Clarity: New Interface Training

211

Get Connected. Get Help.™

Orange County
UNITED WAY

Q&A

To better organize questions the HMIS Help Desk receives during the training, our team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the training.

Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

Agenda

Primary Navigation

1. Primary Navigation Menu
2. Client Search (Default Home Screen) Functions
3. Caseload Widgets
4. Client Profile Creation & Decision Pathways
5. Client Privacy
6. Client Household

Client Navigation

1. History
2. Programs
3. Services & Assessments
4. Care Team
5. Notes
6. Public Alerts & Files

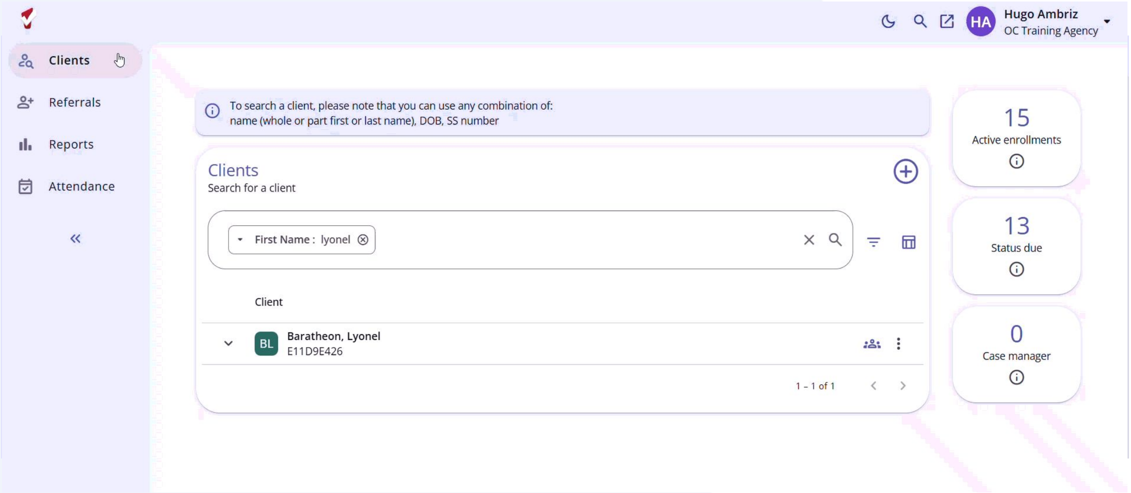
Primary Navigation Menu

The primary navigation menu is located on the left side of the screen and is always visible to the user, regardless of which page they're currently on.

The following key pages are now housed under the primary navigation menu:

- Client Search
- Referrals
- Reports
- Attendance

The primary navigation menu can either be collapsed or expanded depending on user preference.



Primary Navigation Menu - Information Bar

An updated information bar is located on the top of the screen and is always visible to the user, regardless of which page they're currently on.

The following items are housed in the information bar:

- Light/Dark Mode toggle
- Global client search field
- Switch Interface
- Inbox
- Current Staff Member

Client Search

The client search page serves as the default home screen for all users and users can search for client records by utilizing the search bar and entering:

- Name (full, first or last)
- UID
- SSN (full or partial)
- DOB
- Birth year

A recently accessed clients list can be found below the search bar and retains information about the most recent client records a user has accessed or created.

211
Get Connected. Get Help.™

Orange County
UNITED WAY

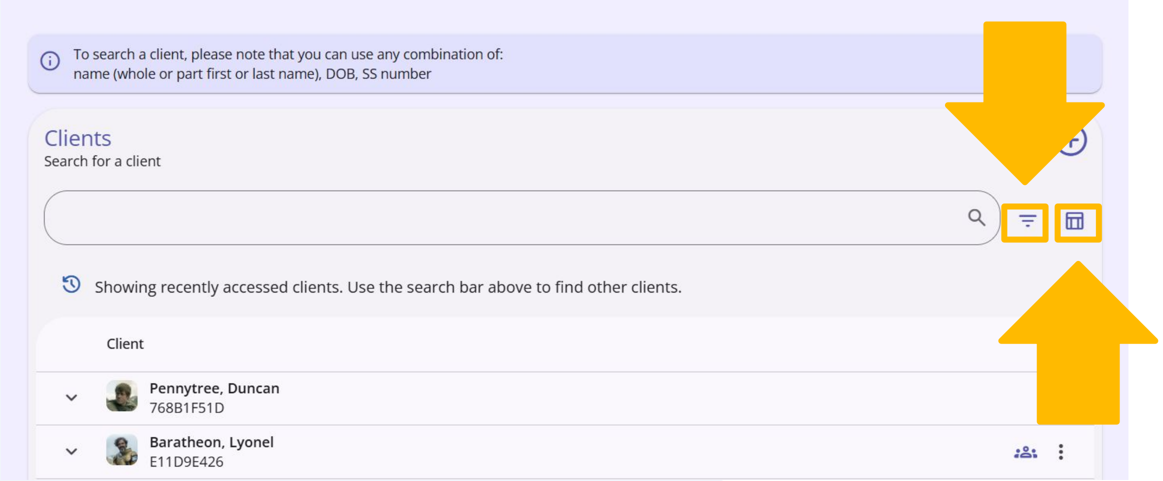
Client Search - New Functions

Client search results can be filtered to more accurately search for clients. Users can utilize the filter icon to filter search results by:

- Name (first or last)
- Alias

Users can also customize the look of the search results view by adding columns to the display using the column selector icon to more easily identify clients.

[Click here](#) for hands-on experience to practice searching for client records



Caseload Widgets

Users can locate their caseload by utilizing the caseload widgets on the right-hand side of the client search page. The following information from the user's current agency is included:

- **Active enrollments:** Displays the number of active enrollments a user has created or was assigned
- **Status due:** Displays the number of upcoming, due or past due annual assessments
- **Case manager**: Displays the number of active referrals a user is assigned

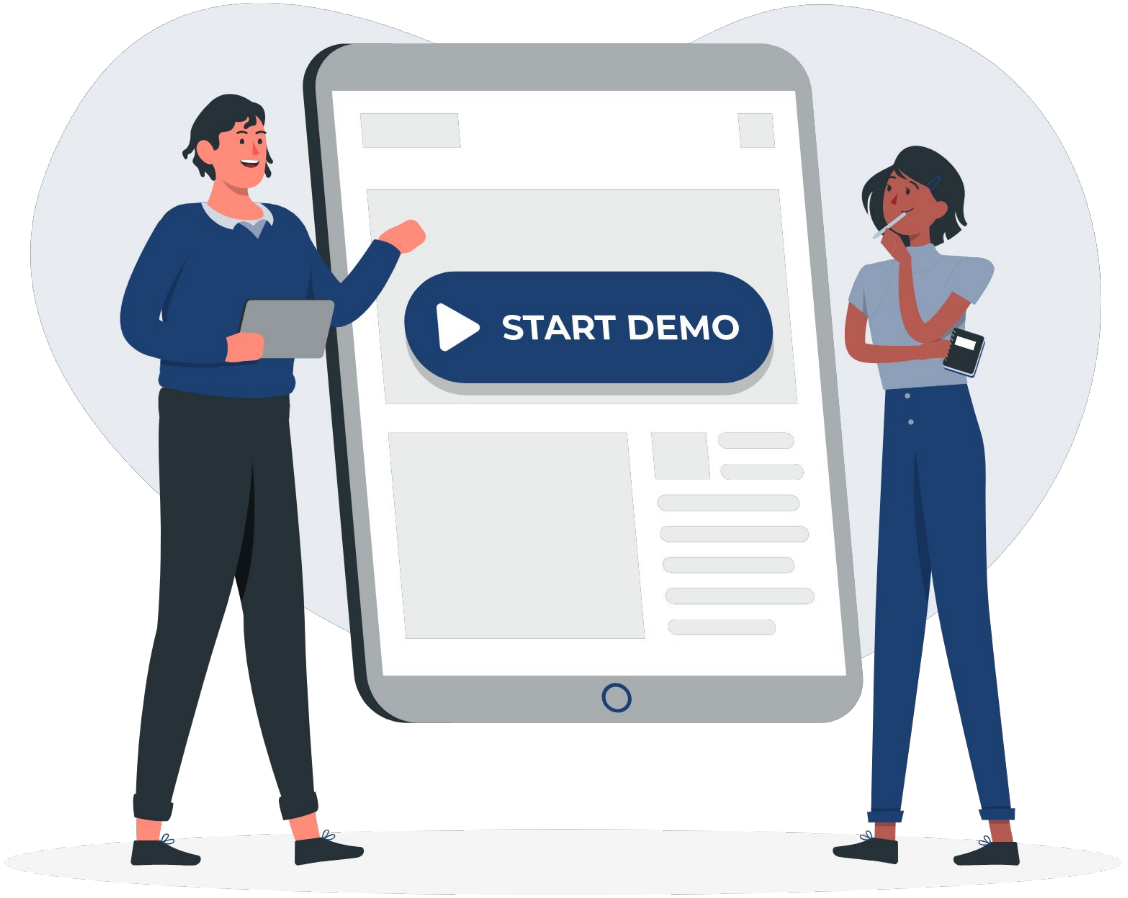
Context about specific widgets can be found by selecting the information icon.

211
Get Connected. Get Help.™

Orange County UNITED WAY

Orange County UNITED WAY

Primary Navigation Menu Demo



Graphic by: https://storyset.com/online

211

Get Connected. Get Help.™

Client Profile Creation Decision Pathways

As part of the client intake process, users are required to ask clients if they consent to share their information in OC HMIS. Client consent is not needed to ask for the information or enter it into the HMIS, client consent is needed for data sharing.

Clients who provide consent to share their information should have their their client profiles set to **public**, while clients who do not provide consent should have their client profiles set to **private**. Unaccompanied minor clients cannot provide consent to share their information and must have private client profiles created.

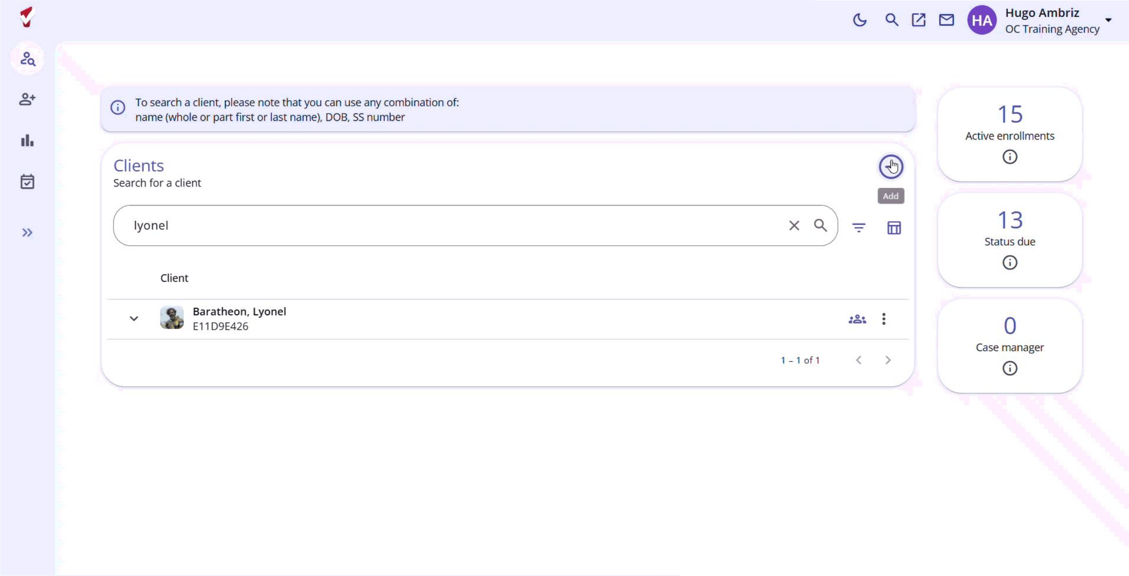
Scenario	Result
Client provides consent to share information and provides PPI	User creates a public client profile with PPI
Client declines consent to share information and provides PPI	User creates a private client profile with PPI
Client provides consent to share information and does not to provide PPI	User creates a public client profile with the the "Consent Refused" toggle enabled
Client declines consent to share information and does not to provide PPI	User creates a private client profile with the "Consent Refused" toggle enabled

Client Profile Creation

New client records can be created on the client search page by selecting the add icon.

On the client profile form that opens, record core data about the client. The following fields are required:

- Name
- SSN
- DOB
- Race and Ethnicity
- Veteran Status
- ROI Permission



[Click here]() for hands-on experience to practice creating new client records.

Client Profile - Information Bar

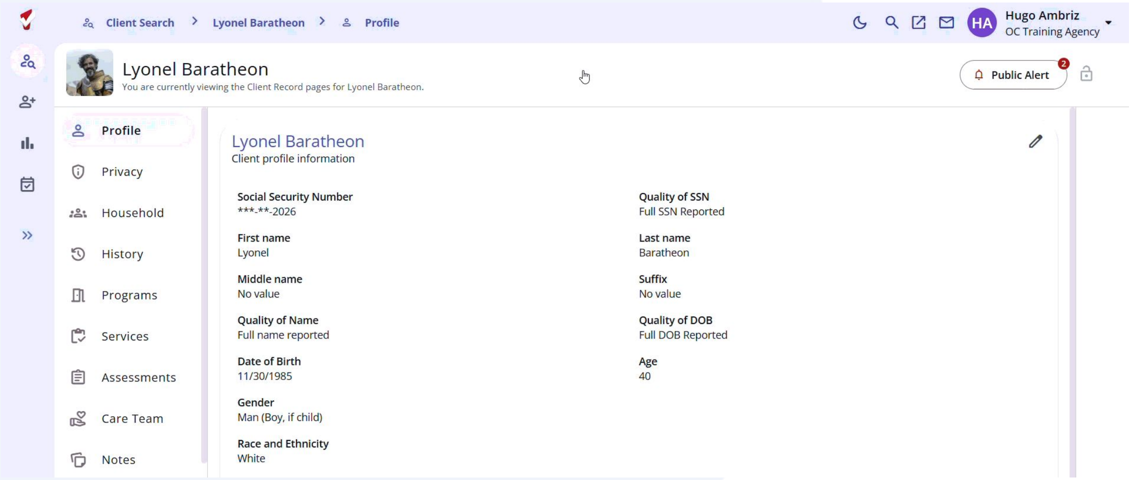
In the client record, a client information bar is located at the top of the screen and is always visible to the user, regardless of which client subtab they're currently on.

The client information bar will always display the following information:

- Name
- Photo/Initials
- Privacy Status

The client information bar may also display missing contact information, missing ROI records, and active public alerts if needed.

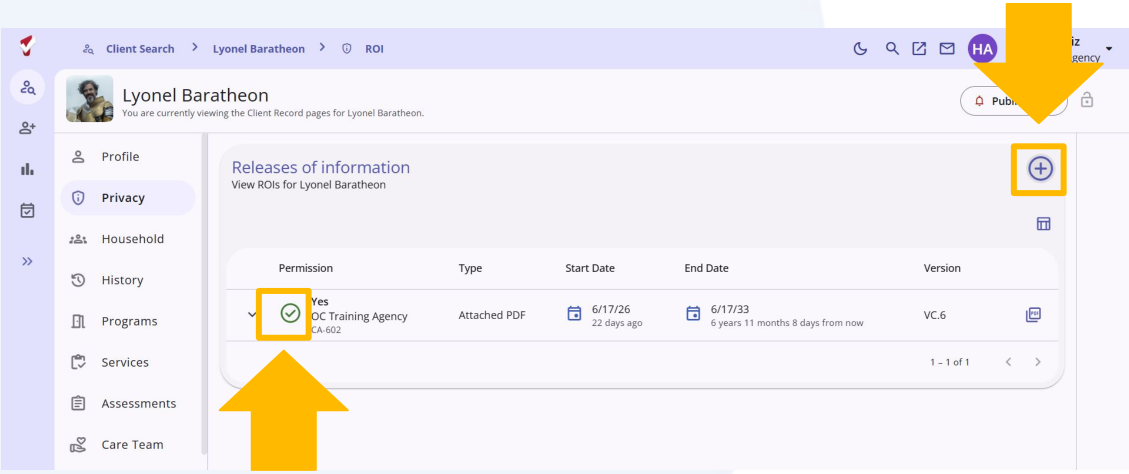
The client UID is now located in the client information bar, and is visible if the user expands the section.



Client Privacy

In the client record, the client privacy tab displays private data, consent refused options, and Release of Information (ROI) data.

To edit an existing ROI, select the green checkmark icon next to the record and then select the edit icon in the ROI form that opens. More information about a specific ROI record can be obtained by by selecting the caret icon next to the record.



To add a new ROI record, select the add icon and complete the fields in the ROI form that opens.

Click here for hands-on experience to practice adding ROI records.

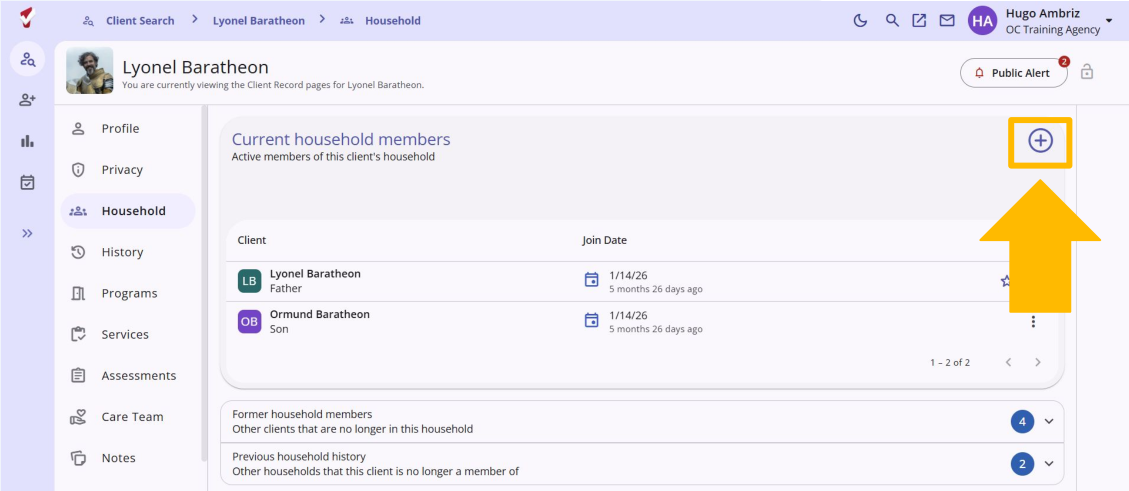
211
Get Connected. Get Help.™

Orange County
UNITED WAY

Client Household - Adding Members

In the client record, the client household tab displays the following household information:

- **Current household members:** Active members of the client's household
- **Former household members:** Previous members of the client's household
- **Previous household history:** Prior households the client was a member in



Within the current household members section, users can add new members to the household by selecting the add icon. New household members can be added by:

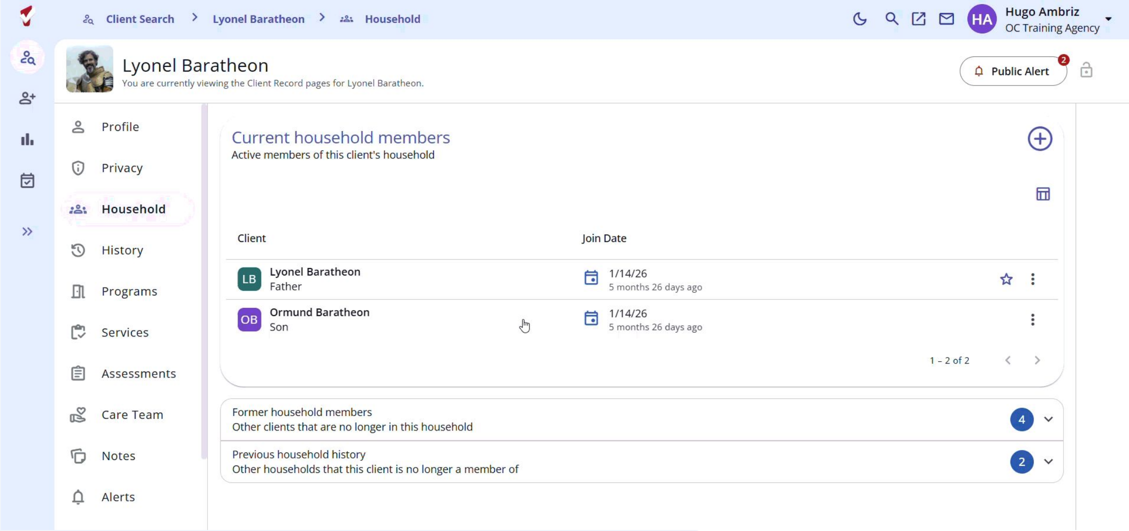
- Quick add from recently accessed client records
- Client search of existing client records
- Add new client record

Client Household - Removing Members

Under the current household members section, users can remove clients from the household by selecting the action menu icon next to the member's profile and then selecting the view household relation option.

In the household member form that appears, select the edit icon and enter the date the client will be exited from the household. A client's exit date cannot be earlier than their join date, and Head of Household (HoH) status must be reassigned if the departing client is the current HoH.

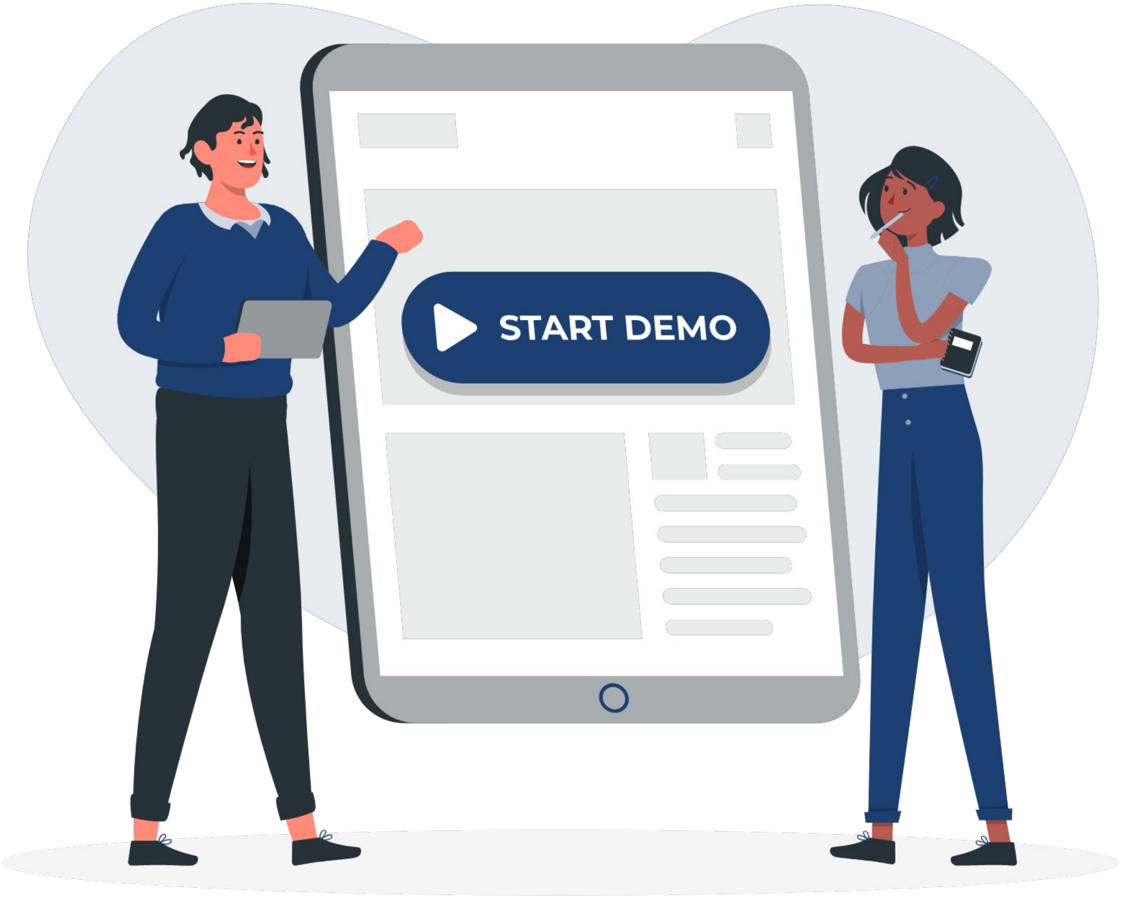
Click here for hands-on experience to practice adding and exiting clients from a household.



211
Get Connected. Get Help.™

Orange County
UNITED WAY

Client Profile Creation Demo



Graphic by: https://storyset.com/online

Get Connected. Get Help.™

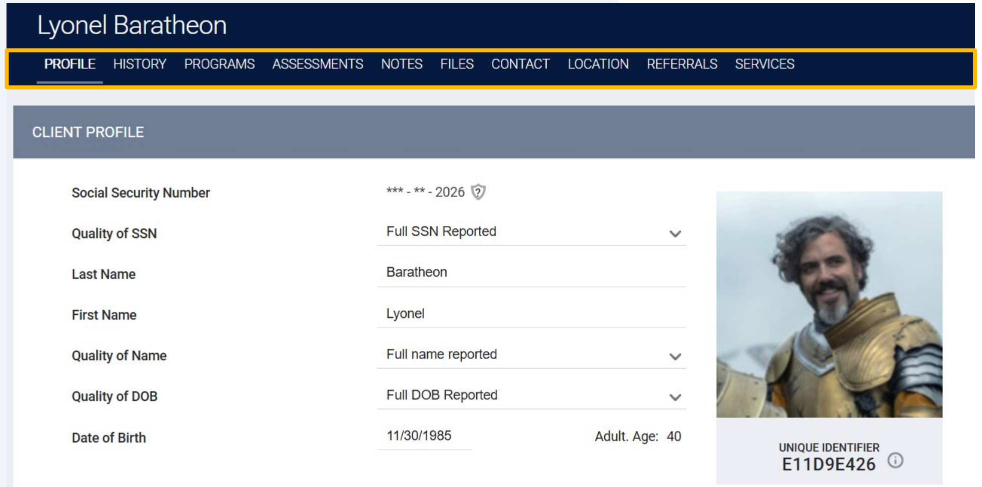
Client Navigation Menu Tabs

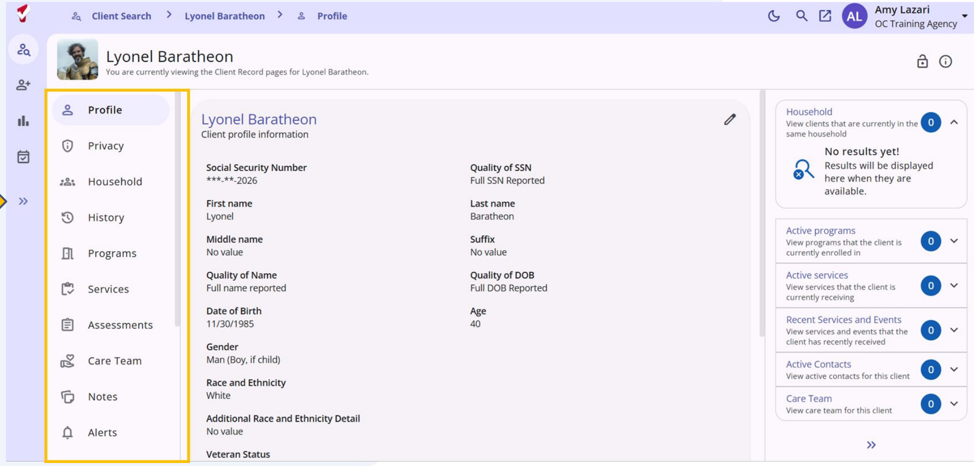
The *Client Navigation Menu* is now located on the left side of the client profile screen, and is accessible to the user regardless of where they click in the client record.

The following key screens are housed under the *Client Navigation Menu:*

- Profile
- Privacy
- Household
- **History**
- **Programs**
- **Services**
- **Assessments**
- **Care Team**
- **Notes**
- **Alerts**
- **Files**
- Forms
- Contact
- Location
- Referrals

The client navigation menu can be either collapsed or expanded by clicking the caret icon on the left of the menu.





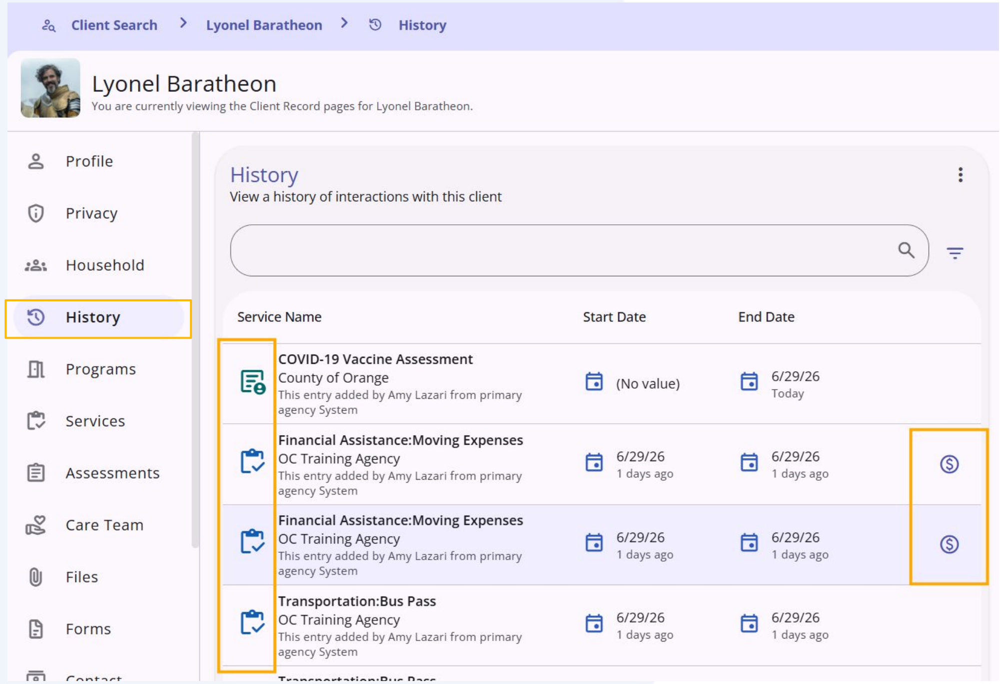
Client History

The History tab is the "central hub" of the client record.

It includes a complete history of prior or active:

- Service Items
- Program Enrollments
- Referrals and Reservations
- Assessments
- Coordinated Entry Events

Users can hover over any icons on the screen to prompt a tooltip containing information about the event.



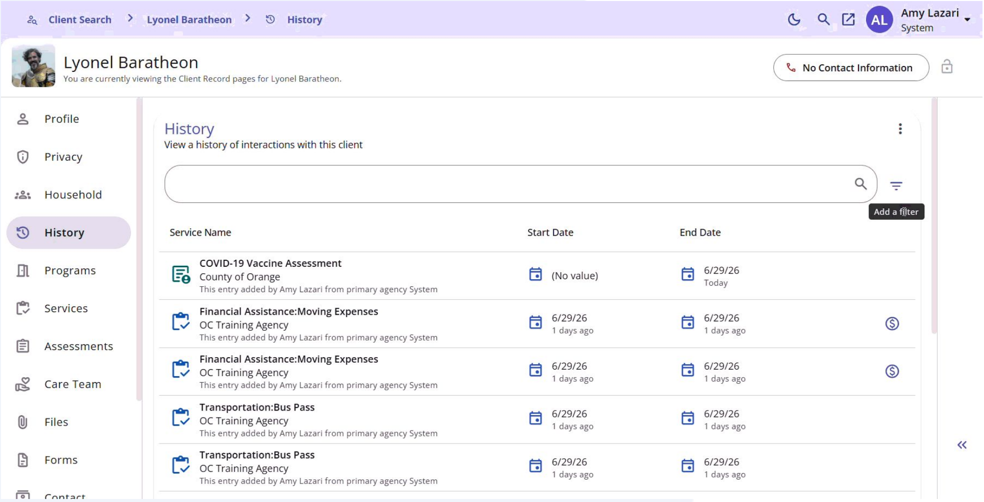
Client History

Advanced Search Options

Select the upside down triangle to access:

- **Agency** - all data entered by that agency
- **Category** - specific service category (e.g. food)
- **Coordinated Entry** - CE Events
- **Start and End Date** - filter for specific dates
- **Type**
  - Assessments, Programs, Referrals, Services, Reservation, Coordinated Entry Event

Reset the search by clicking the delete ("x") icon next to any search criteria previously selected.

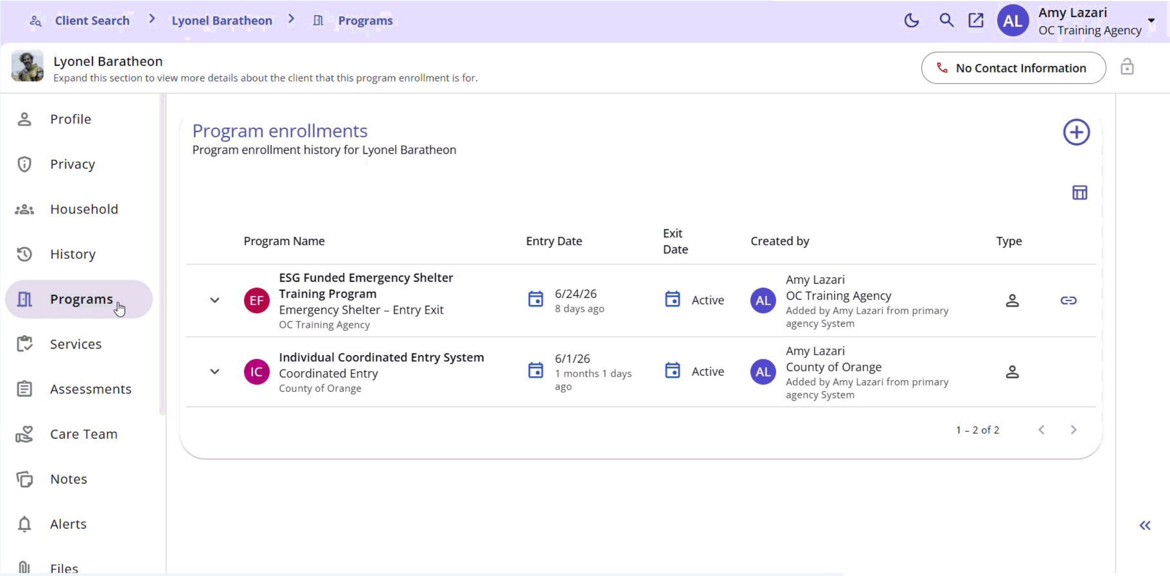


Program

The Programs tab includes the client's ***Program History*** and is where users can add and manage program enrollments.

Program History Screen

- Click on show/hide fields to re-order or collapse the entry date, exit date, or created by fields.
- Click on any current or past enrollments to view/edit/manage enrollment information for the agency.
- **Click on the Add (+) button to start a new enrollment.**



211
Get Connected. Get Help.™

Orange County UNITED WAY

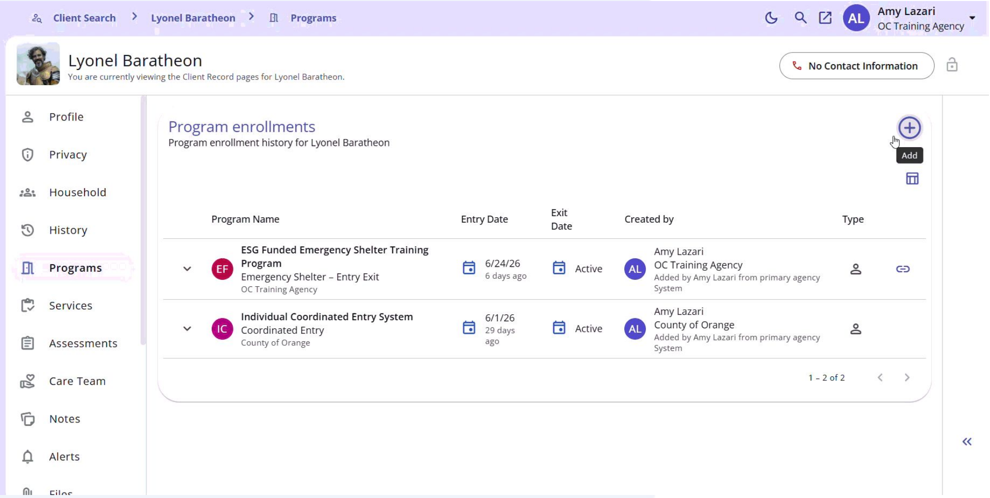
Programs

Creating a new Enrollment

The enroll workflow is broken down into (3) stages:

1. Select the desired project from the list of projects available under the agency, click Next.
2. Add specific members from the client's Global Household to the project enrollment by toggling the button next to their name, click Next.
3. Complete the enrollment screen for each client joining the project, click Save and Complete.

Once the enrollment information has been completed for each member joining the project, the enrollment will appear under each client's program enrollment history.



Programs

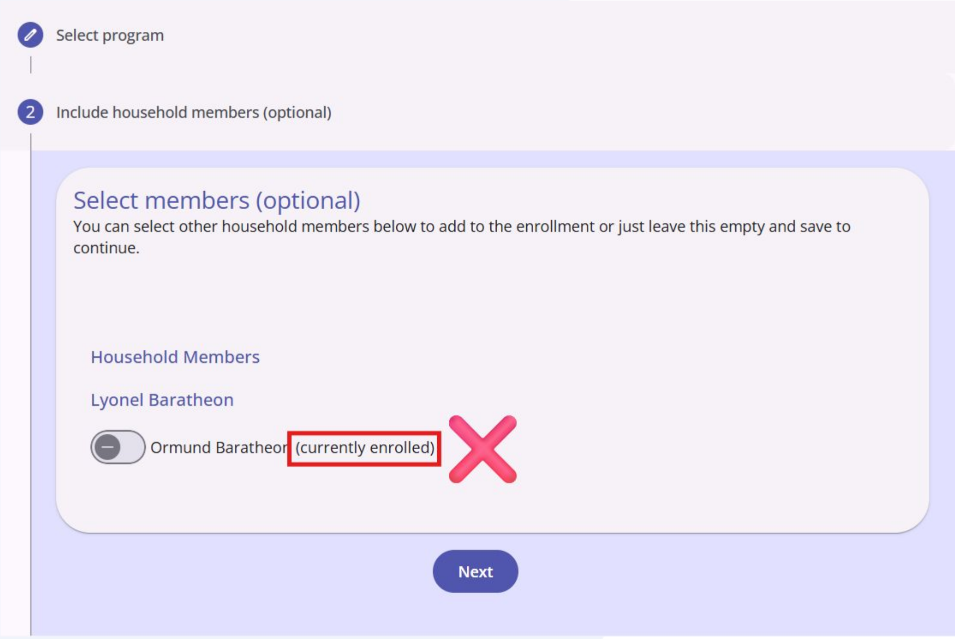
A note about adding household members...

The system will display a **(Currently Enrolled)** label for household members who are already actively enrolled in the same program.

If users select a currently enrolled family member and click Next, the system will allow them to be enrolled, creating two active enrollments in the same project for that member - please avoid this.

Instead complete the enrollment for the Head of Household and any non-enrolled members as needed.

The Agency Administrator may contact the Helpdesk and submit a Program Merge ticket to request the members enrollments be merged into a single group enrollment.



211
Get Connected. Get Help.™

Orange County UNITED WAY

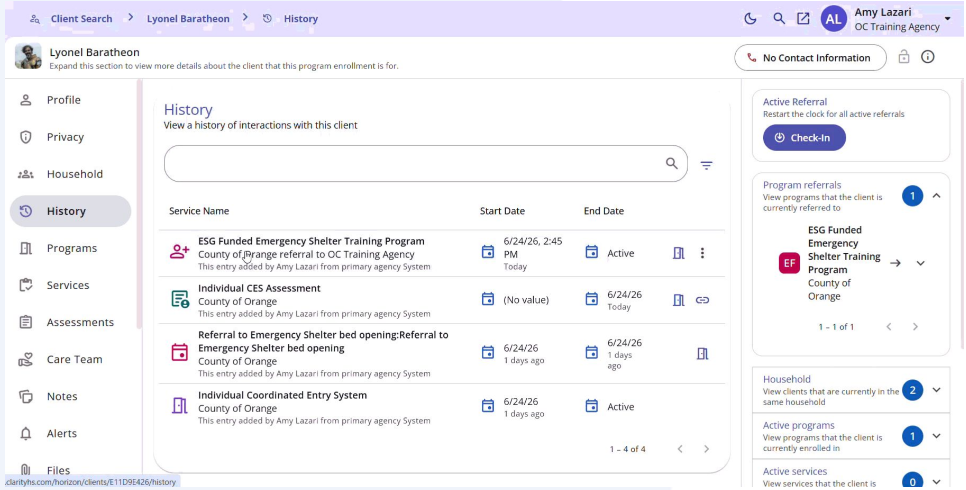
Programs

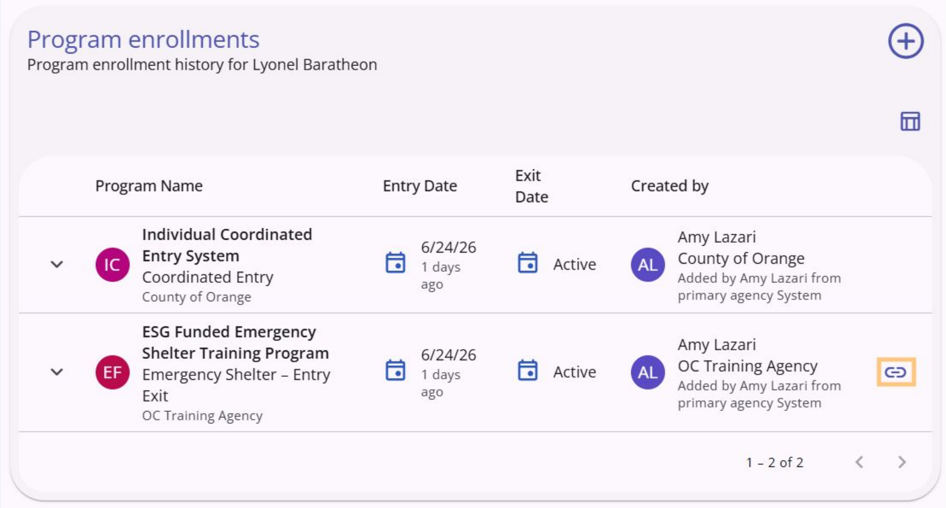
Referral Connected Enrollments

For clients with a **pending housing referral** through the Coordinated Entry System, a referral linked enrollment can be created by enrolling the client into the housing project corresponding to the match.

When the client is enrolled in the project that matches their pending housing referral a referral linkage will <u>automatically</u> be created for the enrollment.

Note: This step if for housing providers only.





211
Get Connected. Get Help.™

Orange County
UNITED WAY

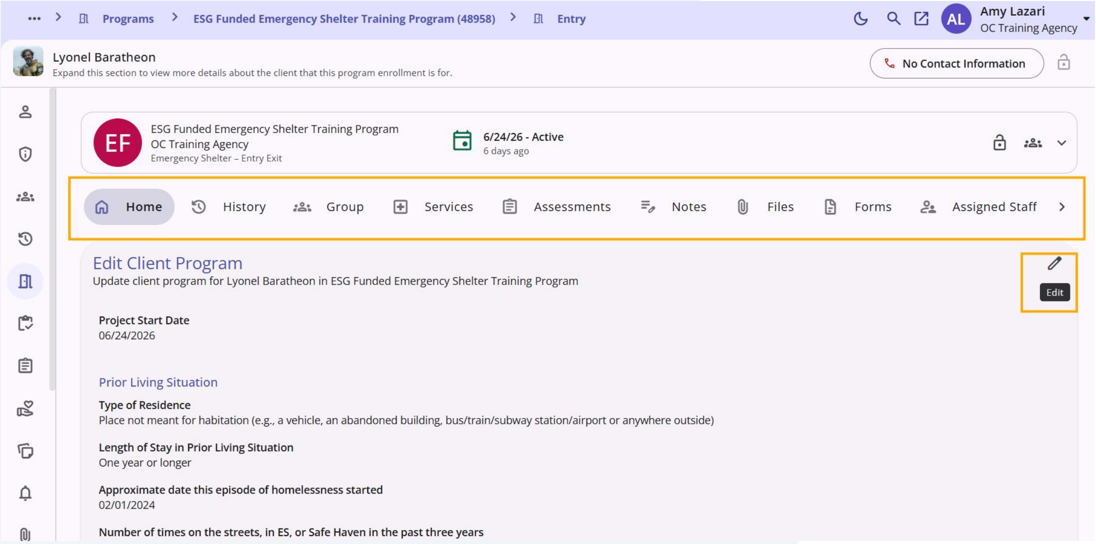
Programs

Program Enrollment History

Click on the enrollment to open, view and manage enrollment information at the program level such as:

- Entry responses (missing, incomplete, erroneous data).
- Set the enrollment to private.
- Household members
- Services, assessments, notes, and files.
- Assigned staff information.
- Program Exit

Click here for an interactive guided demo of enrolling clients into a program.

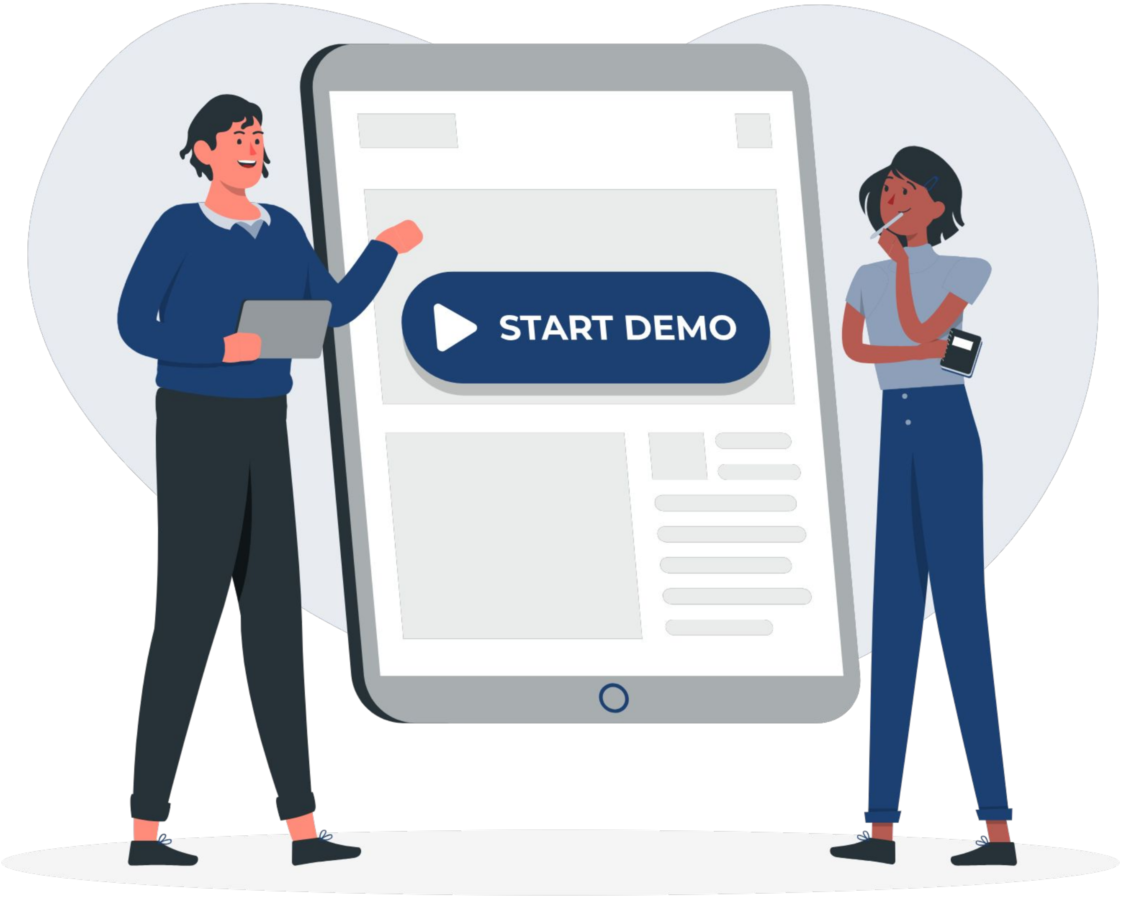


211
Get Connected. Get Help.™

Orange County
UNITED WAY

Orange County UNITED WAY

Demo



Graphic by: https://storyset.com/online

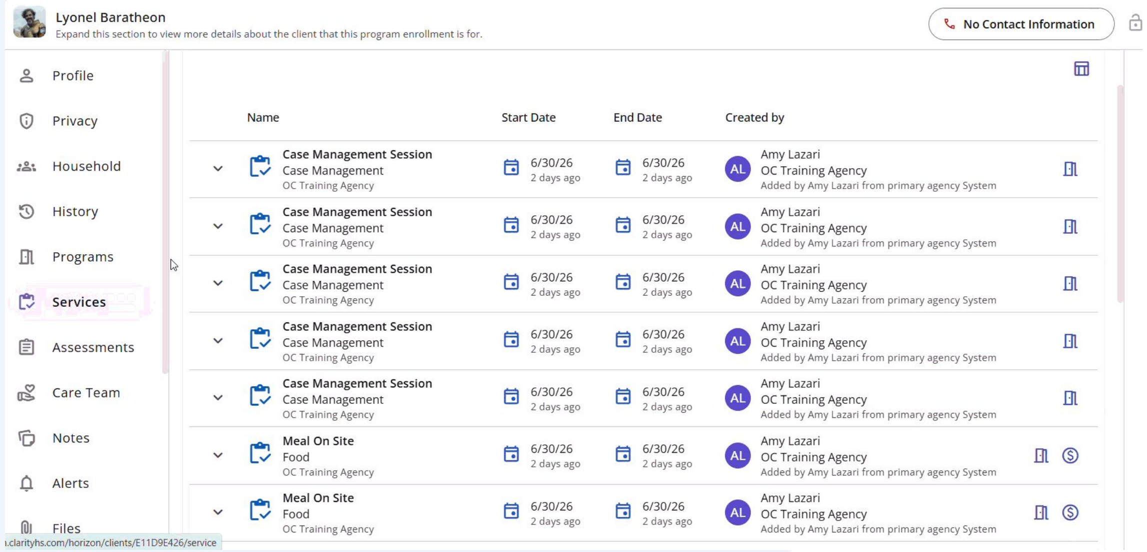
211

Get Connected. Get Help.™

Services

The Services tab includes all service history (agency and program level) and the ability to add and manage services.

- The Service History screen will display the service name, start/end date, and created by fields for all previously recorded services.
- Use the show/hide fields icon to change the order or collapse fields to appear when the user clicks on the caret.
- The door icon on the right indicates that a service was entered at the project level; the dollar icon indicates that an expense was recorded with the service.



Get Connected. Get Help.™

Orange County UNITED WAY

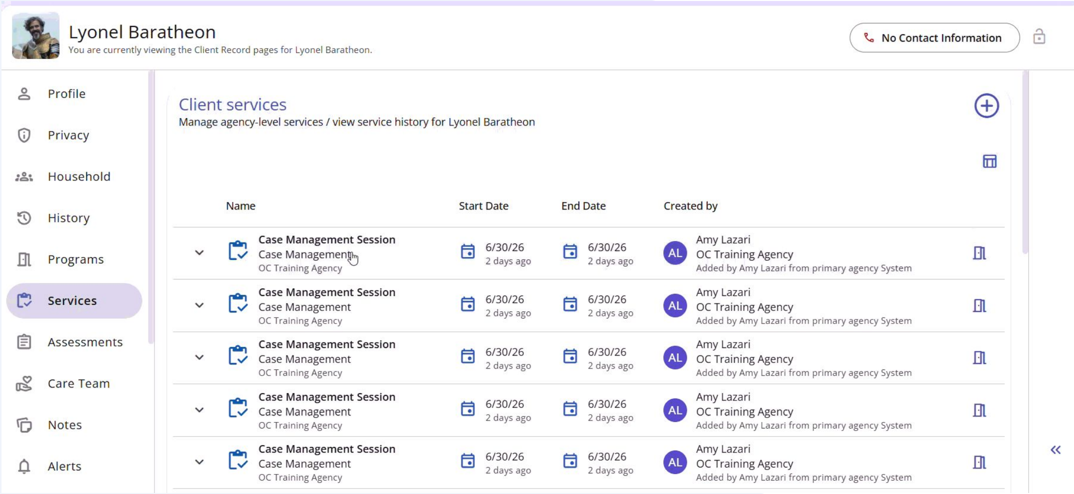
Services

Service Details Screen

Provides a snapshot of the service name, category, and service items recorded as well as the name of the agency and staff that entered the service.

Within the Service Details section there is additional information about the service dates, location and time tracking (if enabled).

If dollar/expense tracking was enabled for the service, that information may be added to an existing service.

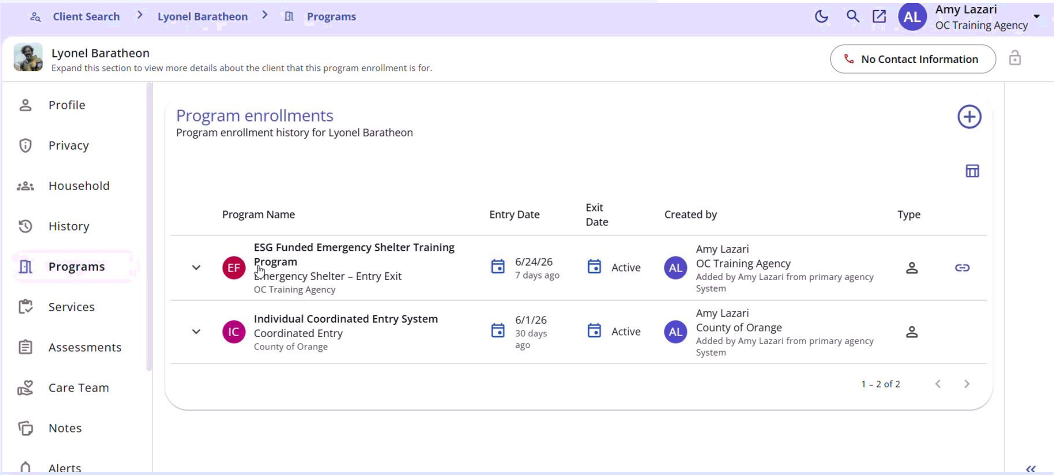


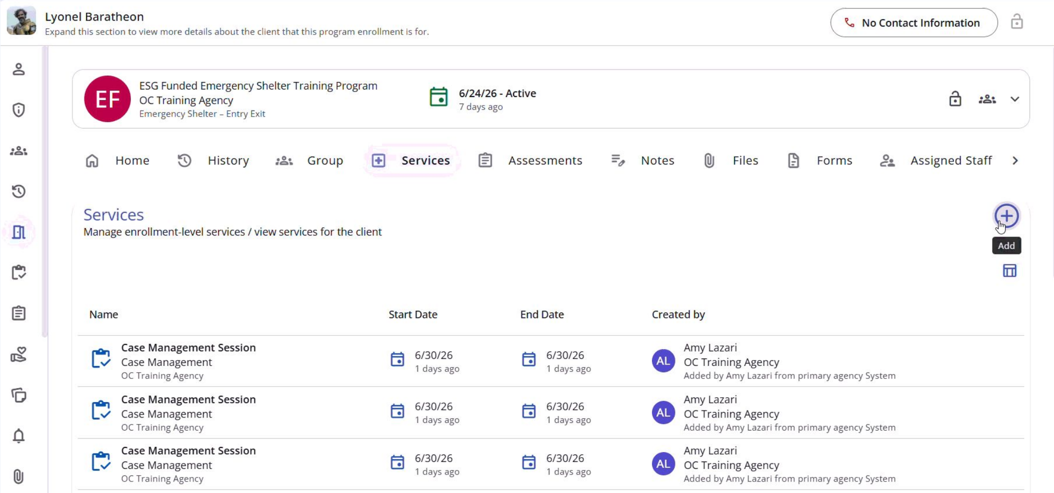
Services

The majority of services entered by users will be set-up at the project level.

To access and add services at the program level…

- Go to Client Navigation menu and select **Programs**.
- Locate and open the enrollment.
- Find and select the **Services button**
- **Click** the Add(+) icon to view services available for the project.
    - Select the service item you want to record.
    - If desired, users may select the lock icon to set the service to Private.
    - Complete the service item information, then select save and complete to record the service.





211
Get Connected. Get Help.™

Orange County UNITED WAY

Services

Deleting and Editing Service Items

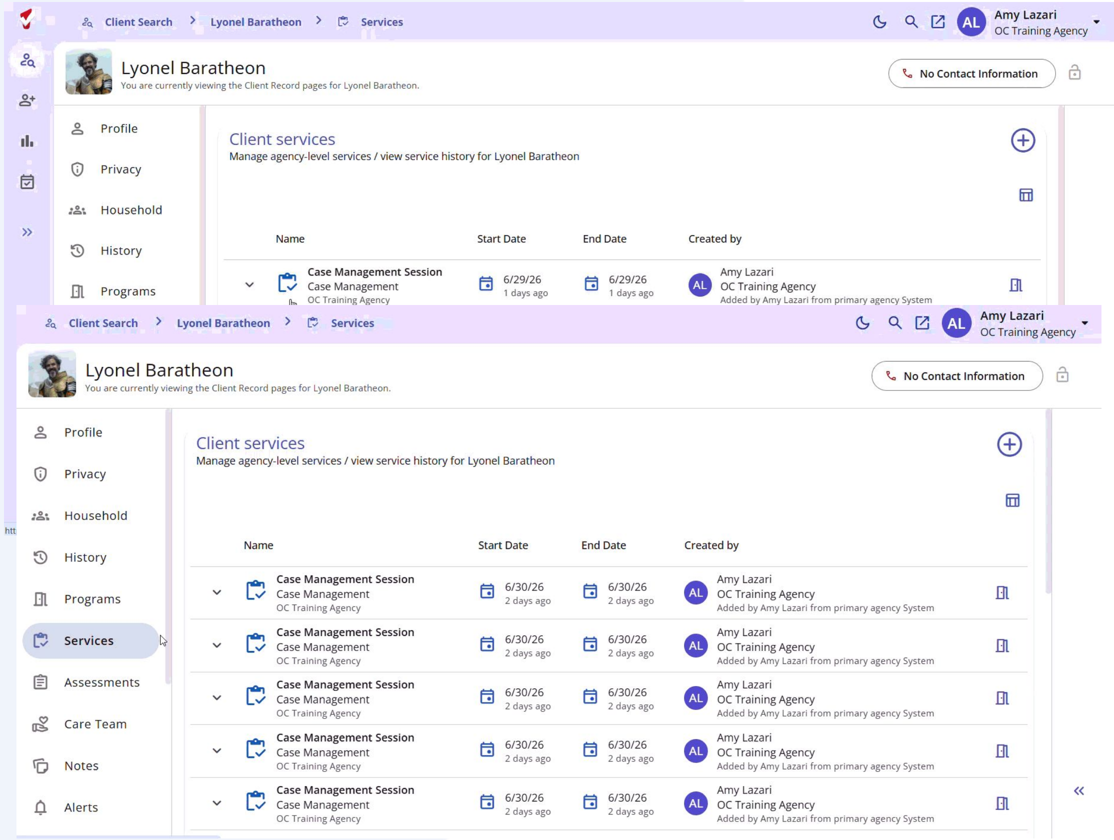
To delete a service, click on the service to view the service details then select the three vertical dots to show *more actions* - select delete.

To edit details of a service, click on the edit icon to expand the service details.

Edit any of the fields and or set the service to private by clicking on the lock icon.

Users who are switched into an agency that is different from the one that provided the service will not delete or edit the service.

[Click here](#) for an interactive guided demo of adding program level services.



Get Connected. Get Help.™

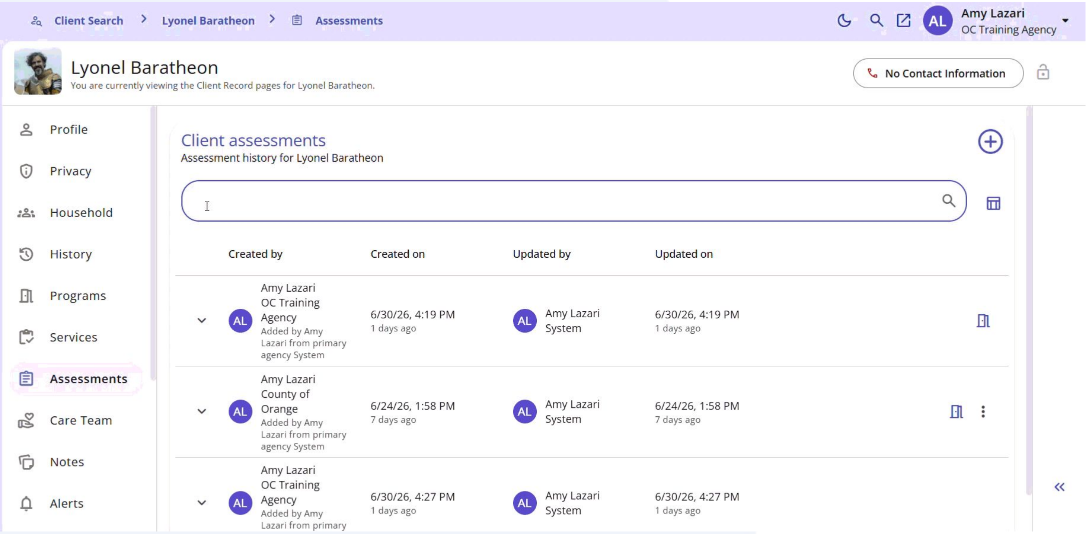
Orange County UNITED WAY

Assessments

The Assessments tab includes all assessment history and the ability to modify or delete assessments depending on a user's access role..

A search bar is located on the page to quickly find a specific assessment previously recorded for the client.

- Use the show/hide feature to order/collapse assessment history information.
- Hover over the door icon for information about which project the assessment was completed under.
- Click on any of the assessment to open/review responses and users with Agency Administrator level access will find the the delete function available on this screen.



211 Get Connected. Get Help.™

Orange County UNITED WAY

Assessments

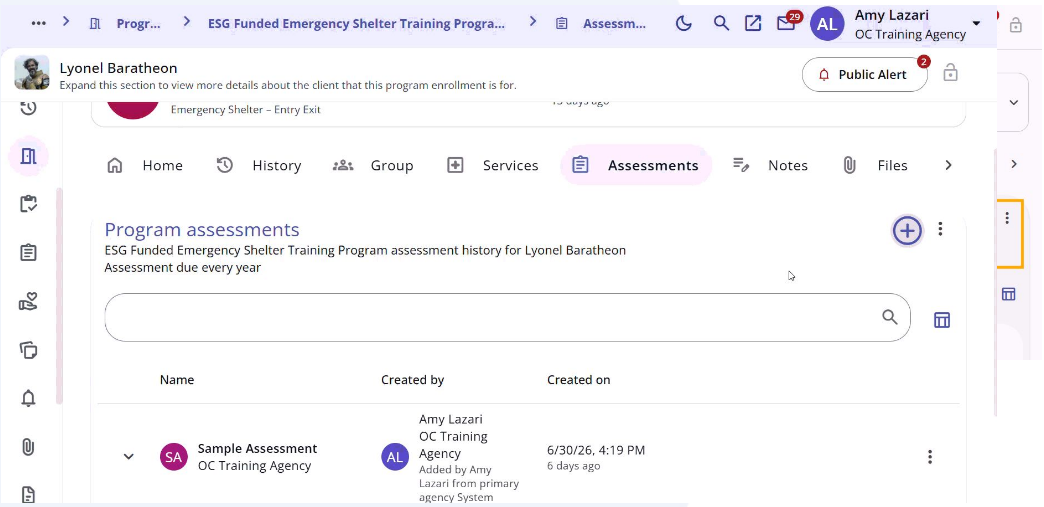
Program Level Assessments

To complete an assessment available for a specific project, navigate to the Programs tab.

- Open the enrollment and navigate to the assessment tab.
- Select the Add (+) button.
- Select an assessment from the list.
- Complete the assessment (set to private if needed).
- Select save and close.

Assessments can be edited by clicking on an existing assessment and selecting the edit button.

Assessments can be deleted by Agency Administrators from this screen by selecting the three vertical dots and clicking delete.



Assessments

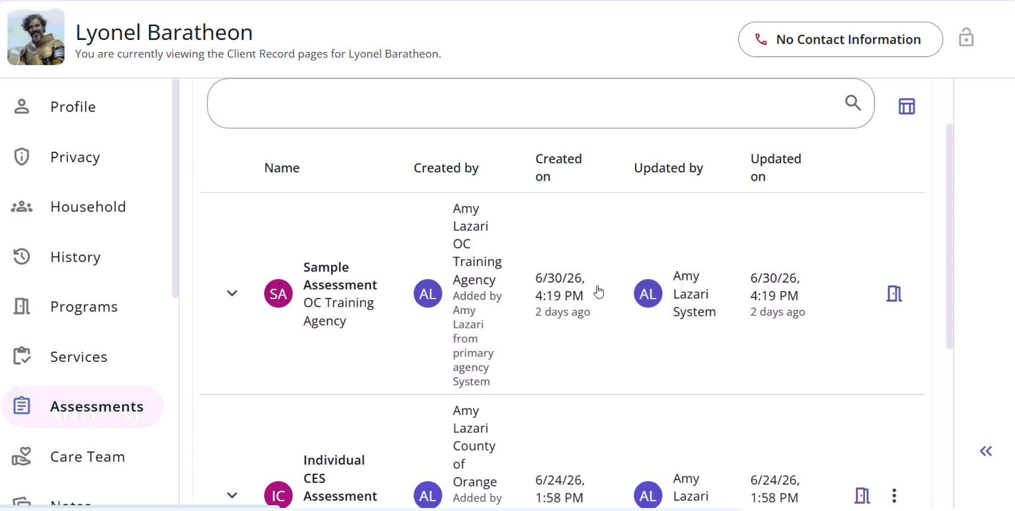
Deleting and Editing Assessments

To delete an assessment from the Assessment tab

- Click on an assessment to open it and view details.
- Select the three vertical dots for more actions.
- Delete the assessment.
- For Agency Administrators only.

To edit an assessment from the Assessment tab

- Select the pencil icon instead to edit the assessment date or any of the responses.
- Edits to assessments should only be made if the original responses recorded are incorrect/inaccurate.

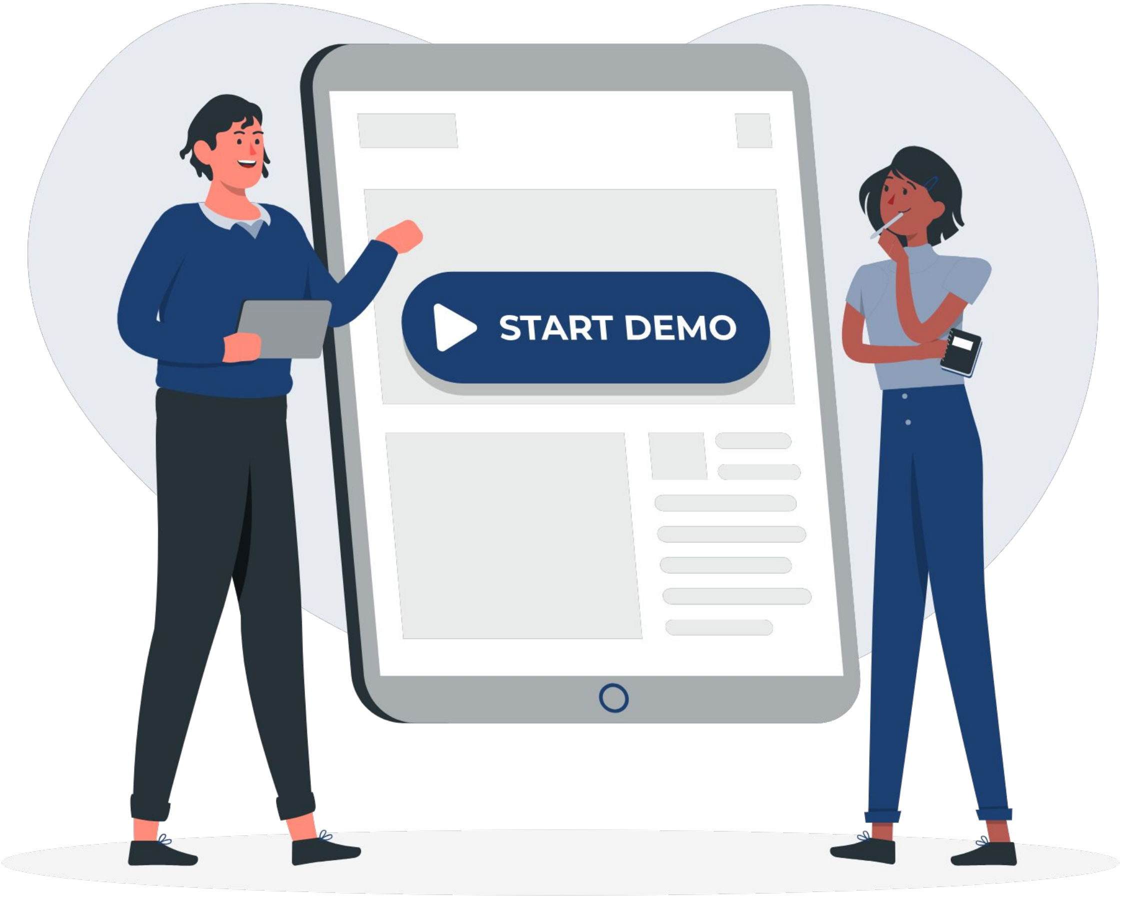


211
Get Connected. Get Help.™

Orange County UNITED WAY

Orange County UNITED WAY

Demo



Graphic by: https://storyset.com/online

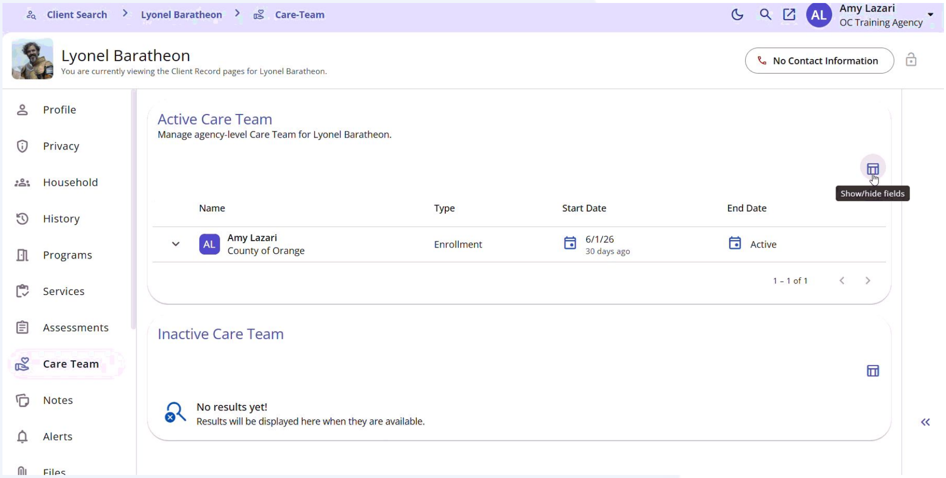
211

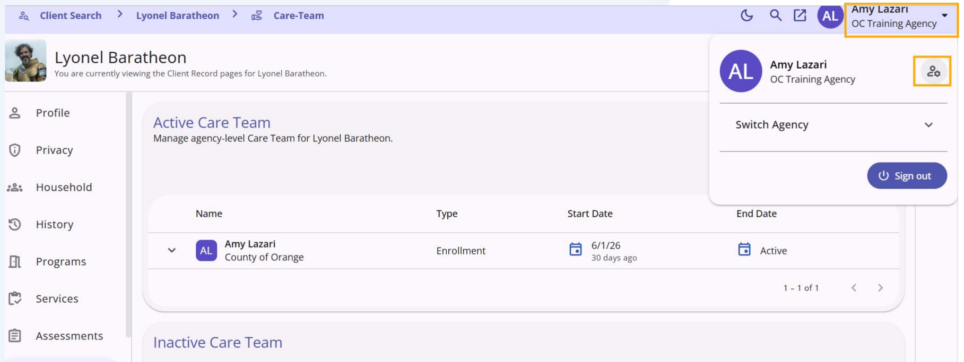
Get Connected. Get Help.™

Care Team

The Care Team tab includes all Assigned Staff from the client's active program enrollments, as well as any staff members manually added to the team who are involved in the client's care but aren't on the Assigned Staff list.

- Users can navigate to a client's profile and click the Care Team tab in the client navigation menu.
- Click the view/hide fields icon to rearrange the order or appear of the care team teams.
- Agency Administrators can manually add Care Team members and any members manually added can be edited by selecting the three vertical dots.
- Users can add or remove their email and phone number information by clicking the agency dropdown and selecting account settings.





211
Get Connected. Get Help.™

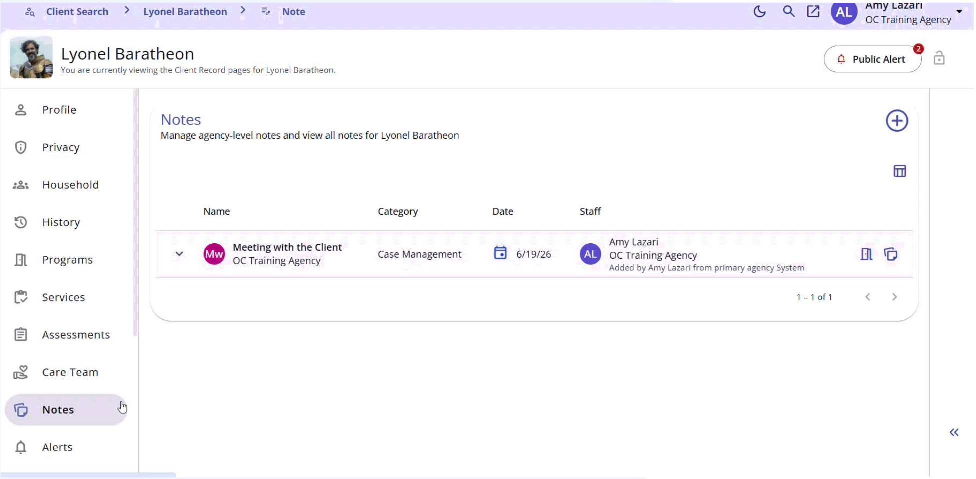
Orange County UNITED WAY

Notes

The Notes tab includes all notes and the ability to add or manage notes.

Notes available to users will display in the Notes History and include the name and agency of the staff member who created the note, the category, and the date the note was created or last modified.

- Use the show/hide fields icon to change the order or collapse information about the notes.
- Hovering over the note icon displays the note text.
- Hovering over the door icon displays the name of the project the note was entered under.
- Select the Add (+) icon to create an Agency level note.



211
Get Connected. Get Help.™

Orange County UNITED WAY

Notes

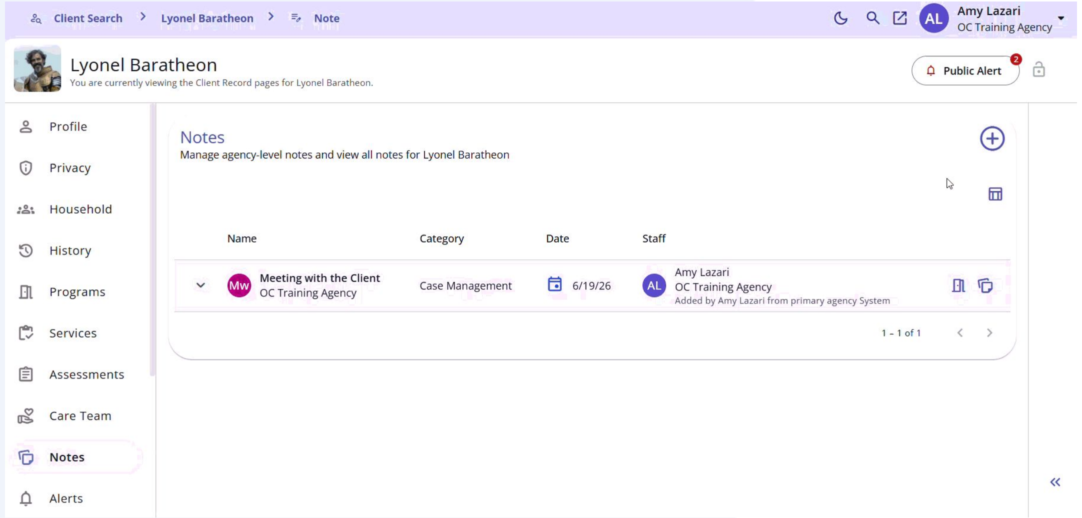
Adding Program Notes

Agency Level notes are viewable by all agencies and staff whereas <u>Project Level notes can only be viewed by agency creating the note</u>.

To add a new program note, open the applicable program enrollment, click the Notes tab, and click the Add (+) icon.

Enter the note details and if needed select the lock icon to set the note to private.

Notes added from within an enrollment will also appear under the main Notes tab and can be edited from that screen.



211
Get Connected. Get Help.™

Orange County
UNITED WAY

Notes

Editing and Deleting Notes

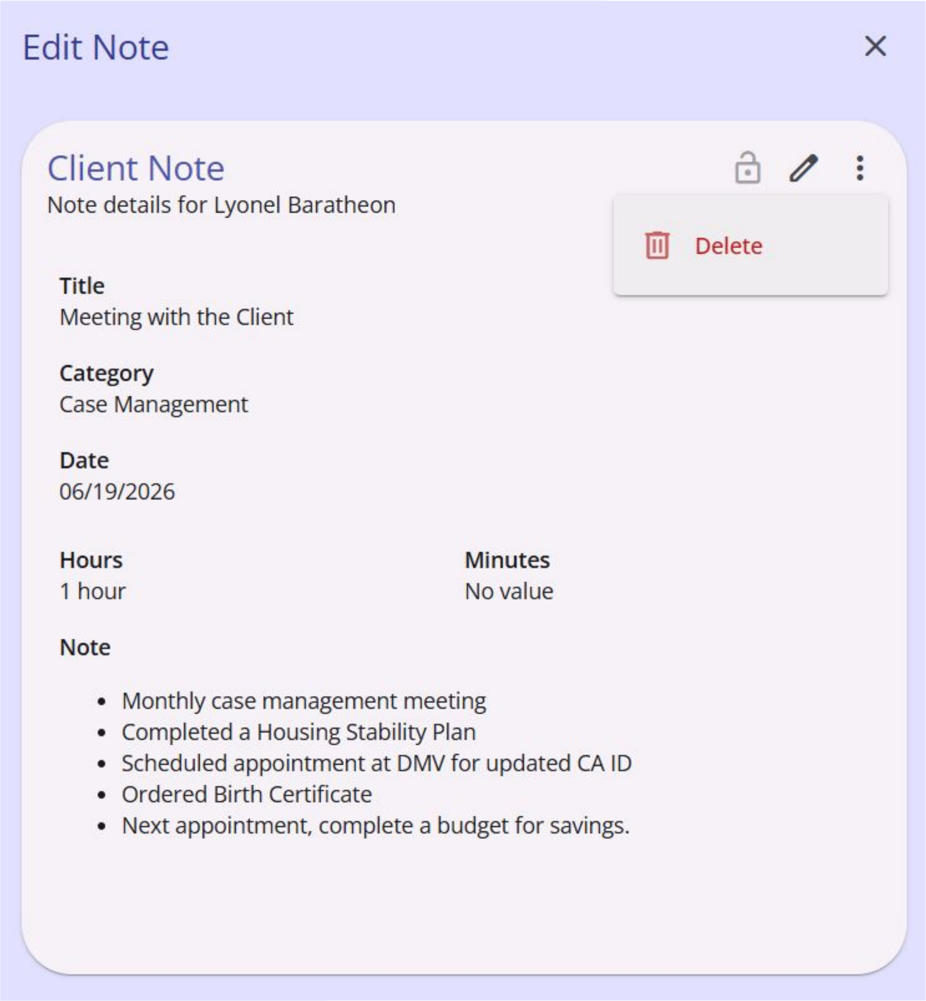
To edit an existing note…

- Click on the note to open it.
- Select the edit icon to begin editing.

To delete an existing note…

- Open the note and select the three vertical dots.
- Click delete.

The delete function is only available to users with Agency Administrator level Access Role type.

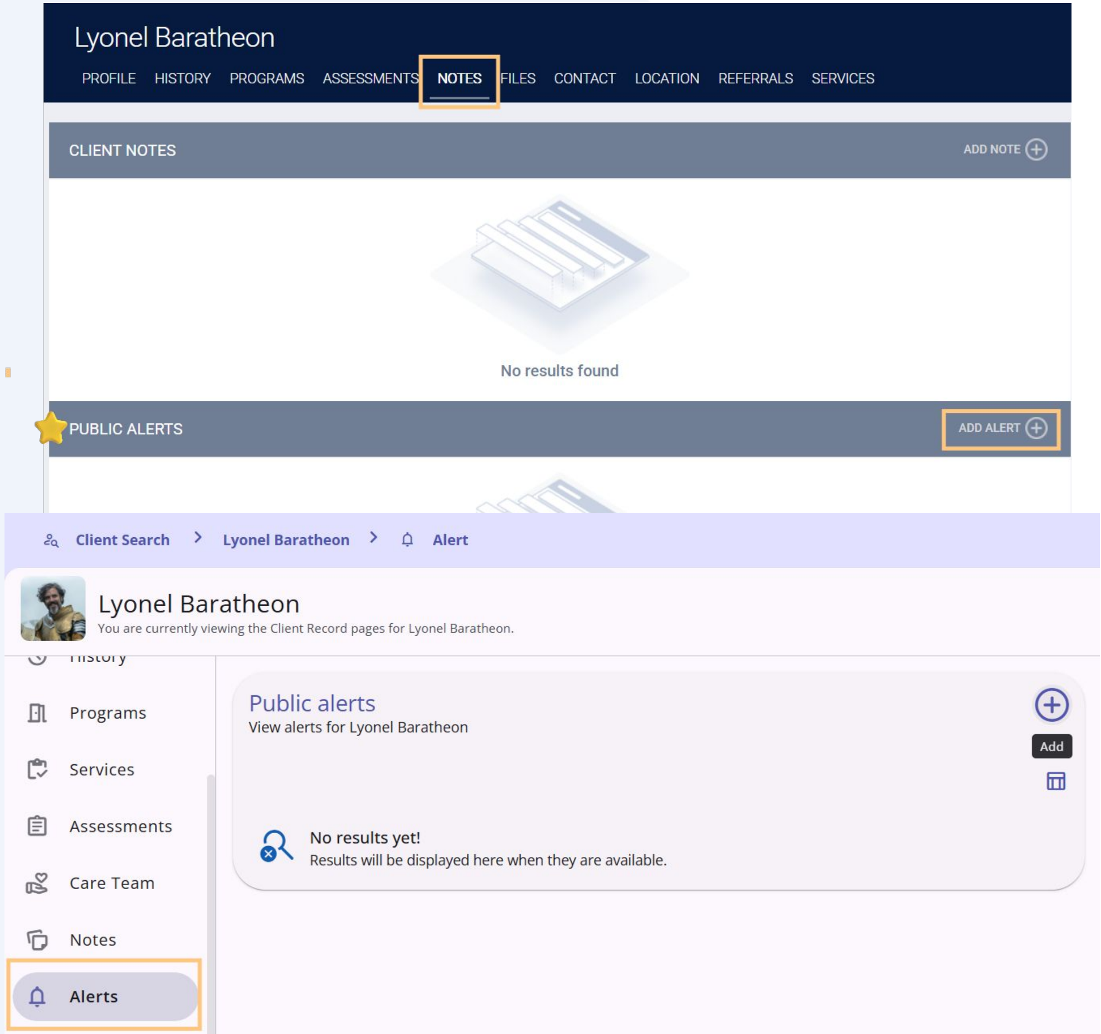


Alerts

The Alerts tab is available only in the new Clarity interface; it does not exist as a standalone tab in the current interface.

This tab is found on the client record navigation menu and includes public alert history and the ability to add and manage public alerts.

When the user clicks on the Add icon, the Add Alert modal appears on the right side of the screen.

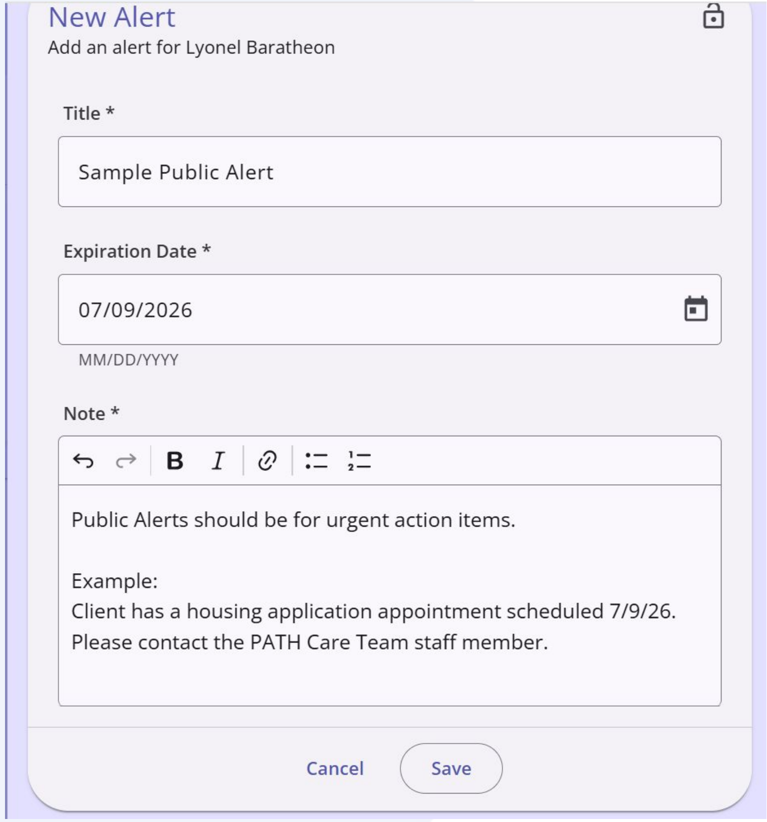


Alerts

When creating a new Public Alert, users must enter a title for the alert, expiration date, and a message.

Public Alert Best Practices...

- Avoid using harsh or non-person centered language that disclose any sensitive client status.
- Avoid setting expiration dates too far out into the future (e.g more than 90-days).
- Selecting the Private checkbox will make the Public Alert visible to only staff members in your agency. Not selecting it will make the Public Alert visible to all agencies.



Alerts

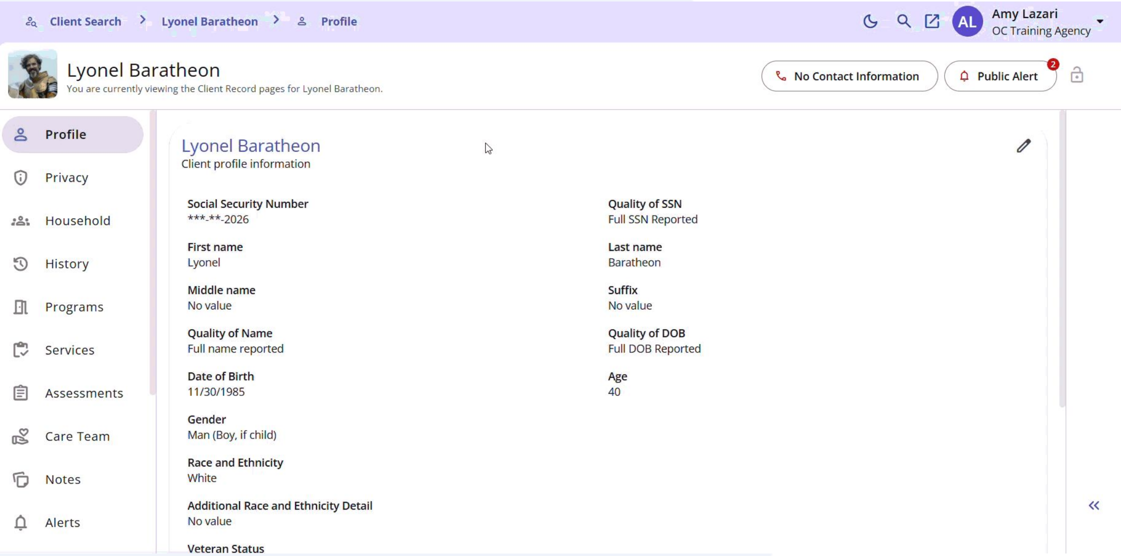
For clients with a Public Alert, a warning will be visible at the top right of the client record information bar.

If a user hovers over the alert, a list of active alerts for the client will be displayed.

Users can click the drop-down arrow to see additional information about a specific alert.

When a user clicks the Public Alert button, they are taken to the Alerts tab to view, edit or delete the existing alert.

Public Alerts can only be deleted by users with Agency Administrator level access role type.



211
Get Connected. Get Help.™

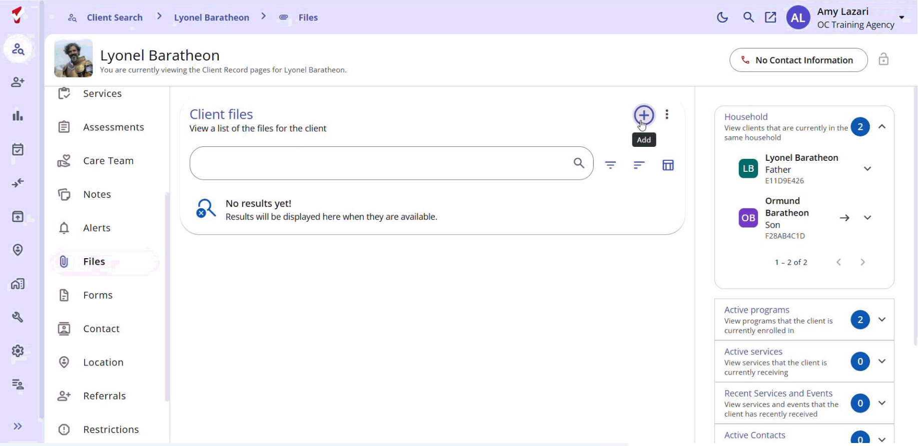
Orange County
UNITED WAY

Files

The Files tab includes file history and the ability to add and manage files at the agency and program levels.

To add program level files:

- Navigate to the Files tab within the client record.
- Select the most appropriate Category and Predefined Name for the file.
- Toggle the Privacy button to prohibit the uploaded file being shared with staff members at other agencies.
- Drag and drop files or click Choose A File to upload the file from a computer or other device.
- Click Save.



211
Get Connected. Get Help.™

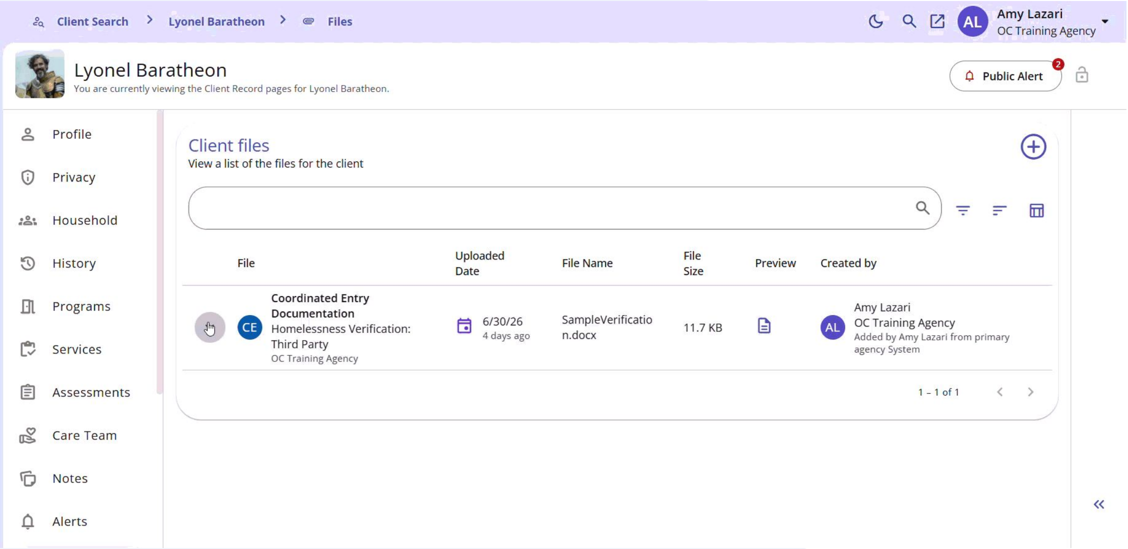
Orange County UNITED WAY

Files

To view, edit, upload, delete, or link files within an enrollment:

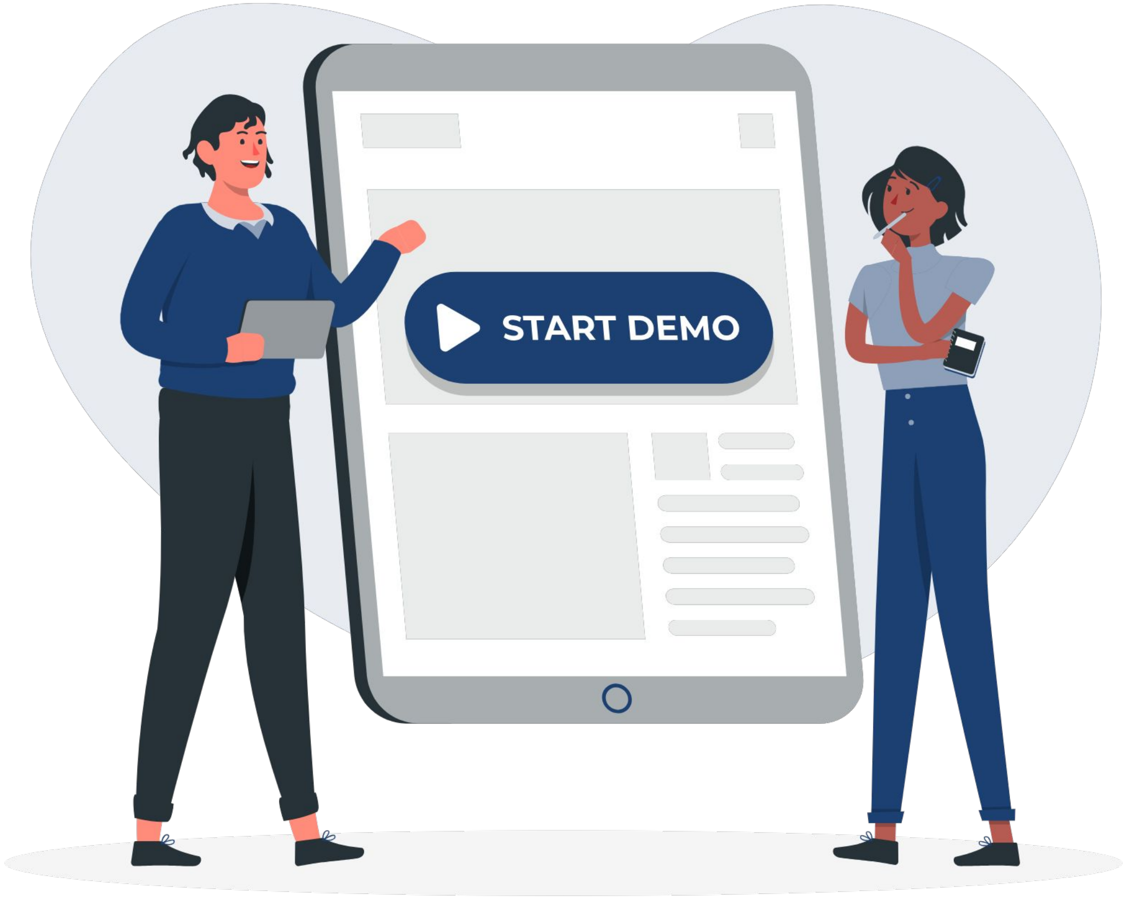
- Navigate to the Programs tab.
- Click on the desired enrollment.
- Select the Files tab.
- Click the Add (+) button to access the file upload screen.
- Click the three vertical dots to link any docs uploaded at the Agency Level.

Files added at the project level will only be visible to users from that agency.



Orange County UNITED WAY

Demo



Graphic by: https://storyset.com/online

211

Get Connected. Get Help.™

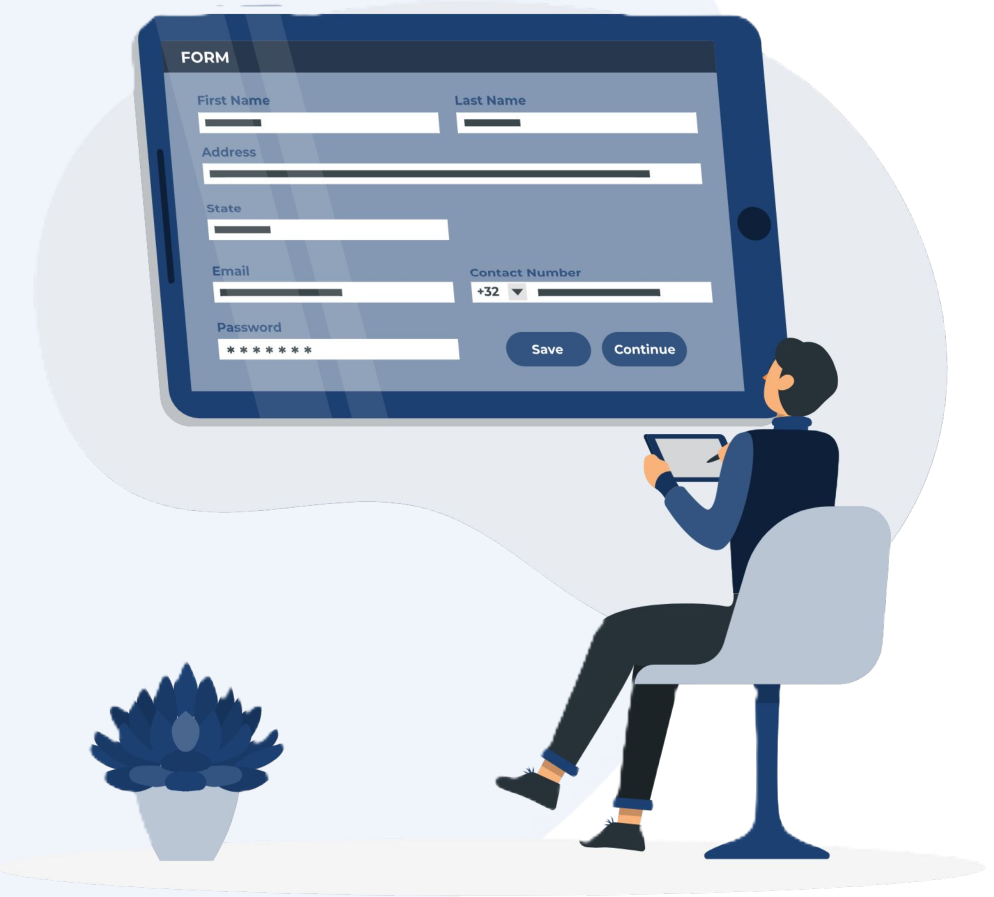
July 2026 Clarity New Interface Training Survey

The HMIS Team invites users to complete our Clarity New Interface Training Survey. The feedback from the survey is used to improve the content and quality of future trainings.

We'd greatly appreciate any feedback.

Thank you!

Survey: https://forms.gle/DEabHkoWDEiAryom6



Graphic by: https://storyset.com/online

211
Get Connected. Get Help.™

Orange County UNITED WAY

Q&A

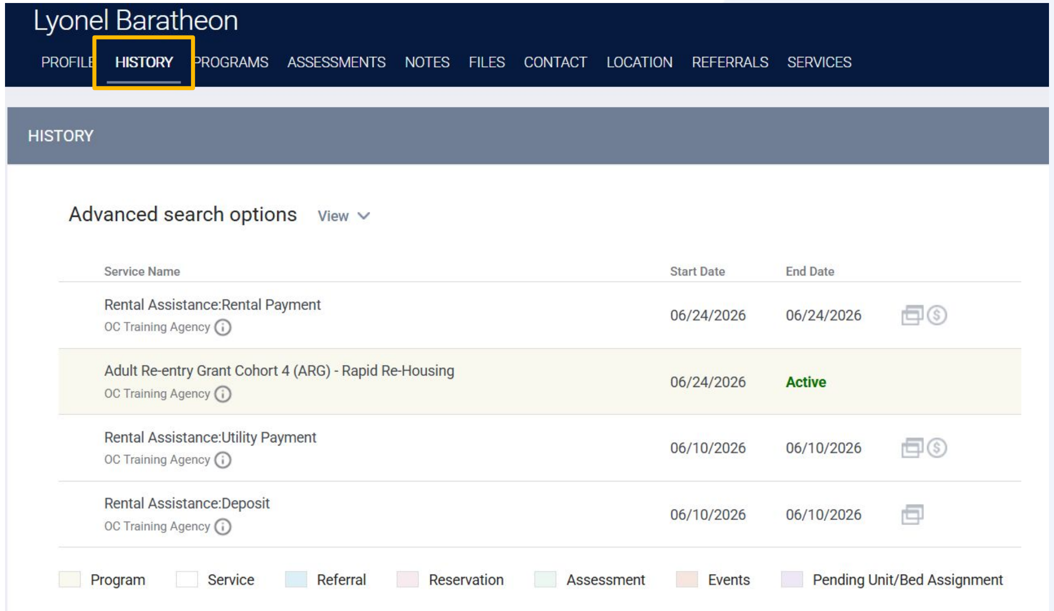
Reminder: Please enter your agency name in the chat box for attendance

Training materials and recording will be available on the OC HMIS website

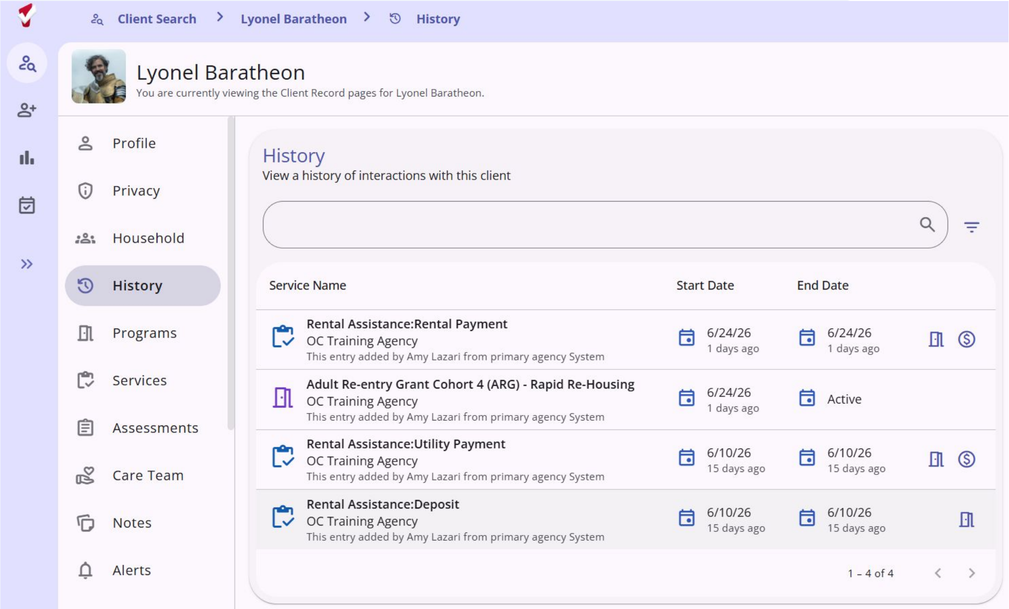
Thank you
Have a great day!

Orange County
UNITED WAY

Client History



Current Interface



Current Interface

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Forms

Users can add, view, and manage forms from the Forms tab in the client navigation menu and from the Forms tab within a client's program enrollment.

Contact

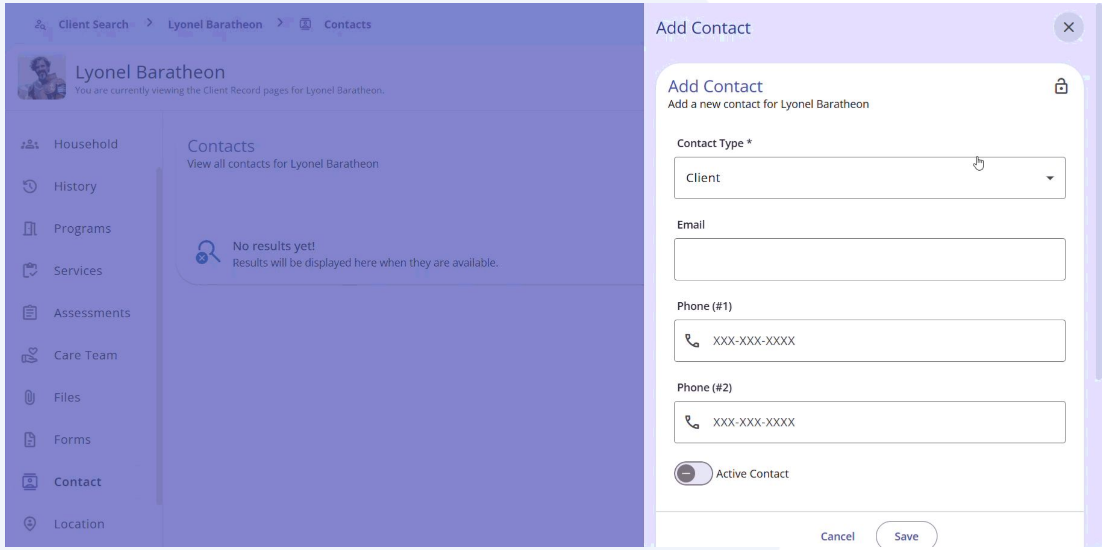
The Contact tab includes contact history and the ability to add and manage contact information.

If the client record is missing contact information a 'No Contact Information,' bubble will appear in the client information banner.

Users can click on the bubble or the Contact tab in the Client Navigation menu to add a contact.

To add a contact, simply click the Add (+) button and complete the contact fields - including a note about the contact is helpful but not required.

Don't forget to select 'Active Contact' if the information is current.



Programs

Private Enrollments

Program enrollments may be set to private after creation by selecting the lock icon available from the program information banner at the top of the enrollment screen.

Once set to private, the lock icon will appear visible next to the enrollment when viewing the client's enrollment history screen.

Staff at other agencies or who are otherwise excluded from viewing your agency data will not be able to open and view any data for the project - all notes, services, and assessments entered under this project will be private.