

Clarity New Interface Office Hours 4

211

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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.

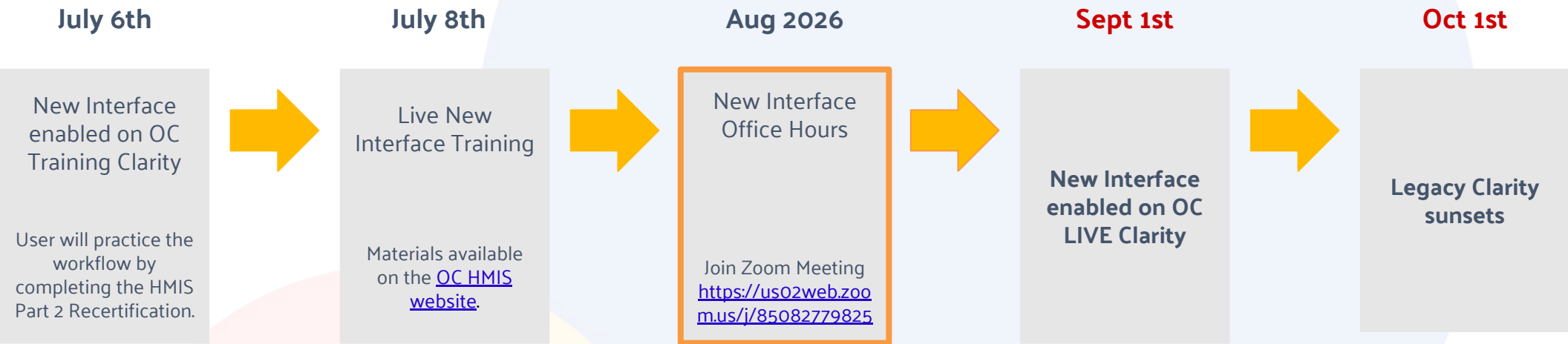
Agenda

- New Clarity Interface Roll Out Schedule
- CES Enrollment
- CES Current Living & Assessment
- Send Referral to Community Queue
- Keep a Client Active on Community Queue
- Add Housing Opportunities
- Review Pending Referrals
- Exit Client from CES Enrollment

Meeting materials and recording will be available on the [OC HMIS website](#)

New Clarity Interface Roll Out Schedule

Clarity Human Services New Interface will go live Sept 1st.

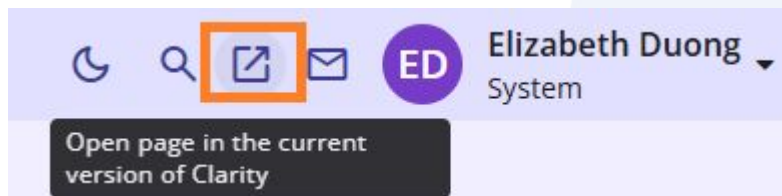


Please keep an eye out for the weekly newsletters to review the new functionality of the New Clarity Interface.

New Clarity Interface Roll Out Schedule

Clarity Human Services New Interface will go live Sept 1st.

The Legacy Clarity will sunset Oct 1st. Users will have 30 days to continue to get familiar with the new interface. User will be able to switch between the two interface until the Legacy Clarity is sunsetted.



Next Steps:

- Complete the [HMIS Part 2 Recertification](#) to practice the new workflow on the New Clarity Interface
- Complete Bitfocus [Clarity Human Services: New Interface Course](#)
- Attend [August Office Hours](#) for additional support
- Review [July New Interface Clarity Training materials](#)
- Review [Clarity's New Look and Common Functions](#)



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CES Workflow for Access Point

1. Enroll the client into the appropriate CES project
2. Add a Current Living Situation Assessment (CLS)
3. Add a Homeless Verification Form and CES Authorization Form to the client record
4. Complete the CES Assessment
 - a. Bed Reservation Assessment if applicable
5. Send Client to the Community Queue
 - a. Bed Reservation Queue if applicable
6. Access Point complete CLS every 90 days or as needed to keep the client active

KB: Coordinated Entry System (CES) for Case Managers



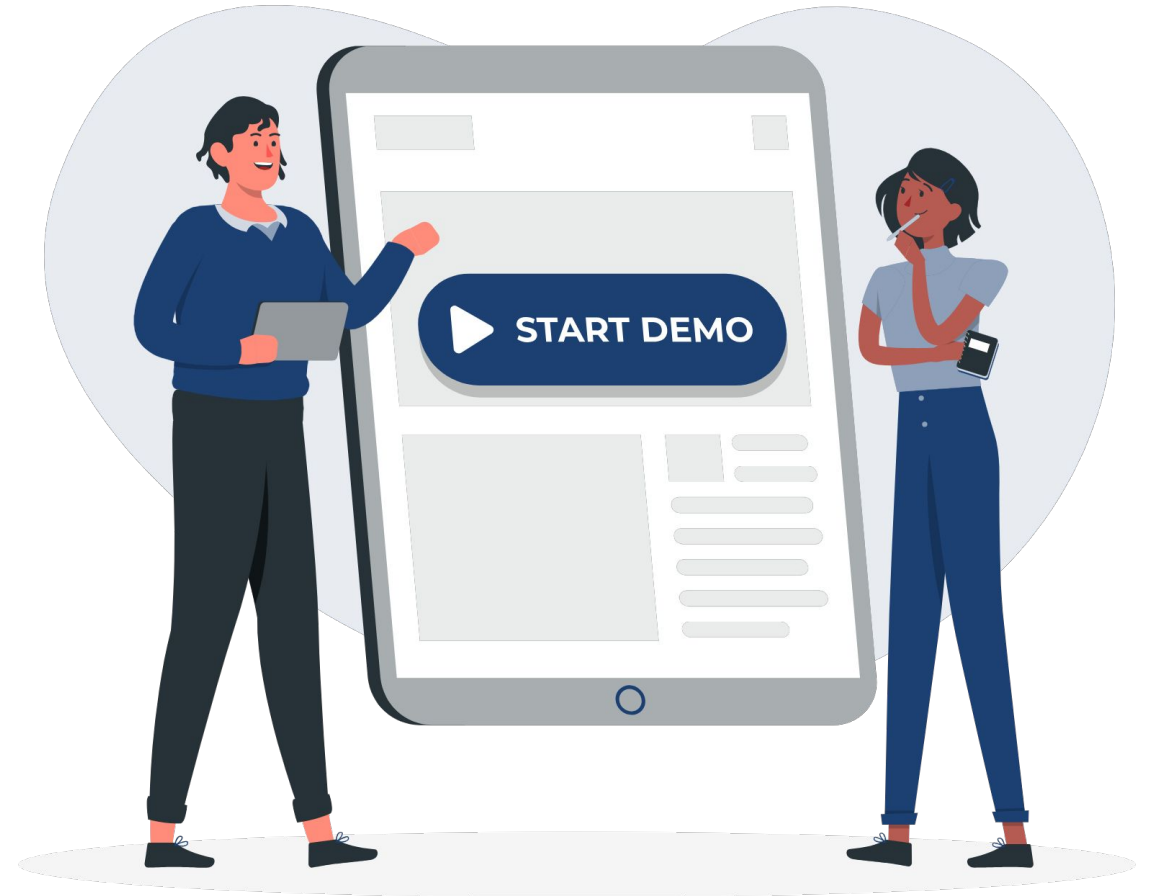
Graphic by: <https://storyset.com/online>

CES Enrollment

1. Switch over to **County of Orange**
2. Select the appropriate CES projects from the list of projects available under the County of Orange, click Next.
 - a. Family CES - at least one minor child (ages 0-17), an expectant (pregnant) mother, or in the reunification process with minor child(ren)
 - b. Individual CES - any other household composition, that isn't a family
3. Complete the **Current Living Situation**
4. Complete the enrollment screen by filling out the entry screen data elements, click Save and Complete.

The top screenshot shows the 'Profile' page for Winnie Sanderson. The breadcrumb trail is 'Client Search > Winnie Sanderson > Profile'. The left sidebar contains links for Profile, Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main content area shows 'Winnie Sanderson' with 'Client profile information'. It includes a 'Social Security Number' field with the value '***-**-1098' and a 'Quality of SSN' field with the value 'Full SSN Reported'. On the right, there is a 'Switch Agency' dropdown menu with 'County Of Orange' selected. The bottom screenshot shows the 'Programs' page for Winnie Sanderson. The breadcrumb trail is 'Client Search > Winnie Sanderson > Programs'. The left sidebar is the same as the top screenshot. The main content area shows 'Winnie Sanderson' with 'You are currently viewing the Client Record pages for Winnie Sanderson.' Below this, there is a 'Program enrollments' section with the subtitle 'Program enrollment history for Winnie Sanderson'. It features a search bar and a message that says 'No results yet! Results will be displayed here when they are available.'

CES Enrollment Demo



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

Upload CES Forms

1. Navigate to the **Client Files** screen from the Client Navigation Menu
2. Select the **Add Icon (+)**
3. Select Coordinated Entry Documentations, then select the appropriate file label and upload the CES doc
4. Click **Save**

The screenshot shows a web application interface for a client named Winnie Sanderson. The top navigation bar includes a search icon, the text 'Client Search > Winnie Sanderson > Profile', and a user profile for 'Elizabeth Duong, County Of Orange'. Below the navigation bar, the main content area is titled 'Winnie Sanderson' with a subtitle 'You are currently viewing the Client Record pages for Winnie Sanderson.' and a 'No Contact Information' button. A left sidebar contains a list of menu items: Profile, Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The 'Profile' menu item is selected. The main content area displays the 'Winnie Sanderson Client profile information' form. The form is organized into two columns. The left column contains fields for Social Security Number (***-**-1098), First name (Winnie), Middle name (No value), Quality of Name (Full name reported), Date of Birth (04/05/1955), Gender (Woman (Girl, if child)), Race and Ethnicity (White), Additional Race and Ethnicity Detail (No value), Veteran Status (No), OC Custom Questions (Alias: No value, Pronoun(s): No value, Federally Recognized Tribe: No value), and Age (71). The right column contains fields for Quality of SSN (Full SSN Reported), Last name (Sanderson), Suffix (No value), and Quality of DOB (Full DOB Reported).

Client Search > Winnie Sanderson > Profile

Elizabeth Duong
County Of Orange

WS Winnie Sanderson
You are currently viewing the Client Record pages for Winnie Sanderson.

No Contact Information

Profile

Privacy

Household

History

Programs

Services

Assessments

Care Team

Notes

Alerts

Files

Forms

Contacts

Location

Referrals

Winnie Sanderson
Client profile information

Social Security Number
***-**-1098

First name
Winnie

Middle name
No value

Quality of Name
Full name reported

Date of Birth
04/05/1955

Gender
Woman (Girl, if child)

Race and Ethnicity
White

Additional Race and Ethnicity Detail
No value

Veteran Status
No

OC Custom Questions
Alias
No value
Pronoun(s)
No value
Federally Recognized Tribe
No value

Quality of SSN
Full SSN Reported

Last name
Sanderson

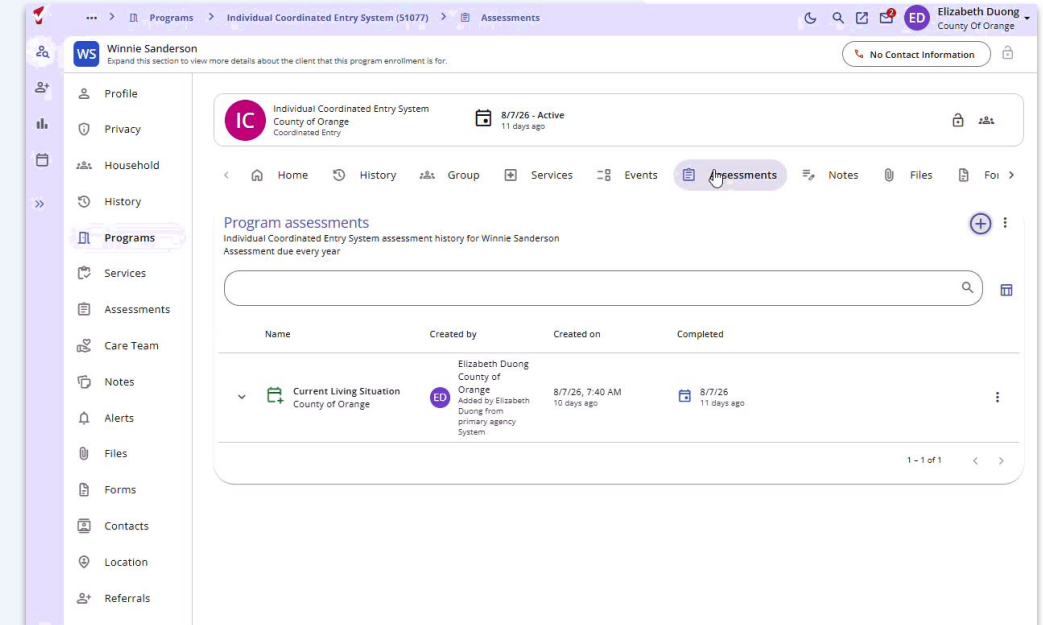
Suffix
No value

Quality of DOB
Full DOB Reported

Age
71

Create a CES Assessment

1. Navigate to the **CES Program Enrollment** from the Client Navigation Menu
2. Select **Assessments**
3. Select the **Add Icon** (+)
4. Add the client's housing preference and list any accessibility needs
5. Click **Save**



Refer Client to Community Queue (CQ)

1. Under the **Client CES Enrollment - Assessment** screen select **Show more actions** and select **View Eligibility**
2. From the Community Queue Referral screen, select the **Add Icon (+)**
3. Select **Coordinated Entry System**
4. Click **Save** and **Complete**

The screenshot shows the 'Assessments' tab for a client named Winnie Sanderson in the Individual Coordinated Entry System (IC). The page displays a table of program assessments with columns for Name, Created by, Created on, and Completed. The table lists three assessments: '[OC Custom] Individual Bed Reservation Assessment', 'Individual CES Assessment', and 'Current Living Situation'. Each assessment was created by Elizabeth Duong, County of Orange, and is marked as completed. The 'Completed' column shows the date and time of completion, along with a calendar icon and the number of days ago.

Name	Created by	Created on	Completed
[OC Custom] Individual Bed Reservation Assessment County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/19/26, 9:27 AM 1 days ago	8/19/26 1 days ago
Individual CES Assessment County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/17/26, 9:43 PM 3 days ago	8/17/26 3 days ago
Current Living Situation County of Orange	Elizabeth Duong County of Orange Added by Elizabeth Duong from primary agency System	8/7/26, 7:40 AM 13 days ago	8/7/26 14 days ago

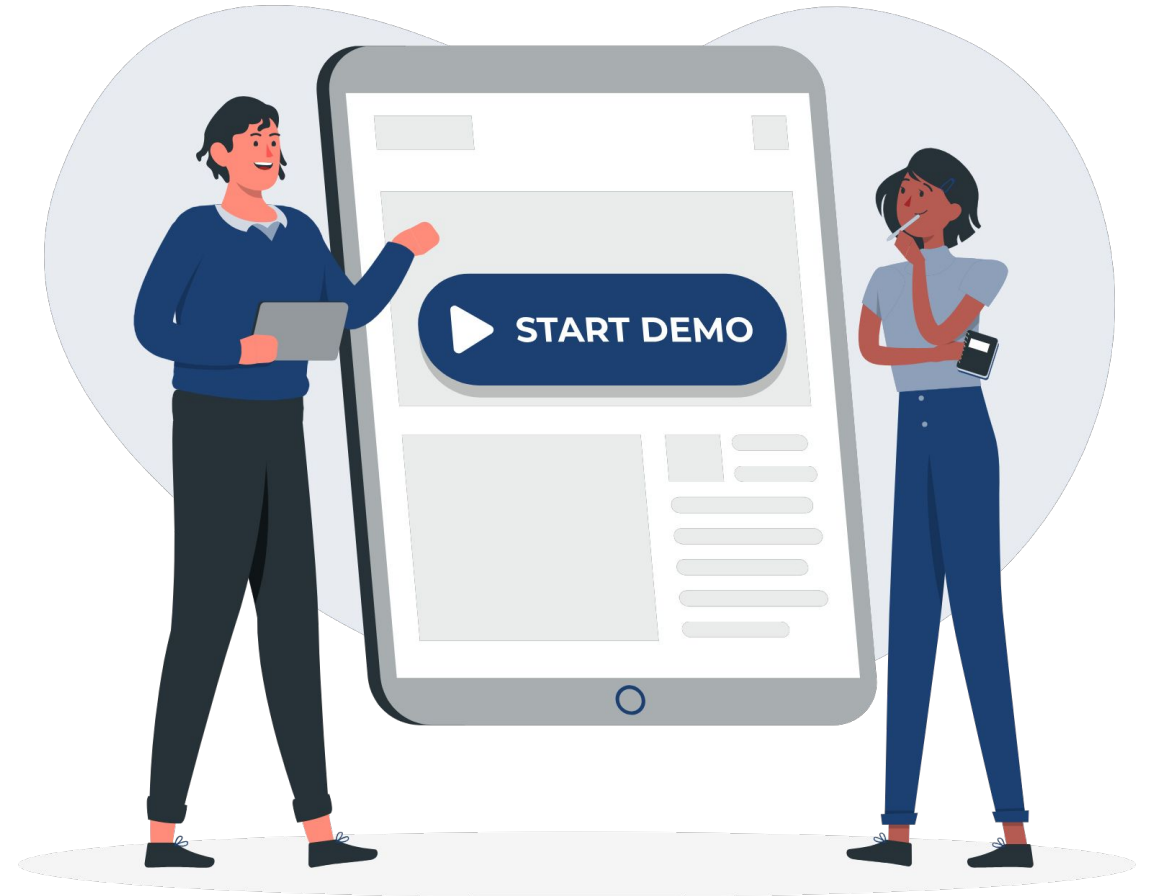
Keep Client Active on the Community Queue (CQ)

While a household is on the Community Queue, their case manager should check in with them regularly. If a household is on the Community Queue for more than 90 days with no activity, their referral will be automatically removed.

- Add an updated Current Living Situation
- Complete a “Check In”
- Add a Note to the Head of Household’s record
- Add a Coordinated Entry Event

The screenshot shows a web application interface for the Individual Coordinated Entry System (IC). The top navigation bar includes a search icon, a list icon, a calendar icon, a mail icon, and a user profile icon for Elizabeth Duong, County Of Orange. The main header displays the client's name, Winnie Sanderson, and a status of 8/7/26 - Active, 14 days ago. The left sidebar contains a vertical menu with icons for Home, History, Group, Services, Events, Assessments, Notes, Files, and a search icon. The main content area is titled 'Edit Client Program' and includes a sub-header 'Update client program for Winnie Sanderson in Individual Coordinated Entry System'. The form contains several fields: Project Start Date (08/07/2026), Prior Living Situation (Type of Residence: Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside), Length of Stay in Prior Living Situation (One year or longer), Approximate date this episode of homelessness started (01/01/2025), Number of times on the streets, in ES, or Safe Haven in the past three years (One Time), Total number of months homeless on the streets, in ES, or Safe Haven in the past three years (More than 12 Months), Disabling Conditions and Barriers (Disabling Condition: No, Physical Disability: No, Developmental Disability: No).

Workflow to Refer Client to CQ Demo



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

CES Workflow for Housing Provider

1. Add Housing Opportunities
2. Review Pending Referrals
3. Record a Referral Outcome
 - a. Send Referral Back to Community Queue if applicable
 - b. Exit Household from CES Enrollment if applicable

KB: [Community Queue for Housing Agencies](#)



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

Add Housing Opportunities

Each housing agency is responsible for entering and updating any housing opportunities at their agency. This can be done by accessing the Availability tab on the Referrals page. Each agency must enter their project's housing opportunities in order to receive matches from either Community Queue.

1. Select Program that has an housing opportunity
2. Include as much detail as possible for appropriate matches to the housing opportunity
3. Add additional details in the Note textbox
4. Click **Save** and **Complete**

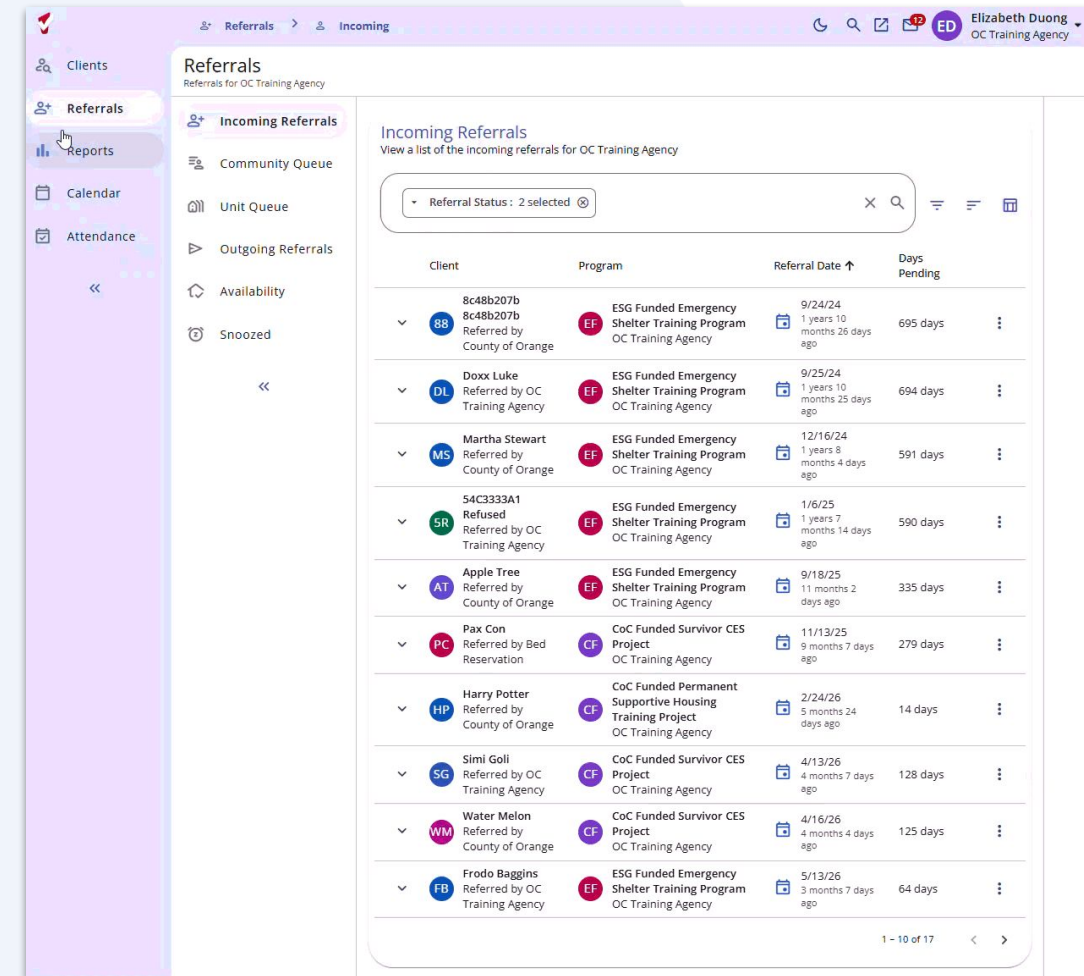
The screenshot shows a web application interface for managing referrals and availability. The top navigation bar includes 'Referrals' and 'Availability' tabs. The left sidebar contains a menu with 'Clients', 'Referrals', 'Reports', 'Calendar', and 'Attendance'. The main content area is titled 'Referrals' and 'Availability' for 'OC Training Agency'. It features a search bar and a table of program openings. The table has columns for 'Program', 'Availability', 'Openings', and 'Community Queues'. The 'Availability' tab is selected, showing a list of programs with their respective availability status and the number of openings.

Program	Availability	Openings	Community Queues
VASH Funded Permanent Supportive Housing Training Project PH - Permanent Supportive Housing (disability required for entry)	Limited	2	Coordinated Entry System
SSVF Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	0	Coordinated Entry System
ESG Funded Homeless Prevention Training Project Homelessness Prevention	None	0	Coordinated Entry System
CoC Funded Homeless Prevention Training Project Homelessness Prevention	None	0	Coordinated Entry System Bed Reservation
CoC Funded Permanent Supportive Housing Training Project PH - Permanent Supportive Housing (disability required for entry)	Limited	27	Coordinated Entry System
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	23	Coordinated Entry System
ESG Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	5	Coordinated Entry System
Non-Federally Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing	Limited	1	Coordinated Entry System
Non-Federally Funded Homeless Prevention Training Project Homelessness Prevention	Limited	0	Coordinated Entry System
Non-Federally Funded Housing With Services (No Disability Required) Training Project PH - Housing with Services (no disability required for entry)	None	0	Coordinated Entry System Bed Reservation

Review Pending Referrals

Once a Matchmaker has matched a household to a housing opportunity, the housing provider must review the match and determine whether or not the household is eligible for the project. Agency Administrators will be notified via email when a household has been matched to a housing opportunity at the agency.

1. Navigate to the **Referrals** screen from the Primary Navigation Menu
2. Select **Incoming Referrals**
3. Select referred Client Referral to review additional details



Referrals
Referrals for OC Training Agency

Incoming Referrals
View a list of the incoming referrals for OC Training Agency

Referral Status: 2 selected

Client	Program	Referral Date ↑	Days Pending
8c48b207b 8c48b207b Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	9/24/24 1 years 10 months 26 days ago	695 days
Doxx Luke Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	9/25/24 1 years 10 months 25 days ago	694 days
Martha Stewart Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	12/16/24 1 years 8 months 4 days ago	591 days
54C333A1 Refused Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	1/6/25 1 years 7 months 14 days ago	590 days
Apple Tree Referred by County of Orange	ESG Funded Emergency Shelter Training Program OC Training Agency	9/18/25 11 months 2 days ago	335 days
Pax Con Referred by Bed Reservation	CoC Funded Survivor CES Project OC Training Agency	11/13/25 9 months 7 days ago	279 days
Harry Potter Referred by County of Orange	CoC Funded Permanent Supportive Housing Training Project OC Training Agency	2/24/26 5 months 24 days ago	14 days
Simi Gali Referred by OC Training Agency	CoC Funded Survivor CES Project OC Training Agency	4/13/26 4 months 7 days ago	128 days
Water Melon Referred by County of Orange	CoC Funded Survivor CES Project OC Training Agency	4/16/26 4 months 4 days ago	125 days
Frodo Bagbins Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	5/13/26 3 months 7 days ago	64 days

1 - 10 of 17

Exiting Household from CES

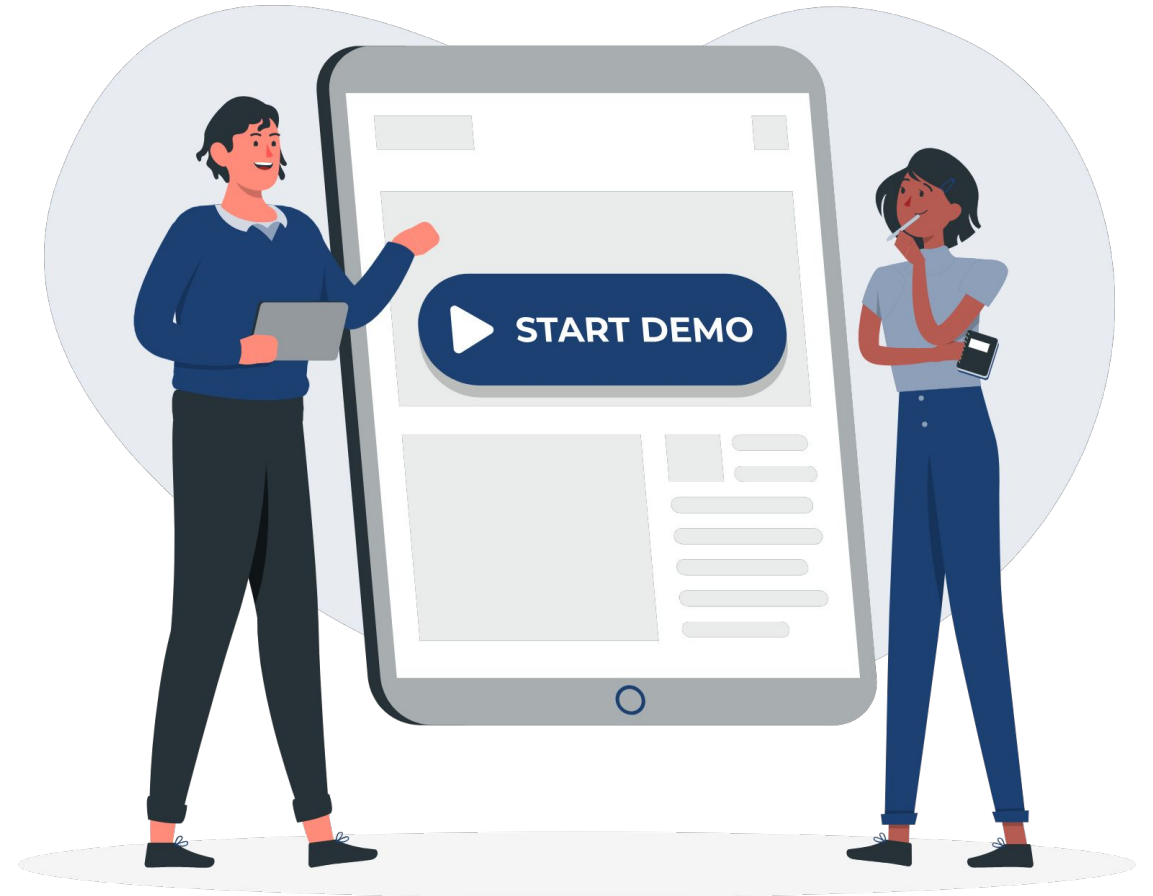
Once the housing provider has determined that the household is eligible for their project and the household has confirmed that they wish to be assisted by the project, the case manager should enroll the household into the agency's housing project.

Households referred to a housing opportunity through the Coordinated Entry System will also need to exit the household from the Coordinated Entry System project.

1. Enroll client into your agency's PH program
2. Once household is housed, exit the household from CES enrollment to close out their CES participation.

The screenshot shows a web application interface for a Coordinated Entry System (CES). The top navigation bar includes a search icon, the text 'Client Search > Harry Potter > Profile', and a user profile for 'Elizabeth Duong' from 'OC Training Agency'. The main content area is titled 'HP Harry Potter' and states 'You are currently viewing the Client Record pages for Harry Potter.' A sidebar on the left contains a list of menu items: Profile (selected), Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main profile area displays 'Client profile information' for Harry Potter, including fields for Social Security Number, First name (Harry), Quality of Name, Date of Birth (01/01/2000), Gender, Race and Ethnicity, and OC Custom Questions (Alias, Pronoun(s), Federally Recognized Tribe, Specify Other Tribe). A 'No Contact Information' button is visible in the top right corner of the profile area.

Workflow for Housing Providers Demo



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

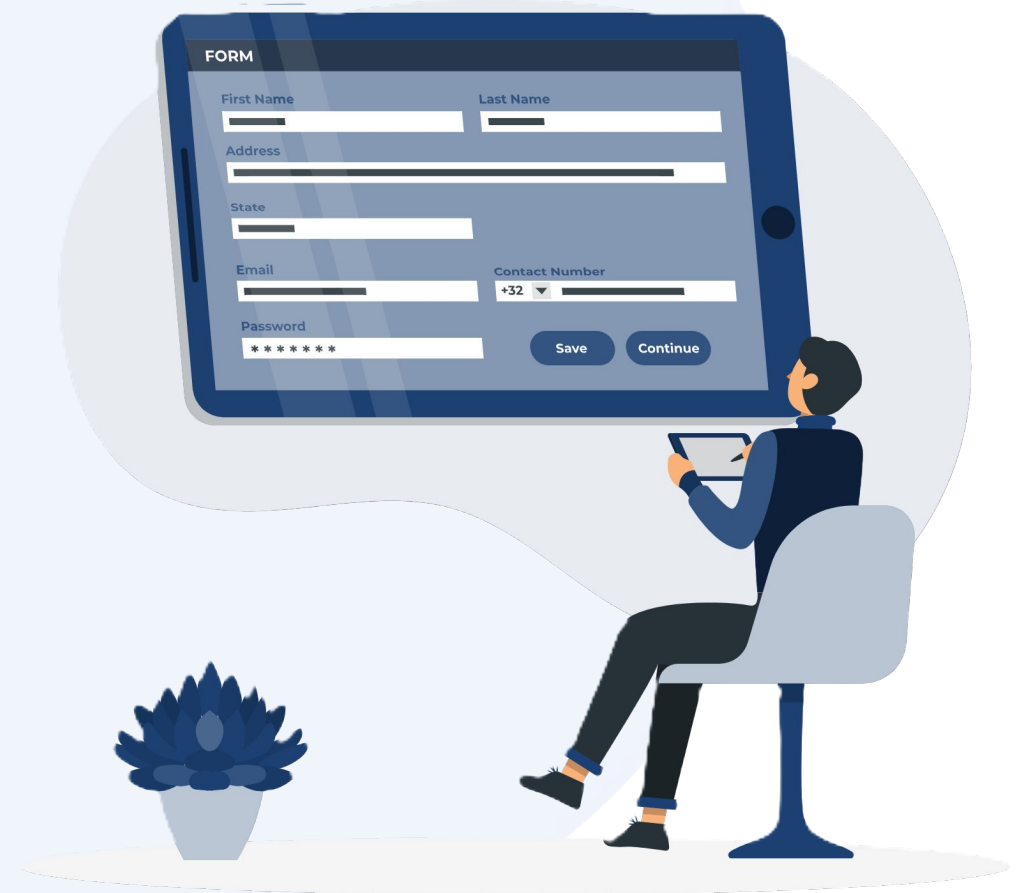
August 2026 Clarity New Interface Survey

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

We'd greatly appreciate any feedback.

Thank you!

Survey: <https://forms.gle/kCuwdqe7bZoptqdD8>



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](#)



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