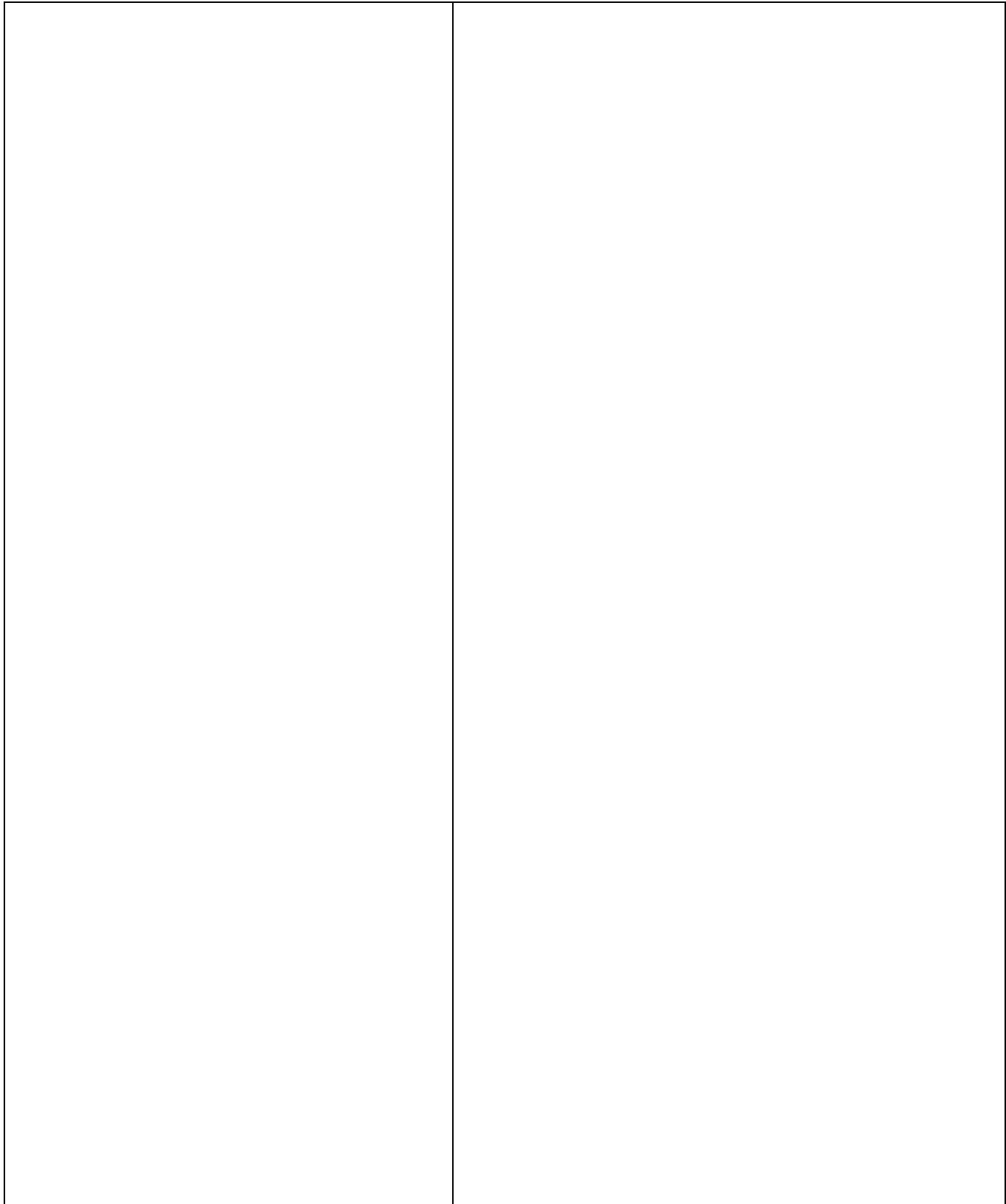


5.12 The resource Directory allows you to see what resources are close to you



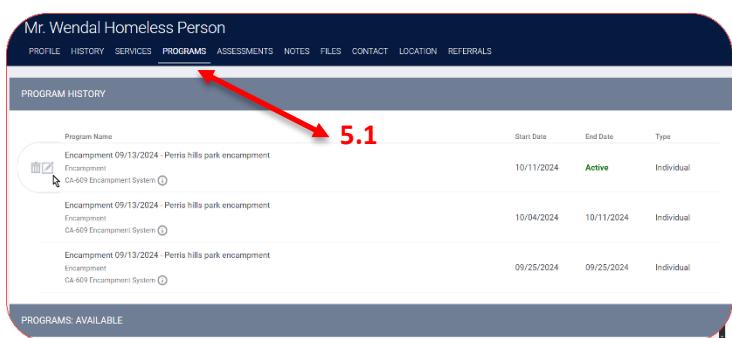
**For unique issues please contact us via email:
help@ohs-hmis.on.spiceworks.com**





5.0 Exit 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

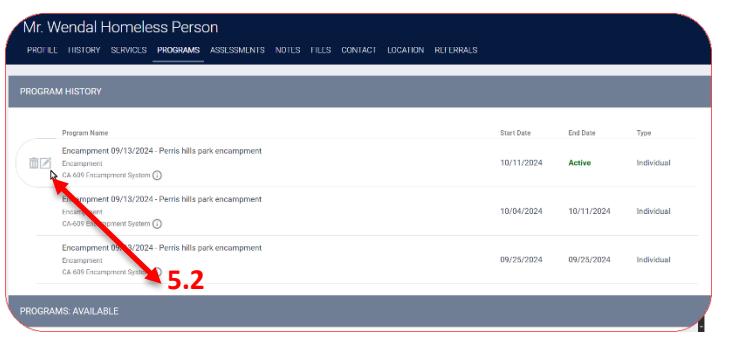
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

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

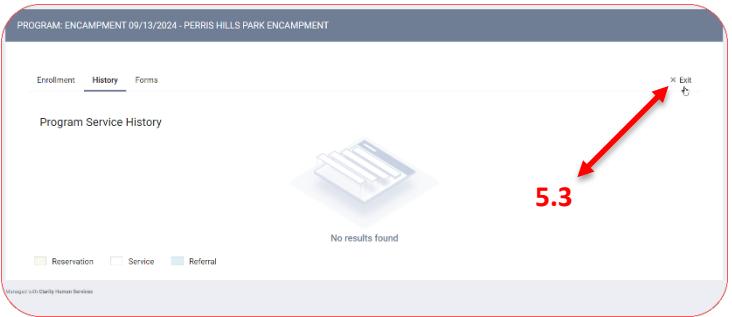
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

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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

5.2 In the program service history window, click Exit



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

Enrollment History Forms

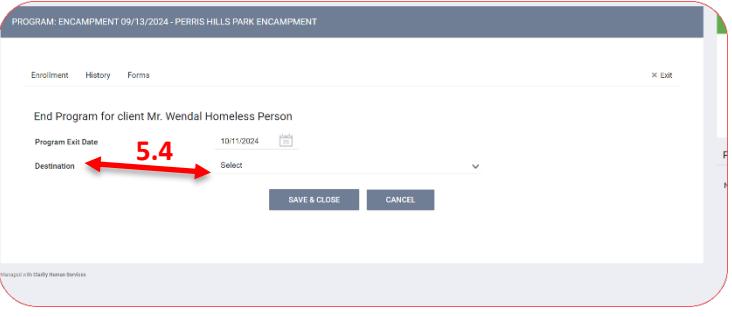
Program Service History

No results found

Legend: Reservation Service Referral

Manager with Child & Family Human Services

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

Manager with Child & Family Human Services

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help@ohs-hmis.on.spiceworks.com**