Clarity New Interface Office Hours 2

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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
- Client Navigation Menu
- Household
- History
- Programs

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

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New Clarity Interface Roll Out Schedule

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

July 6th	July 8th	Aug 2026	Sept 1st	Oct 1st
New Interface enabled on OC Training Clarity User will practice the workflow by completing the HMIS Part 2 Recertification.	Live New Interface Training Materials available on the OC HMIS website.	New Interface Office Hours Join Zoom Meeting https://us02web.zoom.us/j/85082779825	**New Interface enabled on OC LIVE Clarity**	**Legacy Clarity sunsets**

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

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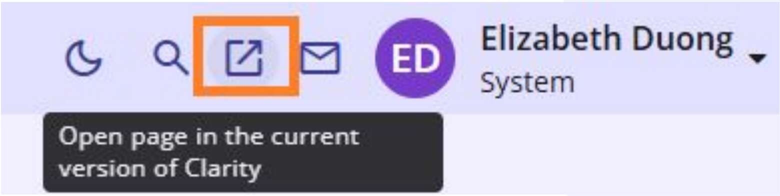
New Clarity Interface Roll Out Schedule

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 Certification 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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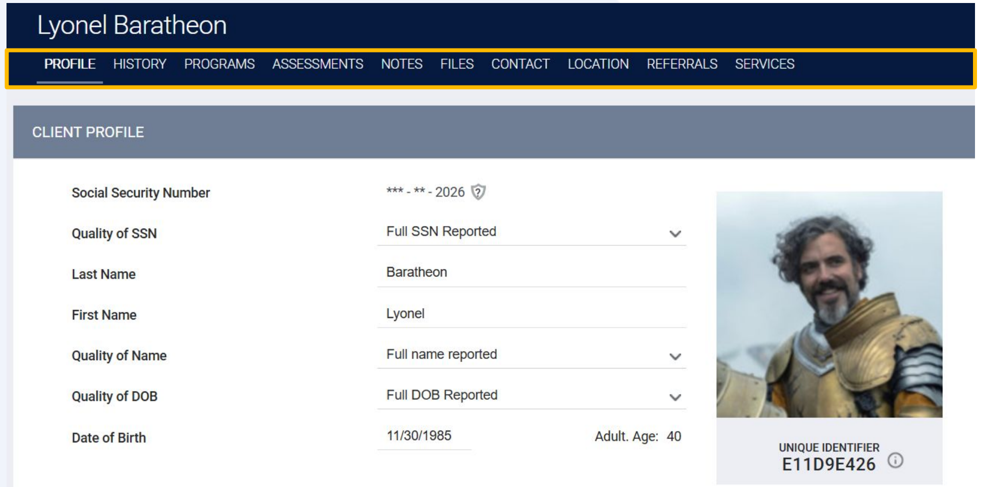
Client Navigation Menu Tabs

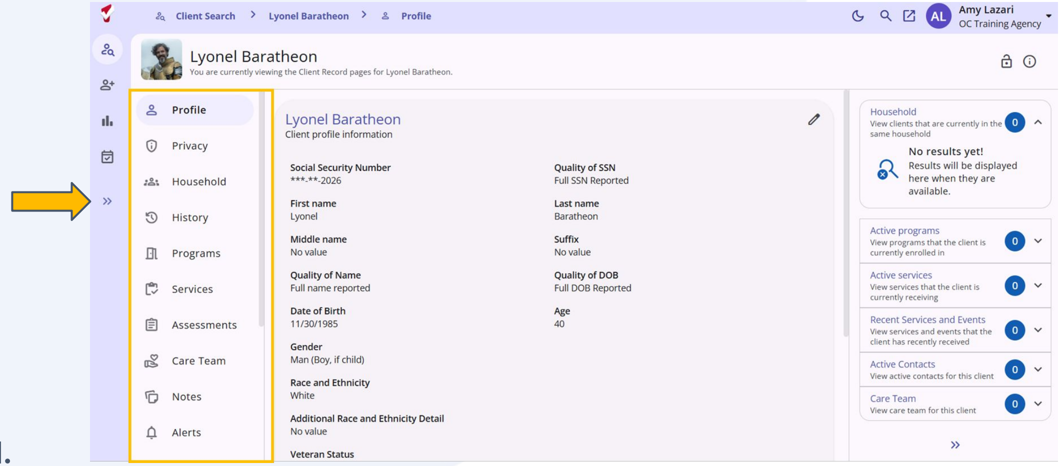
The *Client Navigation Menu* is now located on the left side of the client profile screen, and is accessible to the user regardless of where they click in the client record.

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.





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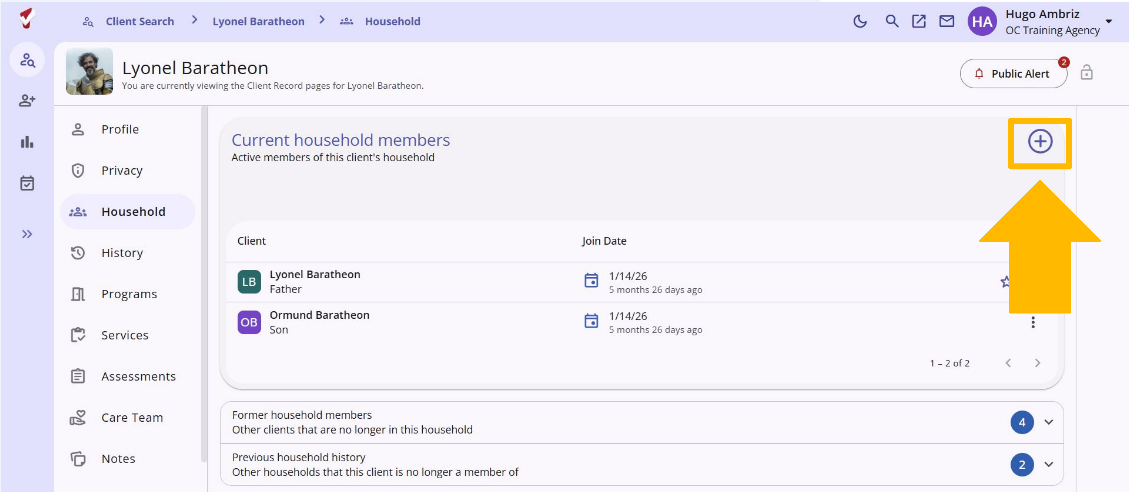
Client Household - Adding Members

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

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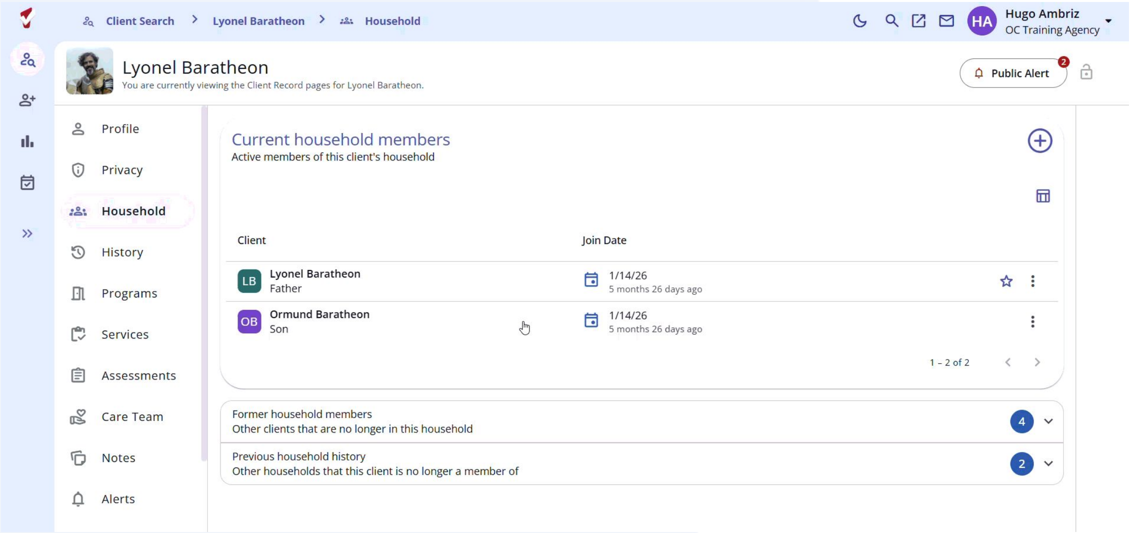
Client Household - Removing Members

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.



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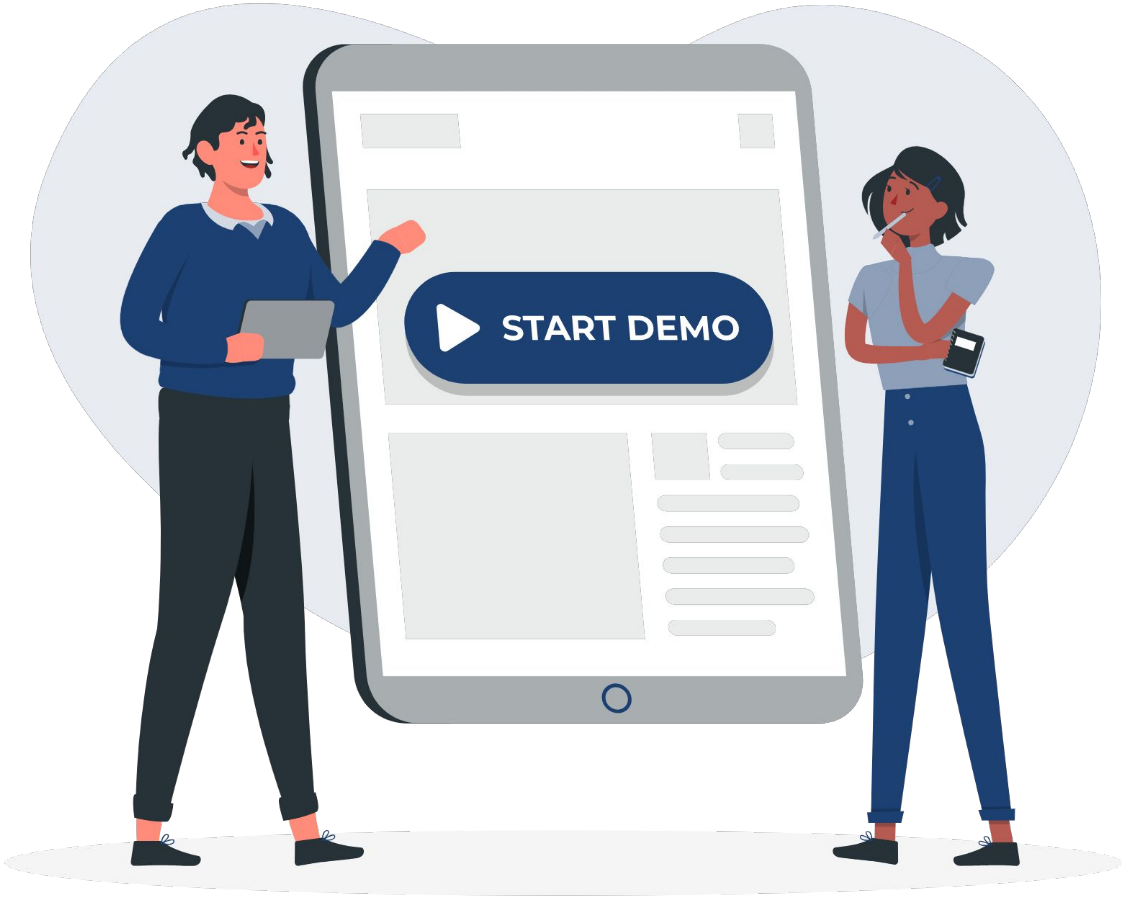
Household Demo



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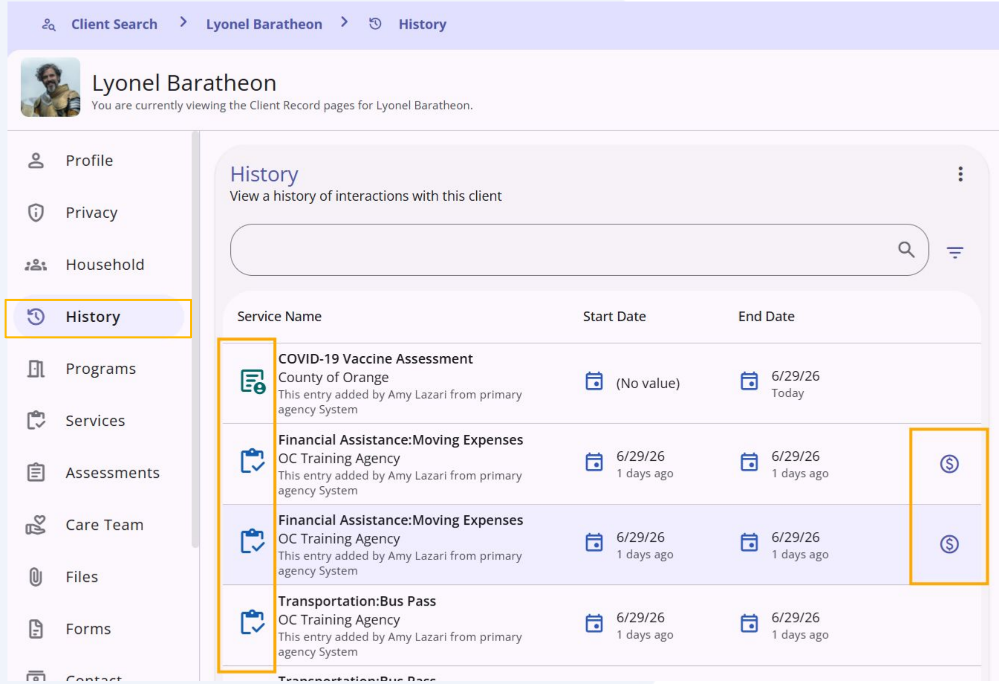
Client History

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.

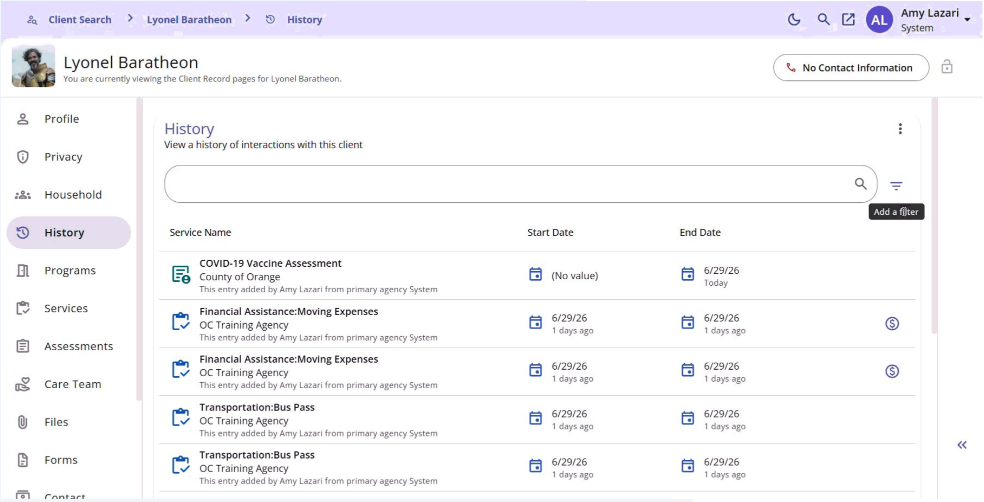


Client History

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.

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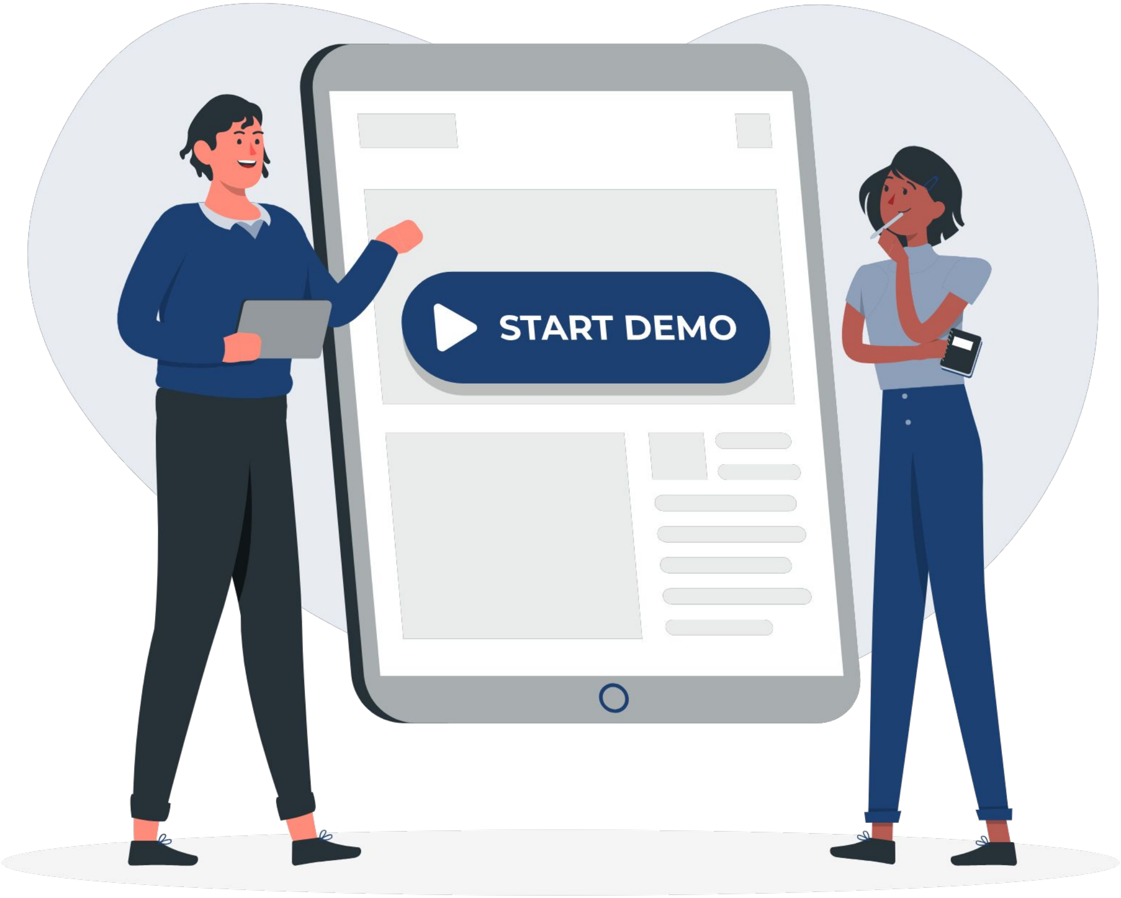
History Demo



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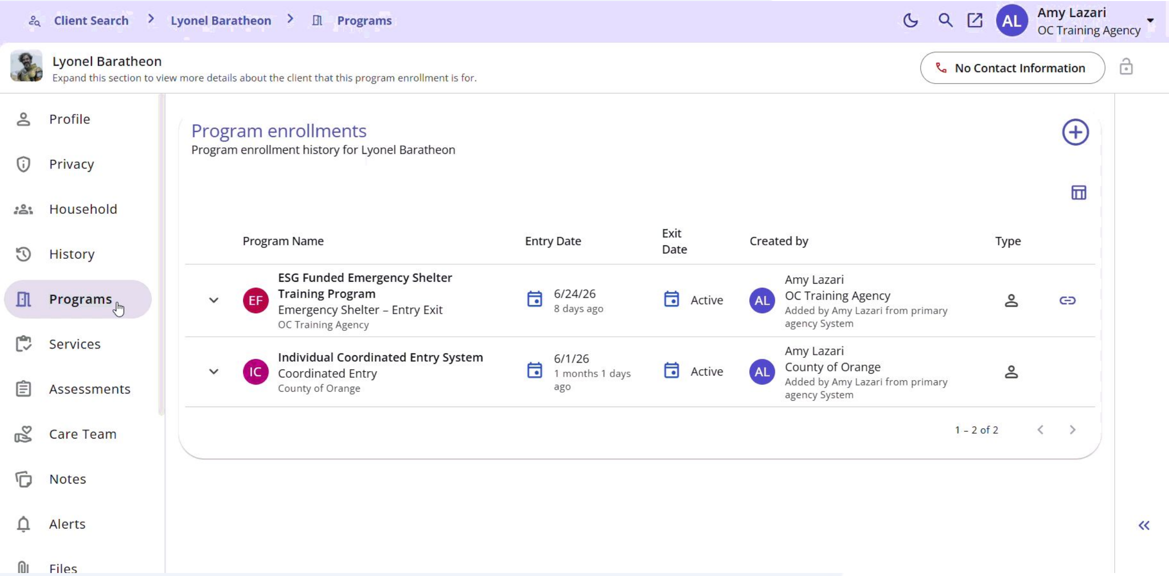
Programs

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.**



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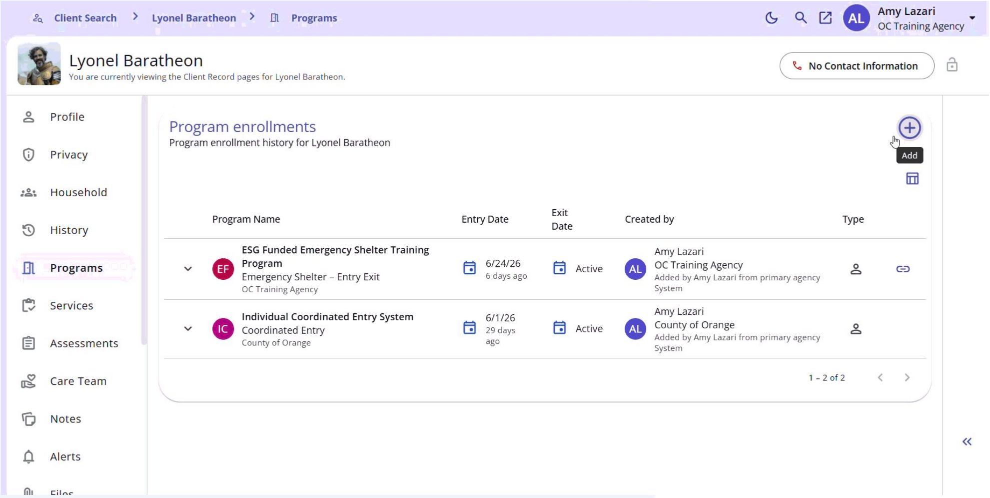
Programs

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

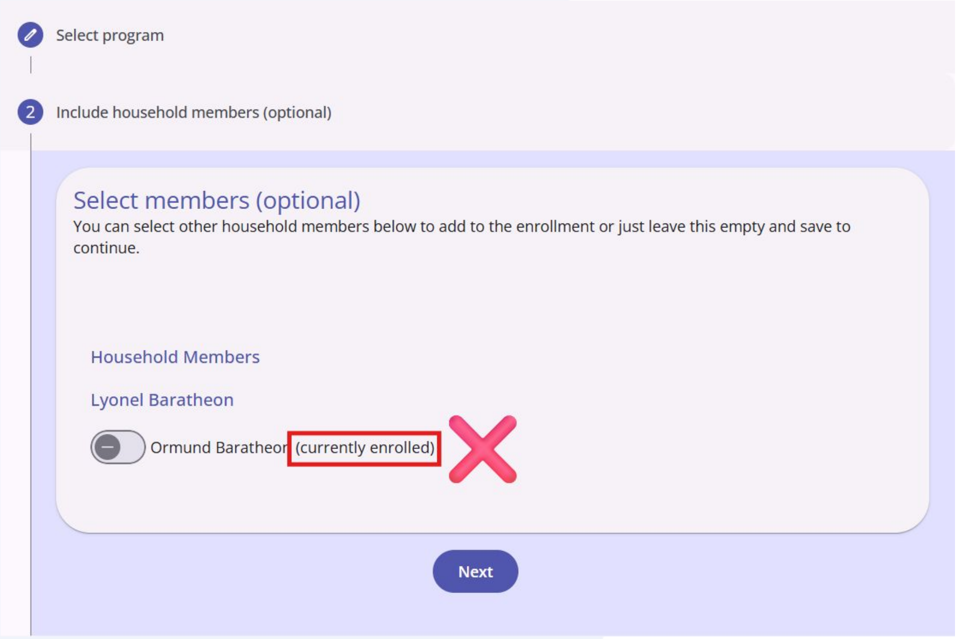
A note about adding household members...

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.



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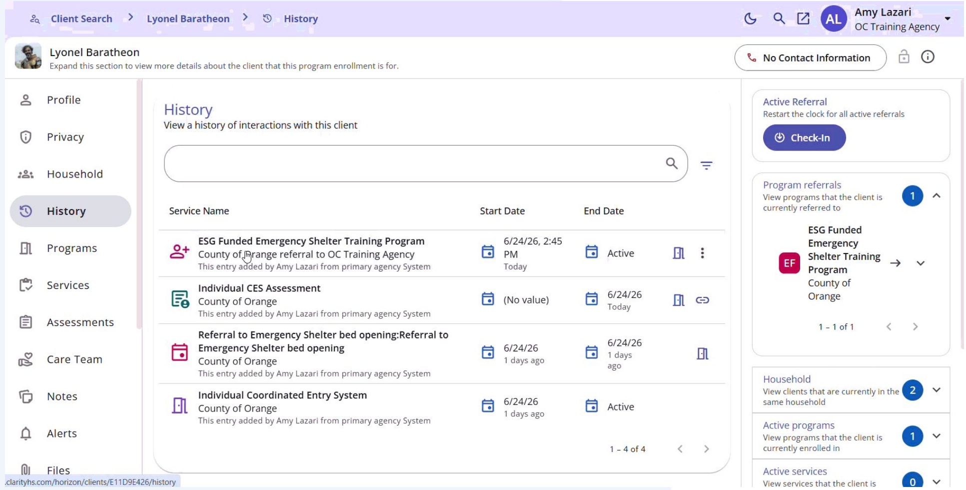
Programs

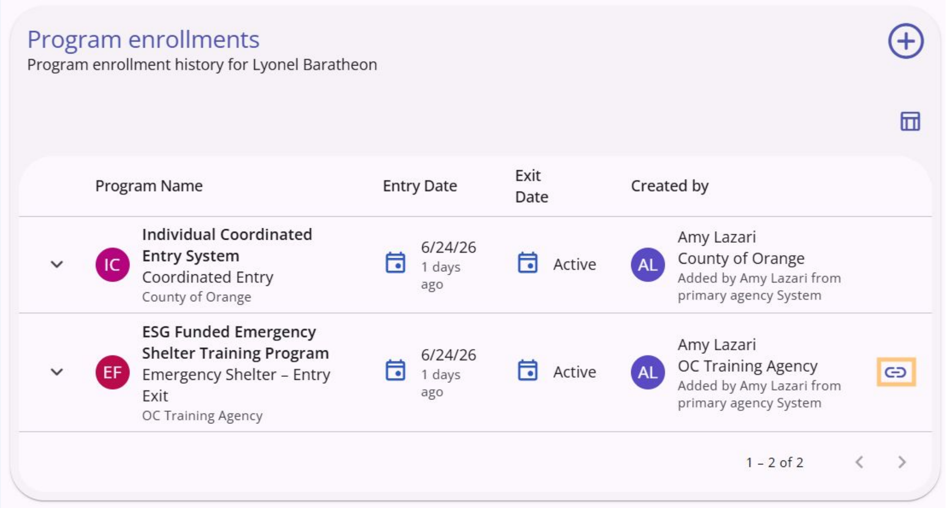
Referral Connected Enrollments

Note: for housing providers only

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.





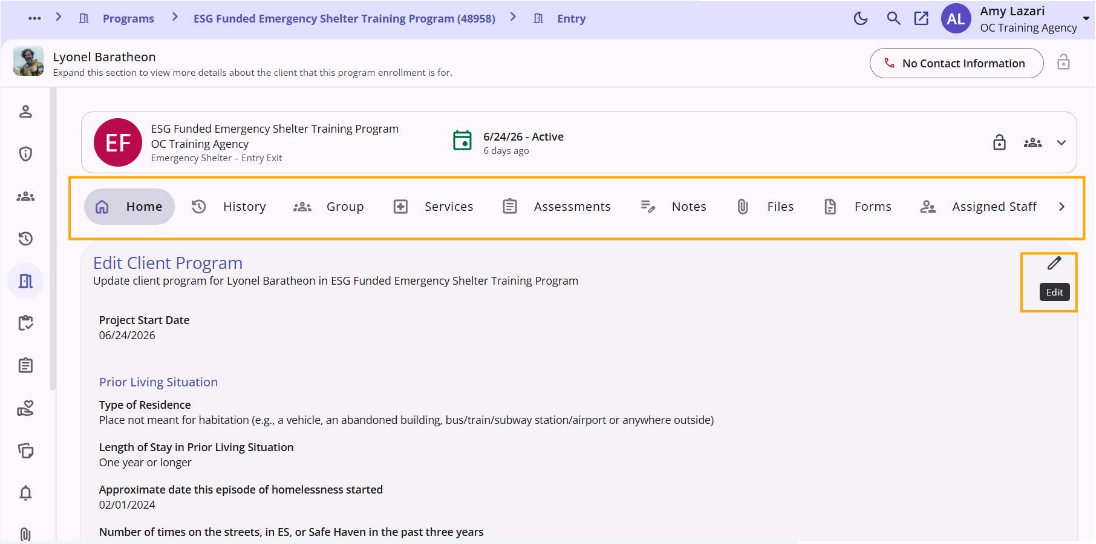
Programs

Program Enrollment History

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

- Entry responses (missing, incomplete, or incorrect 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.



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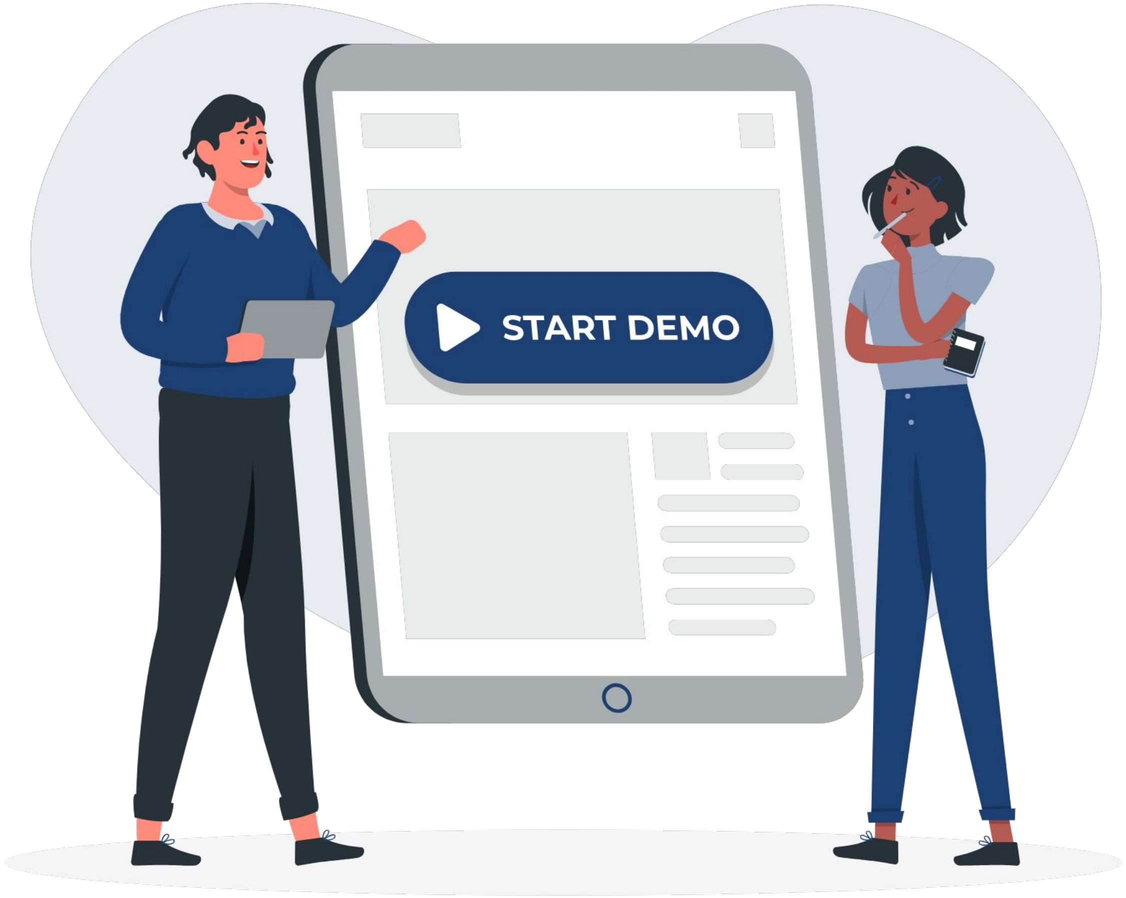
Programs Demo



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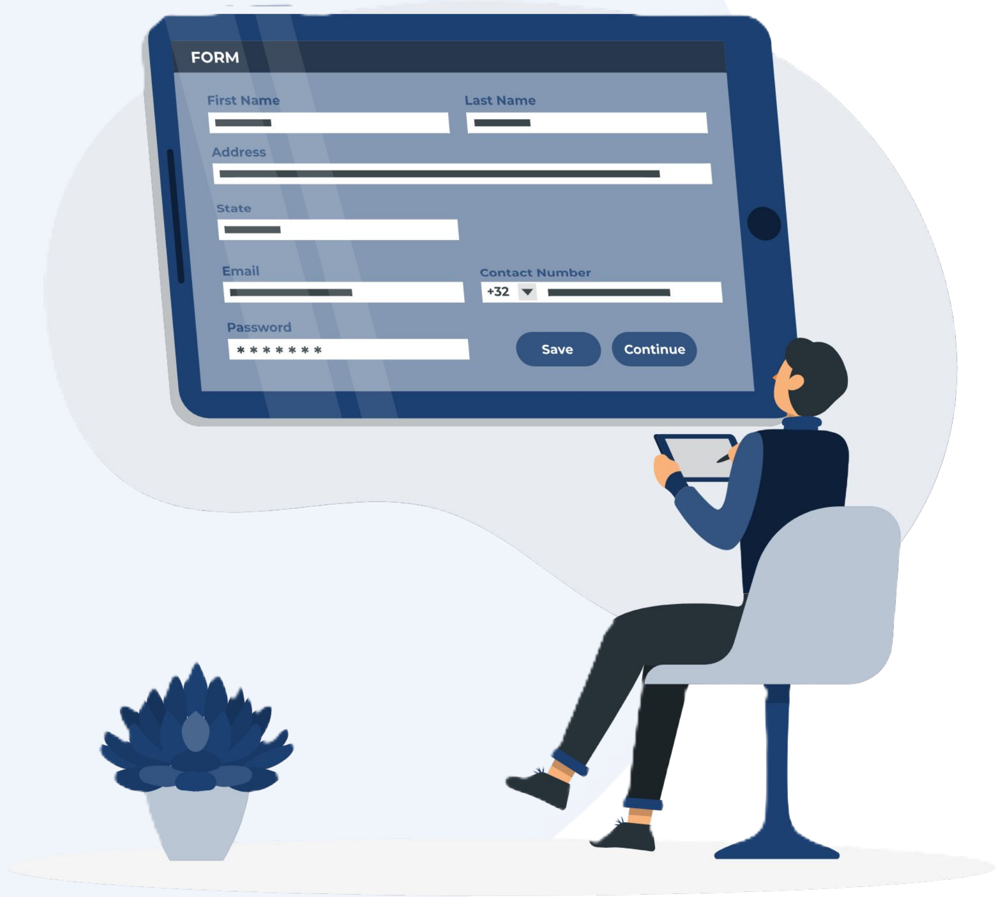
August 2026 Clarity New Interface Survey

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



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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!

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