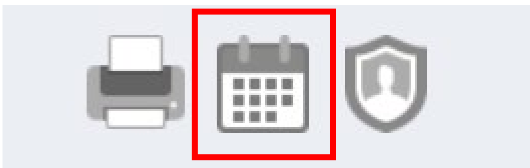
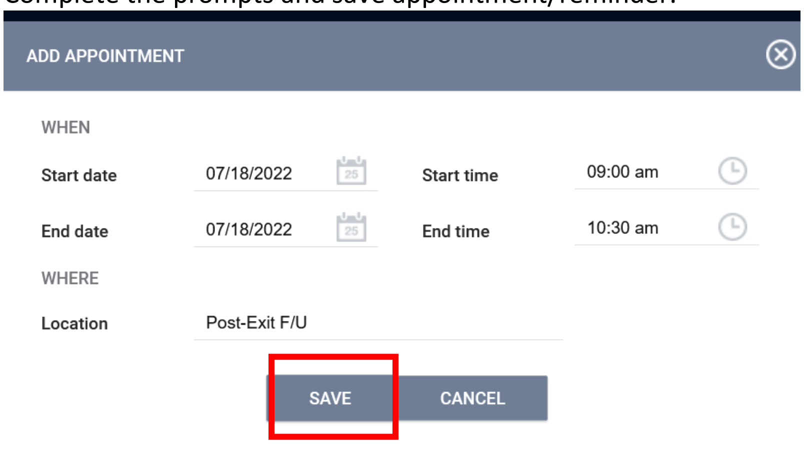
Step-by-Step: Setting a reminder in your Calendar for Post-exit Follow-up

To utilize the Calendar and Follow-Up Assessment in Clarity for Clients who have exited a Program, please follow the steps illustrated in the guide shown below. Post-exit follow-ups are not automatically created by the system, but if you are an assigned Staff Member for the client, you can schedule and receive reminders.

1. Login to CSIS (Community Services Information System).
2. Search for the client you would like to set an appointment/reminder for a follow-up.
3. Select the calendar option to schedule appointment/reminder.



4. Complete the prompts and save appointment/reminder.

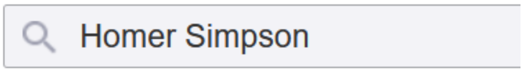


5. You will now see the appointment/reminder in your Clarity Calendar.

Step-by-Step: Completing Post-Exit Follow-Up

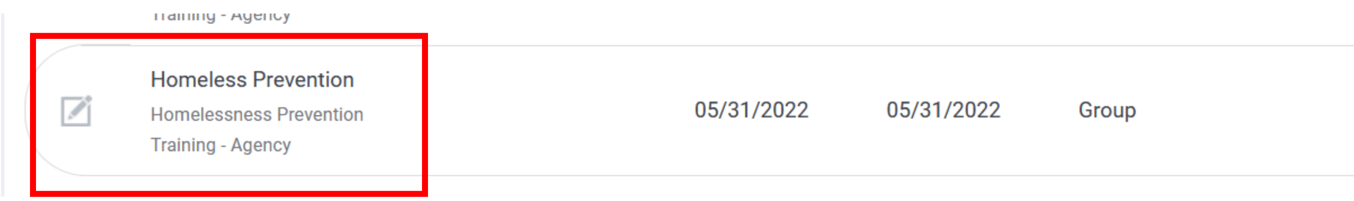
Follow-up Assessments are "program-specific", meaning they are based upon the program in which the individual is enrolled. Additionally, Follow-Up Assessments will not be listed until the client has been exited from the program.

1. Login to CSIS.
2. Search for the client requiring a post-exit follow-up.

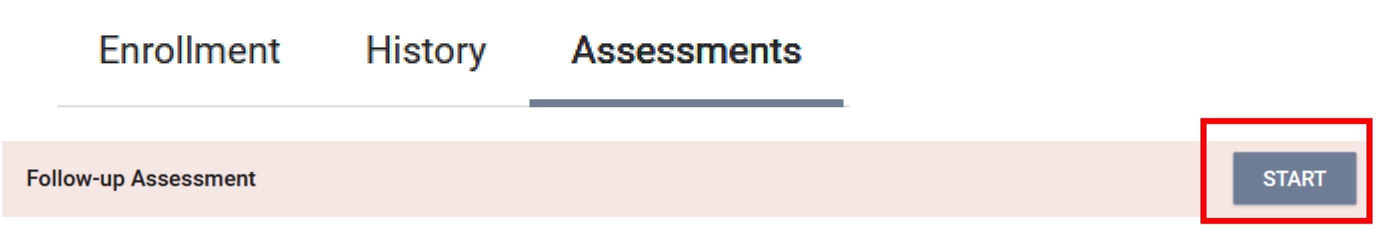


3. Select the PROGRAMS tab in the client record.

4. On the left of the Program Name, you will see a check box which is the edit icon.



5. Click the edit icon to open the Program screen. Once in the program screen, select the ASSESSMENTS tab to view available assessments that can be selected. To complete the Follow-up Assessment(s), click on the + sign beside "Follow-up Assessments" in the column on the right side of the screen.



6. Click Save and Close.
7. For multiple Follow-up assessments, complete steps 5 & 6 for each date.