Clarity New Interface Workflow Training

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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.

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Agenda

- New Clarity Interface Roll Out Schedule
- Creating a Client Record
- Updating Global and Enrollment Household Members
- Enrolling into a Program and CES
- Send Referral to Community Queue
- Keep a Client Active on Community Queue
- Add Housing Opportunities
- Review Pending Referrals
- Exit Client from CES Enrollment

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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.

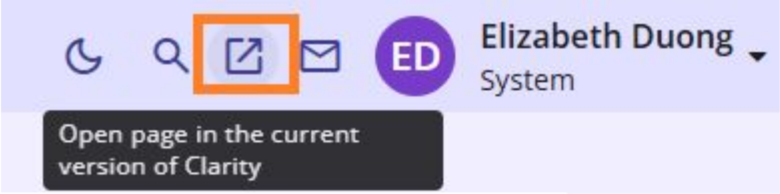
July 6th	July 8th	Aug 2026	Sept 1st	Oct 1st
New Interface enabled on OC Training Clarity User will practice the workflow by completing the HMIS Part 2 Recertification.	Live New Interface Training Materials available on the OC HMIS website.	New Interface Office Hours Join Zoom Meeting https://us02web.zoom.us/j/85082779825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

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 Recertificiation] to practice the new workflow on the New Clarity Interface
- Complete Bitfocus [Clarity Human Services: New Interface Course]
- Review [July and Aug New Interface Clarity Training materials]
- Review [Clarity's New Look and Common Functions]

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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:

- First name or last name (full or at least first 3 letters)
- Full Unique Identifier
- Full Social Security Number or last 4 digits of Social Security Number
- Date of Birth (e.g. 12/12/1985, 12.12.1985, 12-12-1985)
- Year of birth (e.g. 1985)
- Client ID

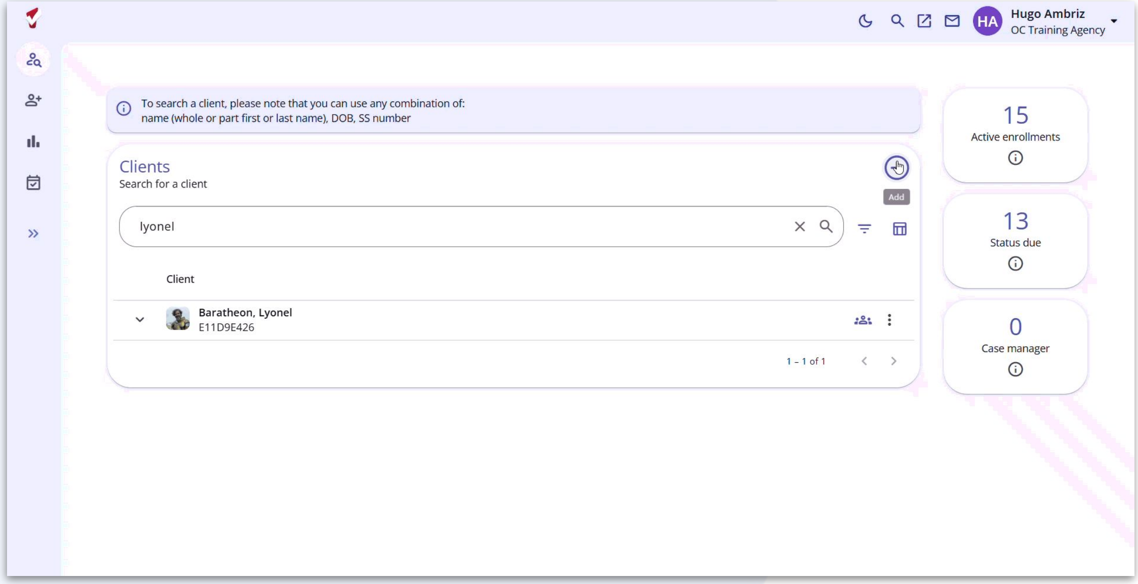
A recently accessed clients list can be found below the search bar and retains information about the most recent client records a user has accessed or created.

Client Profile Creation

New client records can be created on the client search page by selecting the ***Add (+) icon***.

On the client profile screen that opens, record Universal Data Element about the client. The following fields are required:

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



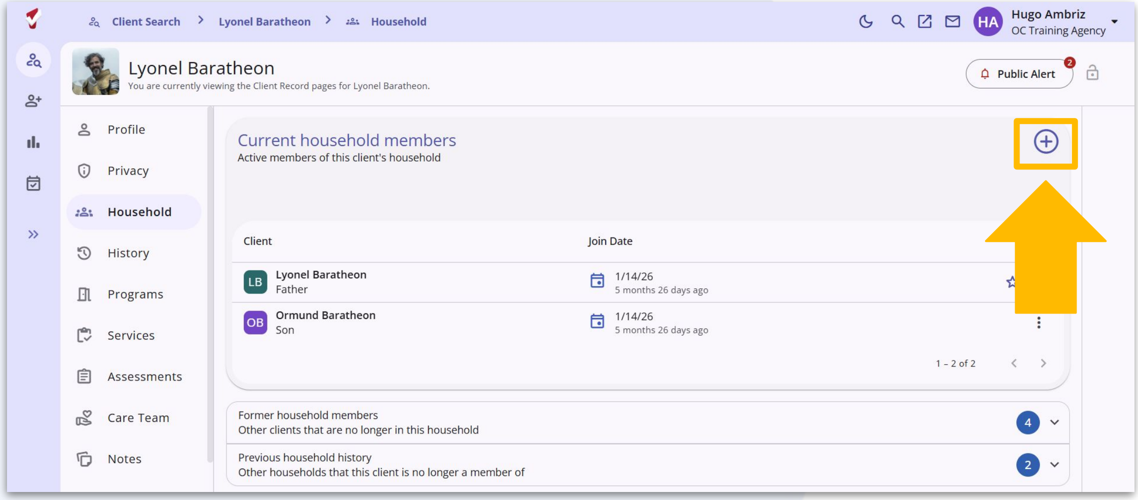
Client Household - Adding Members

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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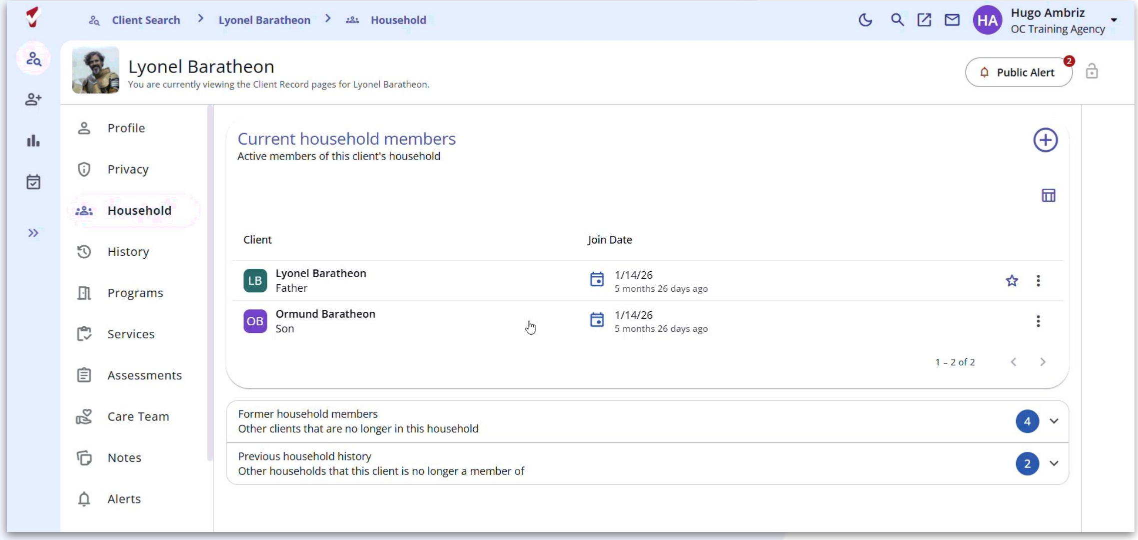
Client Household - Removing Members

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 screen 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.



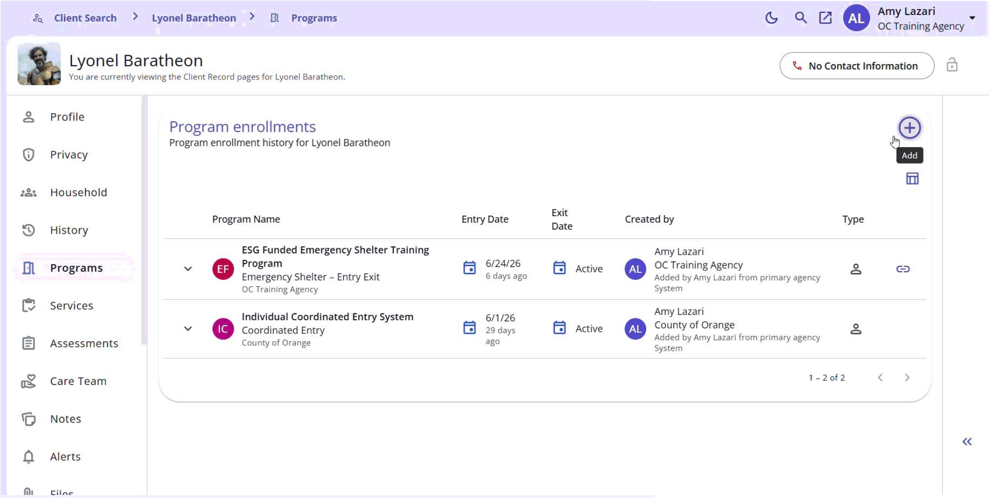
Programs

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.



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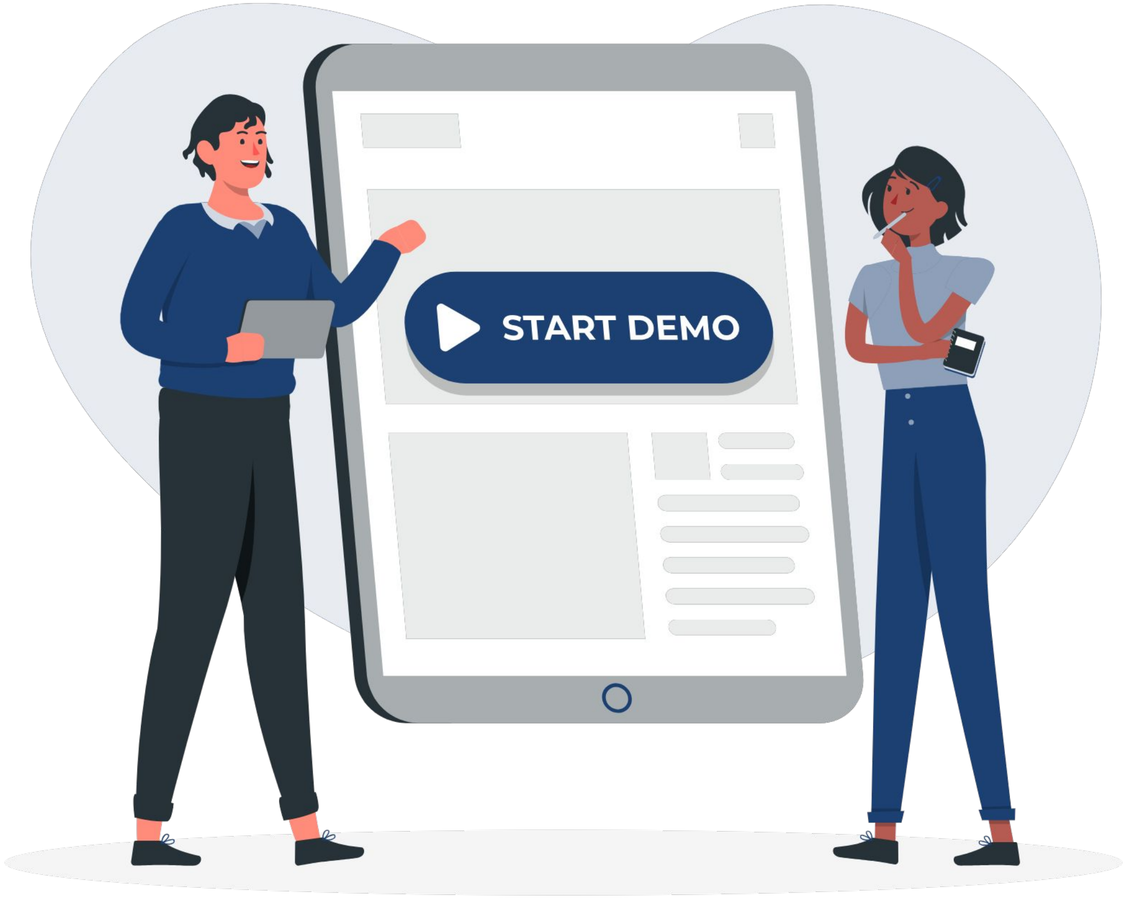
Create a Client and Program Enrollment Demo



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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

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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.

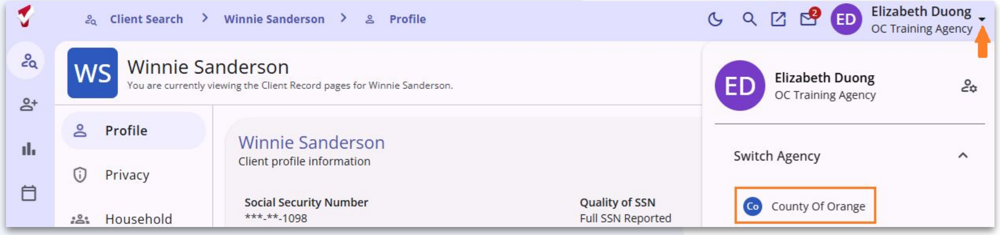
   a. Family CES - at least one minor child (ages 0-17), an expectant (pregnant) mother, or in the reunification process with minor child(ren)

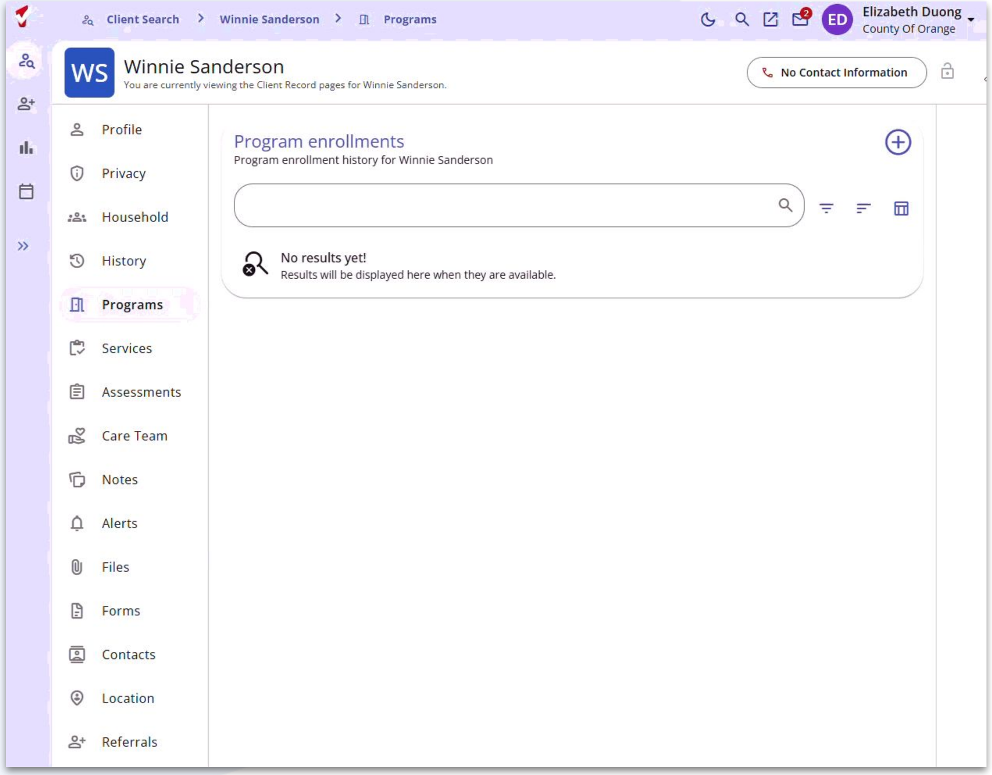
   b. Individual CES - any other household composition, that isn't a family

3. Complete the enrollment screen by filling out the entry screen data elements

4. Complete the ***Current Living Situation***

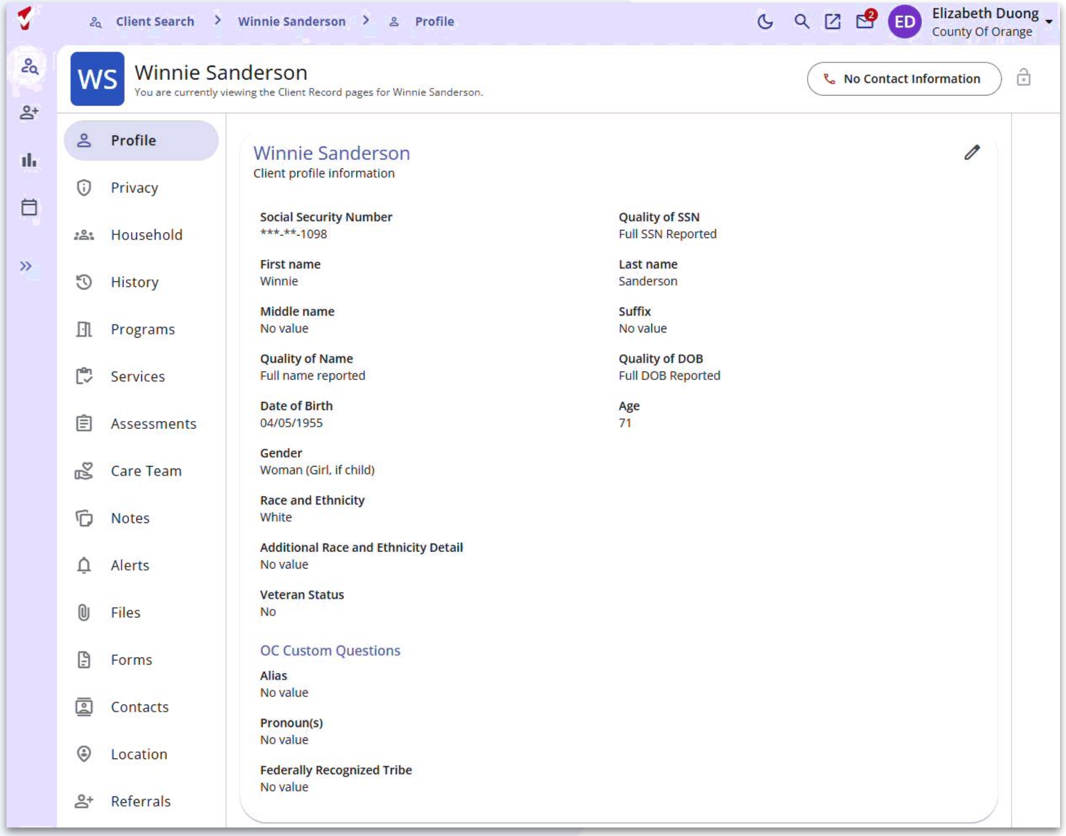
5. Click Save and Complete.





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***



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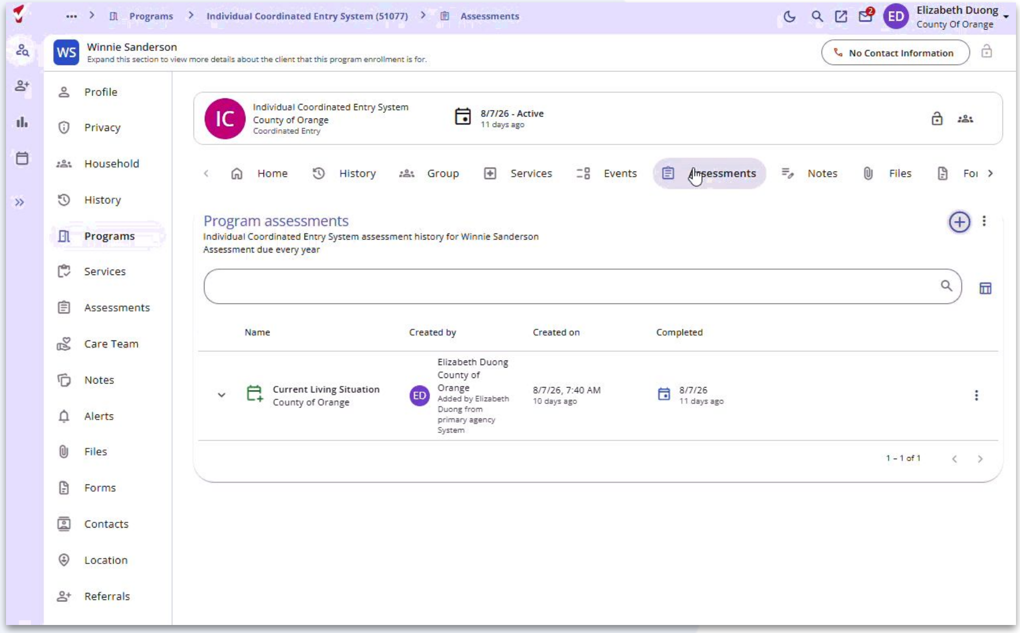
Create a CES Assessment

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***



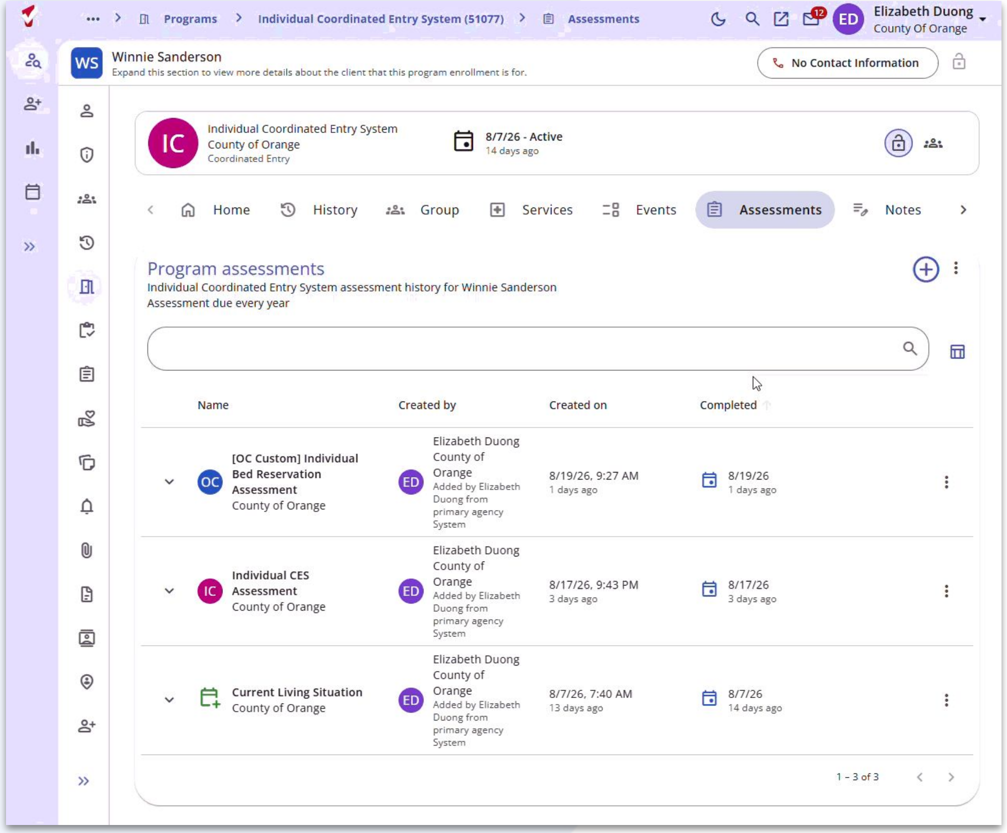
Refer Client to Community Queue (CQ)

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***

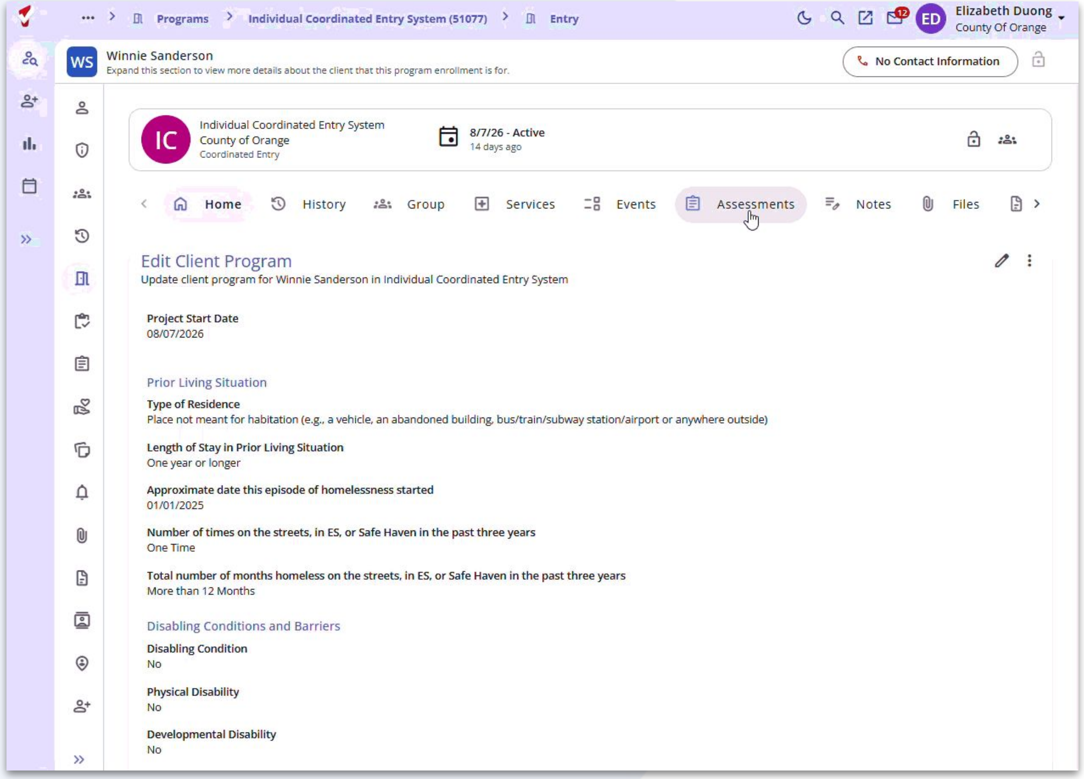
4. Click ***Save*** and ***Complete***



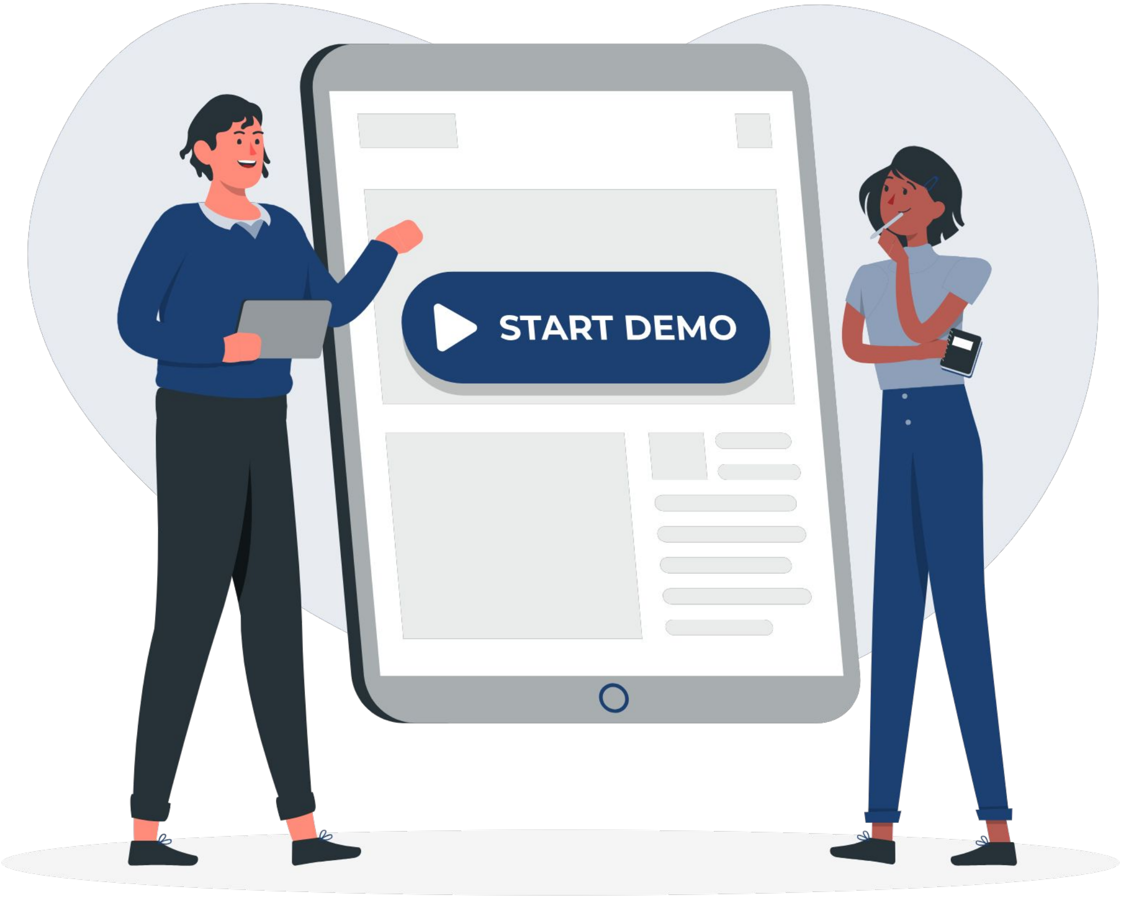
Keep Client Active on the Community Queue (CQ)

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



Workflow to Refer Client to CQ Demo



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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

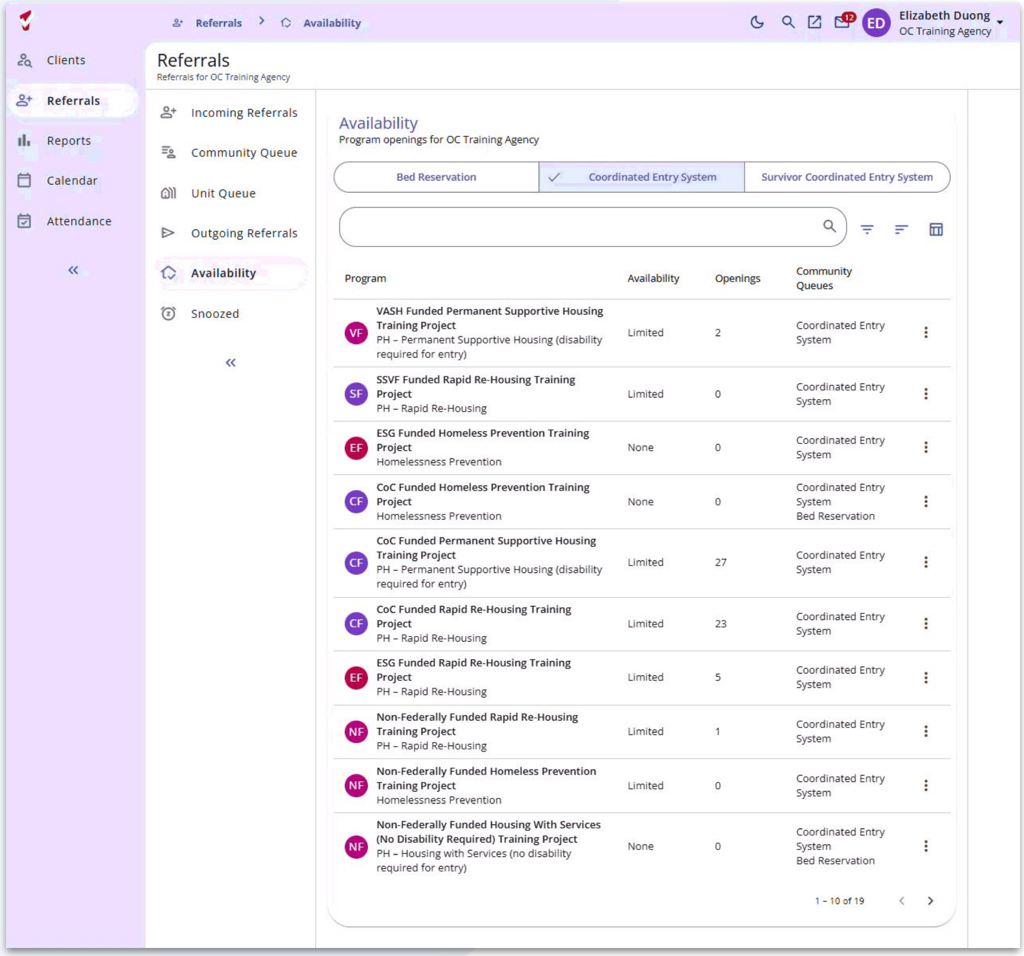
KB: Community Queue for Housing Agencies

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***



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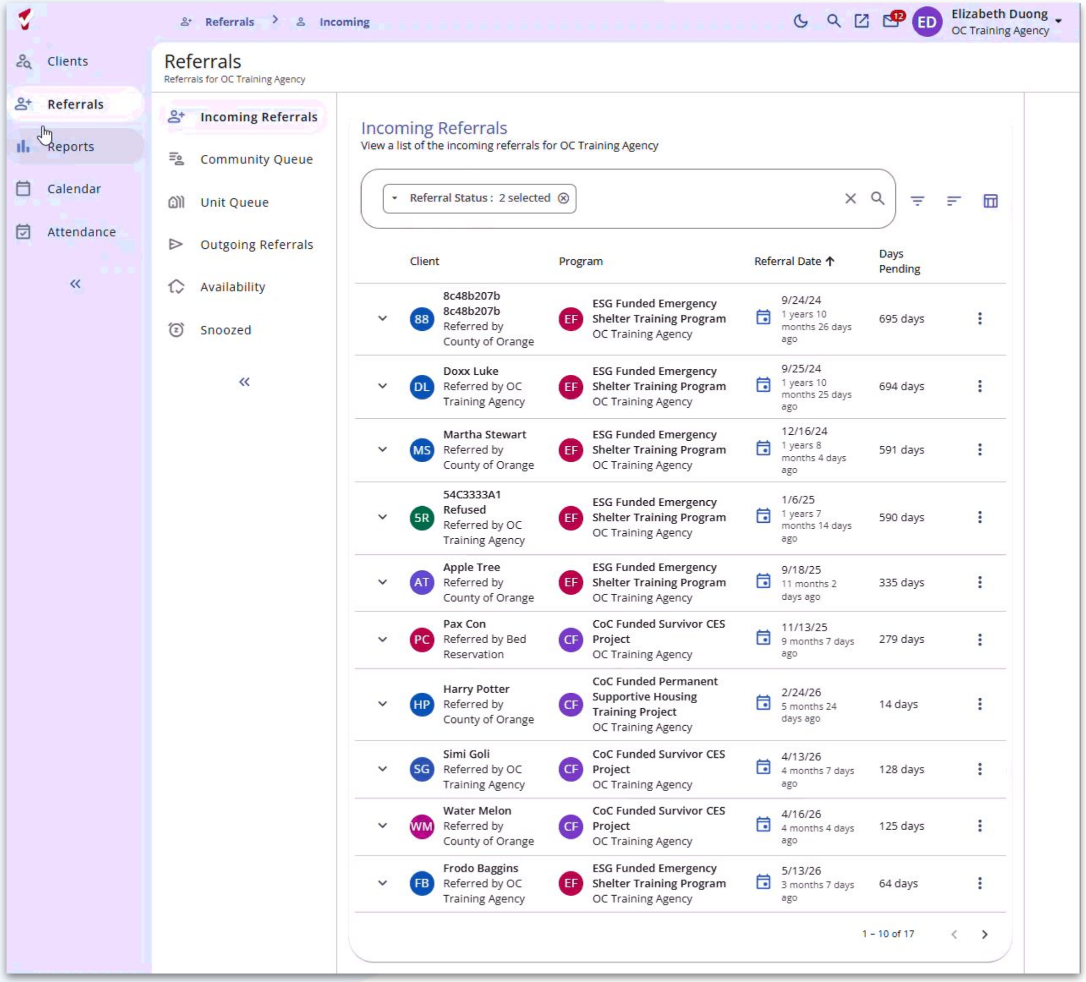
Review Pending Referrals

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



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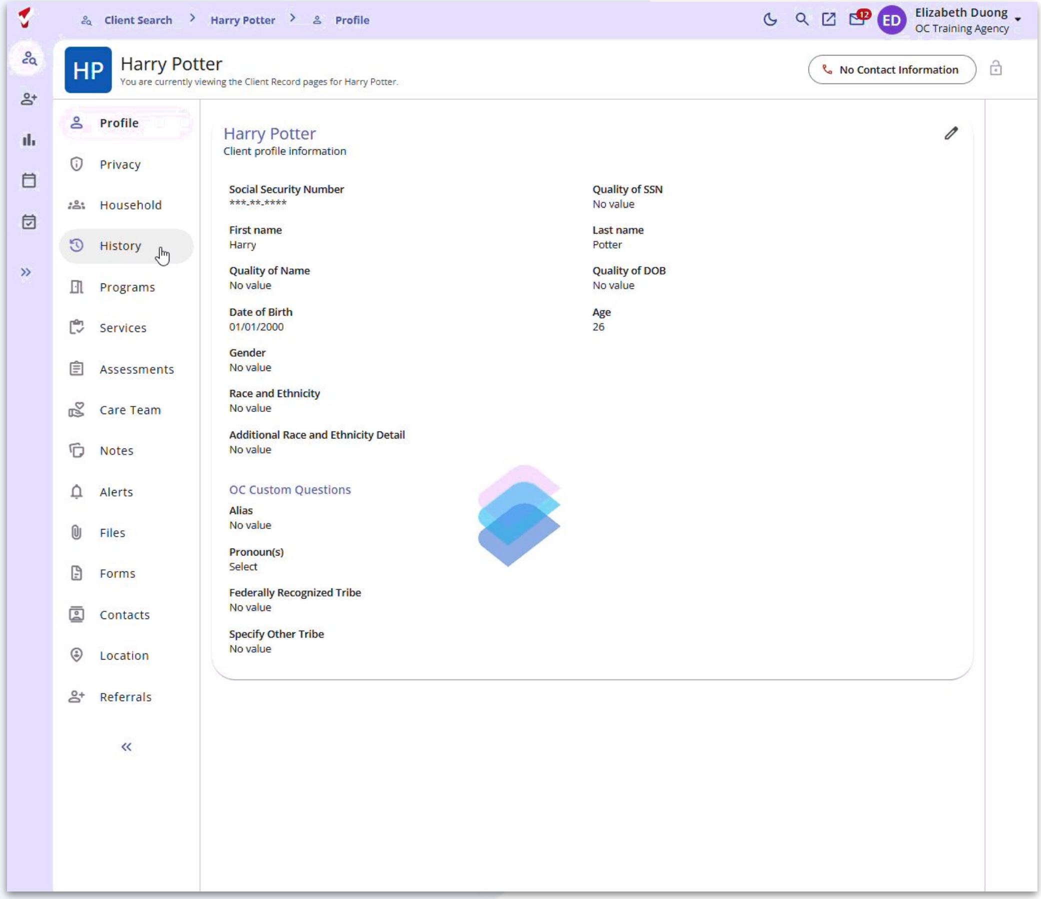
Exiting Household from CES

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.



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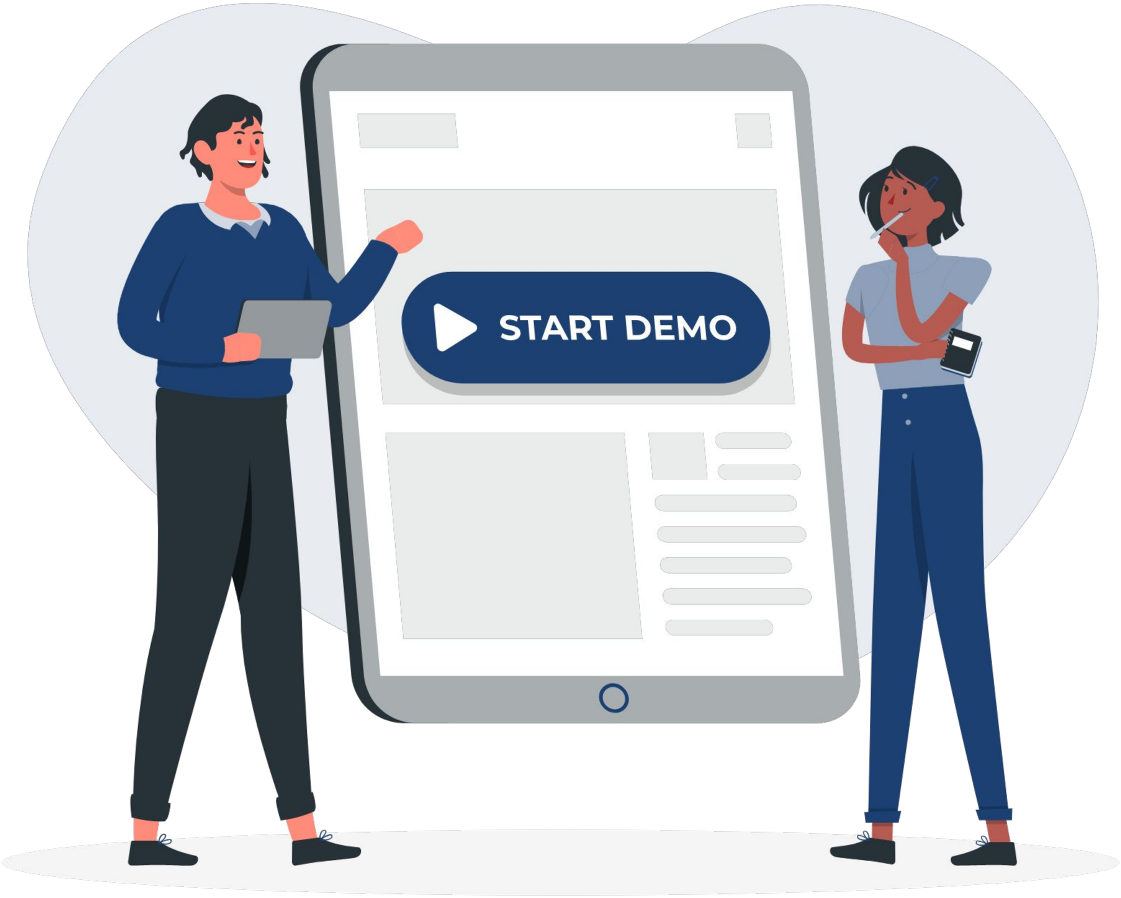
Workflow for Housing Providers Demo



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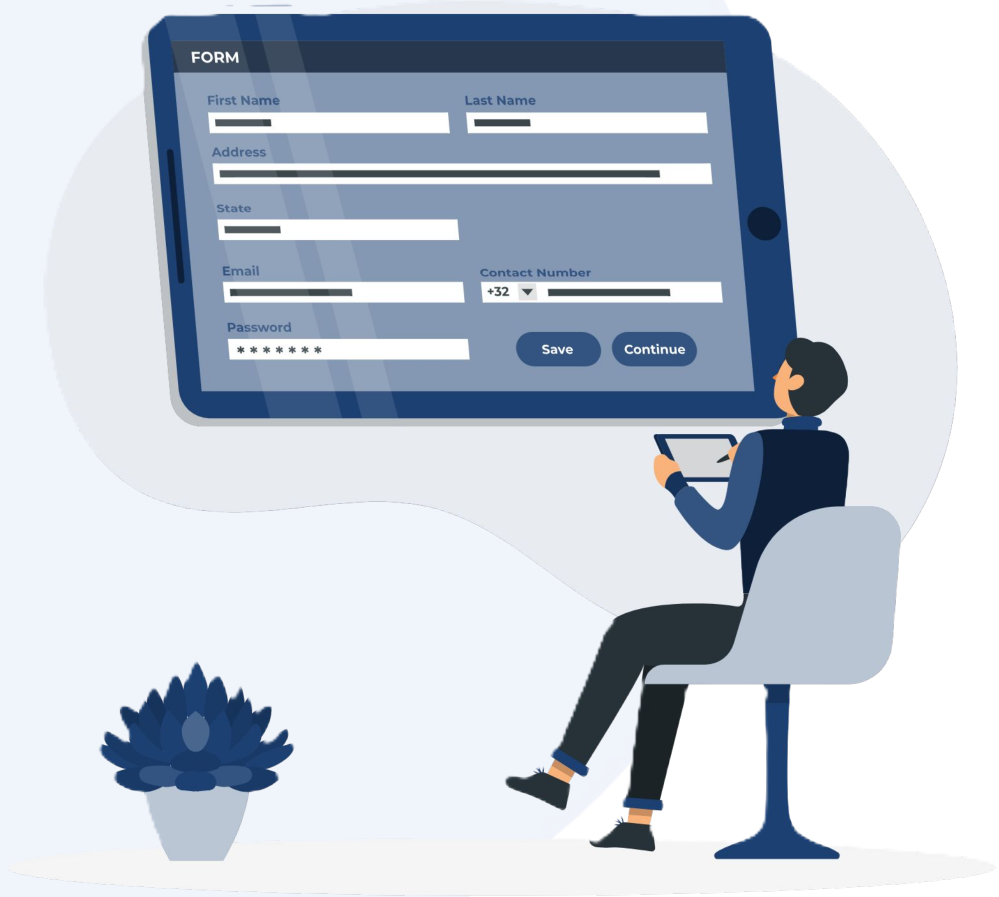
August 2026 Clarity New Interface Survey

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]

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