

Clarity: New Interface Training

211

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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

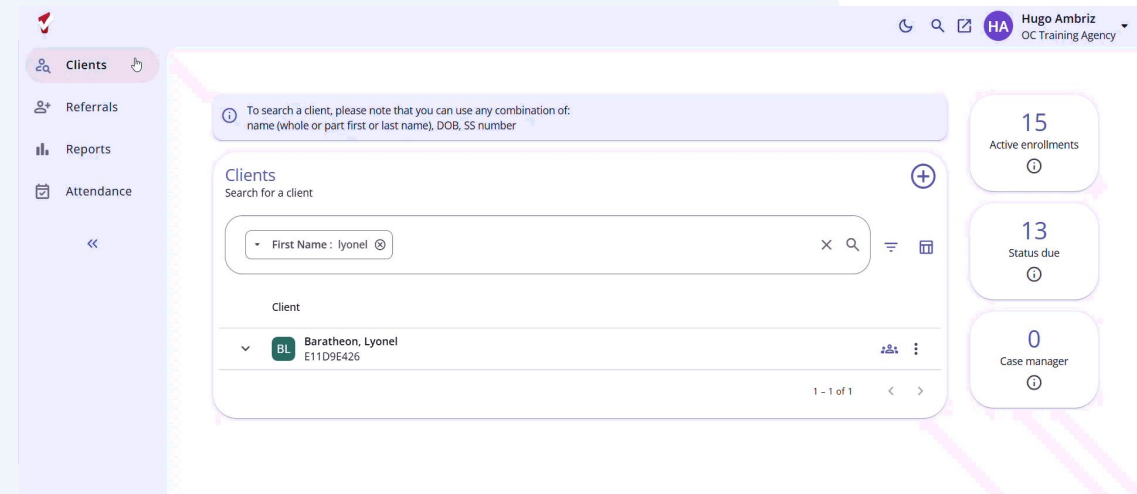
Primary Navigation Menu

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.



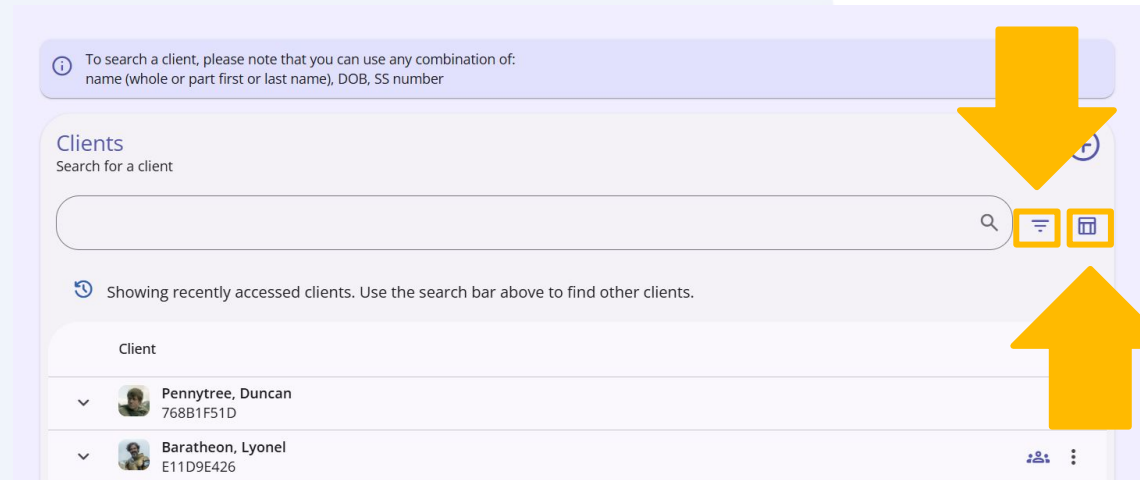
Client Search - New Functions

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

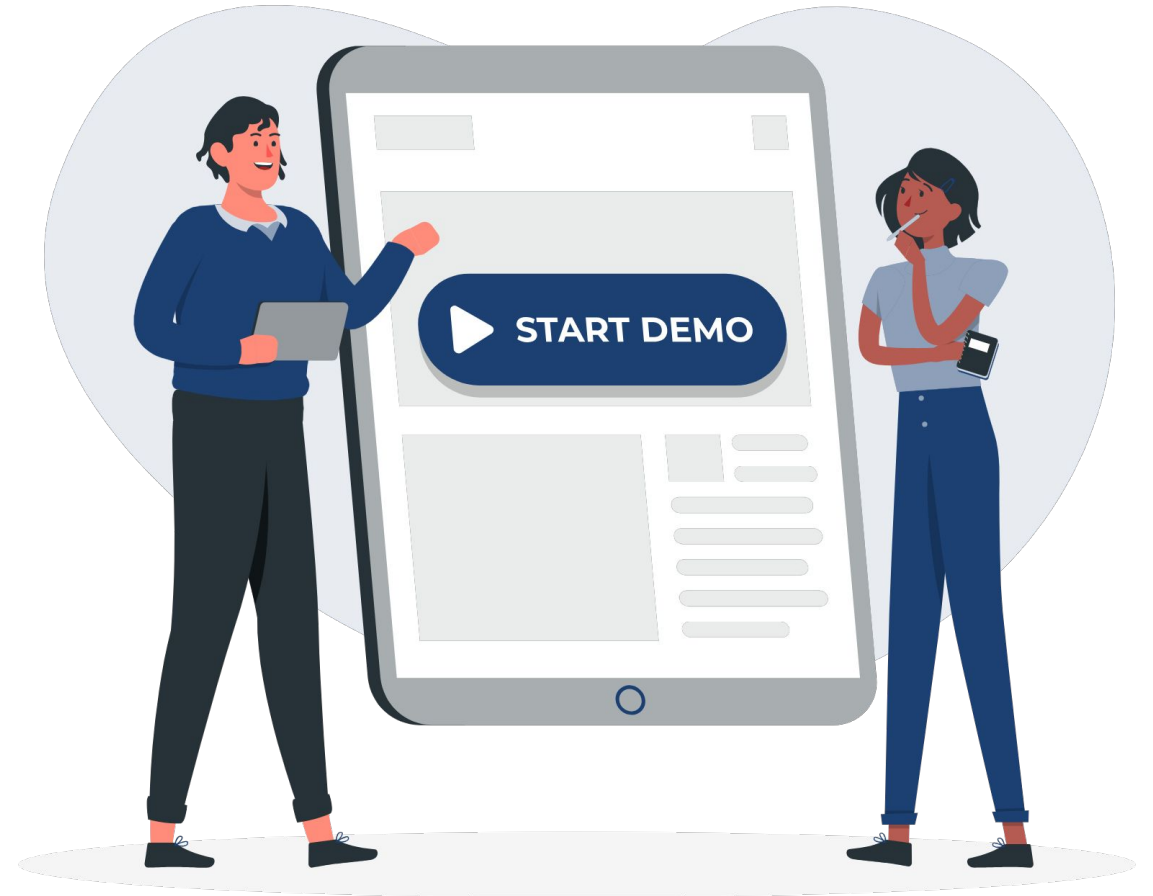
Users can locate their caseload by utilizing the caseload widgets on the right-hand side of the client search page. The following information from the user's current agency is included:

- **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.



Primary Navigation Menu Demo



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

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 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.

The screenshot displays a web application interface for client management. At the top right, the user is identified as 'Hugo Ambriz' from 'OC Training Agency'. The main section is titled 'Clients' with a subtitle 'Search for a client'. A search bar contains the text 'lyonel'. Below the search bar, a list of results is shown, with the first entry being 'Baratheon, Lyonel' with ID 'E11D9E426'. To the right of the search results, there are three summary boxes: '15 Active enrollments', '13 Status due', and '0 Case manager'. The interface includes various icons for navigation and actions, such as a magnifying glass for search and a plus sign for adding new records.

Client Profile - Information Bar

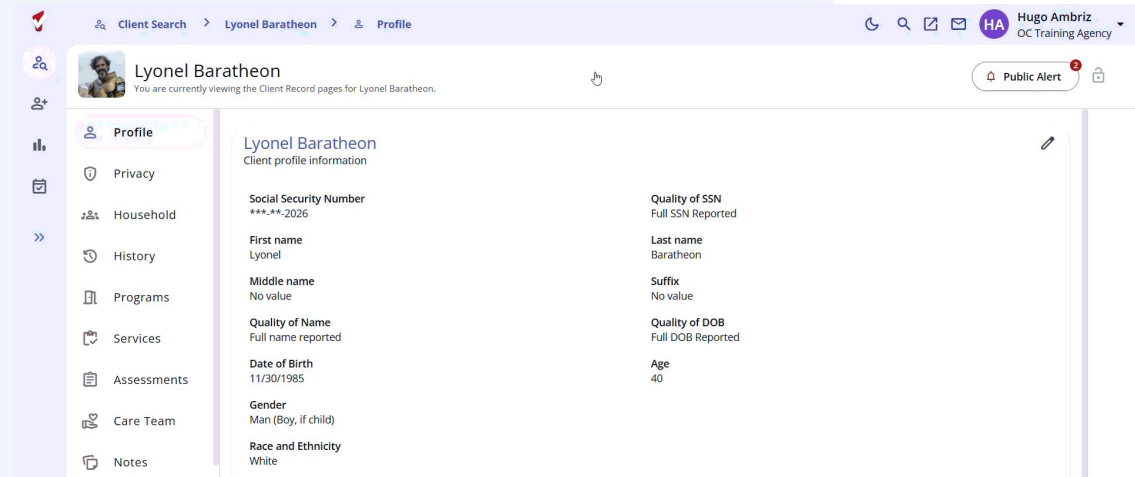
In the client record, a client information bar is located at the top of the screen and is always visible to the user, regardless of which client subtab they're currently on.

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 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.

Permission	Type	Start Date	End Date	Version
Yes OC Training Agency CA-602	Attached PDF	6/17/26 22 days ago	6/17/33 6 years 11 months 8 days from now	VC.6

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

The screenshot shows the 'Household' tab for a client named Lyonel Baratheon. The interface includes a sidebar with navigation options: Profile, Privacy, Household (selected), History, Programs, Services, Assessments, Care Team, and Notes. The main content area is titled 'Current household members' and lists two active members: Lyonel Baratheon (Father) and Ormund Baratheon (Son), both joined on 1/14/26. A yellow box highlights a plus icon in the top right corner of the 'Current household members' section, with a yellow arrow pointing to it. Below this section, there are expandable sections for 'Former household members' (4 items) and 'Previous household history' (2 items).

Client	Join Date
LB Lyonel Baratheon Father	1/14/26 5 months 26 days ago
OB Ormund Baratheon Son	1/14/26 5 months 26 days ago

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.

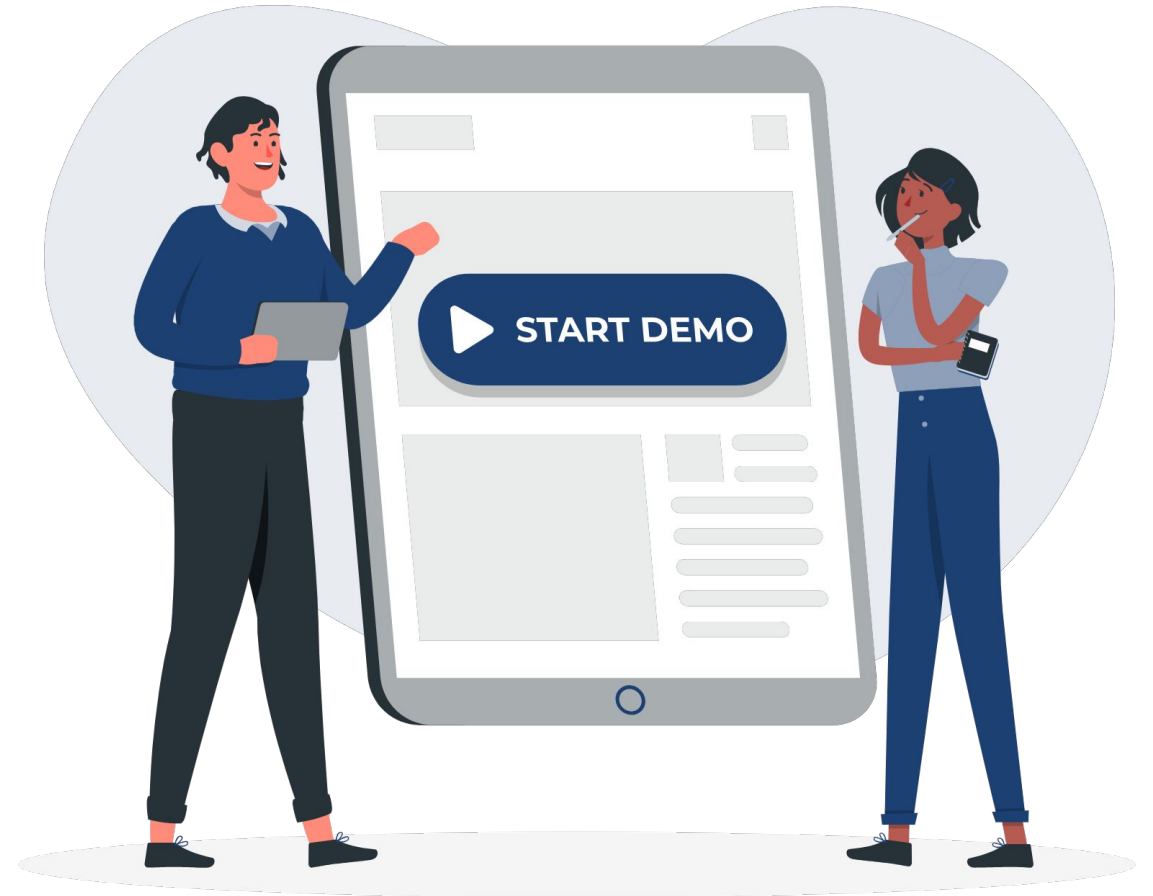
[Click here](#) for hands-on experience to practice adding and exiting clients from a household.

The screenshot displays the 'Client Record' page for Lyonel Baratheon. The breadcrumb trail at the top reads 'Client Search > Lyonel Baratheon > Household'. The left sidebar contains navigation links: Profile, Privacy, Household (highlighted), History, Programs, Services, Assessments, Care Team, Notes, and Alerts. The main content area is titled 'Lyonel Baratheon' and includes a sub-header 'You are currently viewing the Client Record pages for Lyonel Baratheon.' Below this, there is a 'Public Alert' button. The 'Current household members' section, titled 'Active members of this client's household', contains a table with two members:

Client	Join Date
Lyonel Baratheon Father	1/14/26 5 months 26 days ago
Ormund Baratheon Son	1/14/26 5 months 26 days ago

Below the table, there are two expandable sections: 'Former household members' (Other clients that are no longer in this household) and 'Previous household history' (Other households that this client is no longer a member of).

Client Profile Creation Demo



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

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.

Lyonel Baratheon

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

CLIENT PROFILE

Social Security Number *** - ** - 2026

Quality of SSN Full SSN Reported

Last Name Baratheon

First Name Lyonel

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 11/30/1985 Adult. Age: 40

UNIQUE IDENTIFIER E11D9E426



Client Search > Lyonel Baratheon > Profile

Amy Lazari OC Training Agency

Lyonel Baratheon

You are currently viewing the Client Record pages for Lyonel Baratheon.

Profile Privacy Household History Programs Services Assessments Care Team Notes Alerts

Lyonel Baratheon

Client profile information

Social Security Number *** - ** - 2026

Quality of SSN Full SSN Reported

Last Name Baratheon

First Name Lyonel

Middle name No value

Suffix No value

Quality of Name Full name reported

Date of Birth 11/30/1985

Age 40

Gender Man (Boy, if child)

Race and Ethnicity White

Additional Race and Ethnicity Detail No value

Veteran Status

Household View clients that are currently in the same household

No results yet! Results will be displayed here when they are available.

Active programs View programs that the client is currently enrolled in

Active services View services that the client is currently receiving

Recent Services and Events View services and events that the client has recently received

Active Contacts View active contacts for this client

Care Team View care team for this client

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.

The screenshot shows the 'Client History' interface for a client named Lyonel Baratheon. The left sidebar contains navigation options: Profile, Privacy, Household, History (highlighted), Programs, Services, Assessments, Care Team, Files, Forms, and Contact. The main content area displays a table of service history. The table has columns for Service Name, Start Date, and End Date. The 'History' tab is selected, and the table lists four entries: COVID-19 Vaccine Assessment, Financial Assistance: Moving Expenses (two entries), and Transportation: Bus Pass. Each entry includes a description and the date it was added by Amy Lazari. A search bar is located above the table. A yellow box highlights the 'History' tab in the sidebar and the 'Financial Assistance: Moving Expenses' entries in the table. Another yellow box highlights the dollar sign icon in the table's rightmost column.

Service Name	Start Date	End Date
COVID-19 Vaccine Assessment County of Orange This entry added by Amy Lazari from primary agency System	(No value)	6/29/26 Today
Financial Assistance: Moving Expenses OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago
Financial Assistance: Moving Expenses OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago
Transportation: Bus Pass OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago

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.

The screenshot shows the 'Client History' page for Lyonel Baratheon. The interface includes a sidebar with navigation options: Profile, Privacy, Household, History (selected), Programs, Services, Assessments, Care Team, Files, Forms, and Contact. The main content area displays a table of interactions with the client. The table has columns for Service Name, Start Date, and End Date. The data rows show various services such as COVID-19 Vaccine Assessment, Financial Assistance: Moving Expenses, and Transportation: Bus Pass, all added by Amy Lazari from the primary agency system. A search bar and an 'Add a filter' button are located at the top of the table.

Service Name	Start Date	End Date
COVID-19 Vaccine Assessment County of Orange This entry added by Amy Lazari from primary agency System	(No value)	6/29/26 Today
Financial Assistance: Moving Expenses OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago
Financial Assistance: Moving Expenses OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago
Transportation: Bus Pass OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago
Transportation: Bus Pass OC Training Agency This entry added by Amy Lazari from primary agency System	6/29/26 1 days ago	6/29/26 1 days ago

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.

The screenshot shows a web application interface for managing client programs. The top navigation bar includes 'Client Search', 'Lyonel Baratheon', and 'Programs'. The left sidebar lists various tabs: Profile, Privacy, Household, History, Programs (selected), Services, Assessments, Care Team, Notes, Alerts, and Files. The main content area is titled 'Program enrollments' and 'Program enrollment history for Lyonel Baratheon'. It features a table with two rows of enrollment data. The first row is for the 'ESG Funded Emergency Shelter Training Program' with an entry date of 6/24/26 and an active status. The second row is for the 'Individual Coordinated Entry System' with an entry date of 6/1/26 and an active status. Both rows show they were created by 'Amy Lazari' from the 'OC Training Agency' or 'County of Orange'. A '+ No Contact Information' button is visible in the top right. A pagination bar at the bottom right indicates '1 - 2 of 2'.

Program Name	Entry Date	Exit Date	Created by	Type
ESG Funded Emergency Shelter Training Program Emergency Shelter - Entry Exit OC Training Agency	6/24/26 8 days ago	Active	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
Individual Coordinated Entry System Coordinated Entry County of Orange	6/1/26 1 months 1 days ago	Active	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	

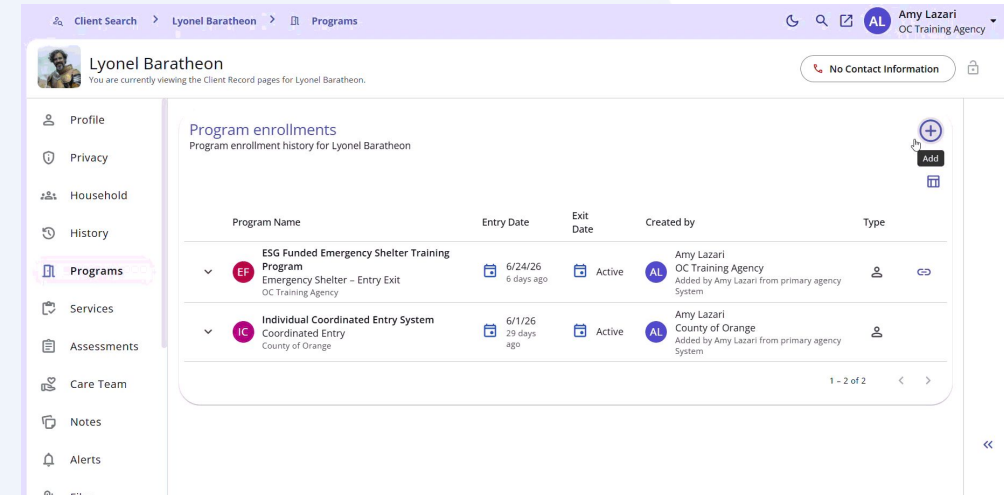
Programs

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.

1 Select program

2 Include household members (optional)

Select members (optional)
You can select other household members below to add to the enrollment or just leave this empty and save to continue.

Household Members

Lyonel Baratheon

☐ Ormud Baratheon (currently enrolled) 

Next

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 automatically be created for the enrollment.

Note: This step is for housing providers only.

The screenshot shows the 'History' tab for client Lionel Baratheon. The left sidebar contains navigation options: Profile, Privacy, Household, History (selected), Programs, Services, Assessments, Care Team, Notes, Alerts, and Files. The main content area displays a table of service history:

Service Name	Start Date	End Date
ESG Funded Emergency Shelter Training Program County of Orange referral to OC Training Agency This entry added by Amy Lazari from primary agency System	6/24/26, 2:45 PM Today	Active
Individual CES Assessment County of Orange This entry added by Amy Lazari from primary agency System	(No value)	6/24/26 Today
Referral to Emergency Shelter bed opening:Referral to Emergency Shelter bed opening County of Orange This entry added by Amy Lazari from primary agency System	6/24/26 1 days ago	6/24/26 1 days ago
Individual Coordinated Entry System County of Orange This entry added by Amy Lazari from primary agency System	6/24/26 1 days ago	Active

On the right side of the interface, there are summary cards for 'Active Referral' (with a 'Check-in' button), 'Program referrals' (showing 1 referral), 'Household' (showing 2 clients), 'Active programs' (showing 1 program), and 'Active services' (showing 0 services).

Program enrollments

Program enrollment history for Lionel Baratheon

	Program Name	Entry Date	Exit Date	Created by
▼	Individual Coordinated Entry System Coordinated Entry County of Orange	6/24/26 1 days ago	Active	Amy Lazari County of Orange Added by Amy Lazari from primary agency System
▼	ESG Funded Emergency Shelter Training Program Emergency Shelter – Entry Exit OC Training Agency	6/24/26 1 days ago	Active	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

Programs

Program Enrollment History

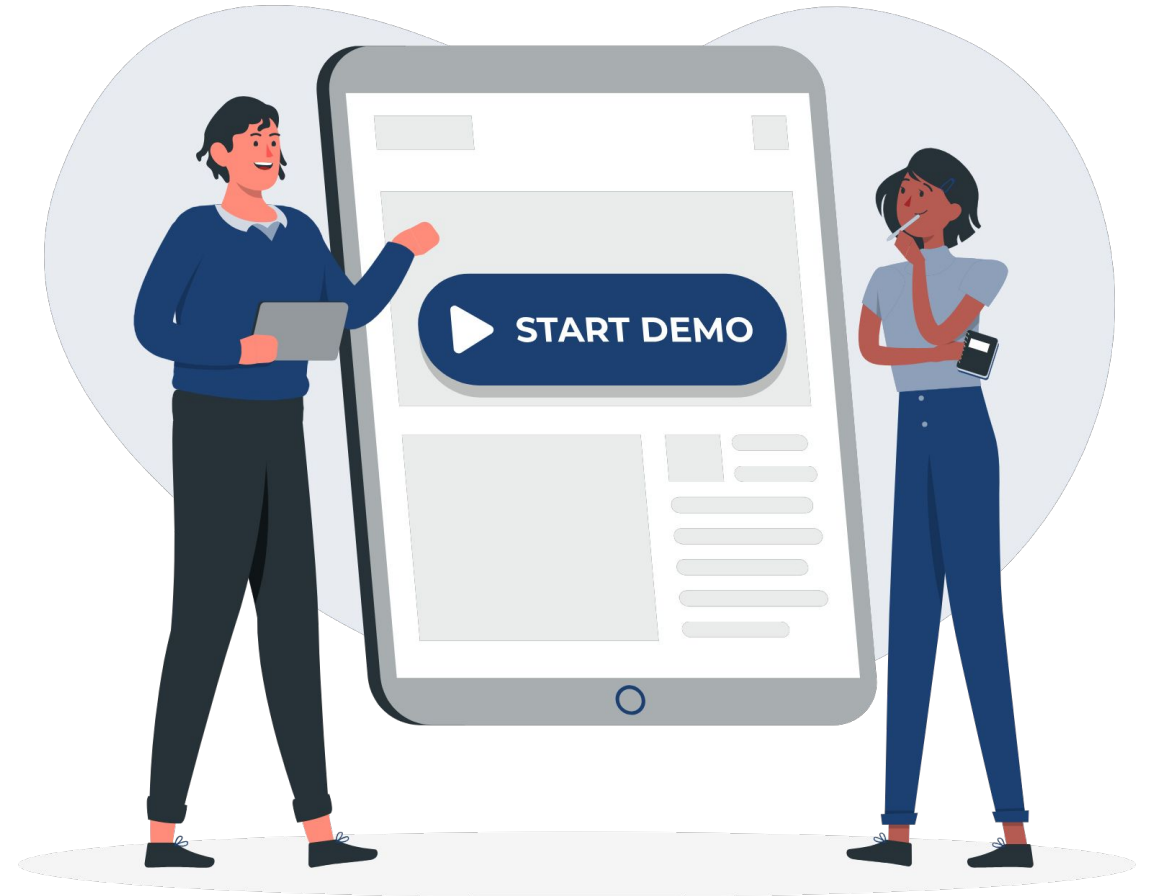
Click on the enrollment to open, view and manage enrollment information at the program level such as:

- 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.

The screenshot shows a web application interface for managing client programs. The top navigation bar includes a breadcrumb trail: Programs > ESG Funded Emergency Shelter Training Program (48958) > Entry. The user is logged in as Amy Lazari from OC Training Agency. The main content area is titled 'Lyonel Baratheon' with a sub-header 'Expand this section to view more details about the client that this program enrollment is for.' Below this, there's a card for the 'ESG Funded Emergency Shelter Training Program' with a status of '6/24/26 - Active' (6 days ago). A yellow box highlights the 'Home' tab in the navigation menu and the 'Edit' button in the top right corner of the 'Edit Client Program' section. The 'Edit Client Program' section has a subtitle 'Update client program for Lyonel Baratheon in ESG Funded Emergency Shelter Training Program' and contains several fields: 'Project Start Date' (06/24/2026), 'Prior Living Situation' (with sub-fields for 'Type of Residence' and 'Length of Stay in Prior Living Situation'), 'Approximate date this episode of homelessness started' (02/01/2024), and 'Number of times on the streets, in ES, or Safe Haven in the past three years'.

Demo



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

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.

Lyonel Baratheon
Expand this section to view more details about the client that this program enrollment is for.

No Contact Information

	Name	Start Date	End Date	Created by	
▼	Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Meal On Site Food OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	Meal On Site Food OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	

lclarityhs.com/horizon/clients/E11D9E426/service

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.

The screenshot shows the 'Service Details' screen for a client named Lyonel Baratheon. The interface includes a left sidebar with navigation options: Profile, Privacy, Household, History, Programs, Services (highlighted), Assessments, Care Team, Notes, and Alerts. The main content area is titled 'Client services' and includes a sub-header 'Manage agency-level services / view service history for Lyonel Baratheon'. Below this is a table with columns: Name, Start Date, End Date, and Created by. The table lists five 'Case Management Session' entries, each with a start and end date of 6/30/26 (2 days ago) and created by Amy Lazari from the OC Training Agency. A 'No Contact Information' button is visible in the top right corner.

Name	Start Date	End Date	Created by
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

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.

The screenshot displays the OC Training Agency software interface. At the top, the breadcrumb navigation shows 'Client Search > Lyonel Baratheon > Programs'. The user is identified as 'Amy Lazari' from 'OC Training Agency'. The left sidebar contains a navigation menu with options: Profile, Privacy, Household, History, Programs (highlighted), Services, Assessments, Care Team, Notes, and Alerts. The main content area is divided into two sections. The top section, 'Program enrollments', shows the enrollment history for Lyonel Baratheon with a table of two programs. The bottom section, 'Services', shows the services available for the selected program, with a table of three 'Case Management Session' services. Both tables include columns for Program Name, Entry Date, Exit Date, Created by, and Type. The 'Services' table also includes a 'Name' column. The interface includes an 'Add' button in the top right corner of the 'Services' section.

Program Name	Entry Date	Exit Date	Created by	Type
ESG Funded Emergency Shelter Training Program Emergency Shelter - Entry Exit OC Training Agency	6/24/26 7 days ago	Active	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
Individual Coordinated Entry System Coordinated Entry County of Orange	6/1/26 30 days ago	Active	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	

Name	Start Date	End Date	Created by
Case Management Session Case Management OC Training Agency	6/30/26 1 days ago	6/30/26 1 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 1 days ago	6/30/26 1 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 1 days ago	6/30/26 1 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

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.

The screenshot displays the 'Client services' page for Lyonel Baratheon. The page header shows the client's name and a 'No Contact Information' warning. The left sidebar contains navigation options: Profile, Privacy, Household, History, Programs, Services (selected), Assessments, Care Team, Notes, and Alerts. The main content area shows a table of 'Client services' with columns for Name, Start Date, End Date, and Created by. The table lists five 'Case Management Session' entries, each created by Amy Lazari from the OC Training Agency. Each entry has a dropdown arrow on the left and a lock icon on the right. The top of the page shows the user 'Amy Lazari' from 'OC Training Agency'.

Name	Start Date	End Date	Created by
Case Management Session Case Management OC Training Agency	6/29/26 1 days ago	6/29/26 1 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

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.

The screenshot shows the 'Assessments' tab for client 'Lyonel Baratheon'. The interface includes a sidebar with navigation options: Profile, Privacy, Household, History, Programs, Services, Assessments (highlighted), Care Team, Notes, and Alerts. The main content area is titled 'Client assessments' and 'Assessment history for Lyonel Baratheon'. It features a search bar and a table of assessment records. The table has columns for 'Created by', 'Created on', 'Updated by', and 'Updated on'. Three assessment records are listed, each with a dropdown arrow on the left and a door icon on the right. The first record is from 'Amy Lazari OC Training Agency' (Added by Amy Lazari from primary agency System) on 6/30/26 at 4:19 PM. The second record is from 'Amy Lazari County of Orange' (Added by Amy Lazari from primary agency System) on 6/24/26 at 1:58 PM. The third record is from 'Amy Lazari OC Training Agency' (Added by Amy Lazari from primary) on 6/30/26 at 4:27 PM. The user 'Amy Lazari OC Training Agency' is logged in.

	Created by	Created on	Updated by	Updated on
▼	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	6/30/26, 4:19 PM 1 days ago	Amy Lazari System	6/30/26, 4:19 PM 1 days ago
▼	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	6/24/26, 1:58 PM 7 days ago	Amy Lazari System	6/24/26, 1:58 PM 7 days ago
▼	Amy Lazari OC Training Agency Added by Amy Lazari from primary	6/30/26, 4:27 PM 1 days ago	Amy Lazari System	6/30/26, 4:27 PM 1 days ago

Assessments

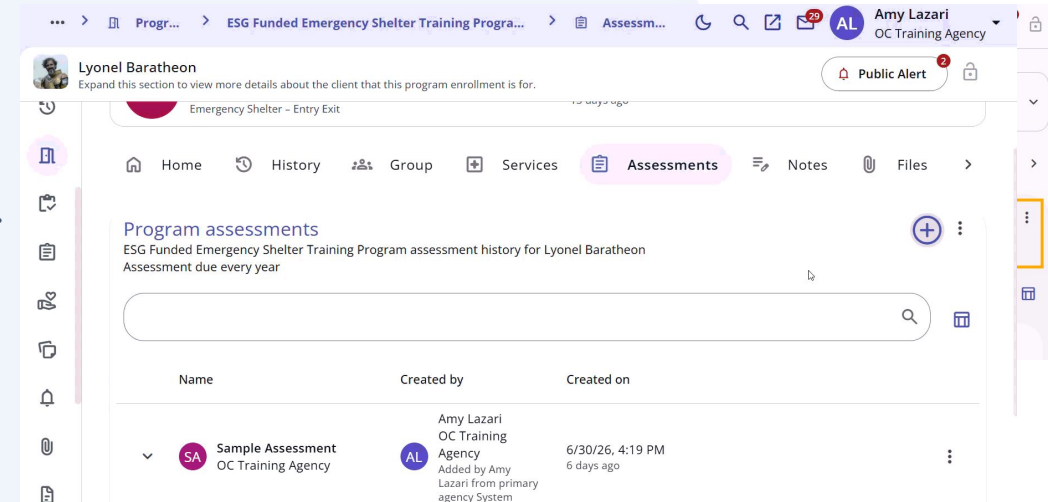
Program Level Assessments

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.

The screenshot displays the client record for Lyonel Baratheon. The 'Assessments' tab is selected in the left sidebar. The main area shows a table of assessments:

Name	Created by	Created on	Updated by	Updated on
Sample Assessment OC Training Agency	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	6/30/26, 4:19 PM 2 days ago	Amy Lazari System	6/30/26, 4:19 PM 2 days ago
Individual CES Assessment	Amy Lazari County of Orange Added by	6/24/26, 1:58 PM	Amy Lazari	6/24/26, 1:58 PM

Below the table, the 'Sample Assessment' details are shown:

Sample Assessment assessment
Entry data collection for Lyonel Baratheon

Assessment Date
06/19/2026

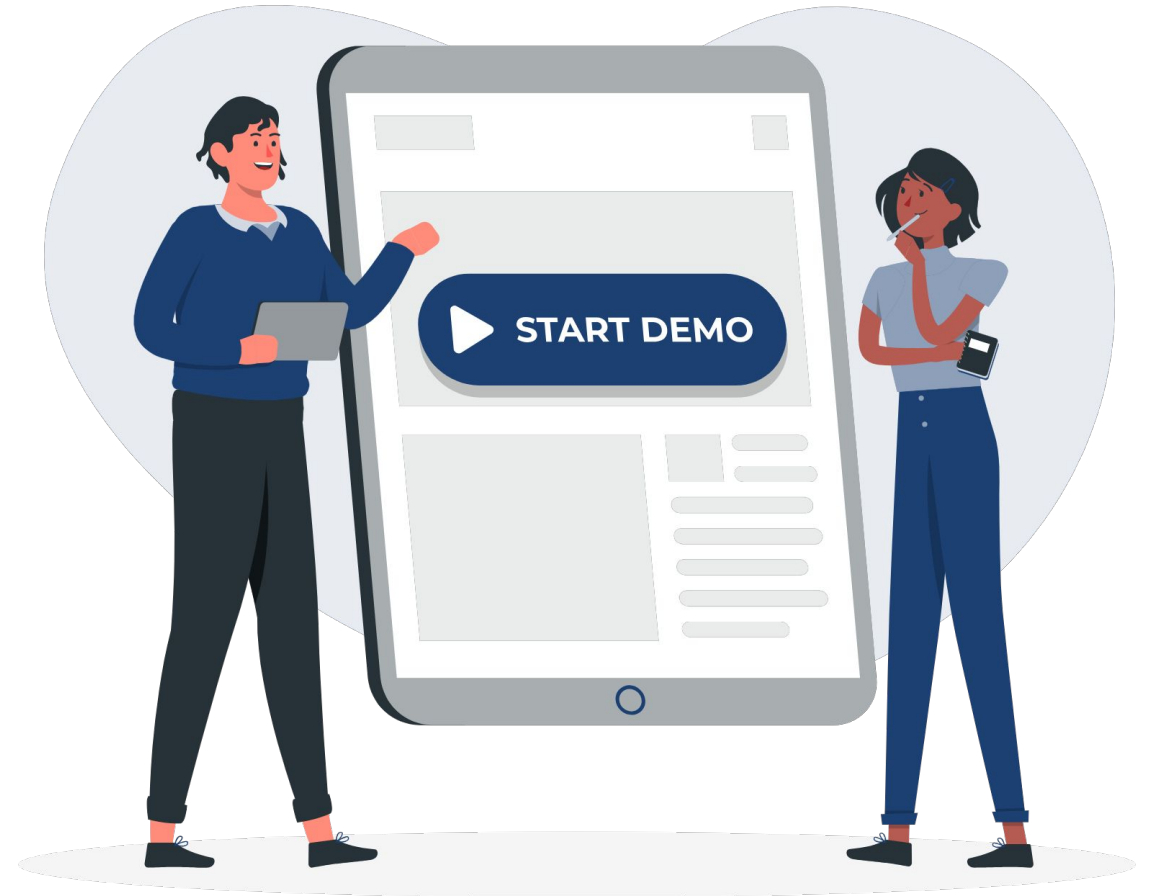
Sample Response #1
Select

Sample Question #2
No value

Sample Question #3
No

An 'Edit' button with a pencil icon is highlighted in the top right corner of the assessment details panel.

Demo

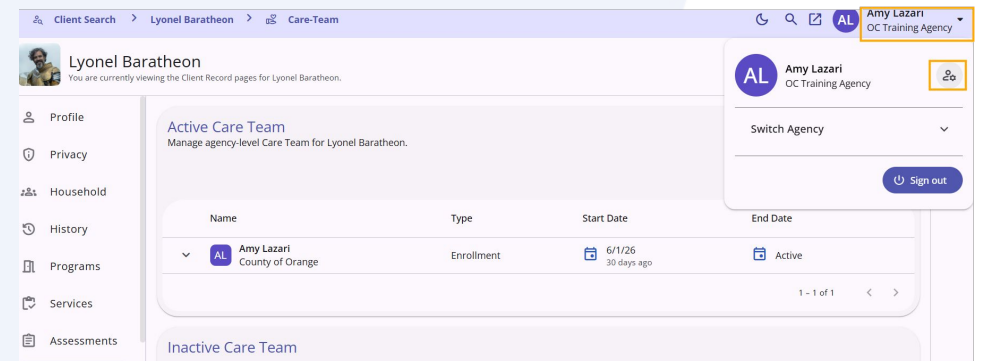
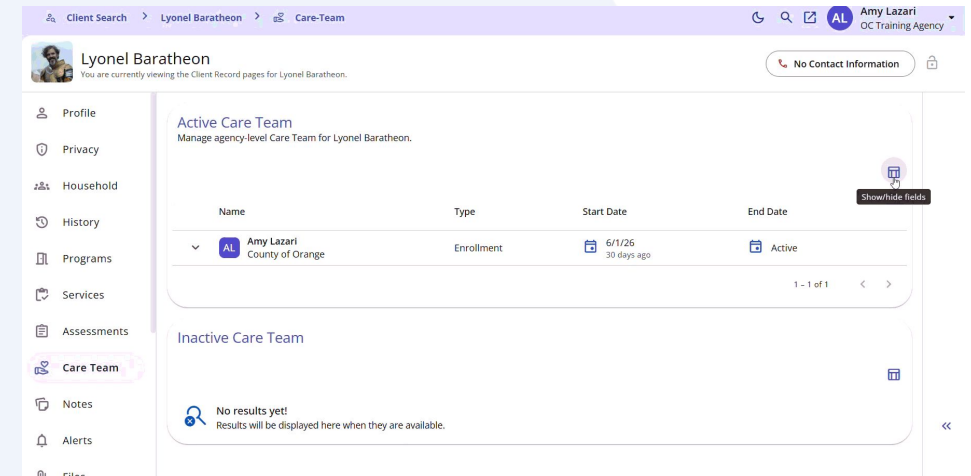


Graphic by: <https://storyset.com/online>

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.

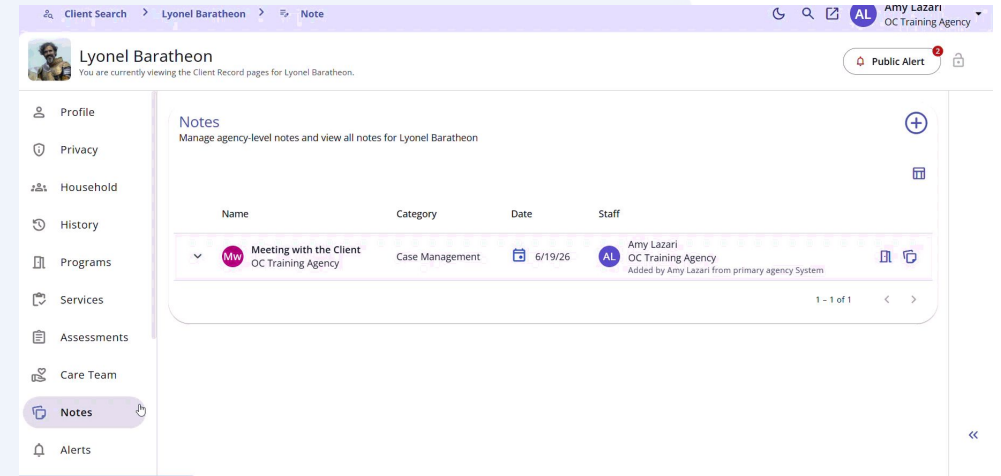


Notes

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.



Notes

Adding Program Notes

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

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.

Client Search > Lyonel Baratheon > Note

Amy Lazari
OC Training Agency

Public Alert

Lyonel Baratheon
You are currently viewing the Client Record pages for Lyonel Baratheon.

Profile
Privacy
Household
History
Programs
Services
Assessments
Care Team
Notes
Alerts

Notes
Manage agency-level notes and view all notes for Lyonel Baratheon

Name	Category	Date	Staff
Meeting with the Client OC Training Agency	Case Management	6/19/26	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

1 - 1 of 1

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.

Edit Note

Client Note

Note details for Lyonel Baratheon

Delete

Title

Meeting with the Client

Category

Case Management

Date

06/19/2026

Hours

1 hour

Minutes

No value

Note

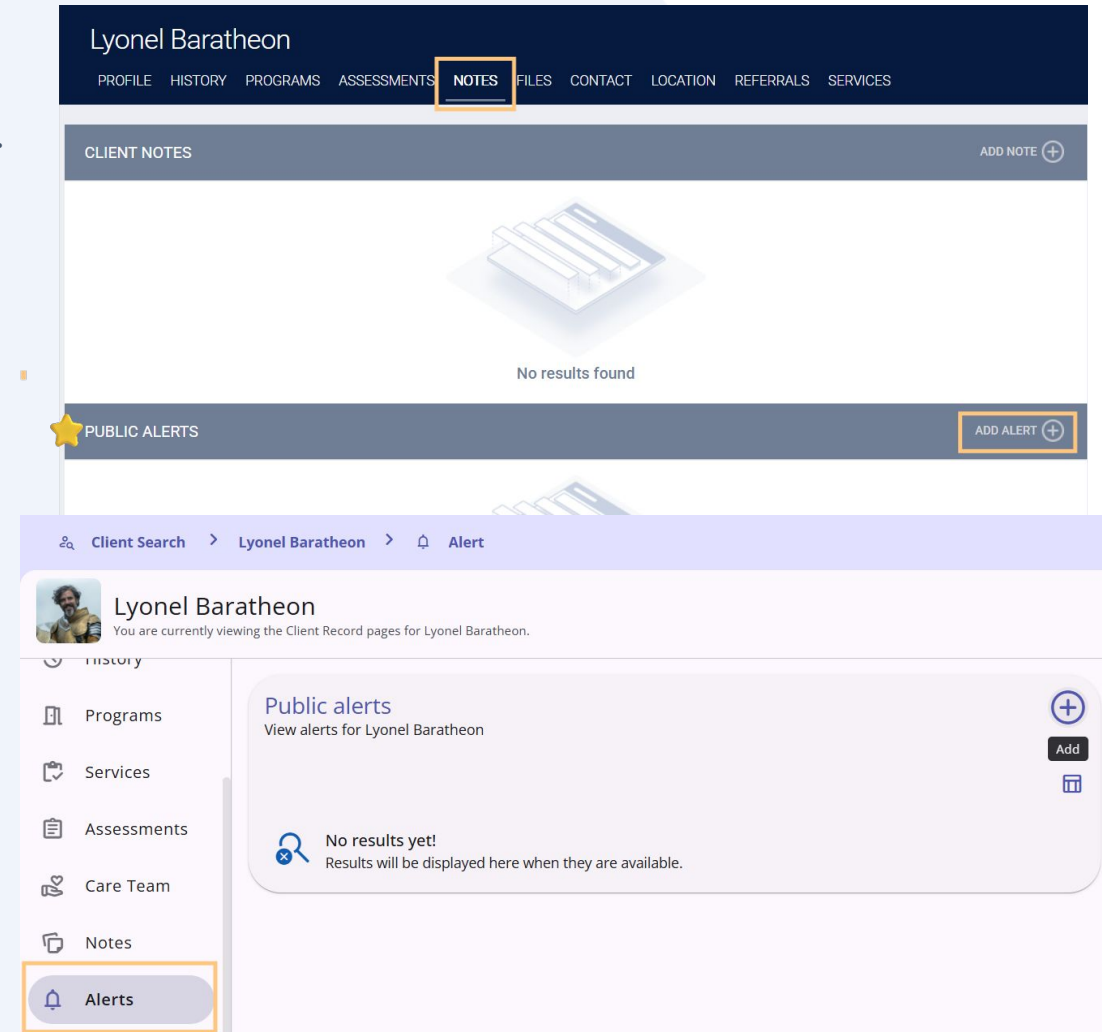
- Monthly case management meeting
- Completed a Housing Stability Plan
- Scheduled appointment at DMV for updated CA ID
- Ordered Birth Certificate
- Next appointment, complete a budget for savings.

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.

New Alert
Add an alert for Lyonel Baratheon

Title *

Sample Public Alert

Expiration Date *

07/09/2026

MM/DD/YYYY

Note *

Public Alerts should be for urgent action items.

Example:
Client has a housing application appointment scheduled 7/9/26.
Please contact the PATH Care Team staff member.

Cancel Save

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.

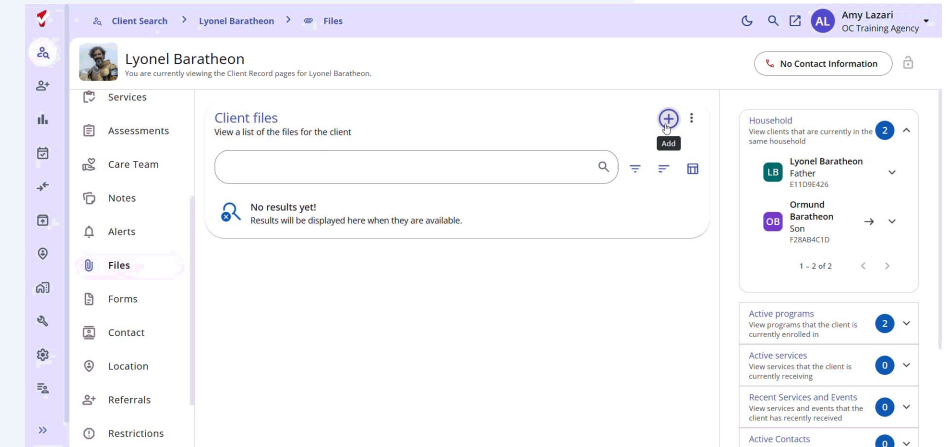
The screenshot displays the client record information bar for Lyonel Baratheon. The top navigation bar includes 'Client Search', 'Lyonel Baratheon', and 'Profile'. The user 'Amy Lazari' from 'OC Training Agency' is logged in. The client's name 'Lyonel Baratheon' is prominently displayed, with a note stating 'You are currently viewing the Client Record pages for Lyonel Baratheon.' To the right of the name, there are two buttons: 'No Contact Information' and 'Public Alert' (which is highlighted with a red border and a red dot). Below the name, a list of tabs is visible: Profile, Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, and Alerts. The main content area shows the 'Profile' tab selected, displaying client profile information such as Social Security Number, First name, Middle name, Quality of Name, Date of Birth, Gender, Race and Ethnicity, and Veteran Status. A red dot is visible next to the 'Public Alert' button, indicating an active alert.

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.

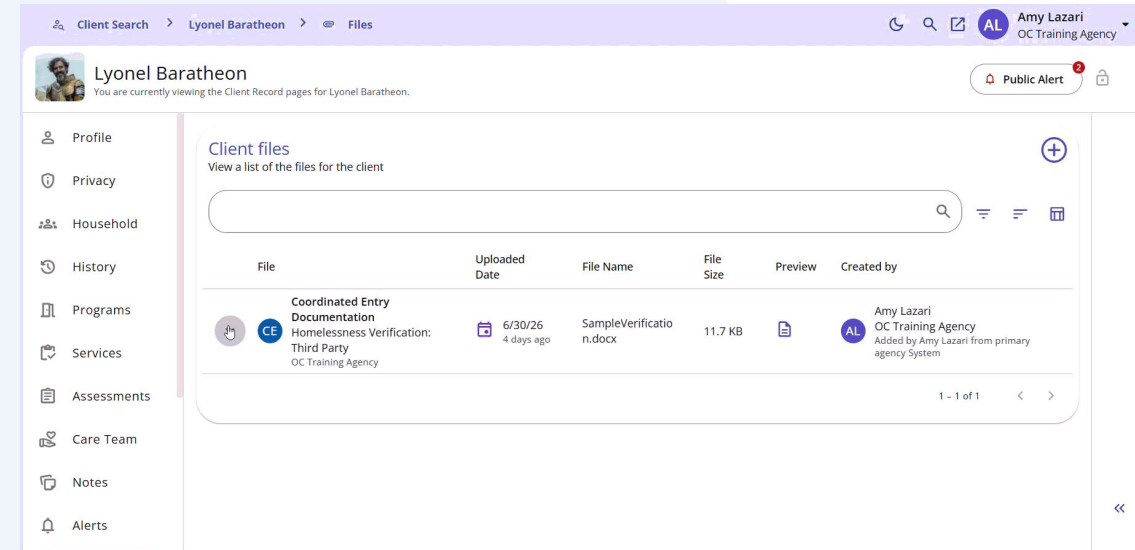


Files

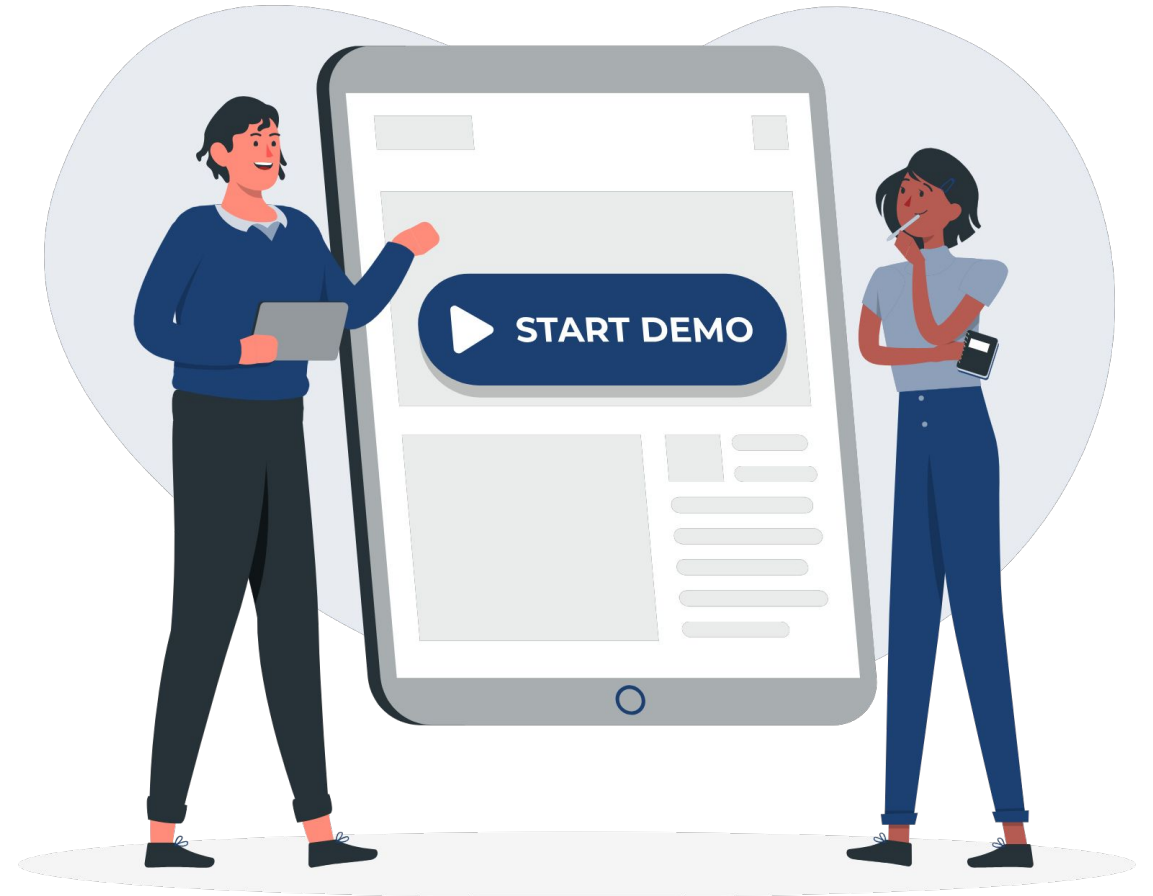
To view, edit, upload, delete, or link files within an enrollment:

- 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.



Demo



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

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>

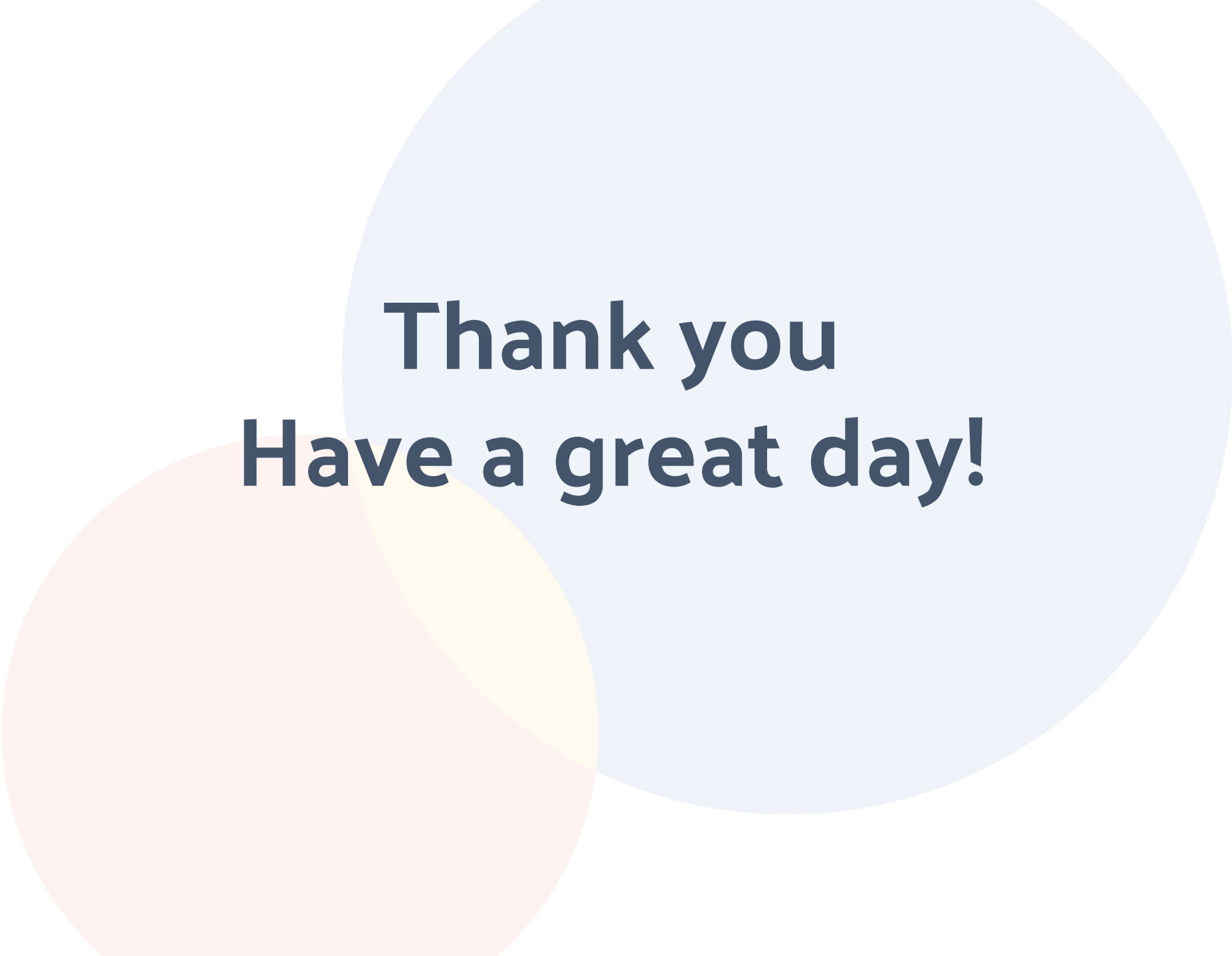


Graphic by: <https://storyset.com/online>

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

Lyonel Baratheon

PROFILE **HISTORY** PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

HISTORY

Advanced search options View ▾

Service Name	Start Date	End Date	
Rental Assistance:Rental Payment OC Training Agency ⓘ	06/24/2026	06/24/2026	📅 💰
Adult Re-entry Grant Cohort 4 (ARG) - Rapid Re-Housing OC Training Agency ⓘ	06/24/2026	Active	
Rental Assistance:Utility Payment OC Training Agency ⓘ	06/10/2026	06/10/2026	📅 💰
Rental Assistance:Deposit OC Training Agency ⓘ	06/10/2026	06/10/2026	📅

Program Service Referral Reservation Assessment Events Pending Unit/Bed Assignment

Current Interface

Client Search > Lyonel Baratheon > History

Lyonel Baratheon
You are currently viewing the Client Record pages for Lyonel Baratheon.

Profile
Privacy
Household
History
Programs
Services
Assessments
Care Team
Notes
Alerts

History
View a history of interactions with this client

Service Name Start Date End Date

Rental Assistance:Rental Payment OC Training Agency This entry added by Amy Lazari from primary agency System	6/24/26 1 days ago	6/24/26 1 days ago	📅 💰
Adult Re-entry Grant Cohort 4 (ARG) - Rapid Re-Housing OC Training Agency This entry added by Amy Lazari from primary agency System	6/24/26 1 days ago	Active	
Rental Assistance:Utility Payment OC Training Agency This entry added by Amy Lazari from primary agency System	6/10/26 15 days ago	6/10/26 15 days ago	📅 💰
Rental Assistance:Deposit OC Training Agency This entry added by Amy Lazari from primary agency System	6/10/26 15 days ago	6/10/26 15 days ago	📅

1 - 4 of 4 < >

Current Interface

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

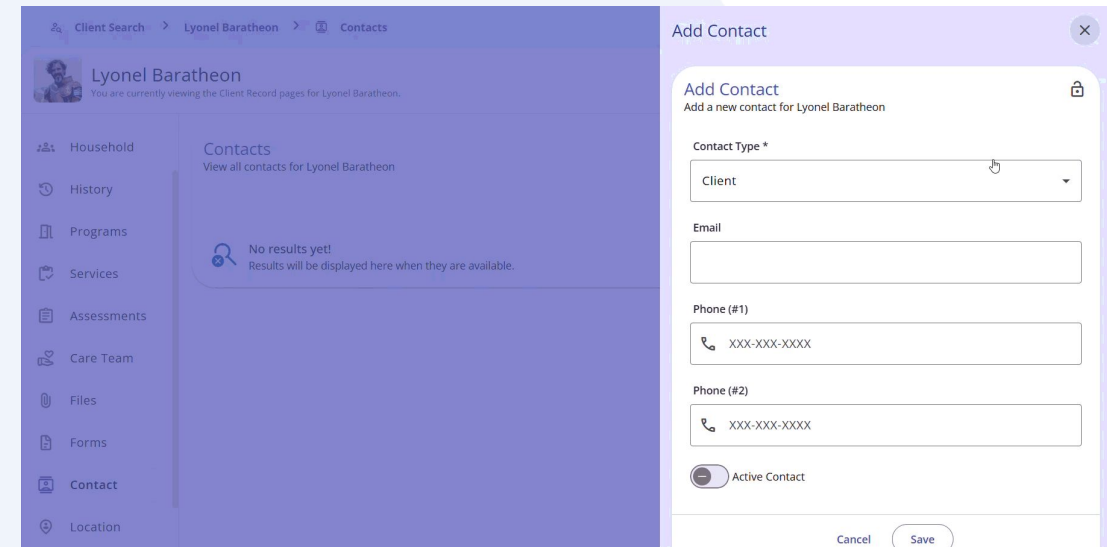
The Contact tab includes contact history and the ability to add and manage contact information.

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.



The screenshot shows a web application interface for managing client records. On the left, a navigation menu lists various tabs: Household, History, Programs, Services, Assessments, Care Team, Files, Forms, Contact, and Location. The 'Contact' tab is currently selected. The main content area displays the 'Contacts' section for a client named 'Lyonel Baratheon'. A message indicates 'No results yet! Results will be displayed here when they are available.' On the right, an 'Add Contact' modal form is open. The form includes a 'Contact Type' dropdown menu (set to 'Client'), an 'Email' field, two 'Phone' fields (labeled '#1' and '#2'), and an 'Active Contact' toggle switch. At the bottom of the modal are 'Cancel' and 'Save' buttons.

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.

Program enrollments
Program enrollment history for Lyonel Baratheon

Program Name	Entry Date	Exit Date	Created by	Type
ESG Funded Emergency Shelter Training Program Emergency Shelter – Entry Exit OC Training Agency	6/24/26 8 days ago	Active	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
Individual Coordinated Entry System Coordinated Entry County of Orange	6/1/26 1 months 1 days ago	Active	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	

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