

Clarity New Interface Office Hours 2

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.

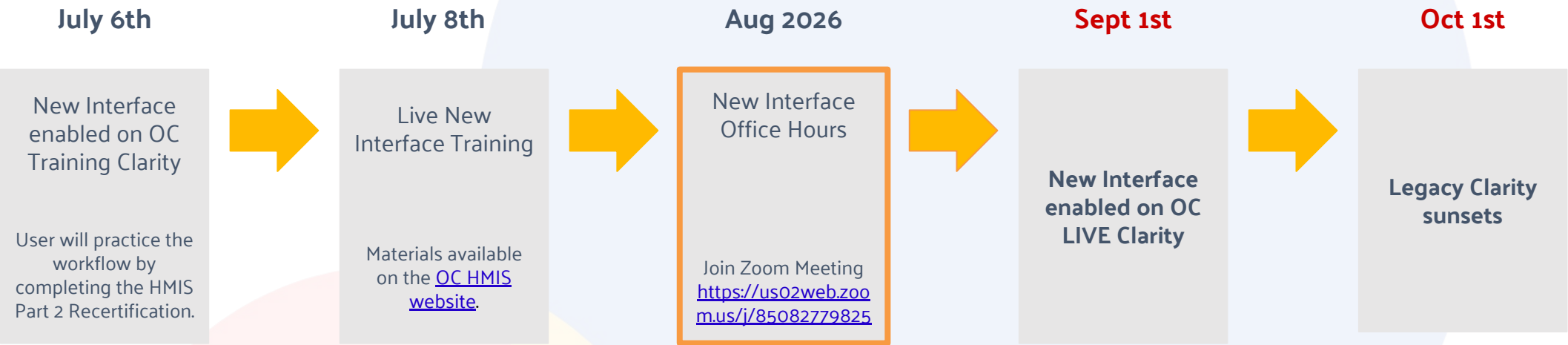
Agenda

- New Clarity Interface Roll Out Schedule
- Client Navigation Menu
- Household
- History
- Programs

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.

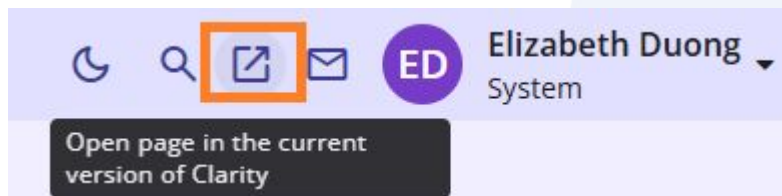


Please keep an eye out for the weekly newsletters to review the new functionality of the New Clarity Interface.

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 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](#)



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

First name Lyonel

Last name Baratheon

Middle name No value

Suffix No value

Quality of Name Full name reported

Quality of DOB Full DOB 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 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 are two expandable sections: 'Former household members' (showing 4 members) and 'Previous household history' (showing 2 households).

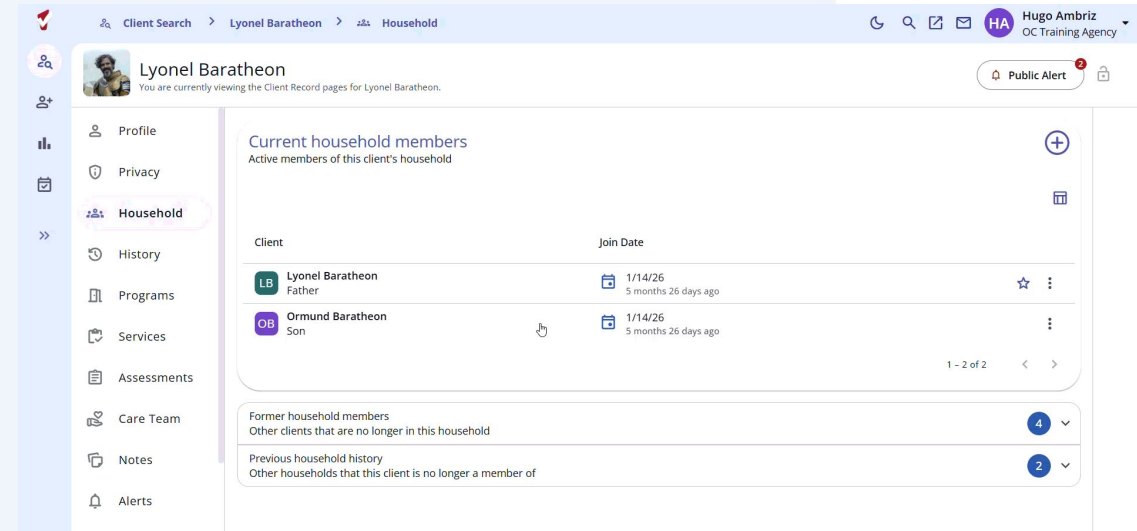
Client	Join Date
LB Lyonel Baratheon Father	1/14/26 5 months 26 days ago
OB Ormund Baratheon Son	1/14/26 5 months 26 days ago

Client Household - Removing Members

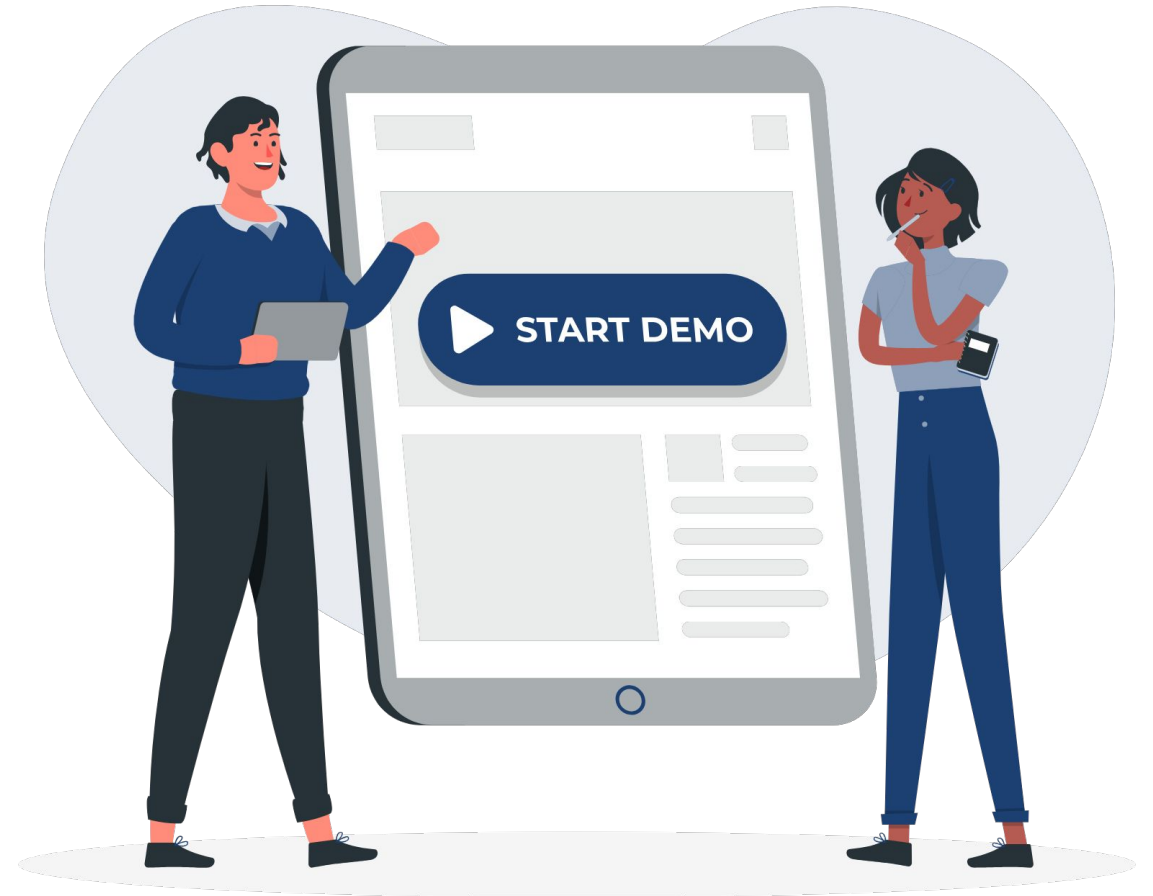
Under the current household members section, users can remove clients from the household by selecting the action menu icon next to the member's profile and then selecting the view household relation option.

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.



Household Demo



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

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' page for Lyonel Baratheon. The left sidebar contains navigation links: 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 in the sidebar. The table lists four entries: COVID-19 Vaccine Assessment, Financial Assistance: Moving Expenses (twice), and Transportation: Bus Pass. Each entry includes a description and the date it was added by Amy Lazari from the primary agency system. The 'End Date' column shows dates from 6/29/26. A search bar is located above the table. A tooltip is visible over the dollar sign icon in the 'Financial Assistance: Moving Expenses' row.

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:

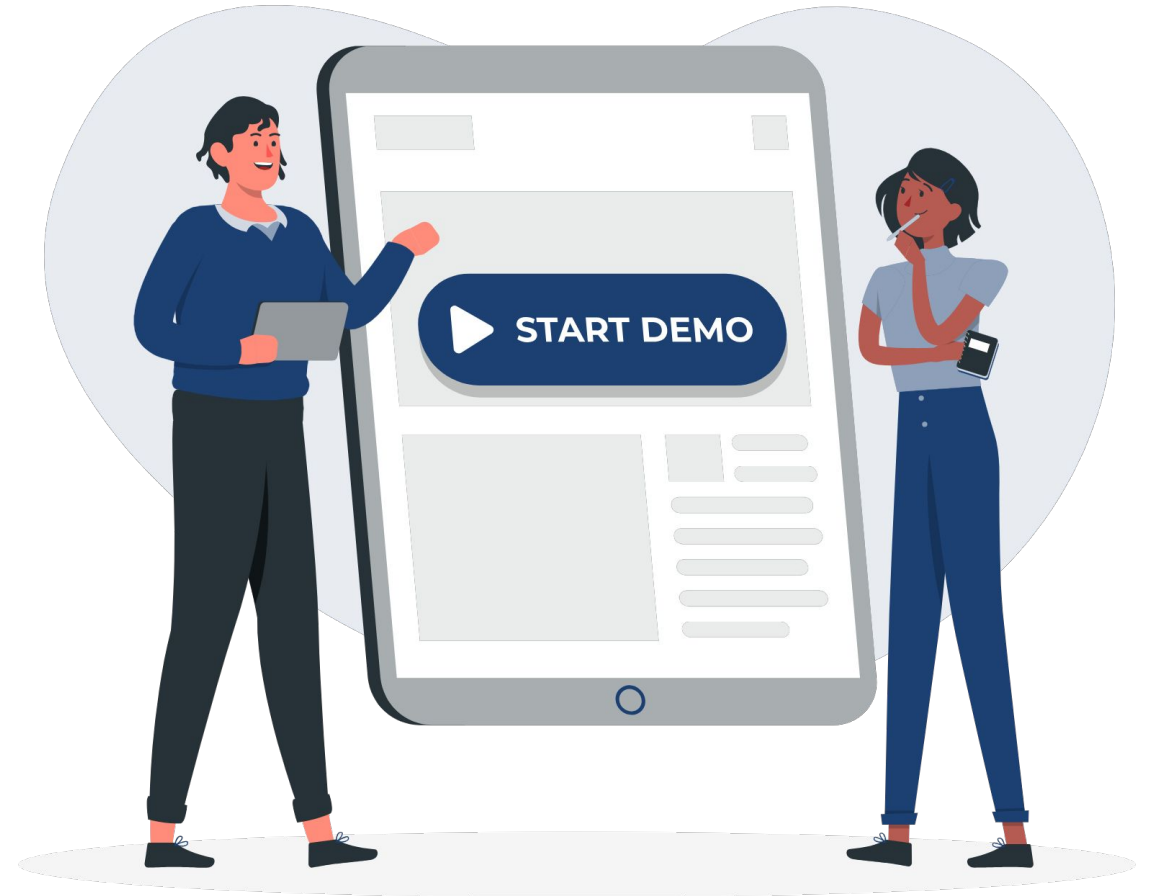
- **Agency** - all data entered by that agency
- **Category** - specific service category (e.g. food)
- **Coordinated Entry** - CE Events
- **Start and End Date** - filter for specific dates
- **Type**
 - Assessments, Programs, Referrals, Services, Reservation, Coordinated Entry Event

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

The screenshot shows the 'Client History' page for a client named Lyonel Baratheon. The page is part of a web application with a purple header bar. The header includes a search bar, the client's name, and a user profile icon for Amy Lazari. Below the header, there's 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 like COVID-19 Vaccine Assessment, Financial Assistance: Moving Expenses, and Transportation: Bus Pass, all added by Amy Lazari from the primary agency system. Each row includes a date and a relative time indicator (e.g., 'Today', '1 days ago'). There is also a search bar and a filter icon 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

History Demo



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

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.

The screenshot shows the 'Programs' tab for a client named Lyonel Baratheon. The interface includes a sidebar with navigation options: Profile, Privacy, Household, History, Programs (selected), Services, Assessments, Care Team, Notes, Alerts, and Files. The main content area displays 'Program enrollments' for Lyonel Baratheon. It features a table with columns: Program Name, Entry Date, Exit Date, Created by, and Type. Two enrollments are listed: 'ESG Funded Emergency Shelter Training Program' and 'Individual Coordinated Entry System'. Both are active and created by Amy Lazari. A '+ No Contact Information' button is visible in the top right. A pagination bar at the bottom right shows '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	Person icon
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	Person icon

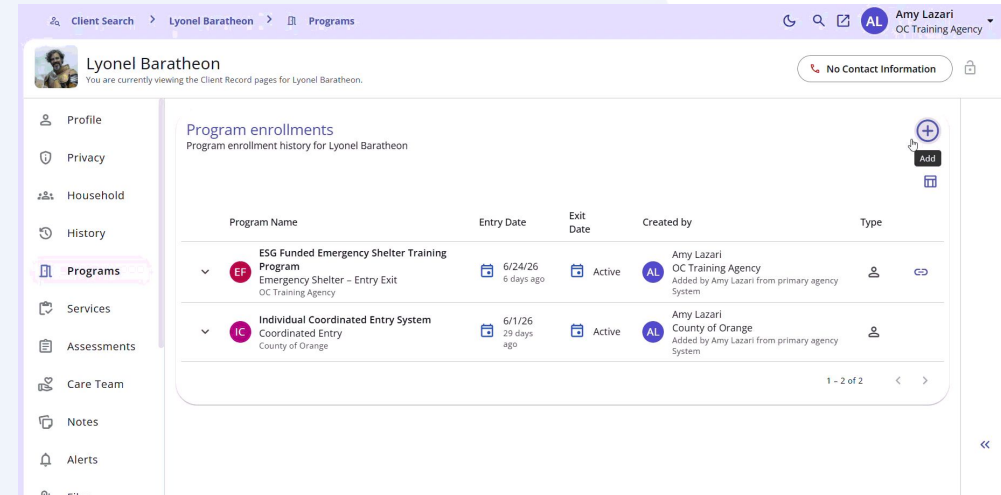
Programs

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.

The screenshot shows a two-step process for selecting a program and including household members. Step 1 is 'Select program'. Step 2 is 'Include household members (optional)'. Under step 2, there is a section titled 'Select members (optional)' with the instruction: 'You can select other household members below to add to the enrollment or just leave this empty and save to continue.' Below this is a list of 'Household Members'. The first member is 'Lyonel Baratheon'. The second member is 'Ormund Baratheon', who has a red box around the text '(currently enrolled)' and a large red 'X' over it, indicating that this member cannot be added again.

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

☐ Ormund Baratheon (currently enrolled)

Next

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 automatically be created for the enrollment.

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 historical interactions:

Service Name	Start Date	End Date	Status
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 several summary cards: 'Active Referral' with a 'Check-in' button, 'Program referrals' showing 1 referral (ESG Funded Emergency Shelter Training Program), 'Household' showing 2 clients, 'Active programs' showing 1 program, and 'Active services' showing 0 services.

The screenshot shows the 'Program enrollments' section for client Lionel Baratheon. It displays a table of current program enrollments:

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

At the bottom right, it indicates '1 - 2 of 2' enrollments.

Programs

Program Enrollment History

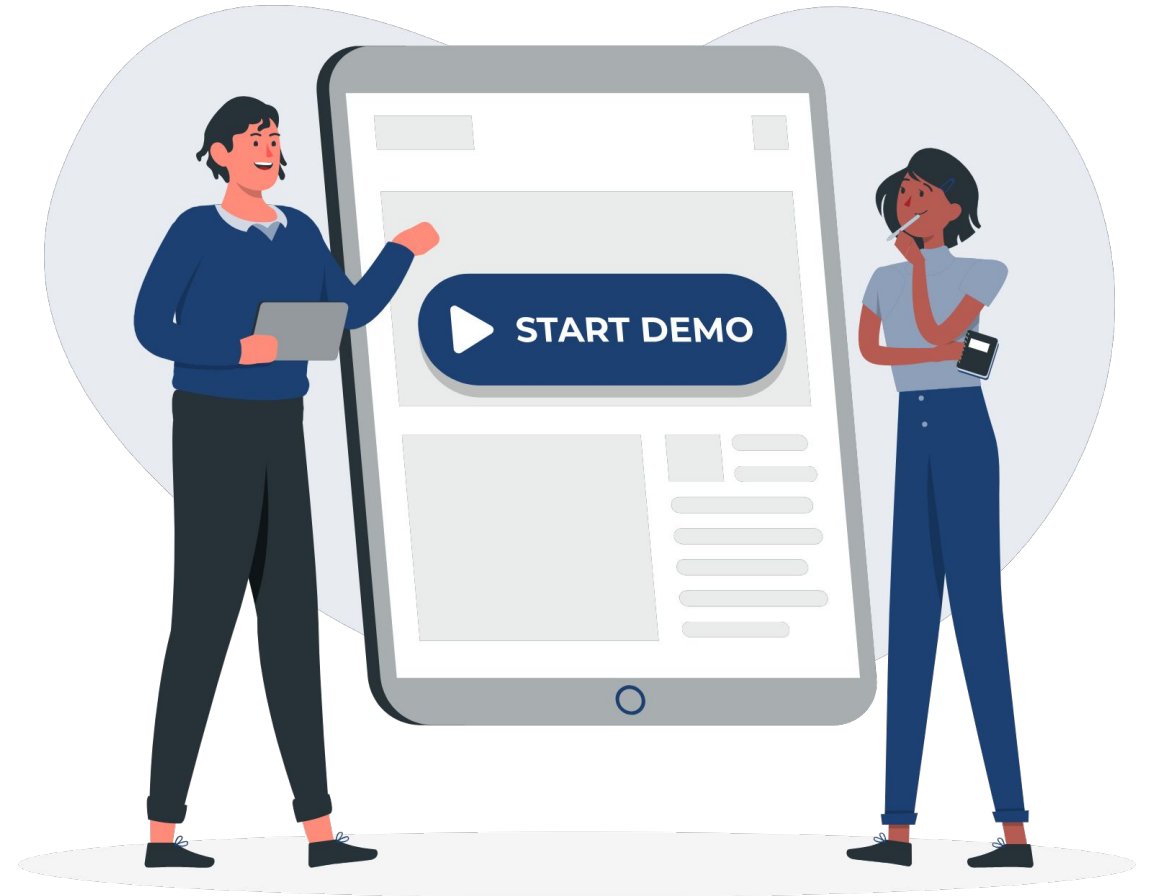
Click on the enrollment to open, view and manage enrollment information at the program level such as:

- 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.

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. The 'Edit Client Program' section is active, showing fields for 'Project Start Date' (06/24/2026), 'Prior Living Situation' (Type of Residence: Place not meant for habitation), 'Length of Stay in Prior Living Situation' (One year or longer), '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'.

Programs Demo



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

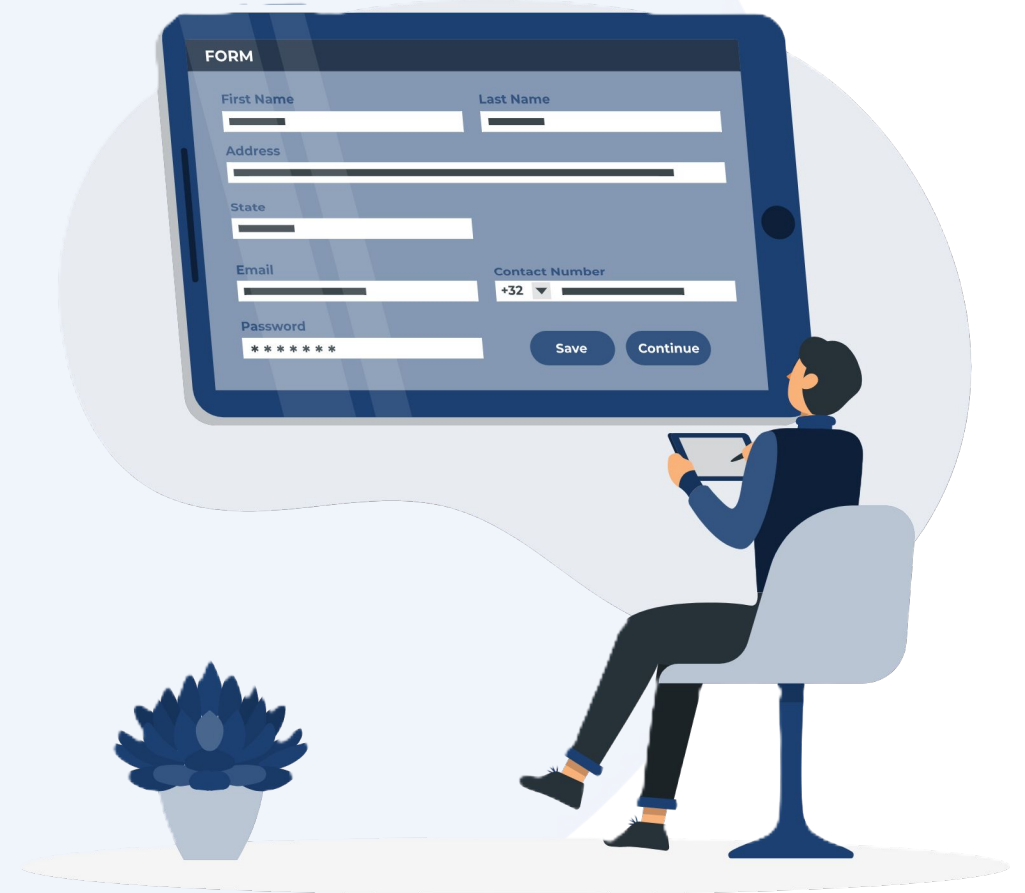
August 2026 Clarity New Interface Survey

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>

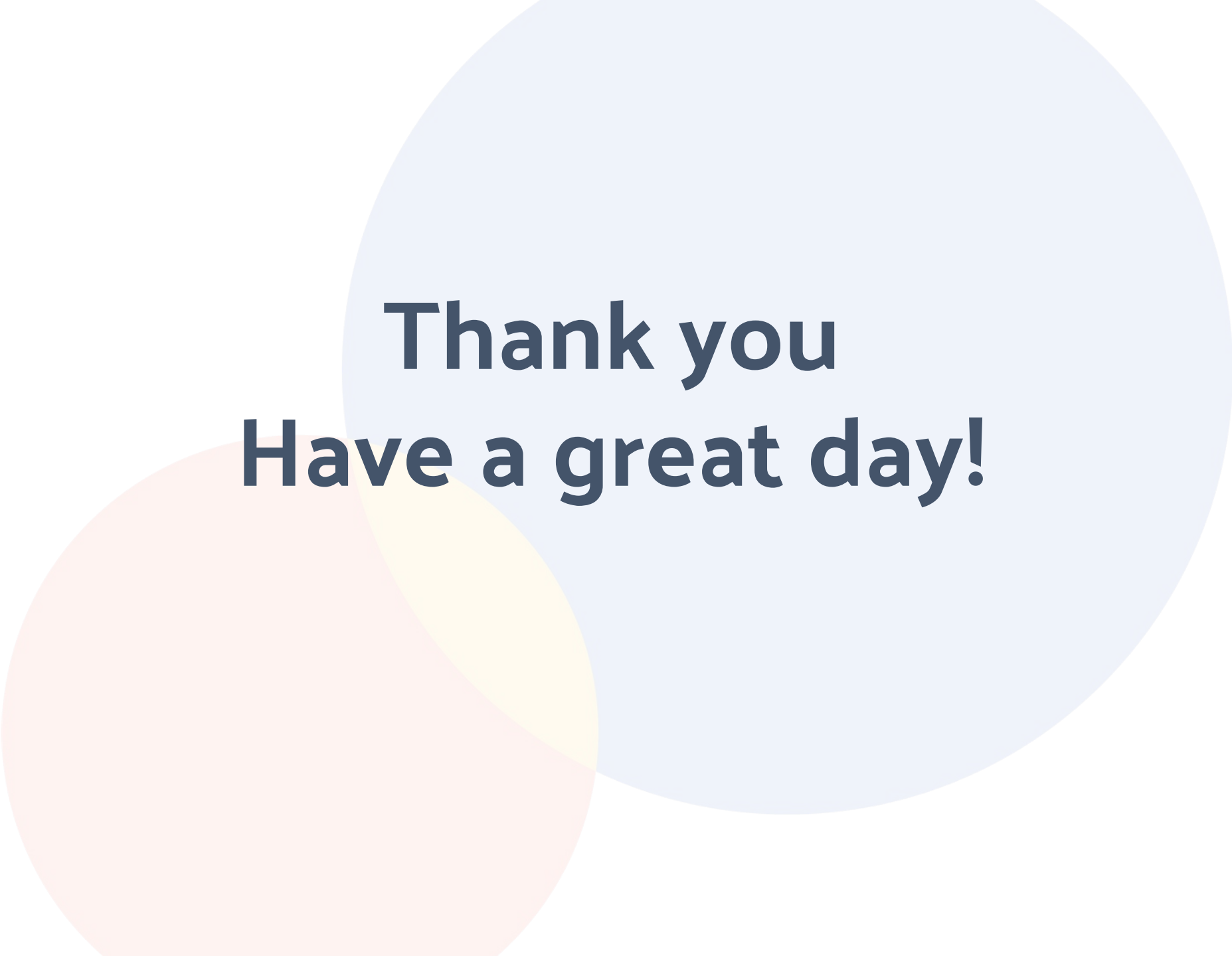


Graphic by: <https://storyset.com/online>

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](#)



**Thank you
Have a great day!**



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UNITED WAY