Managing Client Data in Clarity

Previous: Obtaining and Documenting Consent

Policy: Data Management and Security

Purpose

Ensuring that Anything Helps clients are enrolled in the programs they are eligible for and receive the resources they require in a timely and compliant manner. These processes ensure the protection of client data and support our outreach, case management, tenancy support and housing navigation services.

Definitions

Dynamic Field: Fields that appear or disappear based on the information entered, enhancing the efficiency of data entry.

Program Enrollment: The process of formally recording a client's participation in a service program within the system.

Procedures

Client Intake

- Ensure the client is not already in the system by entering the first three letters of their first and last names and verify the client's identity using their social security number and date of birth.
- If no duplicate is found, click on "Add Client" to open the client intake page.
- Fill out the client information as accurately as possible, completing any dynamic fields that generate based on the entered information. For clients under 18, the veteran status question will not appear.
- Complete and collect the ROI as required – If the ROI is soft required, a yellow bar will appear indicating the absence of an ROI, but this will not prevent client creation.
- Click “Add Record” once all fields are completed. A green ribbon indicates successful client creation. If there are errors that need to be corrected, a red ribbon will appear.

Program Enrollment

- Navigate to the client profile and click on the "Programs" tab.
- Select the relevant program for enrollment.
- Complete the enrollment by filling in the required universal data elements such as income and other relevant details.
- After enrollment, navigate to the program page to view client activity and manage staff assignments.
- For households, follow the same steps above, and ensure all members are correctly enrolled.

Data Management

- Add case notes via the “Programs” and “Client” tabs, ensuring PII is appropriately handled.
- Manage public alerts for urgent client needs and remove alerts when they are no longer necessary.
- Upload forms and files at either the client or program level as pertinent to the context.
- Provide services to clients via the “Client” and “Programs” tabs, tracking appropriately.
- Capture client location data using the “Location” tab, inputting addresses or using GPS for accuracy.
- Manage client contact information under the “Contact” tab, toggling active/inactive status as needed.
- Regularly update client information using the “Status Assessment” if there are any changes in their situation.
- Conduct an “Annual Assessment” within the 30-day window of the client's program start date.
- Maintain historical data and ensure it is stored for a minimum of seven years.

Client Exit

- Navigate to the client profile and select the appropriate program.
- Click on the "Exit" button and complete the exit form, ensuring accurate data collection.
- For households, follow the same steps above, and ensure all members are correctly exited.