Bitfocus

MyConnectSV

CLARITY HUMAN SERVICES

SANTA CLARA COUNTY

PROVIDER TRAINING GUIDE

FEBRUARY 2026 |VERSION 2.6

CONTENTS

ABOUT MyConnectSV

MyConnectSV is the secure Customer Portal connected to Clarity Human Services, Santa Clara County's Homeless Management Information System (HMIS). MyConnectSV is the local name for this module, but you may also see it referred to as the Customer Portal within Clarity Human Services. MyConnectSV provides people experiencing homelessness or receiving services or housing with access to components of their HMIS records, tools to communicate with providers, and information and resources to empower them in their journey to permanent housing. Bitfocus developed MyConnectSV in partnership with Destination: Home, the County of Santa Clara, and individuals with lived experience of homelessness to address critical concerns identified in the Technology Needs Assessment of the Santa Clara County Supportive Housing System.

Participant-Centered Tools

MyConnectSV introduces new participant-centered tools designed to support participants in the case management and housing navigation process by increasing access to services and improving communication methods between participants and their care team members. Key features of MyConnectSV include a secure message center, the ability to upload documentation, sign new Releases of Information, complete assessments, and more.

Collaborative Approach

MyConnectSV was designed for participants experiencing homelessness with input from individuals with lived experiences of homelessness, including actively homeless individuals. The tools included can also help providers increase coordination with participants and improve the efficiency of the case management process.

Connection to Clarity Human Services

Clarity Human Services is the County of Santa Clara's designated HMIS system. MyConnectSV is the Customer Portal module embedded within HMIS that provides participants with access to and the ability to update components of their HMIS record, including their personal contact information, geolocation, and their Release of Information. Providers can request updated information from participants through HMIS, and participants receive and respond to these requests within MyConnectSV. When participants complete actions within MyConnectSV, such as uploading documentation or completing an assessment, these updates are reflected and accessible on the participant record within HMIS in real-time. Many features provide the ability to track participant progress all in one centralized location. Providers can also send mass messages and requests to multiple participants at one time, saving you time and energy!

PROVIDER ROLES & RESPONSIBILITIES

Service providers who utilize MyConnectSV will work closely with participant participants. Provider responsibilities include:

Participate in training for MyConnectSV workflow and functionality

Training will be provided for all providers participating in MyConnectSV through the Bitfocus Santa Clara County Learning Management System.

Provide training and support to your participants who participate in MyConnectSV

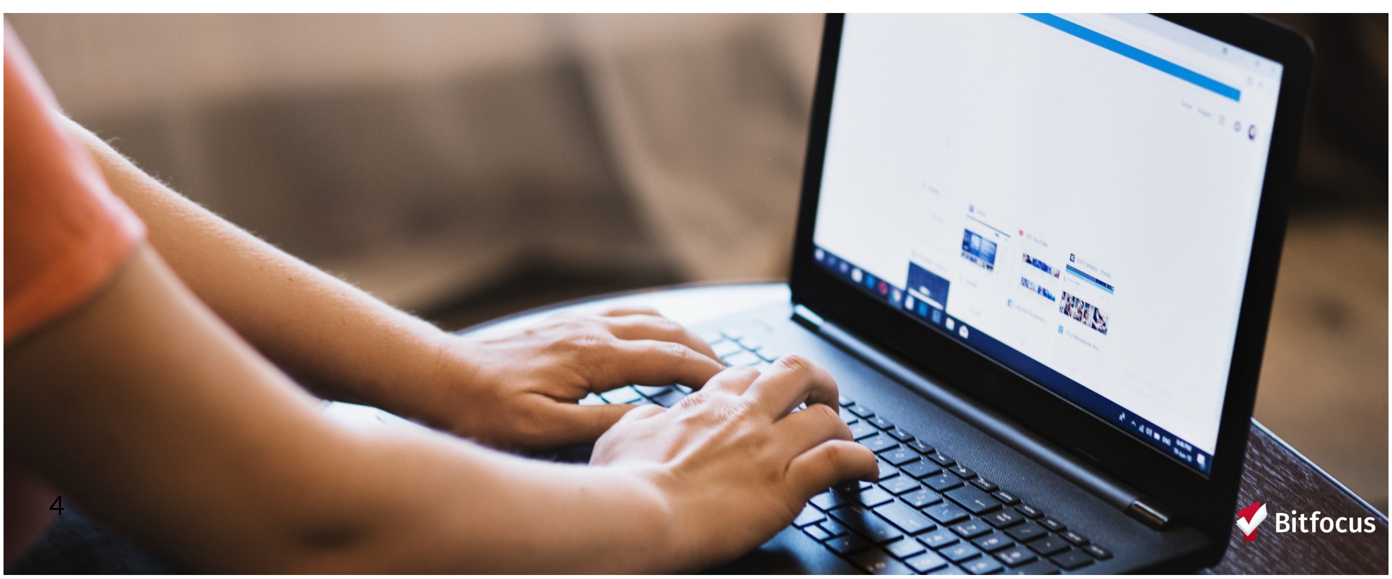
Providers serve as the primary connection between participants and MyConnectSV, and providers are responsible for delivering initial training to participant participants and offering ongoing support when necessary. Providers will receive training on the participant onboarding process, and it is anticipated that MyConnectSV training will require 15 to 20 minutes per participant.

Send MyConnectSV invitation to participants through HMIS

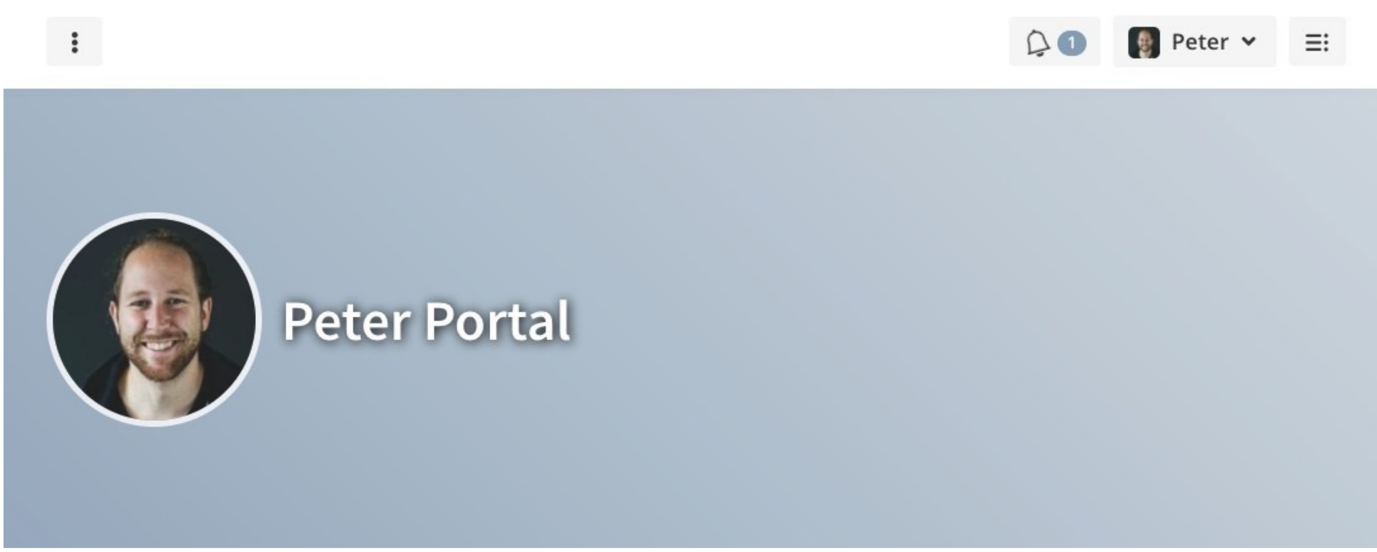
Provider participants are responsible for sending an invitation to participants to participate in MyConnectSV. Invitations are sent to the participants via email, and the invitation is initiated through a link on the participant's HMIS profile page. This is the first step of the account creation process. We ask providers to invite as many participants to MyConnectSV as possible.

Utilize MyConnectSV features within the case management process

Provider participants should use MyConnectSV regularly to support participants through the case management process. This guide provides recommended strategies for using MyConnectSV, and provider participants will be instrumental in discovering and establishing new use cases to maximize MyConnectSV's impact.



ACCOUNT MANAGEMENT

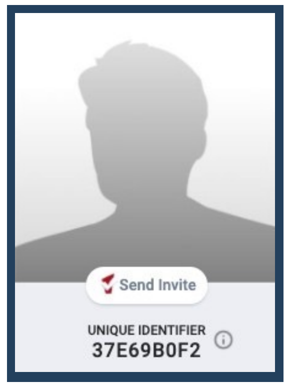


ACCOUNT CREATION: Sending Invitations

The participant's account creation process includes multiple steps to ensure the safety and confidentiality of a participant's personal information. The process begins with an invitation initiated from HMIS by the service provider to the participant. It also requires the participant to complete a two-factor authentication process to gain account access. Participants without access to a personal mobile device are still eligible for an account, and additional recommendations are included in the account creation instructions for participants using a shared device.

Sending Invitations to Participants Through Clarity

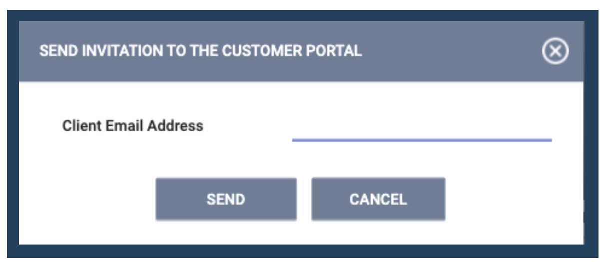
The first step of the account creation process requires a provider to initiate an invitation to join MyConnectSV (the Customer Portal within Clarity). Participant invitations are generated through the following steps:



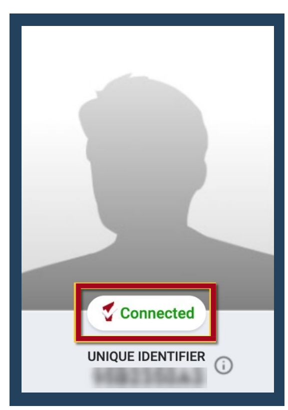
(Note: If you do not see a Send Invite button, the agency may not be configured for MyConnectSV Access, and you should contact your system administrator.)

Navigate to the participant profile page in HMIS and click the Send Invite button, which is located at the

Enter the participant email address in the pop-up box and Send. MyConnectSV invitation button will now say Invite Sent.

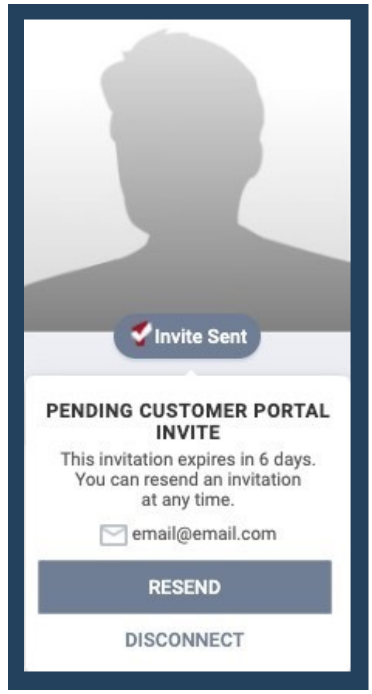


The Invite Sent button will change to Connected once the participant has followed the steps in the next section to create a MyConnectSV account. If a participant doesn't sign up right away, they'll receive emails reminding them their invitation will be expiring soon. If an account is not created from the invitation email within the number of specified days, the invite will expire and a new invitation email will need to be sent (following the steps outlined above).

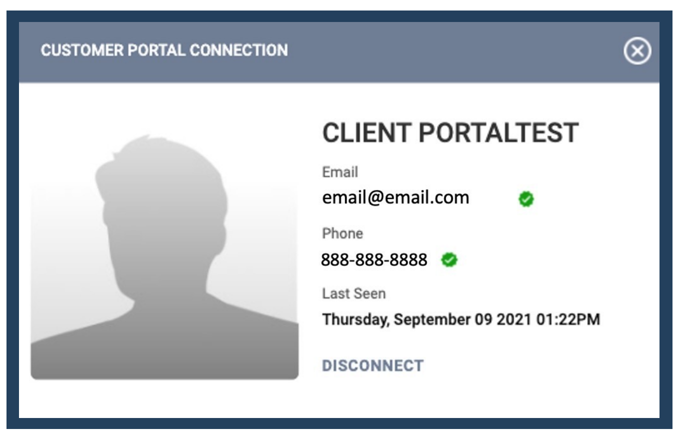


ACCOUNT CREATION: Reviewing Account Status

Invitation Status
Hovering over the Invite Sent button will display the number of days to invitation expiration, the email address the invite was sent to, and the options to manually Resend or Disconnect the invite.

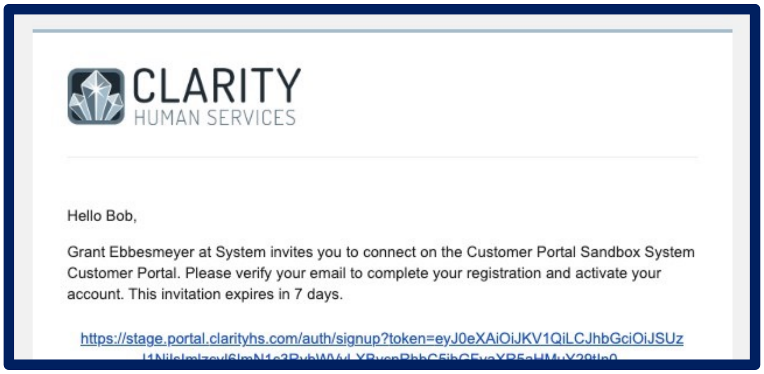


Account Status for Active Accounts
Once the participant has created their account, clicking on the Connected button will display a summary of MyConnectSV account information including the email address and phone number associated with MyConnectSV account as well as a Last Seen date and time for when MyConnectSV account was most recently accessed by the participant. This is a useful reference for when a participant reaches out for support accessing their account



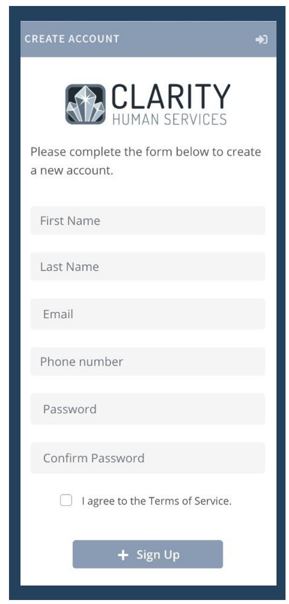
ACCOUNT CREATION: Participant Instructions

Participant Email Invitation
After a provider sends an invitation to join MyConnectSV, the participant will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation." Clicking the link will direct the participant to the MyConnectSV site to register an account.

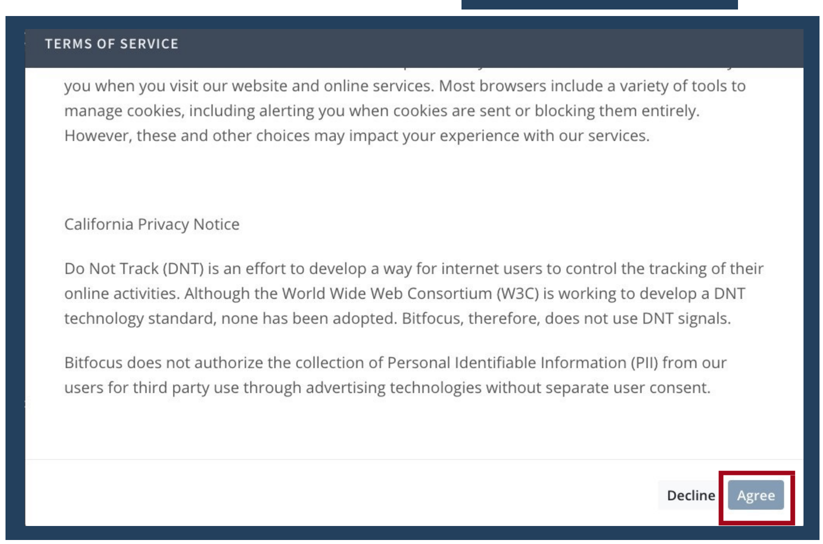


Participant Credentials
The participant enters their first name, last name, email address, mobile phone number, and password to start registration. The email address will be the username. Info bubbles appear to provide additional information about field requirements.

The password must be at least 8 characters ling and contain at least one special character, one upper case letter, and one lower case letter.



Terms of Service
The participant will need to click I Agree to the Terms of Service to review the site agreement. When the Terms of Service appear, they will need to scroll to the bottom of the Terms to click the Agree button. Agreeing to the Terms of Service is required to access MyConnectSV.



ACCOUNT LOGIN: Participant Instructions

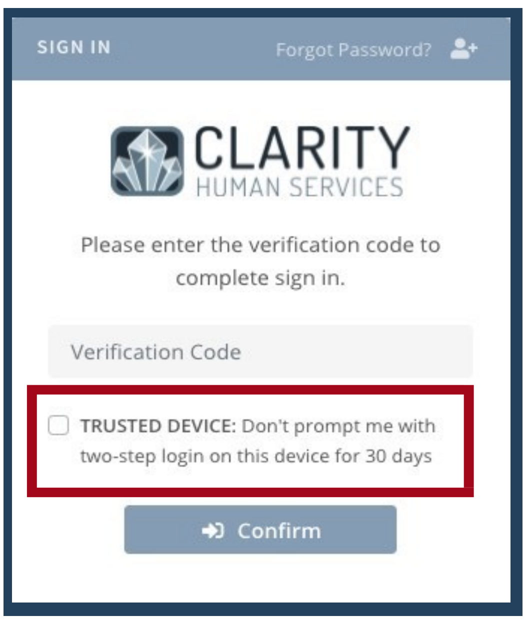
To log into their MyConnectSV account at any time, participants should visit the following web address:

portal.clarityhs.com

Encourage the participant to write this address down or save it in their device's bookmarks to ensure it's not lost.

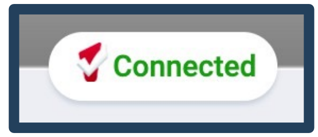
Authentication Process

MyConnectSV is secured with multi-factor authentication. This means that in addition to entering the password, the system will send a verification code to the email address used at account creation. The code sent to the participant's email must be entered into the login screen to access the account. After authentication is complete, the account will be made active.

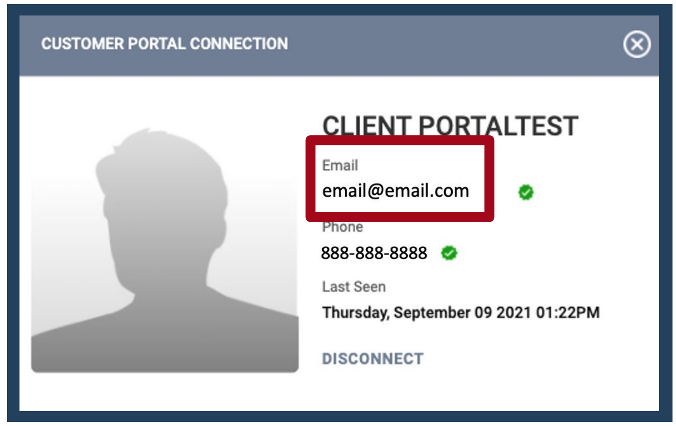


There is an option to mark a trusted device to limit the need to enter a code from each log in to once every 30 days. It is advised not to mark a public or shared device as trusted to protect your personal information and security. Enter the code and click Confirm. This completes the log-in process, and you will be directed to your Portal dashboard.

TROUBLESHOOTING LOGIN ISSUES



If a participant reports that they are having difficulty logging into their MyConnectSV account, you can start by trying the following:

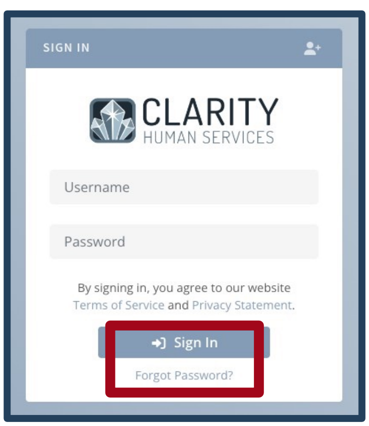


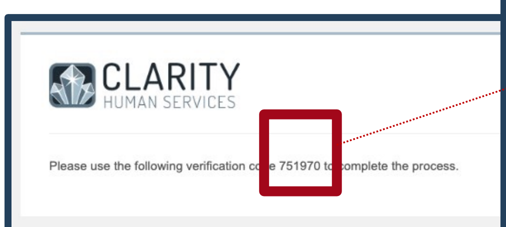
Navigate to the participant's profile in Clarity and confirm they have a Connected icon above their unique identifier.

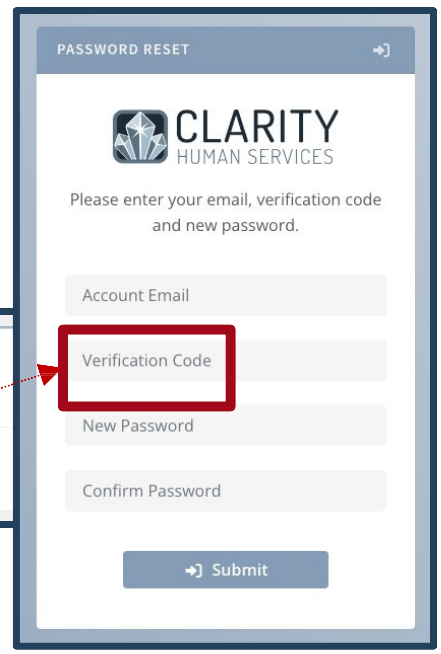
Clicking on the Connected button will display a summary of MyConnectSV account information including the email address associated with the MyConnectSV account. Confirm they are using this exact email address to log in. If they need to change their email address, click Disconnect and send a new invitation to their new email address.

Resetting Account Password

If a participant forgets their MyConnectSV password, they can easily reset it by visiting portal.clarityhs.com and clicking the "Forgot Password?" link under "Sign In." On the next screen, enter the email address connected to the MyConnectSV account; the participant will receive an email with a verification code, which they will enter on the next screen and set a new password.







If a participant with an active MyConnectSV account is still having login issues after attempting these steps, providers can submit a support request for our team to investigate further by emailing [sccsupport@bitfocus.com.](mailto:sccsupport@bitfocus.com) Please do not have participants contact Bitfocus for support directly.

ACCOUNT DISCONNECTION: Provider Instructions

Account disconnection options are available for providers and participants. Reasons for account disconnection may include loss of access to the email address associated with their account, potential security breach, or participant desire to suspend access. The participant account will still exist, but the participant will not be able to access any account information after the disconnection is complete.

Reasons for Account Suspension

There are a variety of reasons a participant's MyConnectSV account may need to be disconnected:

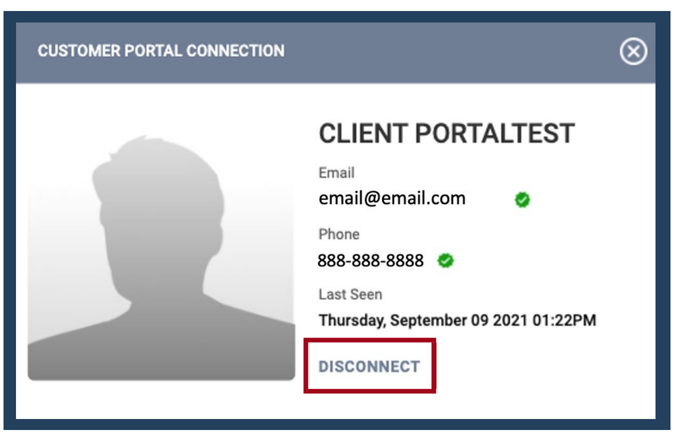
- Updated Participant Email Account
  If a participant updates their email address or loses access to the email address connected to MyConnectSV, providers will need to take steps to disconnect the current account and send a new MyConnectSV invitation to an updated email address.

- Participant Request to Suspend
  A participant may request to disconnect their account verbally or in writing. Providers are encouraged to respond to the request as soon as possible.

- MyConnectSV Account Security Breach
  If there is concern that a participant's MyConnectSV account has been compromised, their account should be immediately disconnected and the system administrator should be notified.

Instructions for Account Disconnection

Navigate to the participant profile page and click the Connected/Invite Sent button, which is located at the bottom of the participant photo section. Click Disconnect, the button display under the participant profile picture will change to Send Invite, indicating there is no longer a connection between the Clarity profile and MyConnectSV. (Note: After a disconnection, if a participant uses the email to log into MyConnectSV, the dashboard and navigation panel will not display any Clarity information.)



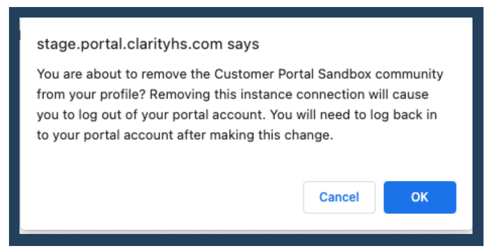
After the account is disconnected, an invite to a new email address can be sent. The participant record is stored in the Clarity database, so when a new email address MyConnectSV account is connected, historical information from the previous account will be available.

ACCOUNT DISCONNECTION: Participant Instructions

Within MyConnectSV, participants have the option to disconnect their MyConnectSV account. If they opt to disconnect their account, all information will be removed from their MyConnectSV account. If participants log back into their account after disconnect, they will only have access to view the MyConnectSV dashboard and the profile settings.

Instructions for Account Disconnection

Navigate to the participant profile page within MyConnectSV. Under the Community Management settings, participants will see the option to disconnect their account. To disconnect, participants should click the red trash can icon appearing next to the instance name. When the participant selects the trash can icon, they will receive a warning notice confirming account disconnection.

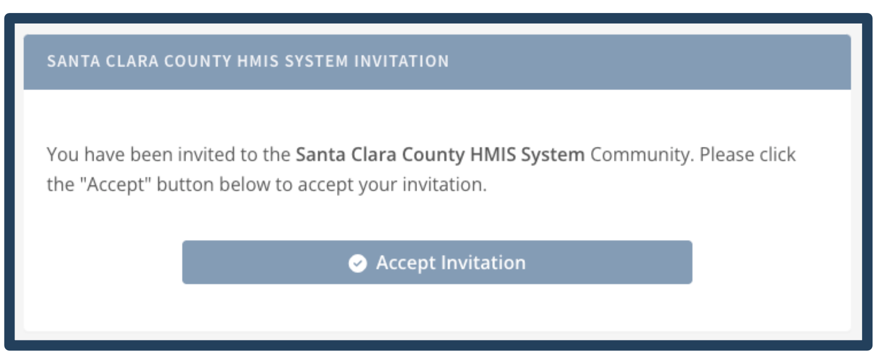


Instructions for Account Reconnection

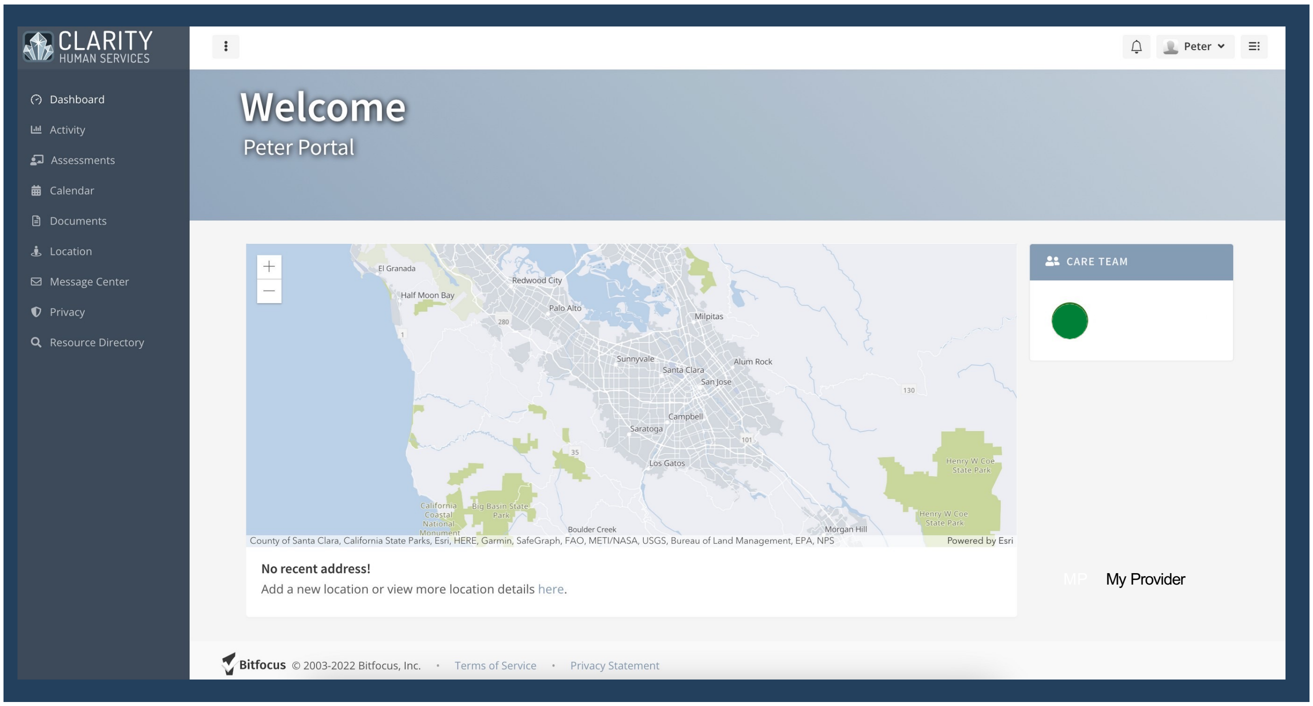
If a participant wishes to reconnect their account, it will require a new invitation from a service provider. After a provider sends the new invitation, the participant will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation."

If the participant has provided the same email that they previously used to connect to MyConnectSV, they will be taken directly to the MyConnectSV login page. They can then utilize the same email and password they previously used to login to their MyConnectSV account. If they have forgotten their password, they can easily reset it by clicking the "Forgot Password?" link under "Sign In." After clicking "Forgot Password?", enter the email address connected to the MyConnectSV account; the participant will receive an email with a verification code, which they will enter on the next screen and set a new password.

After logging into their MyConnectSV account, the participant should press "Accept Invitation" to reconnect their account.



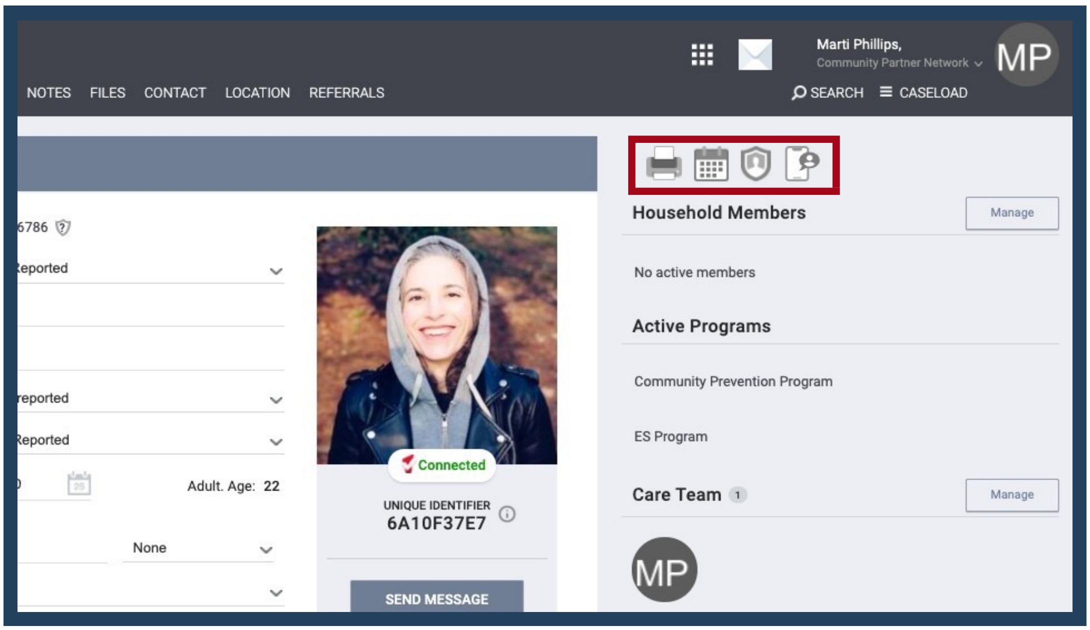
NAVIGATION


CLARITY
HUMAN SERVICES
Dashboard
Activity
Assessments
Calendar
Documents
Location
Message Center
Privacy
Resource Directory
Peter
Welcome
Peter Portal
CARE TEAM
No recent address!
Add a new location or view more location details here.
My Provider
Bitfocus © 2003-2022 Bitfocus, Inc.
Terms of Service
Privacy Statement

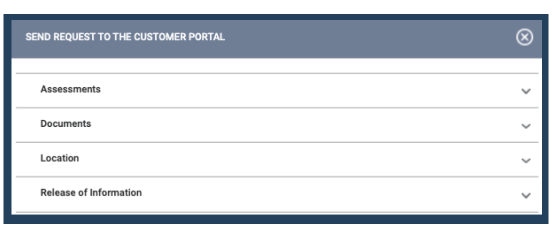
NAVIGATION: Provider Instructions

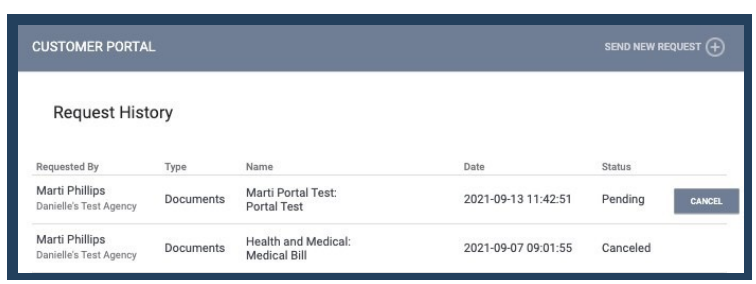
MyConnectSV is a module of Clarity Human Services and information is easily integrated and exchanged between MyConnectSV and HMIS. Providers can issue MyConnectSV requests to individual participants through the participant profile in HMIS, as well as send mass requests or messages to multiple participants at one time.

Individual MyConnectSV Requests
MyConnectSV Requests are managed through Customer Portal screen which is accessed through the Customer Portal icon in the participant's HMIS profile. The icon only displays if a participant has an active MyConnectSV account. Some MyConnectSV requests, such as assessments, can also be initiated through a program enrollment.



Send & Manage Individual Participant Requests
Send new MyConnectSV requests by clicking the Customer Portal icon and Send New Request in the Customer Portal screen. A pop-up window will display with request options. Use the dropdown to send the desired request to the participant. There are some limitations to how many requests can be sent for the same information.
Requests and their status can be viewed in the Request History. Providers are able to cancel pending requests by clicking the Cancel button next to the request.

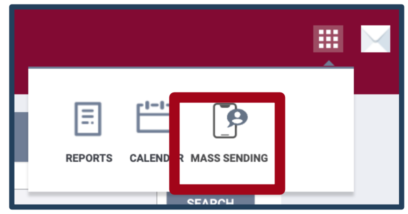




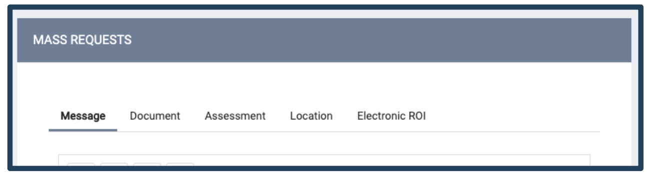
NAVIGATION: Provider Instructions

Mass MyConnectSV Requests

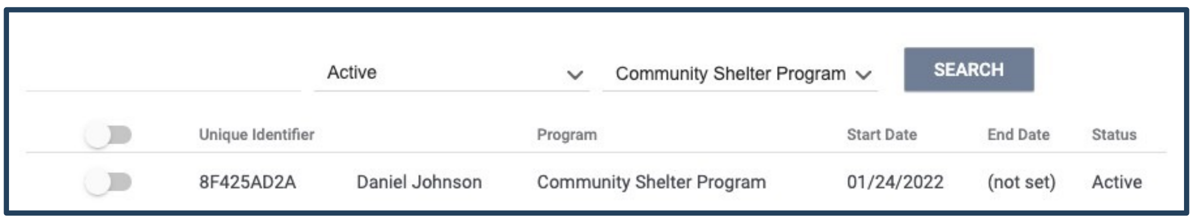
MyConnectSV requests or messages to multiple participants at one time are managed through the Mass Sending functionality, which is accessed through the navigation pad.



After clicking Mass Sending, choose either Message or the type of mass request you'd like to send (Document, Assessment, Location, or Electronic ROI). Details on specific types of requests are included in the next section (Feature Review).

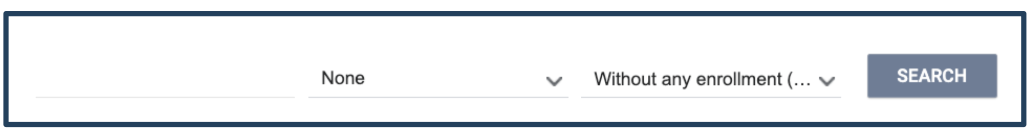


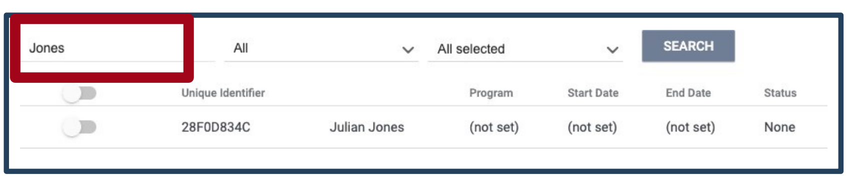
Use the dropdowns under the request information section to find a list of participants with MyConnectSV Portal accounts who currently have an Active program enrollment (not exited) or Inactive program enrollment (previously were enrolled but exited) in the selected program(s) within your agency.



Click SEARCH to get a list of participants with MyConnectSV accounts who are currently active in the Community Shelter Program.

Alternatively, to find participants who are not currently or previously enrolled in programs in your agency select None and Without any enrollment:

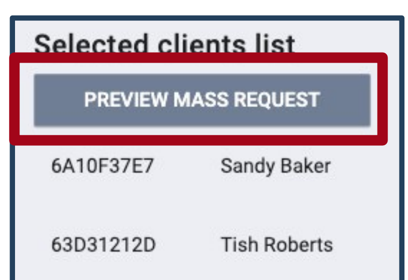




You can also use the text box to search for a specific participant by name:

Click SEARCH to get a list of participants with MyConnectSV accounts who have never been enrolled in programs in your agency.

Click the top toggle button to add all participants in the current list to the Selected participants list in the right pane, or add and remove individual participants by clicking the toggle next to their name:



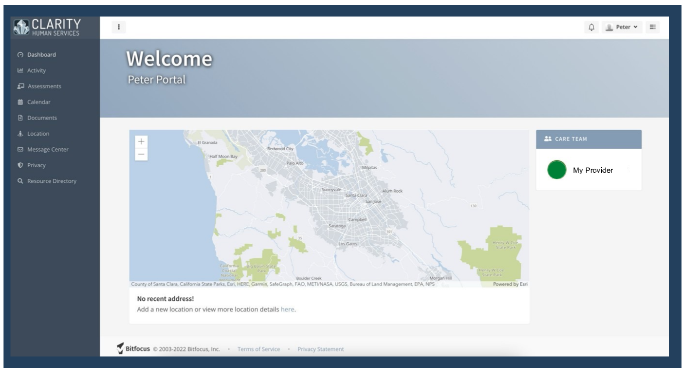
Click Preview Mass Request in the right pane to review and send your message or request.

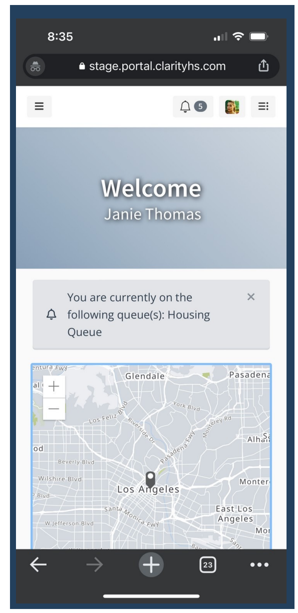
NAVIGATION & PROFILE: Participant Instructions

MyConnectSV navigation defines how participants move between the various MyConnectSV features. Navigation within MyConnectSV is designed to be intuitive and user-friendly.

Dashboard

Upon logging in, participants will land on their personal Dashboard area of MyConnectSV. Additional information about the Dashboard is available in the feature review section of this guide.



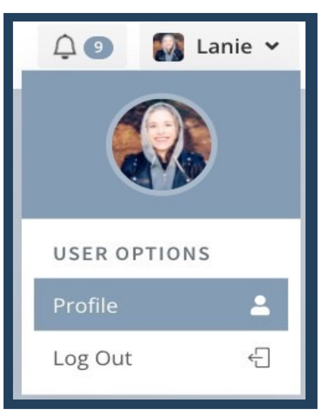


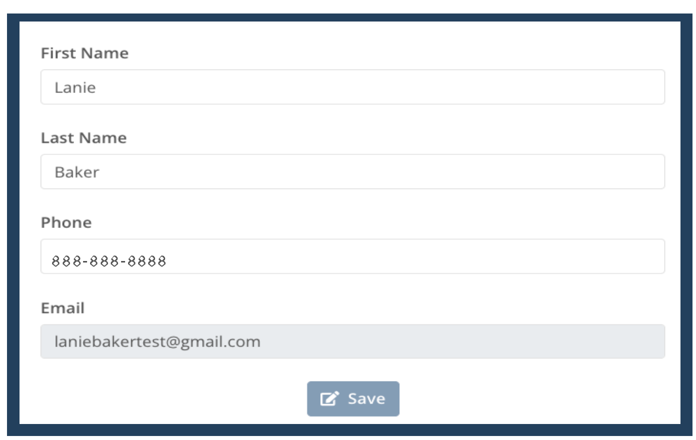
Participant Profile

The participant profile is accessed through the drop-down in the upper right-hand corner of MyConnectSV. Participants are able to update their personal information including their name, phone number. The Participant Profile also includes Password Settings, Account Preferences, and Community Management.

Profile Information

When a participant updates their contact information, the new information is made available to providers in the Contact tab of Clarity. MyConnectSV submitted contact information is indicated with the contact type "Participant Supplied".

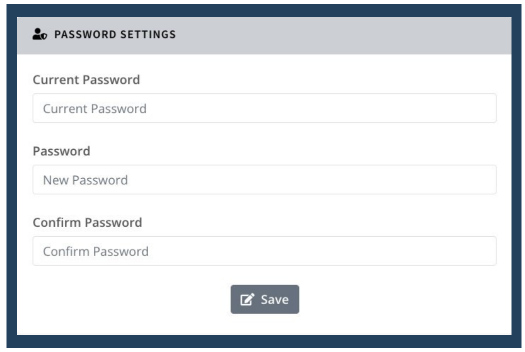




NAVIGATION & PROFILE: Participant Instructions

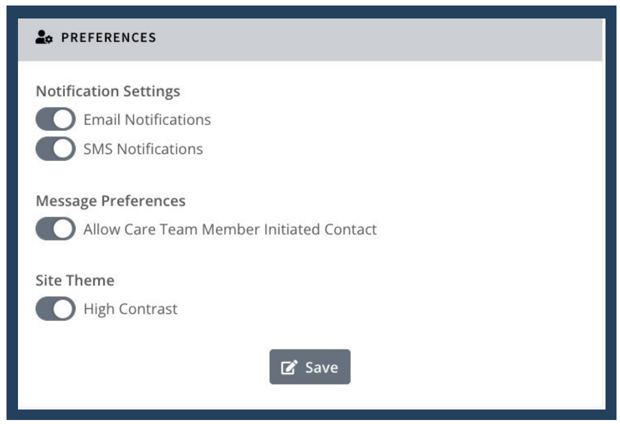
Password Settings

Participants can easily update their Customer MyConnectSV password in the Password Settings options located within the Participant Profile. To generate a new password, the current password is required.



Account Preferences

The Account Preferences settings allow participants to select their notification preferences, message preferences, and site theme.



Notification Settings

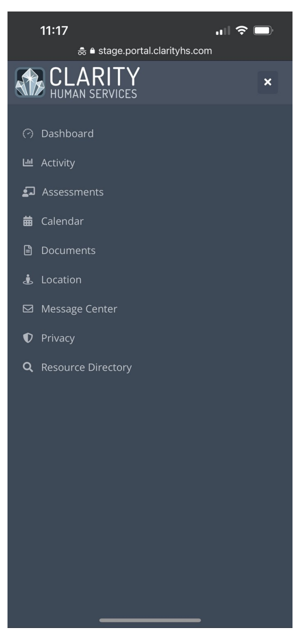
The Notification Settings allow participants to select to receive an email notification, text message, or both whenever a provider requests information, schedules an appointment or sends a message. It is recommended that participants leave at least one of these settings enabled.

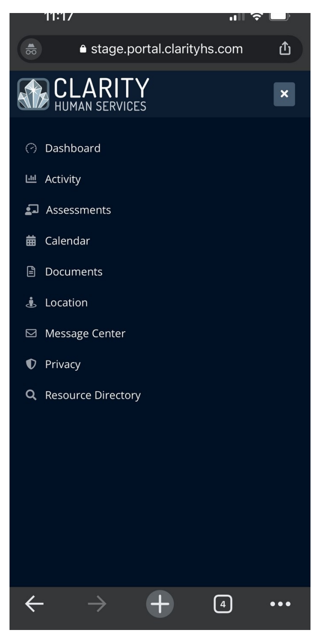
Message Preferences

The Message Preference settings allow participants to disable care team member initiated messages. By default, this setting is turned on. If a participant disables care team member initiated contact, it will prevent all care team members from sending messages.

Site Theme

The Site Theme setting allows users to select a High Contrast Site theme which converts their view of MyConnectSV to a higher contrast. This setting may be easier to view for some participants.





Community Management

The Community Management setting allows participants to disconnect their Custom MyConnectSV Account. Account Disconnection will suspend the participant's access to their Customer MyConnectSV data but not delete the account. Refer to page 10 for more information.

NAVIGATION & PROFILE: Participant Instructions

New Profile Photo Upload

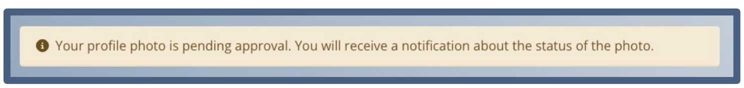
If a participant wants to upload a new profile photo for their Clarity profile, they can now do so through MyConnectSV.

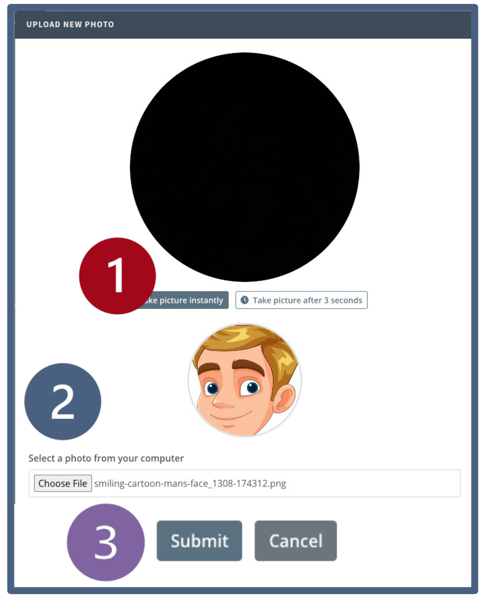
From their MyConnectSV profile, participants will start by clicking on the current profile photo and clicking on the blue camera icon.

If their device has a camera, they can take a new photo (1), or they can choose an existing photo on their device (2) to upload as their profile photo.

Current photo requirements will appear, so participants should ensure their chosen photo meets these requirements, and then click Submit (3).

A MyConnectSV user will see the following banner in their profile while their new photo is pending approval:

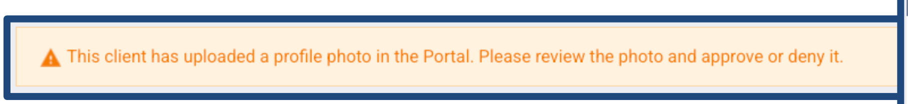


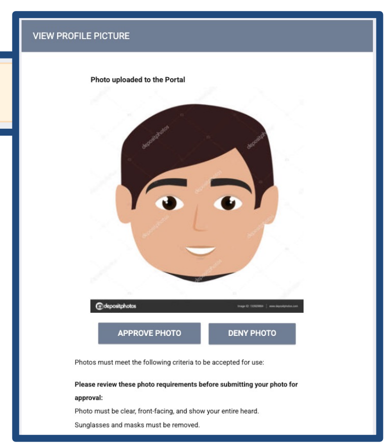


PROFILE PHOTO APPROVAL: Provider Instructions

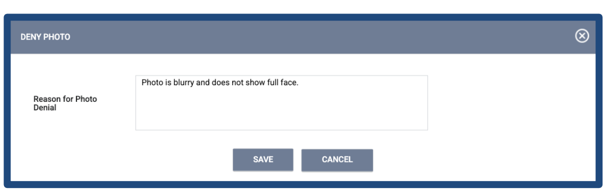
When a Customer Portal client user uploads a profile photo in the Customer Portal, a message is sent to the client's Care team members via email and Clarity inbox.

When a participant has a pending profile photo for approval, a banner is also visible at the top of the client's profile in Clarity:





Clicking on this banner will allow you to review and approve or deny the photo. The photo requirements will be listed to assist you. If you need to deny the photo, you can add the reason for denial, which will be sent to the participant in MyConnectSV.

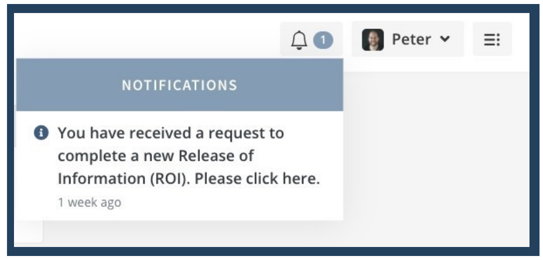


The participant will be notified based on their notification settings when their photo has been approved or denied.

NAVIGATION & PROFILE: Participant Instructions

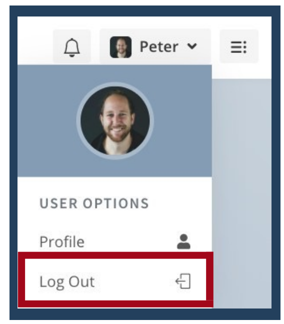
Participant Notifications

Participants will receive a notification upon login alerting them to any new provider requests. Notifications are resolved once a participant clicks on it and is directed to the page. The notification banners at the top of each page will remain for ROIs, documentation requests, and assessments until the requested item is completed. Notifications can also be reviewed in the right- side panel of MyConnectSV



Log Out

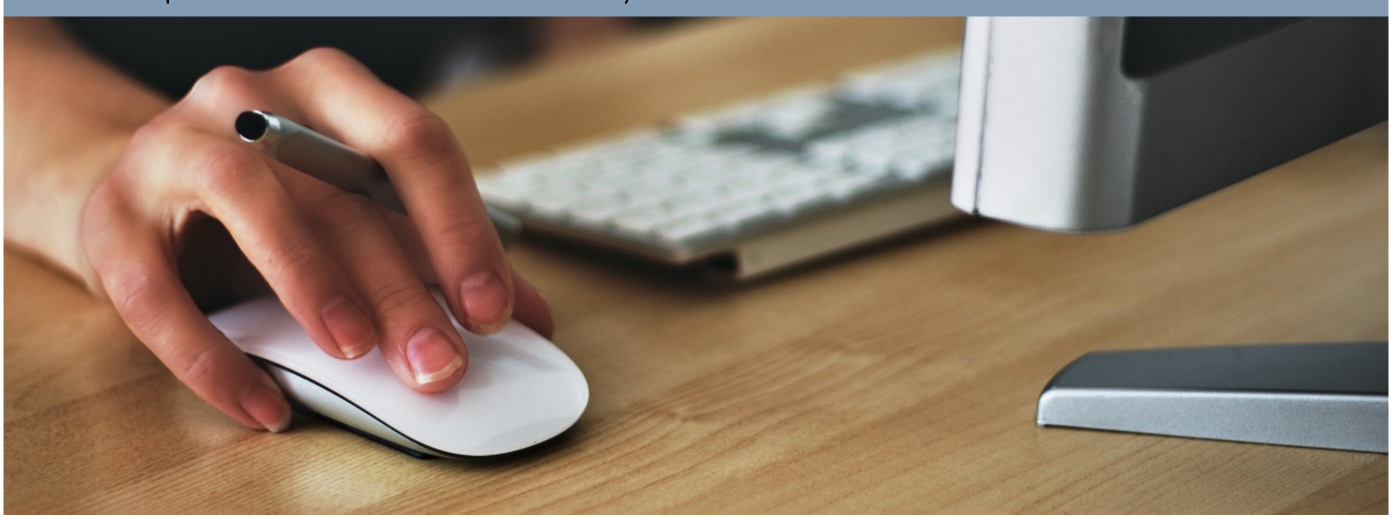
Participants can log out of MyConnectSV through the user options dropdown. Remind participants to log out at the conclusion of each session especially when using a shared device. Participants will be automatically logged out after 20 minutes of inactivity, and a warning will display two minutes before the automated logout occurs.



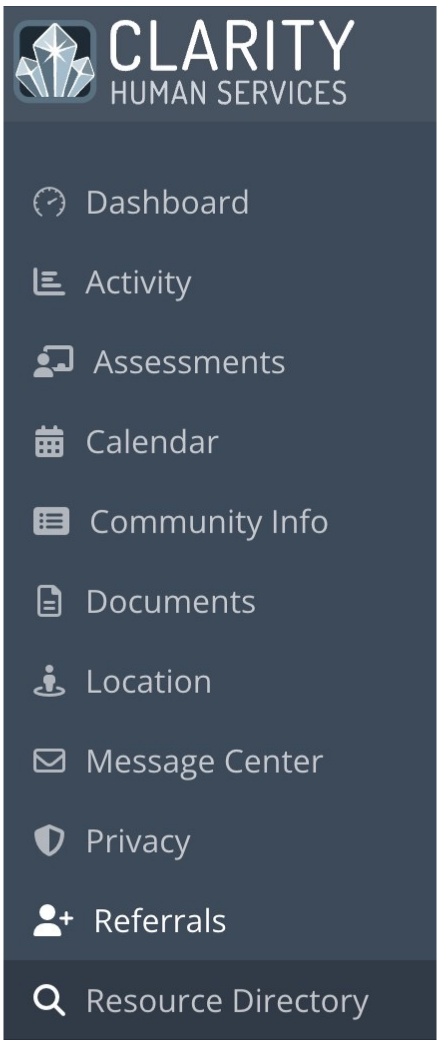
Use Case & Promising Practices

MyConnectSV is designed to be easy and intuitive to navigate.

- Encourage participants to spend time exploring the participant Dashboard, Profile, and Navigation Pane.
- Encourage participants to review their MyConnectSV Profile for accuracy and update their contact information any time changes occur.
- Encourage participants to leave the Notification Settings enabled for email notifications and SMS notifications.
- Encourage participants to leave care team member-initiated contact enabled so they can receive messages and updates from their care team members at any time.



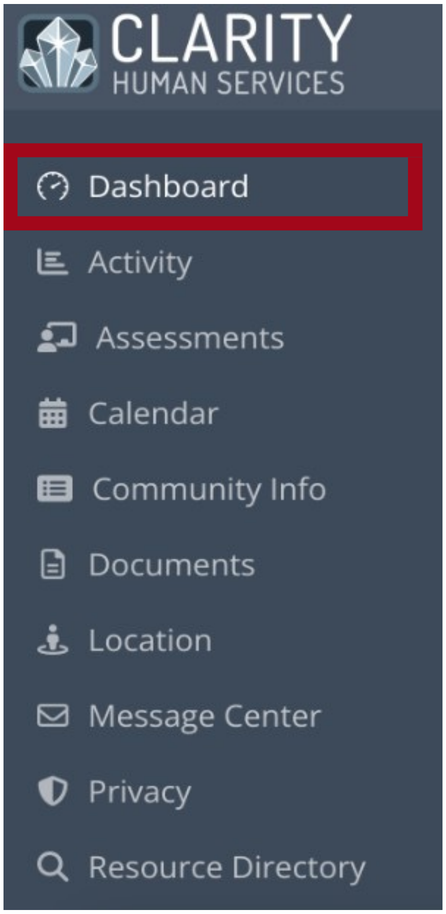
FEATURE REVIEW

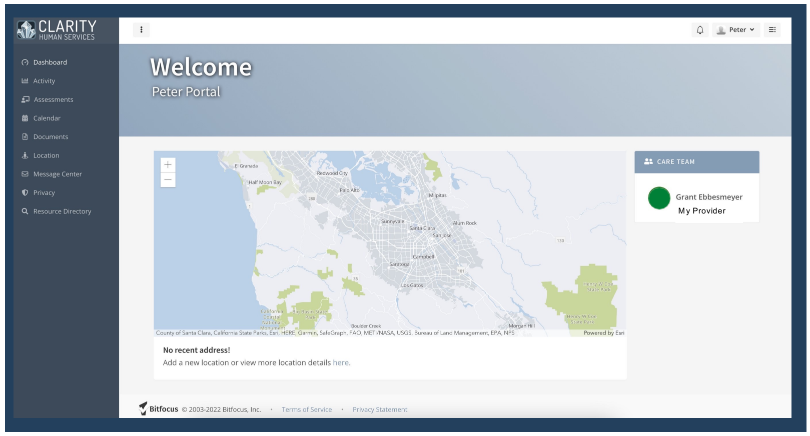


The next section of the MyConnectSV Provider Training Manual contains instructions on each of the features currently available through MyConnectSV. Each subsection includes feature details, user instructions for service providers and participants, and information on use cases and promising practices for each of the features.

DASHBOARD

The Dashboard is the default screen when the participant logs into MyConnectSV and displays various relevant information.

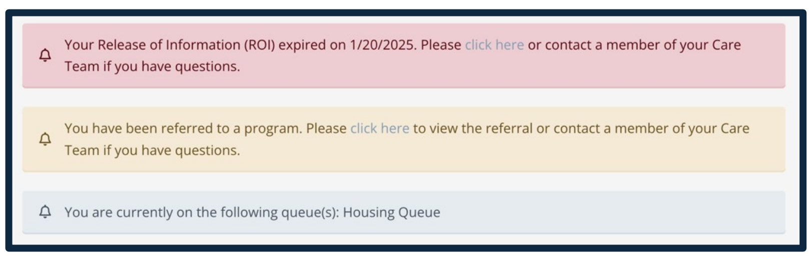




Care Team & Household Members

The participant's Care Team members are displayed in the care team information box, along with their Agency and Program name (if assigned to a specific program). Clients can click on the Care Team member's name to easily send a new message. Care team members must be assigned to the participant in Clarity to display on the Portal dashboard.

The participant's Household members are also listed in the household information box.



Pending Referral, Expired ROI, and Community Queue Banners

If a participant's Release of Information (ROI) is expired in HMIS, they will see a red banner. Check out the Privacy (ROI) feature guide for more information.

If a participant has a pending referral to a program, they will also see a yellow banner on the Dashboard. Check out the Referrals feature guide for more information.

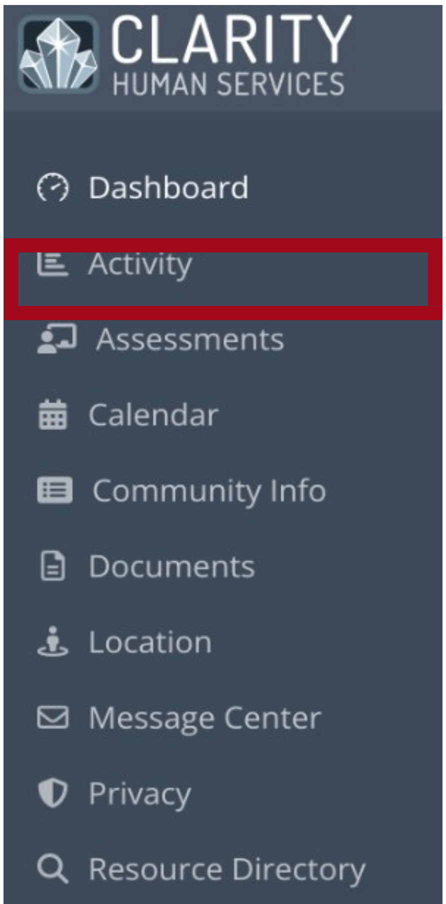
If a participant has an active referral on a Community Queue or a pending or in-process referral to a program from the Queue, a banner will display on the dashboard. No additional functionality or information is available outside of the status notification.

Upcoming Appointments

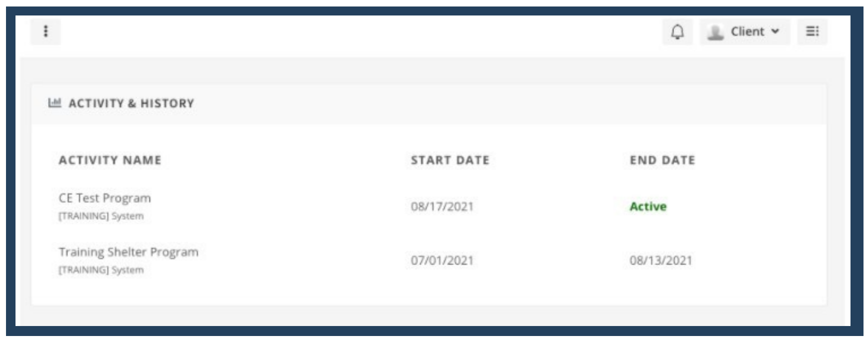
Upcoming provider appointments are displayed in the appointment information box. More information on appointments is available in the Calendar section of this guide.

ACTIVITY & HISTORY

Activity & History provides participants with a chronological listing of project enrollments, including agency name, program name, participation start date, and participation end date. A green active icon is displayed for any active enrollments, and new enrollment data is available in the participant view of MyConnectSV in real-time. Any group or family enrollments will include an icon with the count of members enrolled.
The participant view does not include access to project enrollment or exit records, assessments, service history, or provider notes.



How to View Activity & History
Under the participant view of MyConnectSV, the Activity tab includes a display of program enrollment and exit data. No additional actions are available to participants in the Activity tab. There are no required actions or instructions for providers to use this feature.



Use Case & Promising Practices

The Activity & History feature allows participants to review their program participation history for accuracy and reference purposes.

Explain to participants how you and other providers might use this information: For example, previous and current program participation history might be used to understand a participant's past program involvement or to determine eligibility for future programs.

Explain to participants how they might use this information: Encourage participants to review Activity & History data to ensure accuracy. Request participants to review start and end dates with attention to any active enrollments. Participants should reach out to their provider if they identify discrepancies or have questions about their service history.

Explain that enrollment data is available in real-time. Participants can view new program enrollments or exits immediately after providers complete the actions within HMIS.

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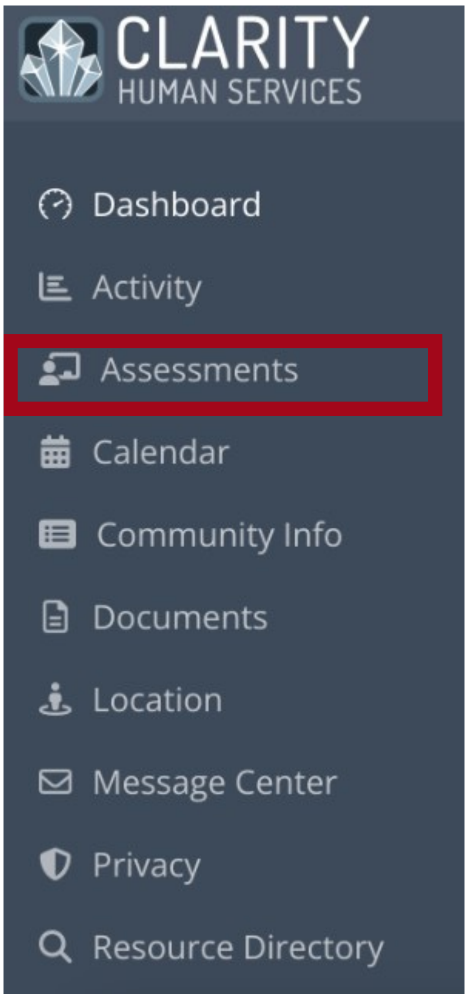
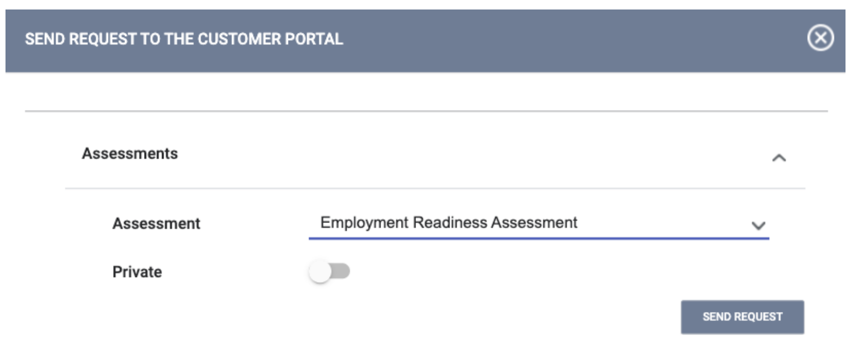
ASSESSMENTS

The Assessments feature allows participants to complete and submit provider-issued assessments directly from their personal device and at their convenience. Assessments must be reviewed and approved for MyConnectSV submission by MyConnectSV Working Group and made available for providers by the system administrator. Not all assessments are appropriate for MyConnectSV submission; some, such as the VI-SPDAT assessment series, should only be completed by providers within Clarity.

Both global assessments and program-level assessments can be submitted through MyConnectSV. Participants will receive a notification when a request for an assessment has been submitted.

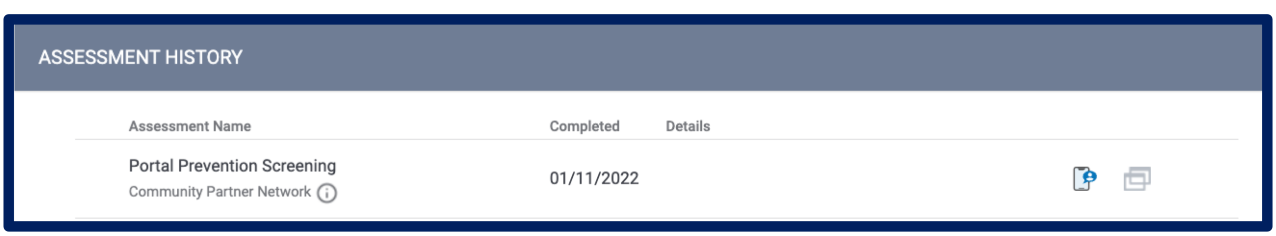


Sending & Reviewing Global Assessments
Global-level assessments are assessments that are not associated with a program enrollment. To send a global-level assessment to an individual, navigate to the participant's profile screen, open MyConnectSV request screen, and select Send New Request. Select the appropriate assessment from the drop-down menu and press Send Request. The participant will receive an email or text message notifying them of the request, and a notification and request banner will appear in MyConnectSV at next log-in.



Mass Assessment Request: To send a mass Assessment request to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.

Once the assessment has been completed and submitted by the participant, it will be available for review in the participant's assessment history. MyConnectSV SV icon appears in the assessment details sections to indicate the participant completed it through MyConnectSV.

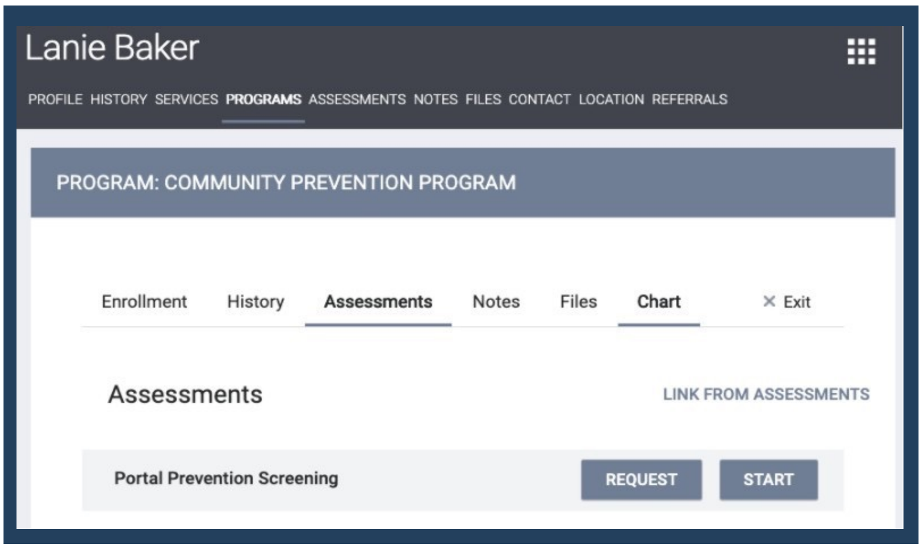


ASSESSMENTS

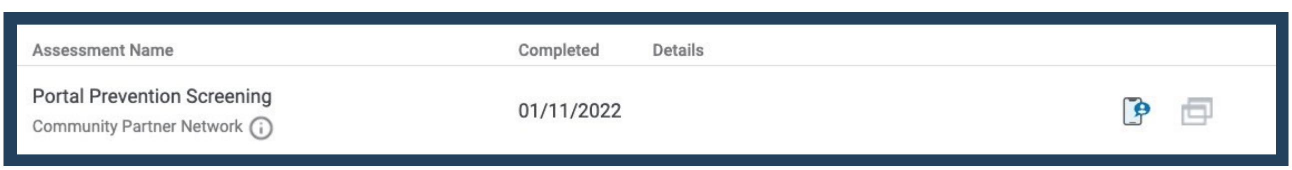
Sending Program-Level Assessments

Program-level assessments are assessments that are completed through a program enrollment. To send a program-level assessment, open the participant's enrollment record and navigate to the assessments tab.

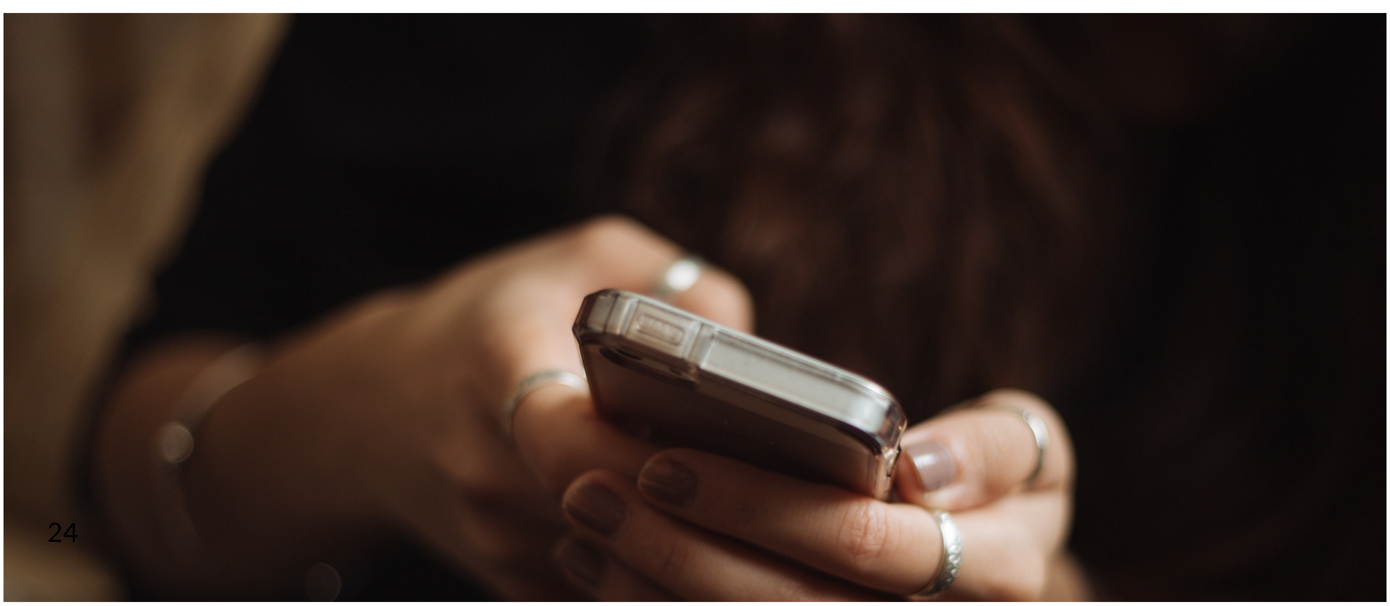
Assessments enabled for submission through MyConnectSV will be indicated with a Request option. Select Request and click Send Request to complete the transaction. The participant will receive an email or text message notifying them of the request if enabled in their settings, and a notification and request banner will appear in MyConnectSV at next log-in.



Once the assessment has been completed and submitted by the participant, it will be available for review in the participant's program enrollment assessment history. MyConnectSV icon appears in the assessment details section to indicate the participant completed it through MyConnectSV.



Assessment Name	Completed	Details
Portal Prevention Screening Community Partner Network	01/11/2022	

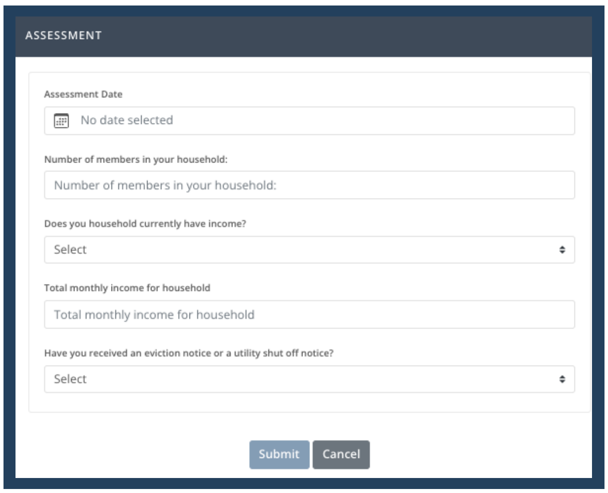


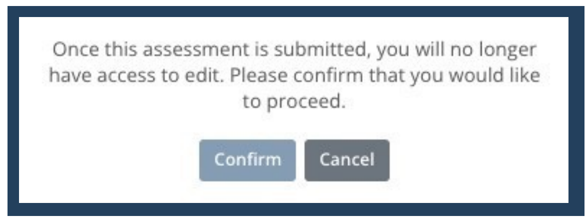
ASSESSMENTS: Participant Instructions

Completing an Assessment

Once a provider initiates a request for an assessment, the participant will receive a notification through MyConnectSV after their next login and may also receive an email or SMS if enabled. Participants can respond to the request by clicking the notification or selecting the Assessment screen in the navigation pane.

Once the participant clicks the banner, the assessment will open and participants can enter their responses and complete the assessment. After pressing Submit, the participant will receive a warning stating that the assessment cannot be edited after submission. Participants will need to press Confirm to successfully submit the assessment.





Reviewing a Previous Assessment

Participants have the ability to review previous assessments submitted through MyConnectSV. All previous assessments are available in the assessment history pane. Participants can click on the assessment of interest and review their responses. Note: Previously submitted responses cannot be edited by the participant

Use Case & Promising Practices

The Assessment Management feature allows participants to quickly and easily complete assessments from their personal device and at their convenience. Assessment Management provides a potential opportunity to eliminate an in-person appointment while maintaining privacy and confidentiality.

- Explain to participants how you might use this information: Advise participants that they will be receiving an assessment request before submitting a request through MyConnectSV. Provide participants with information on why you're requesting the assessment, how you will use the information, and allow the opportunity to ask any questions.

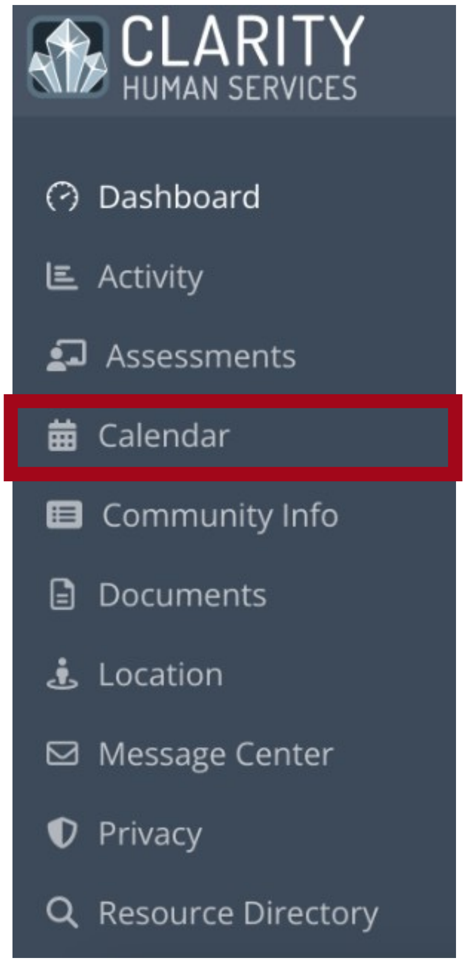
- Explain to participants that their responses remain confidential and follow the same guidelines as assessments issued by a care team member. Encourage participants to reach out to their care team members through the message center or a phone call if they have any questions about the assessment.

- Explain to participants that they have the right to request an assessment be issued by a care team member or provider.

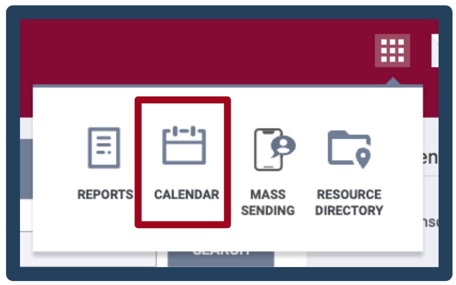
- Encourage participants to respond to the assessment request as soon as possible so that services are not

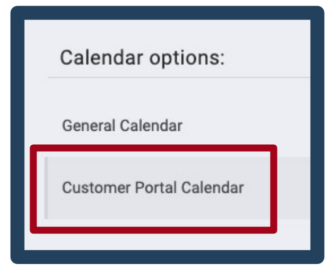
CALENDAR

The Calendar feature allows providers to schedule participant appointments and post appointment availability directly within Clarity. Participants can schedule appointments with care team members based on their posted available time slots. Appointment details and notifications are then made available to the participant through their MyConnectSV account. The Calendar allows providers to manage all participant appointments in one centralized location and ensures participants always have access to appointment details.

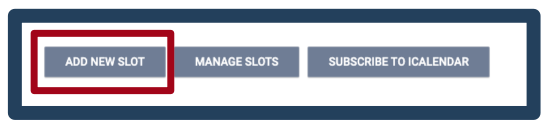


How to Post Available Appointment Slots
In Clarity, navigate to the Calendar in the launchpad, and then click on "Customer Portal Calendar" in the right sidebar:

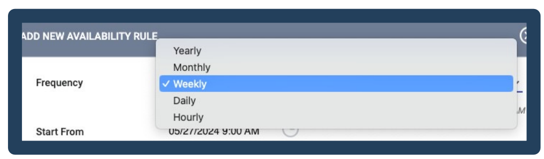




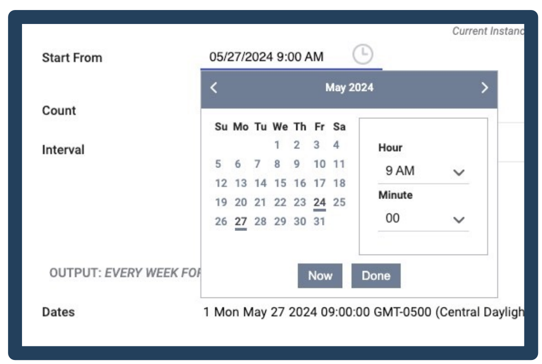
Click "Add New Slot" under the displayed calendar:



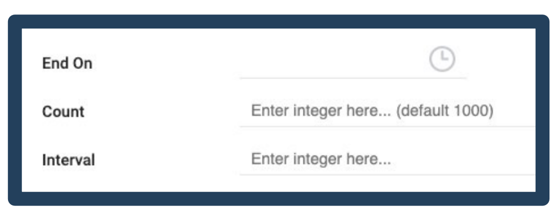
First, choose the Frequency you want this appointment slot to repeat:



Next, choose the Start From date and time when you want the first appointment slot to occur:

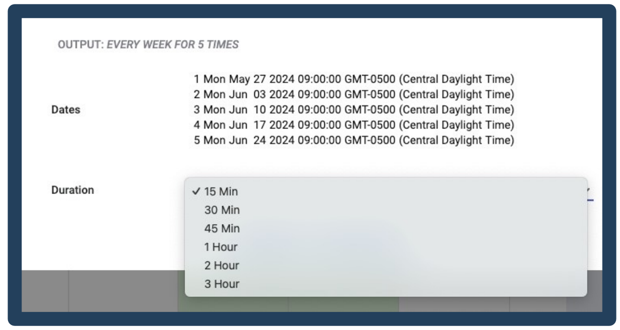


You can choose either an End On date when you want the series to end, or specify the Count of appointment slots you want to schedule (Note: only one of these options can be used, so entering in either an End On date or Count will cause the other field to disappear).



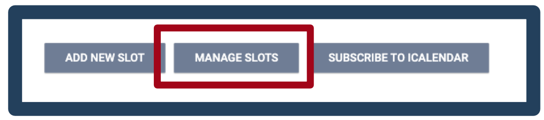
You can also choose an optional Interval between each frequency if desired (for example, to repeat the time every 3 days or every 2 weeks, instead of every 1 day or 1 week).

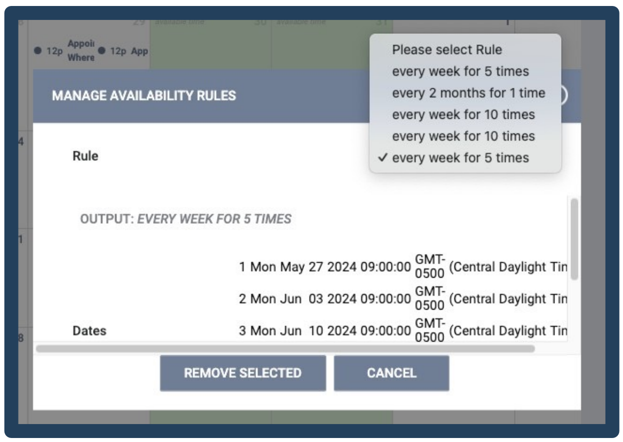
Review the Output and Dates preview, and then click Save to post the new appointment slots. After saving, participants on your care team with MyConnectSV accounts will be able to see your availability and directly schedule appointments with you.



You will be notified in your Clarity inbox when a participant schedules a new appointment or cancels a previously scheduled appointment.

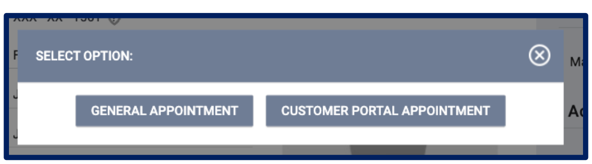
To remove an existing series of scheduled appointments, click on "Manage Slots". The choose the series in the dropdown list and click "Remove Selected".





How to Schedule a Participant Appointment Schedule new appointments with participants using the calendar icon on the participant's HMIS

If you'd like to schedule an appointment to fill an existing appointment slot, click Customer Portal Appointment. If you don't want to schedule an appointment to fill an existing appointment slot, click General Appointment.



Complete the fields and click Save to save the appointment.

How to Manage or Delete Appointments

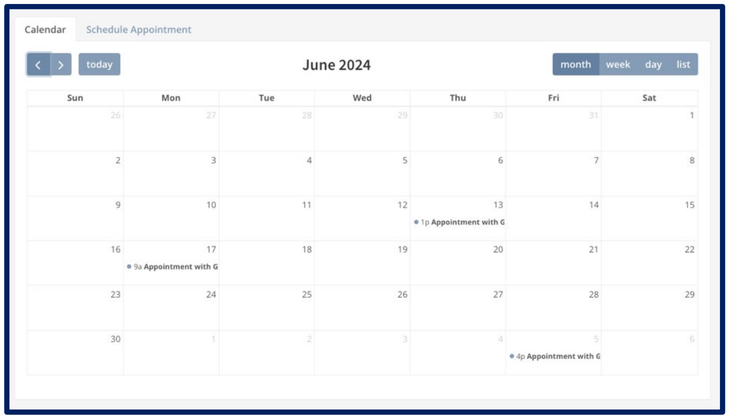
To delete an appointment, select the appointment and click the trashcan icon. Adjustments to the appointment time or date cannot be made once the appointment is set. If adjustments are required, delete the original appointment through the calendar screen, and set a new appointment with the revised appointment details. More information on Clarity's Calendar features, including calendar integrations, can be found in our Help Center Calendar article.

CALENDAR: Participant Instructions

Participants can view a listing of all provider appointments scheduled through Clarity in the Calendar screen of their MyConnectSV account. Participants can select various views including an appointment list, or view by day, week, or month. Participants can also schedule appointments with care team members based on their posted available time slots.

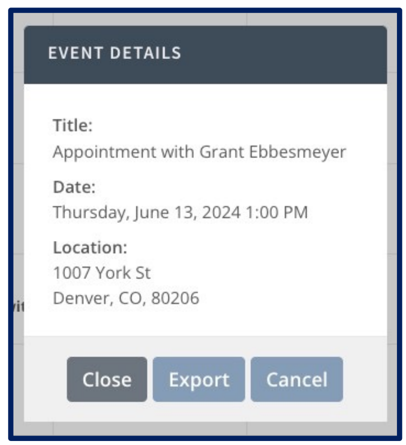
View upcoming appointments: Participants can view upcoming appointments by navigating to Calendar.

Clicking on any scheduled appointment will show a pop-up with additional appointment details, as well as the options to Export or Cancel the appointment.



Exporting appointment information: Participants can click on Export to export the appointment information as a calendar file, which can then be added to their phone or other external calendar. The participant must agree to the Privacy and Security Warning prior to exporting the appointment information.

Canceling an appointment: Participants can click on Cancel to cancel an upcoming appointment. If an appointment is canceled, the Clarity user will be notified with a message.



Use Case & Promising Practices

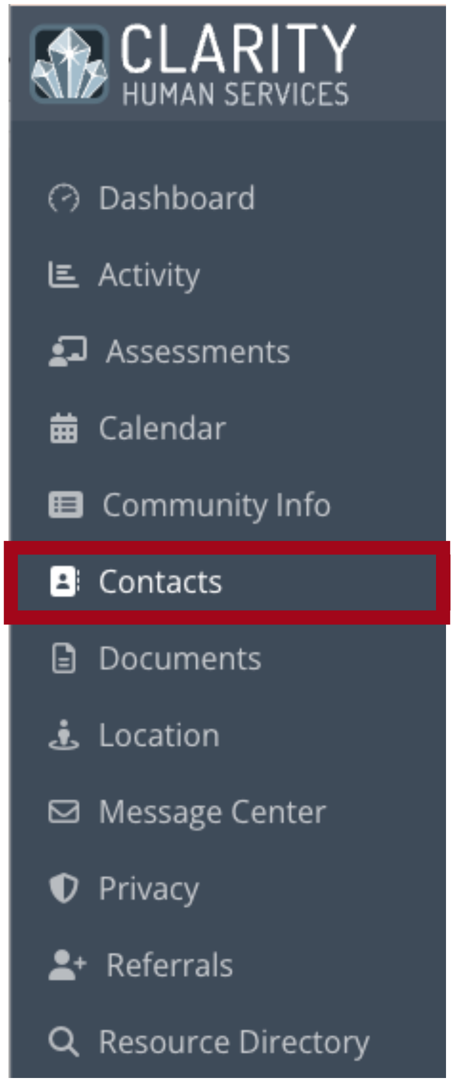
The Appointment Management feature allows providers and participants to manage appointments in a centralized location and helps ensure that participants have adequate access to appointment information.

- Explain to participants how they might use this information: The appointment management feature allows them to view all upcoming appointments with providers & care team members and can help remind them about appointments that they have scheduled with providers.

- If you have posted appointment slots, alert your participants by sending them a message through MyConnectSV so that they can utilize the appointment scheduling functionality to meet with you.

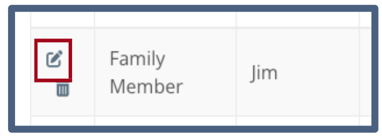
CONTACTS

The Contacts feature allows participants to view and update information saved on their Contact tab in their Clarity profile, as well as add new Contact records that they want to share with you and other providers.

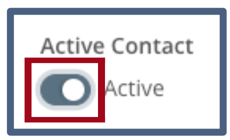


Participant Instructions

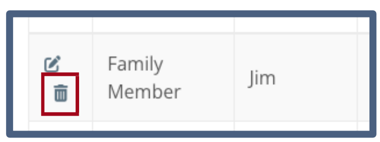
Viewing and Updating Contact Records
To update a Contact Record that is already listed, the participant will click on the pencil icon in that row.

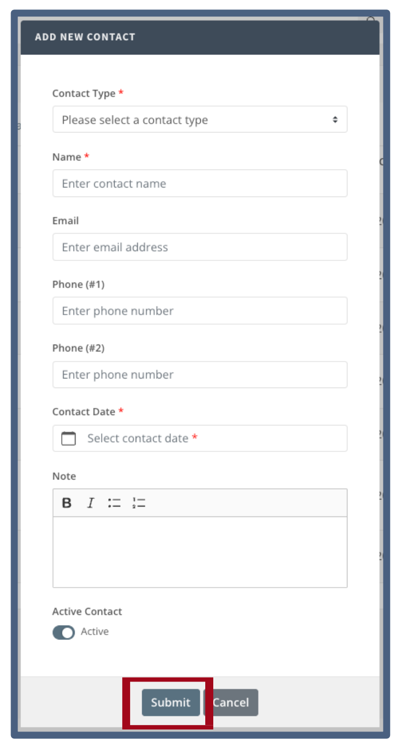


They can then make any updates to this Contact, such as updating the phone number or email address. They can also report a contact as Inactive by toggling off the "Active" button at the bottom. Be sure to click Submit to save any changes.



Participants can also delete Contacts that you have added from MyConnectSV by clicking the trash can icon in that row. Then click "Delete" in the confirmation message. However, participants *cannot* delete records that have been created by any Clarity users.





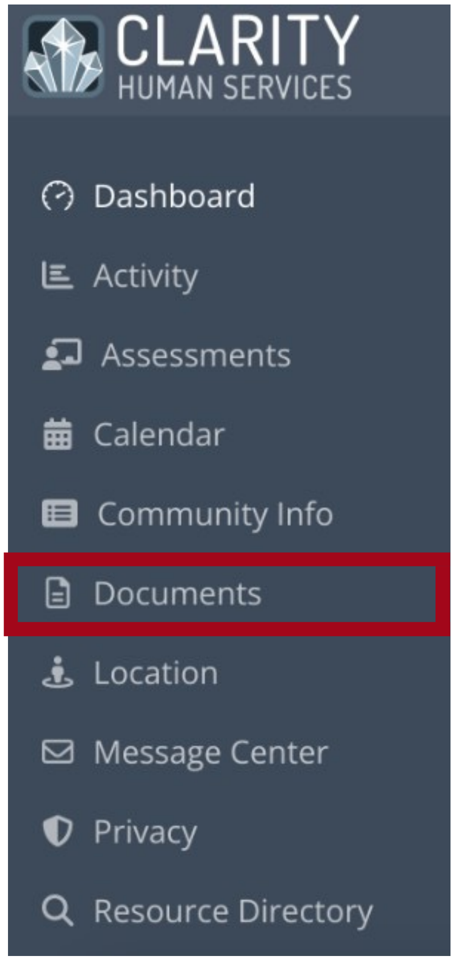
Adding New Contact Records
To add a new Contact record, participants will start by clicking New Contact:

Participants should fill in the info in the pop-up window that they want to share with their care team members. Required fields are marked with a red asterisk (*).

Clicking Submit at the bottom will add the new Contact to the Contact tab on their Clarity profile.

DOCUMENTS

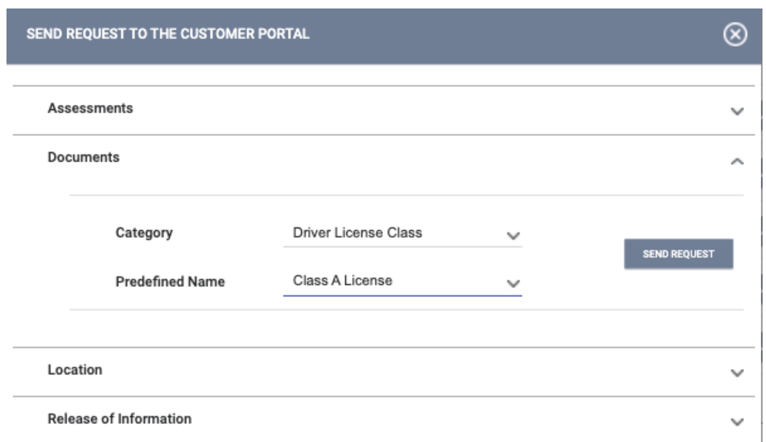
The Documentation Management feature allows participants to upload key documents at any time, and providers to request various forms of documentation from participants. Participants can then respond to the request and upload their personal documentation directly through MyConnectSV. Participants will be able to review any documentation previously uploaded through MyConnectSV.



How to Request Documents

Providers can send a new request for documentation to an individual through MyConnectSV using the "send new request" icon in MyConnectSV screen. Documentation requests can also be initiated through a program enrollment. Select the documentation type requested from the drop-down screen and click Send Request.

Mass Document Request: To send a mass Document request to multiple individuals at one time, follow the process for Mass Request detailed on page 14.



Participants can now submit multiple photos per request, so to request full multi-page documents (such as leases or income verification), you will only need to send one request per document

Types of Documentation Available

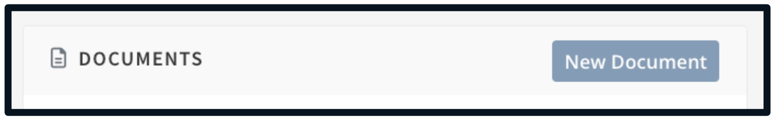
Providers can request a variety of documentation from participants through MyConnectSV. Documentation categories may include:

- Family, Social, & Legal
- Finances & Income
- Health & Medical
- Education & Employment
- Personal Identification
- Military Service Records

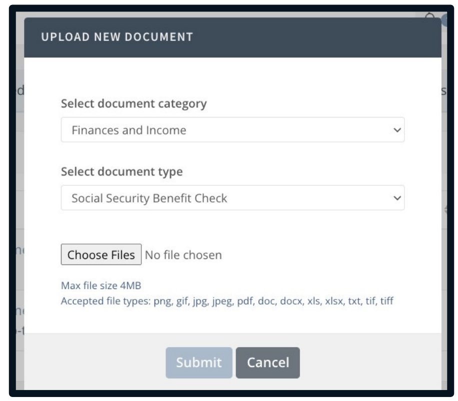
Each category contains multiple types of documentation available for upload. To add additional file categories or documentation items, contact your system administrator.

DOCUMENTS: Participant Instructions

Participants can upload a new document at any time by navigating to Documents and clicking New Document

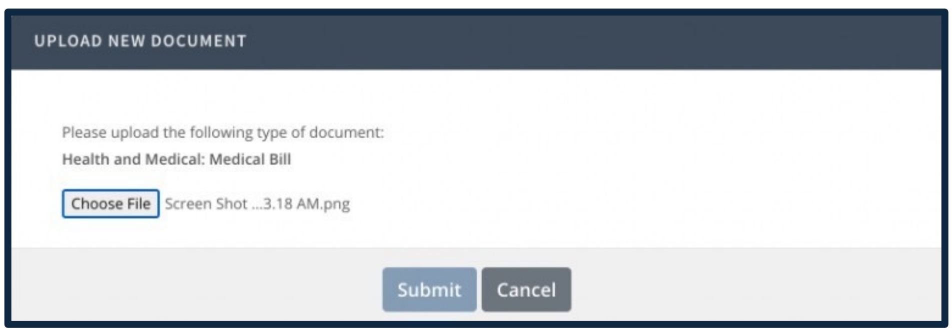


After doing so, they will use the dropdown arrows to select the document category and document type:

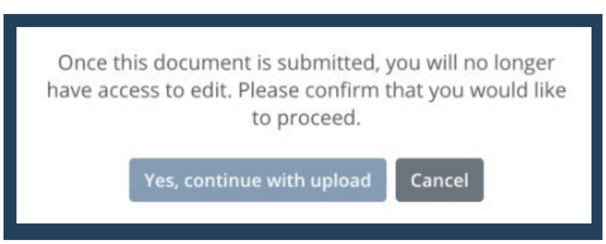


If a provider initiates a request, the participant will receive a notification through MyConnectSV. Participants can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.

Participants can then upload the documentation requested from the provider by clicking on the request banner. Participants can upload a PDF of the document, screenshot, or upload a photo (or multiple photos) using their mobile device.



When a participant selects the file and clicks Submit, they will receive an additional notification warning stating that submitted documentation cannot be edited. Participants should click Yes, Continue to Upload to submit their documentation or Cancel to discontinue submission. Participants can view their submitted documentation by clicking on the document in the documentation history.



DOCUMENTS: Participant Instructions

Use Case & Promising Practices

The Documentation Management functionality allows participants to upload required documentation requested from their care team directly through MyConnectSV. Documentation requests can also be issued by providers outside of the care team.

Explain to participants how you might use this information: Advise participants that they will be receiving a document request before submitting a request through MyConnectSV. Provide participants with information on why you're requesting the document, how you will use the information, and allow the opportunity to ask any questions.

Encourage participants to respond to requests for documentation as soon as possible. Requests for documentation are often required for housing or services, and delays in submission could affect service provision.

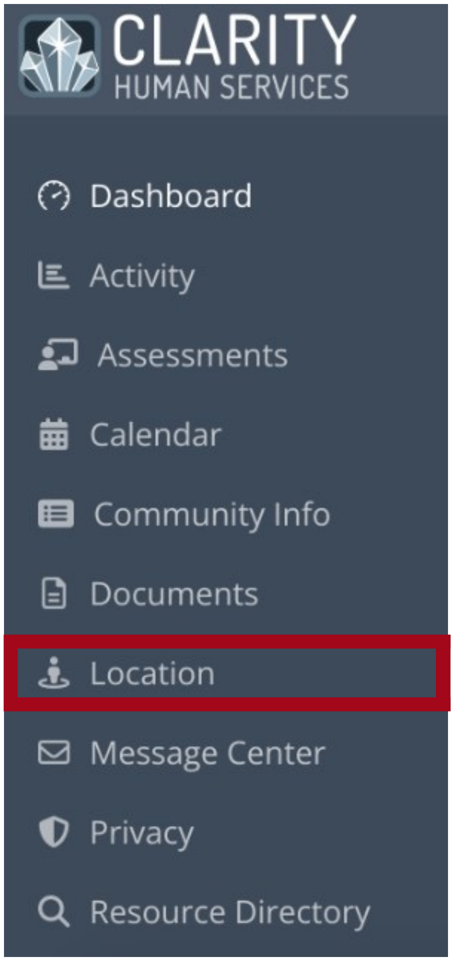
Explain to participants that they can securely upload PDFs, screenshots, or a photo of requested documents directly through MyConnectSV.

Explain to participants they will be notified through MyConnectSV when documentation has been requested, and they can also upload any documents they believe will be beneficial for their providers to be able to access.

Explain to participants that they can view any previous documentation uploaded through the documentation history screen. Explain to participants that once a document has been submitted, they cannot modify or edit it.

LOCATION

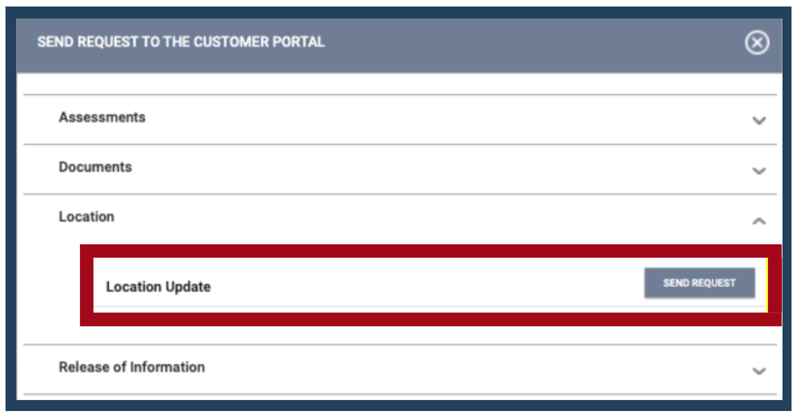
The location feature allows participants to share their address or GPS location through MyConnectSV. Participants can add new locations at any time, and providers are able to send requests for updated location information through Clarity.



How to Request a Location Update

Send a location request to an individual through MyConnectSV icon on the participant's HMIS profile page. Select Location Update from the drop-down screen.

Mass Location Request: To send a mass Location request to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.

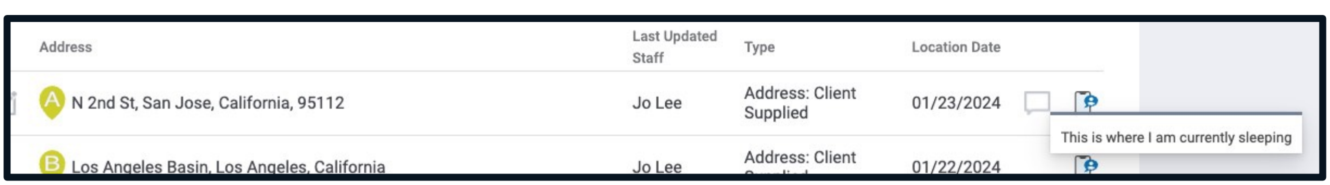


Viewing Location Updates

Once the participant submits new location information, it is available for review in the Location screen of the participant's HMIS profile.

Participant-supplied location updates are marked with MyConnectSV icon.

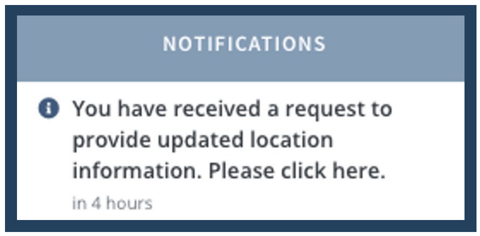
Additionally, if the participant has submitted a Note with their location, it will appear by hovering over the Note box icon:



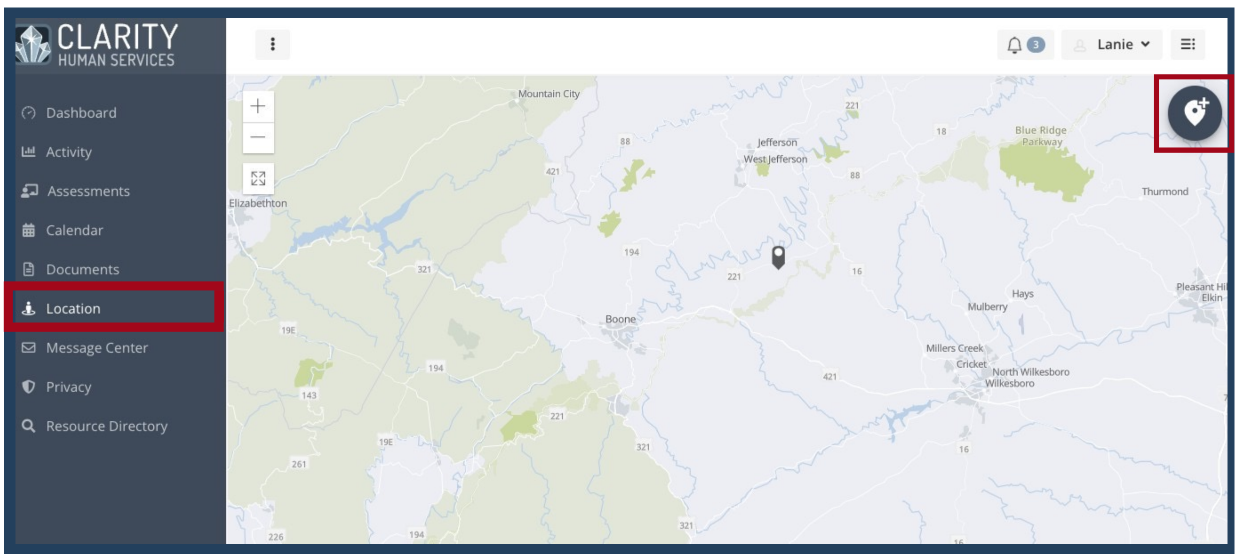
Address	Last Updated Staff	Type	Location Date
N 2nd St, San Jose, California, 95112	Jo Lee	Address: Client Supplied	01/23/2024
Los Angeles Basin, Los Angeles, California	Jo Lee	Address: Client	01/22/2024

LOCATION: Participant Instructions

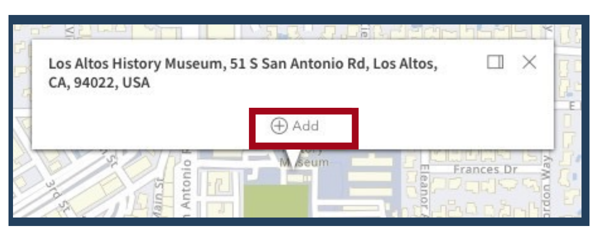
Participants can update their location at any time through MyConnectSV's Location screen. Participants can also receive requests for location updates from providers. Participants should take the following steps to add a new location or respond to a provider request. When a location request is sent, the participant will receive a notification asking them to add a location update through MyConnectSV.



Participants can click the notification or open the location feature using the navigation pane to add a new location. Add a new address or GPS location by clicking the Add Location icon at the top right-hand corner of the location screen.



Participants can share their current location using the GPS signal associated with their device by clicking the Use Current Location visible below the search bar. Each device is different, so you may need to research how to enable location sharing for a participant's device if it is not working as anticipated. The map will orient to the participant's location and an address will be displayed. Participants can save their location by selecting the Add icon. Participants can also enter an address into the search field and save the location following the same steps as above.



LOCATION: Participant Instructions

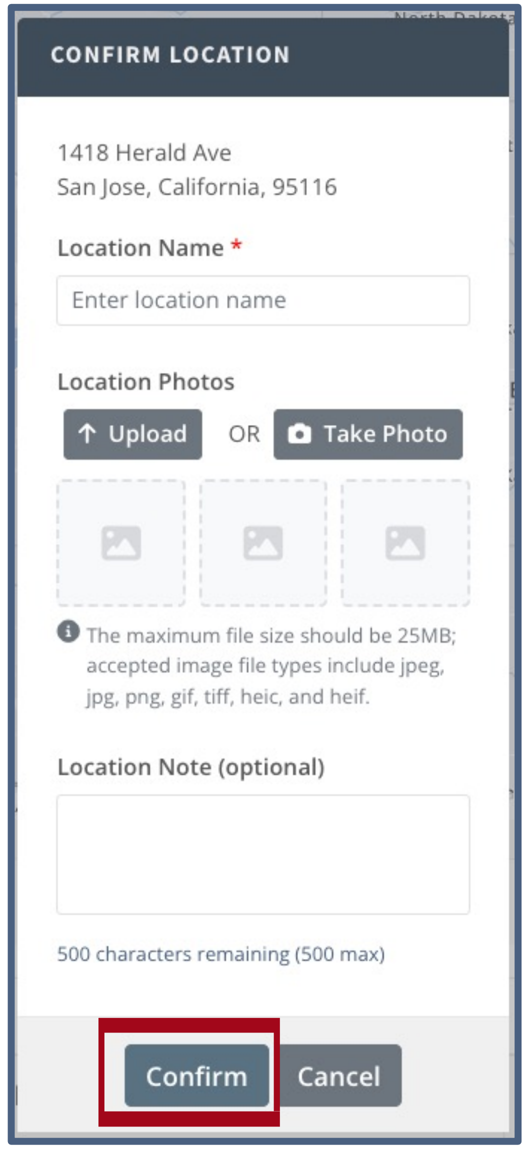
After clicking "Add" on a new location, a "Confirm Location" pop-up box will appear, where participants can also add additional information.

Participants will need to enter a Location Name, such as "Sleeping location" or "Daytime location."

Participants can also choose to include up to three photos to share with this location to make it easier for you and other providers to find them. If their device has a camera, they can choose to "Take Photo," or they can upload existing photos from their device.

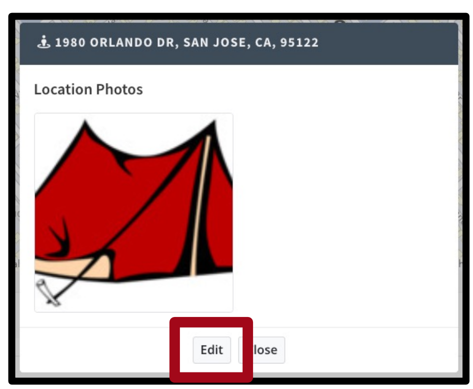
Participants also have the option to add any additional notes before sharing the location, like more detailed directions or other information about the location.

Participants must click "Confirm" to share the new Location.



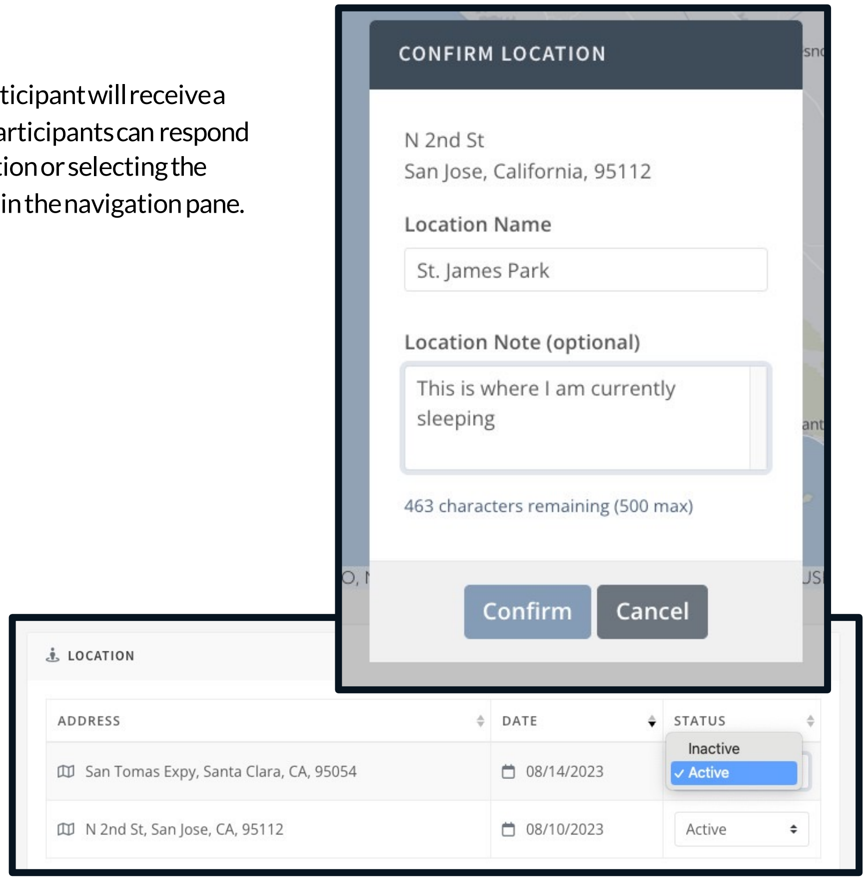
Updating Location Details
After a location has been added, participants can add or update the name, photos, or notes for that location. They cannot change the location address. If they no longer want to be located at a location, you should mark that location as inactive following the instructions on the next page and then add a new location.

To edit a location, the participant will start by either clicking on the location pin on the map, or in the row listed below the map. Click **Edit** in the window that pops up to edit the location..



LOCATION: Participant Instructions

If a provider initiates a request, the participant will receive a notification through MyConnectSV. Participants can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.



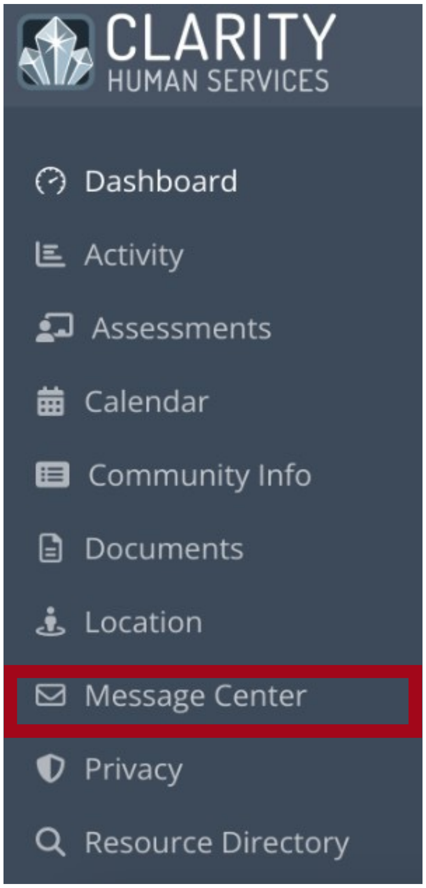
After a location has been added, it will be visible in the user's location history tab. After a location has been added, the user can choose to make it "Inactive" by selecting the option in the "Status" dropdown. This allows participants to filter the location out, so it no longer appears on the map and in their location history.

Use Case & Promising Practices

- The Location Feature allows MyConnectSV users to share their location with their care team members. This feature can help providers quickly locate MyConnectSV users and may assist in expediting services.
- Explain to participants how you might use this information: The Location feature helps care team members quickly locate them for services or other related needs. The Location feature is NOT INTENDED to track participants but rather to assist with connection to services. Care team members can only view the locations that participants choose to share with them.
- Explain to the participant that their care team members can request a location update through MyConnectSV. They are also able to update their location at any time.
- Encourage participants to add Notes to the Locations they choose to share to provide additional information and context.
- Explain to the participant that they must enable Location Services on their personal device to share their location using the GPS location.
- Encourage participants to update their location whenever they have a change of address, relocate their encampment, obtain a new temporary residence, or any other situation impacting location.

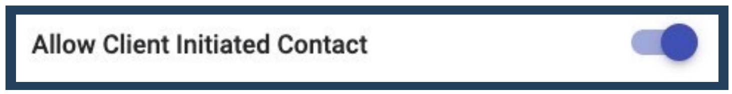
MESSAGE CENTER

The Message Center feature provides a secure communication channel between participants and care team members. Participants and providers can track conversations in a single platform, and Message Center retains the conversation history for future reference. All users also can turn off contact through the Message Center if desired.



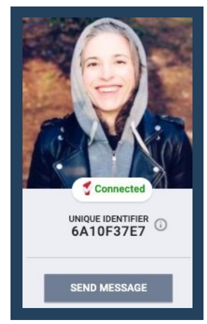
Allow Participant Initiated Contact

By default, participants and care team members can receive incoming messages but have the option to turn off incoming messages. To turn off participant initiated contact, navigate to account settings and turn off the Allow Participant Initiated Contact in the My Info pane. Press Save Changes button to ensure the settings are updated.



Sending a New Message

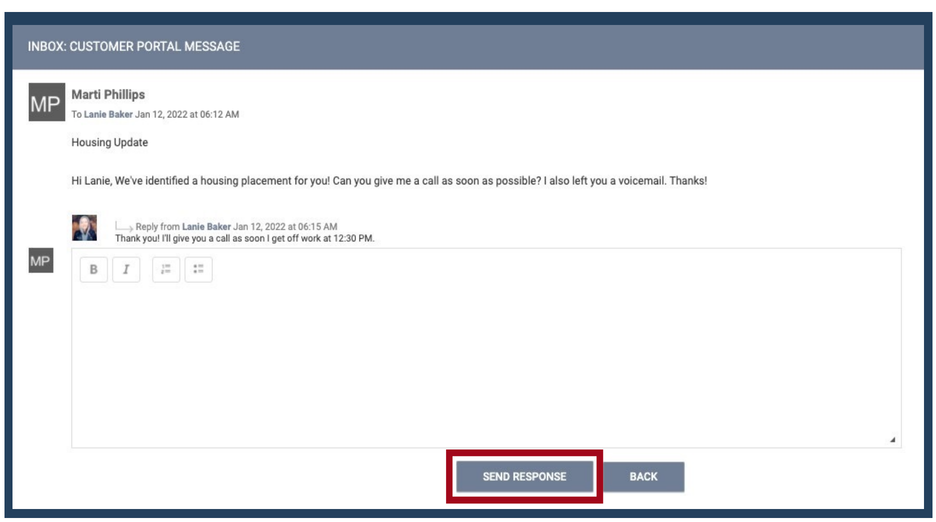
To send a new message to a single participant, navigate to the participant's Clarity profile and press the Send Message button under the participant's photo. Draft your message and select Send Message when complete. Copies of sent messages are available in the Clarity Inbox.



Mass Message: To send a mass Message to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.

Responding to a Message

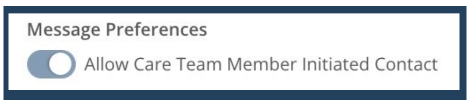
View and respond to incoming messages in the Clarity Inbox. An alert will appear next to the inbox icon when new messages are received, and any new messages will be displayed under unread messages. To respond to a message, open the message of choice, draft response, and select Send Response.



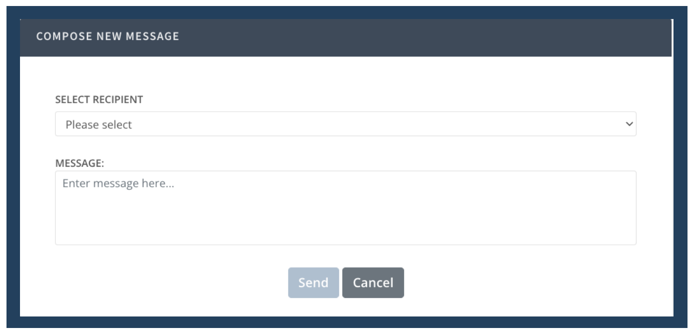
MESSAGE CENTER: Participant Instructions

The Message Center allows participants to initiate and respond to messages from care team members through a confidential and secure channel. Participants are able to conveniently track conversations will all providers and view previous conversation history.

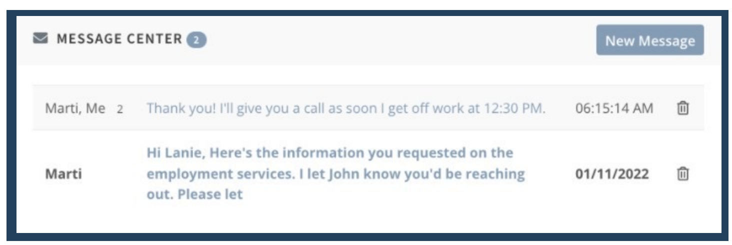
Allow Care Team Initiated Contact
By default, a participant's care team members are able to initiate contact with a participant through MyConnectSV. Participants can opt to turn off care team initiated messages through MyConnectSV's Profile Settings by toggling off the Allow Care Team Member Initiated Contact option under the preferences pane.



Care Team Member
Participants can send a new message to a care team member through the Message Center pane. Participants should select New Message, select the proper recipient, draft a message, and press Send. A copy of the message will be available for review in the participant's inbox



Responding to a Message
When participants receive a message from a care team member, they will receive an alert at their next login and may receive an email or SMS if enabled. Participants can view the message by clicking on the notification or navigating to the Message Center. New and unopened messages will be displayed in bold. To respond, participants should open the message, draft a response, and select Send.



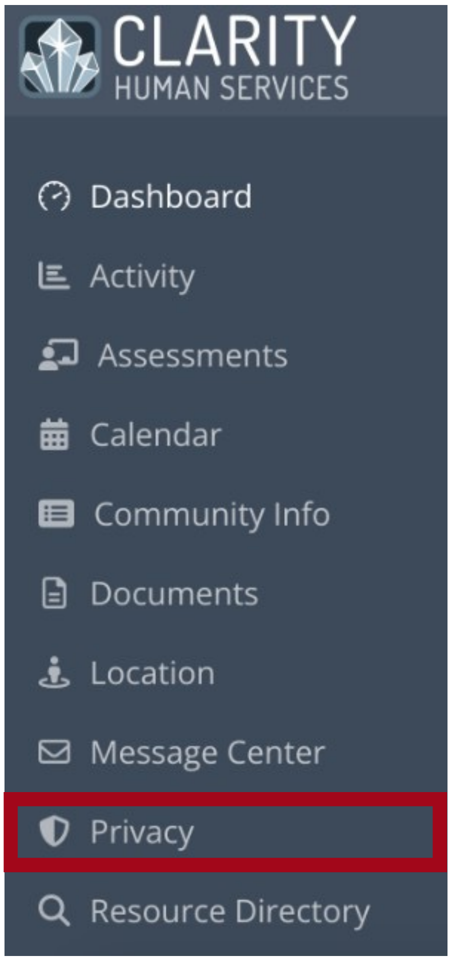
Use Case & Promising Practices

The Message Center feature streamlines communication between participants and providers and keeps communication organized in a centralized location.

- Explain to participants how they might use this feature: Explain to the participant that they can send and receive messages to easily communicate with their care team members through the Message Center.
- Explain to the participant that the Message Center is a secure communication channel and all information shared is confidential.
- Explain to the participant that they have the option to turn messaging off in their MyConnectSV Profile Settings. Encourage the participant to leave messaging on so that they can receive communication from their care team member. Messaging is a helpful tool for communicating updates, service needs, referral status, etc.

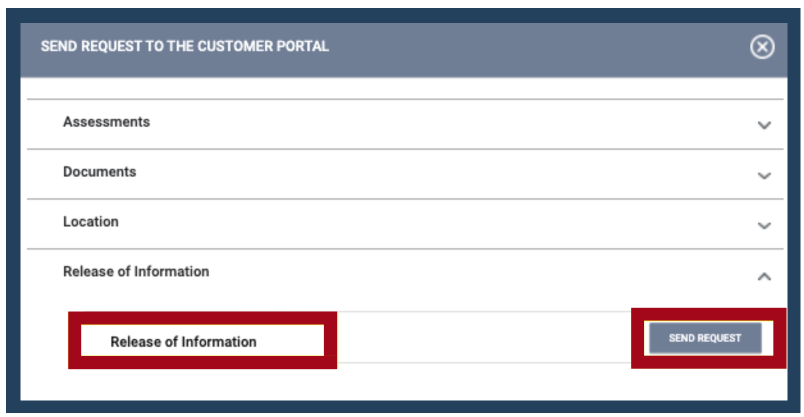
PRIVACY

The Privacy Management feature provides an online resource for easy access and management of Releases of Information (ROIs). Participants are also to view and download their current and past ROIs. If the ROI is already expired or expiring in the next 7 days, the Privacy Management feature allows participants to electronically sign a new ROI from their MyConnectSV account, whether or not they receive a request from a provider. Providers can also resolve an expired ROI by requesting a new ROI from participants through MyConnectSV.



How to Request a New ROI
Request a new ROI through MyConnectSV Request icon located on the participant profile. Select Send New Request and then select to send a request for a "Release of Information" through the drop-down menu.

Mass ROI Request: To send a mass ROI request to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.

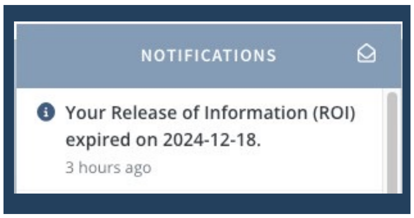


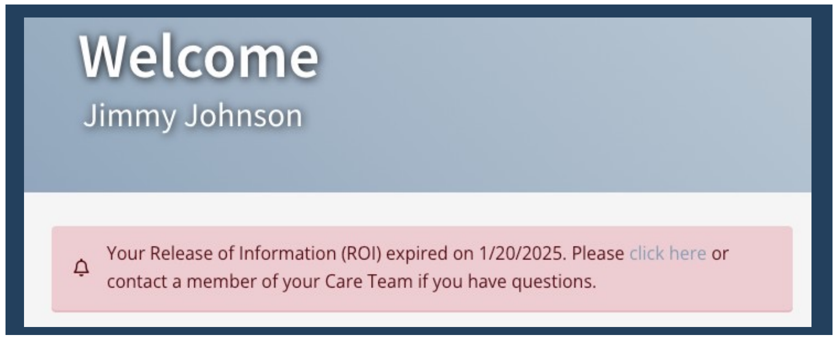
ROI Restrictions
There are a few important restrictions on ROIs that providers should be aware of. Providers are only able to initiate one ROI request per participant at one time. Additionally, the participant's previous ROI must be within two weeks of expiring in order to initiate a request.

Revoking or Amending an ROI
To ensure proper ROI revocation protocols, participants are not able to revoke or amend an existing ROI through MyConnectSV. If they need to make changes to a current ROI, they must contact their provider directly.

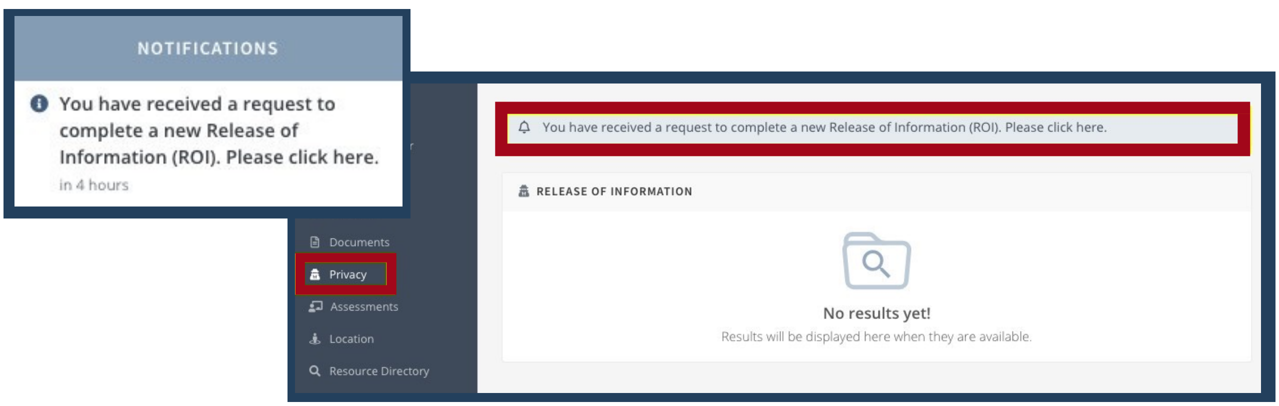
PRIVACY: Participant Instructions

A participant will receive a notification if their ROI is expiring within seven days, and another if their ROI has already expired. They will also see a red banner at the top of their dashboard when they log into MyConnectSV:

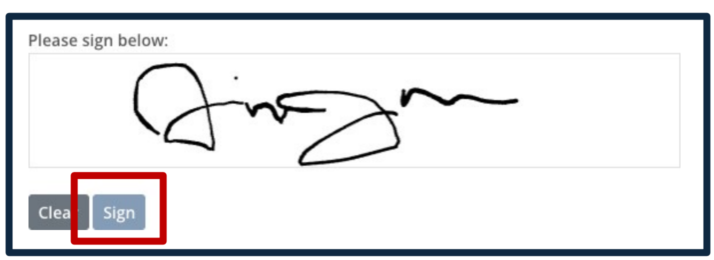




If a care team member requests a new ROI through MyConnectSV, participants will receive a notification. Participants can respond to the request by clicking on the notification or by opening the Privacy Management in the navigation pane.



Participants can complete a new ROI by clicking the link in either banner shown above. The electronic signature form will be displayed for the participant to sign electronically and submit directly within MyConnectSV.



After adding an electronic signature, participants must click Sign and then Save to successfully save the signature and complete submission.

PRIVACY: Participant Instructions

Participants can view their previously submitted ROIs by clicking the icon in the ROI history screen. It is important to note that participants cannot modify or revoke any current or previous ROIs through MyConnectSV. They should contact their care team member directly to request revisions or revoke their ROI.

RELEASE OF INFORMATION

	PERMISSION	TYPE	START DATE	END DATE
	Yes	Electronic Signature	09/07/2021	09/07/2024

Use Case & Promising Practices

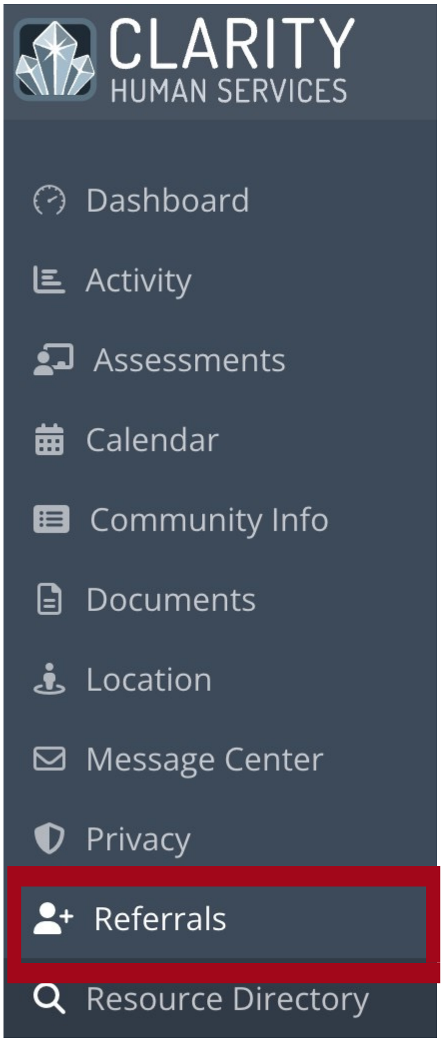
- The Privacy Management feature allows participants to quickly and easily sign and submit a new Release of Information directly through MyConnectSV.

- Explain to participants how you might use this feature: Explain to participants that a valid ROI helps providers to coordinate services, and that expired or missing ROIs can lead to delays in service or housing.

- Explain that participants cannot revise or revoke their current ROI within MyConnectSV. They must contact their care team member to make any revisions to their current ROI.

- Encourage participants to respond to ROI requests right away so that housing and services are not delayed.

REFERRALS: Participant Instructions

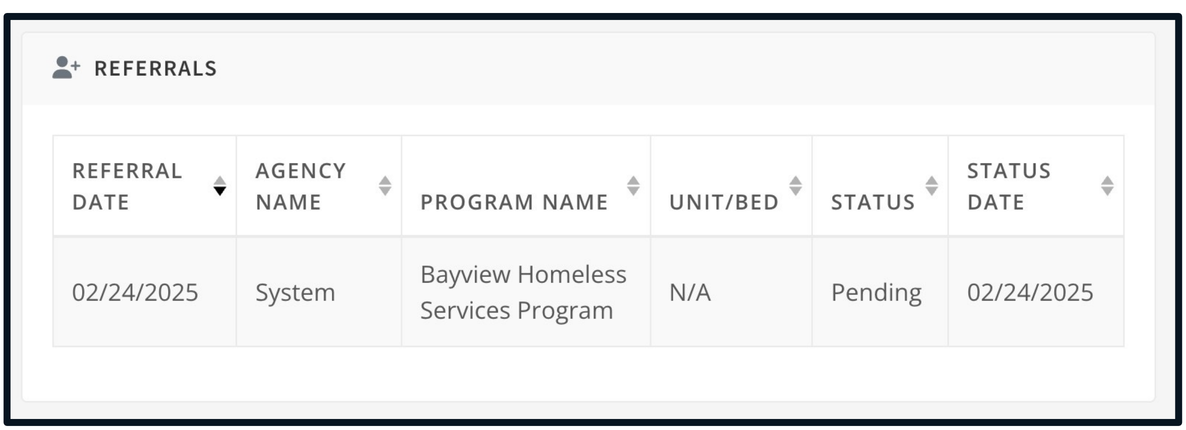


The Referrals feature provides participants with a listing of their current and past referrals in HMIS, including the referral date, agency name, program name, current referral status, and the date when the status was most recently updated.

A participant may have questions for you about what their referral history means. You can use the additional information in HMIS to help answer their questions about current and past referrals.

If a participant contacts you because they see they have a Pending program referral, please help them connect with a staff member at the referred-to agency as quickly as possible. You can leave an updated referral note or send the other provider a message in Clarity. You should tell the other provider that this participant has a MyConnectSV account and can be messaged through their HMIS profile to securely communicate with them about next steps to process their pending program referral.

How to View Referrals
Under the participant view of MyConnectSV, the Referrals tab includes a display of a participant's program referral history. No additional actions are available to participants in the Activity tab. There are no required actions or instructions for providers to use this feature.



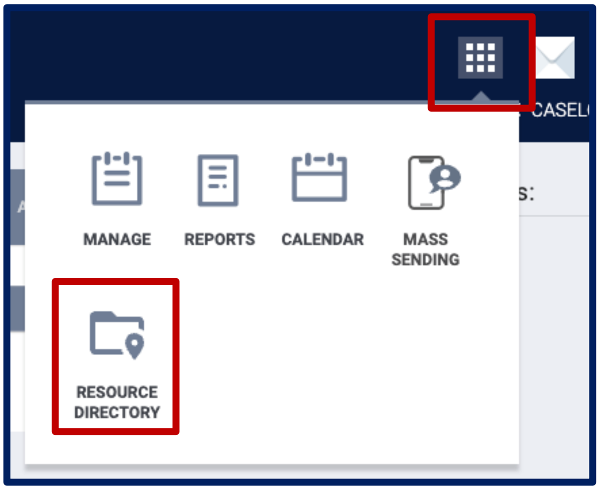
REFERRALS

REFERRAL DATE	AGENCY NAME	PROGRAM NAME	UNIT/BED	STATUS	STATUS DATE
02/24/2025	System	Bayview Homeless Services Program	N/A	Pending	02/24/2025

RESOURCE DIRECTORY

Providers can now utilize a Resource Directory within Clarity Human Services! Providers will see the same information about resources that participants can access through the MyConnectSV Resource Directory.

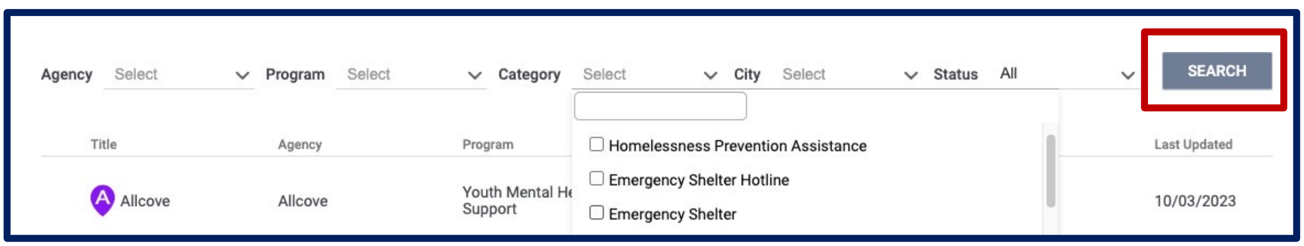
If you have an update to any of the resources included in the Resource Directory or a new resource to add, please submit this form: https://forms.gle/sdHo1h1Mq93sbSXp9

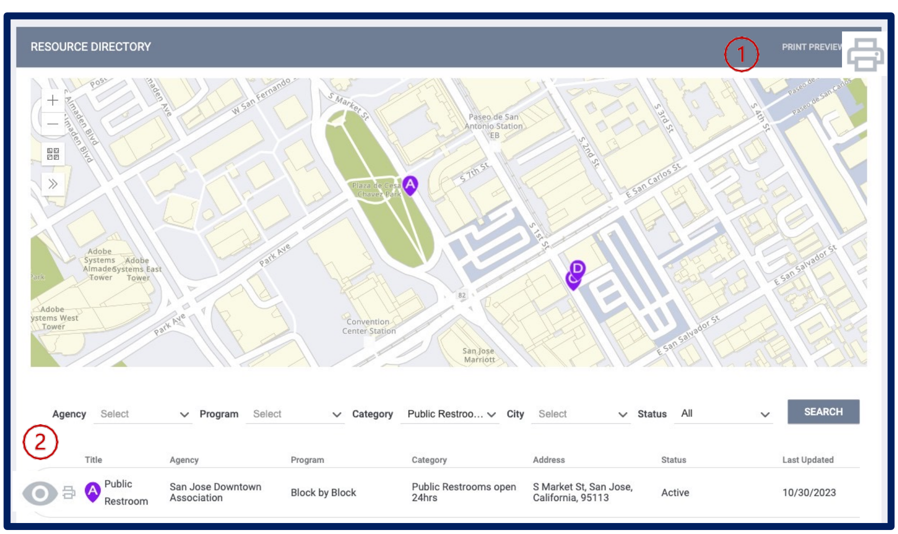


Provider Instructions

Navigate to the Resource Directory in Clarity through the launch pad.

Once in the Resource Directory, use the Agency, Program, Category, and/or City filters to choose one more options to filter; be sure to click Search to apply your filters and view the filtered results:





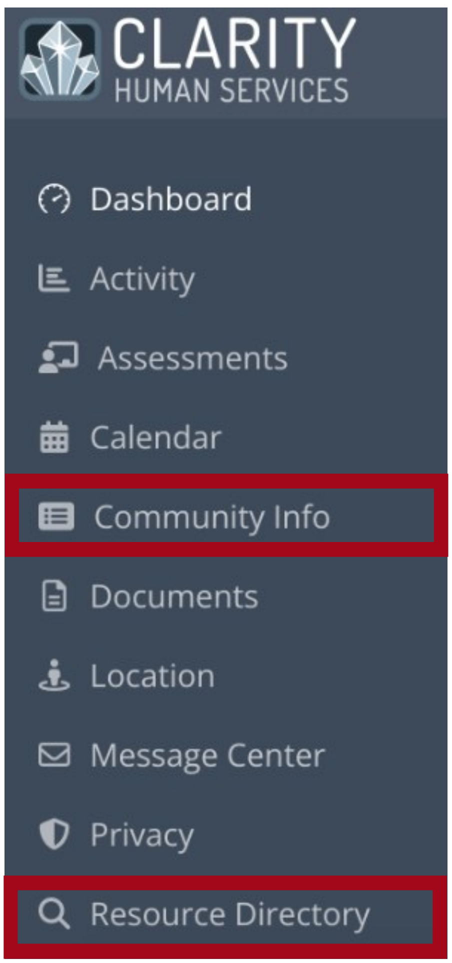
You can use the letters on the map to see the location of corresponding resources in the filtered list.
Use the Print Preview button to generate a printable list of resources and details for all resources included in the current filtered list.
Alternatively, to view or print information about only one resource included in the list, hover over the resource title and click on the eyeball icon to view additional info, or the print button to generate a printable view of that specific individual resource.

Bitfocus

RESOURCE DIRECTORY & COMMUNITY INFO

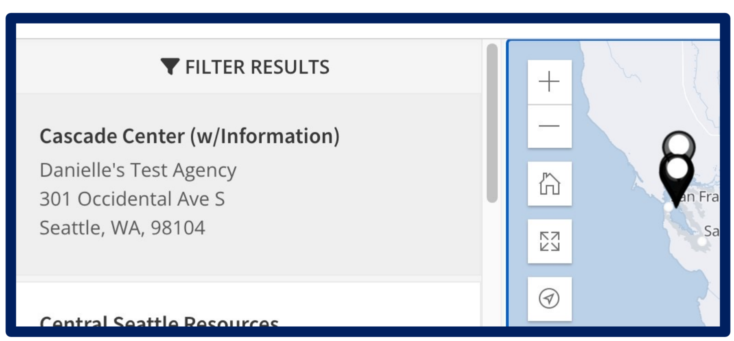
Participant Instructions

The Community Info and Resource Directory both allow participants to get up-to-date local information. In Community Info, participants can view and filter articles with additional information, instructions, and/or links about services that may be available or local announcements. In the Resource Directory, participants can use a map with their current location to identify nearby resources, as well as view and filter resources by agency, category, and/or location.



Community Info
Explain to participants that Community Info articles can be sorted by Title, Date Updated, or filtered using the "Category Filter" dropdown. Click on the title to view the full article and scroll down to the bottom to close or print the information.

Resource Directory
Explain to participants that the Resource Directory can be filtered by clicking "Filter Results." Click on the directory item to view more information, click "Show more details" to view full information, and scroll down to the bottom to close or print the information.



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