



OC HMIS Part 2 Training Skills Test

Please complete tasks 1 through 20 in order on the [Clarity training site](#). You may log in with the training credentials provided by your Agency Administrator. If your Agency Administrator does not know their agency's log-in information for the Clarity training site, they should enter a ticket with the [HMIS Help Desk](#).

When entering client information for this exercise, you may enter any false information you like unless otherwise specified. For this training, you will need to complete all of the tasks under the **OC Agency Training** agency in the Clarity training site.

Task Exercise:

1. **Add a client record.** Client 1 should be at least 18 years old. Make a note of the Unique Identifier for any client records created during the exercise, as this information will need to be sent to 211OC.
2. **Complete a Release of Information for the Client 1.** The Document Type should be Attached PDF. The PDF document itself can be any document.
3. **Add another client record.** Client 2 should be a minor and will be the child of Client 1.
4. **Complete a Release of Information for Client 2.** The Document Type should be Household.
5. **Add Client 2 to Client 1's Global Household.** Ensure that Client 1 is the head of household.
6. **Add a public alert to Client 1.** Describe the subject as if a concern arose that would benefit other agencies to be aware of.
7. **Enroll the household in Project 1.** Ensure that Client 1 is the group enrollment head of household. You may select any of the projects listed under the OC Training Agency.
8. **Set the Project Start Date for both clients to be one month prior to today** (For example, if today is 08/01/2020 the project start date should be entered as 07/01/2020). While the data you use will be fake, please ensure that your responses to the enrollment questions are consistent with the presumed relationship between Client 1 and Client 2. In other words, please answer these questions as if Client 2 is Client 1's child. Pretend that Client 1 and Client 2 spent the night before in an Emergency Shelter.
9. **Add services to the enrollment.** Add any of the services in the project.
 - a. Add 1 service to Client 1, and add a note to the service as well.
10. **Complete a Status Assessment for Client 1 and Client 2 under their enrollments.**
11. **Complete an Annual Assessment for Client 1 and Client 2 under their enrollments.**
12. **Add project level notes.** For both notes, enter the time spent on the case management session in the Time Tracking field.
 - a. Add a private note to Client 1's enrollment
 - b. Add a public note to Client 1's enrollment
13. **Using the Attendance tab, add the Food: Meal service to Client 1 for 7 days.**
14. **Create a new client profile for Client 3.**

15. **Complete a Release of Information for Client 3.** The Document Type should be Verbal Consent.
16. **Add Client 3 to the global household.**
17. **Enroll Client 3 into Project 1 (the same project you initially enrolled Client 1 and Client 2 into), and make sure Client 3 is in the same household as Clients 1 and 2.** The Project Start Date for Client 3 should be 7 days ago.
18. **Exit all 3 clients from the project.** The Project Exit Date should be two days ago.
19. **Enroll all three clients into a new project, Project 2, that is different than the previous enrollment they have.** Ensure that Client 1 is the group enrollment head of household. The Project Start Date should be yesterday's date.
20. **Exit Client 3 from the project.** Client 1 and Client 2 should remain enrolled in the project. The Project Exit Date for Client 3 should be today's date.
21. **Run the Program Roster Report for either of the projects that the three clients were enrolled in and download the PDF.** The reporting range should be for the past month, ending today. The status should be *Active within Report Date Range*.

22. Have your Agency Administrator [submit a ticket](#) to the HMIS Help Desk. In the ticket, have your Agency Administrator include the following information:
 - Name of user who took the test:
 - Username you used in the Clarity Training Site:
 - Client 1 ID and Fake Name:
 - Client 2 ID and Fake Name:
 - Client 3 ID and Fake Name:
 - Project 1 Name:
 - Project 2 Name:
 - Date on which the test was completed:
 - PDF Attachment of the Program Roster Report