

Clarity New Interface Workflow 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.

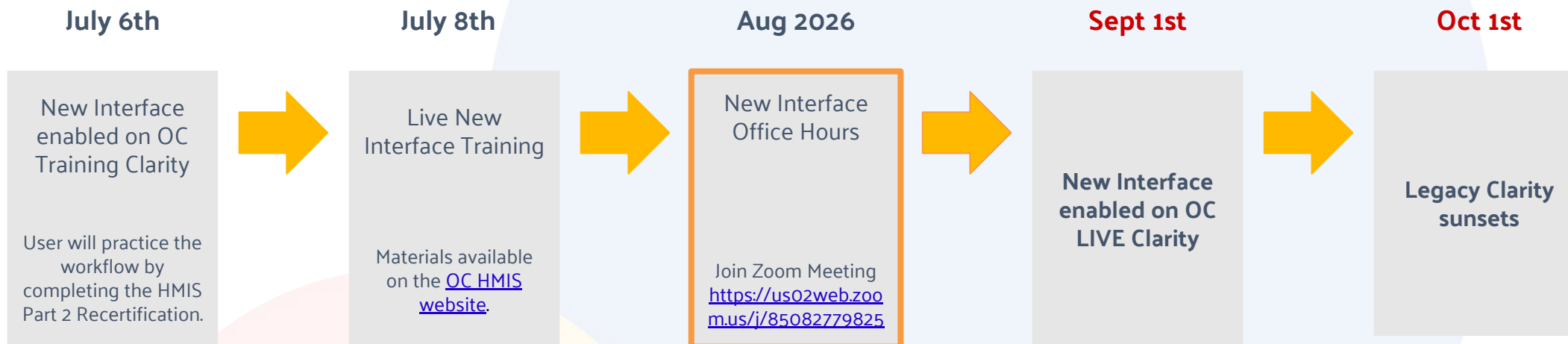
Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

Agenda

- 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

New Clarity Interface Roll Out Schedule

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

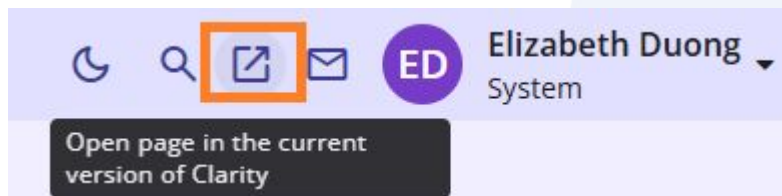


Please keep an eye out for the weekly newsletters to review the new functionality of the New Clarity Interface.

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](#)
- Review [July and Aug New Interface Clarity Training materials](#)
- Review [Clarity's New Look and Common Functions](#)



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

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

The screenshot shows a web application interface for client management. At the top right, the user is identified as 'Hugo Ambriz' from the 'OC Training Agency'. A search bar at the top left contains the text 'lyonel'. Below the search bar, a list of clients is displayed, with the first entry being 'Baratheon, Lyonel' with ID 'E11D9E426'. On the right side of the interface, there are three summary cards: '15 Active enrollments', '13 Status due', and '0 Case manager'. The interface includes a sidebar with navigation icons and a top navigation bar with search and settings icons.

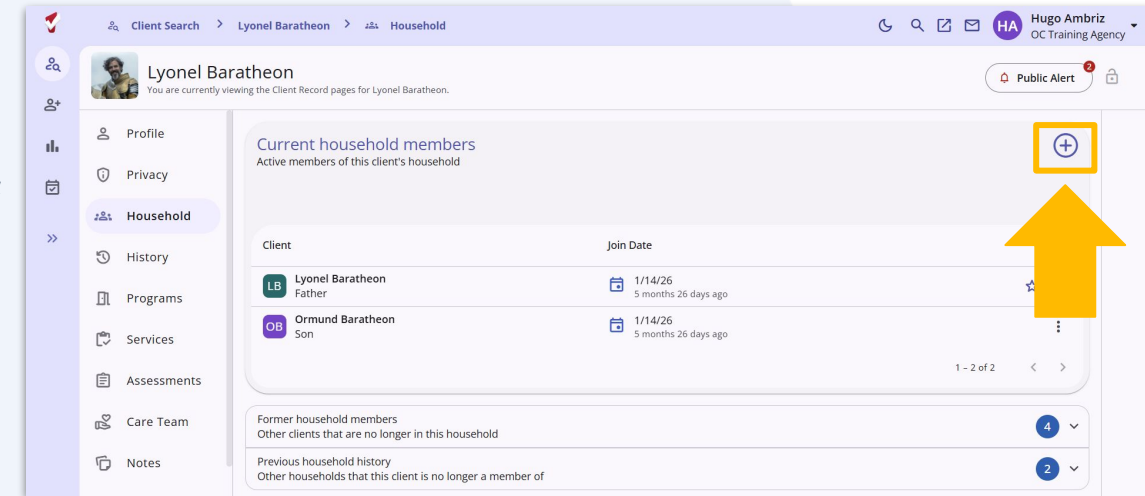
Client Household - Adding Members

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:

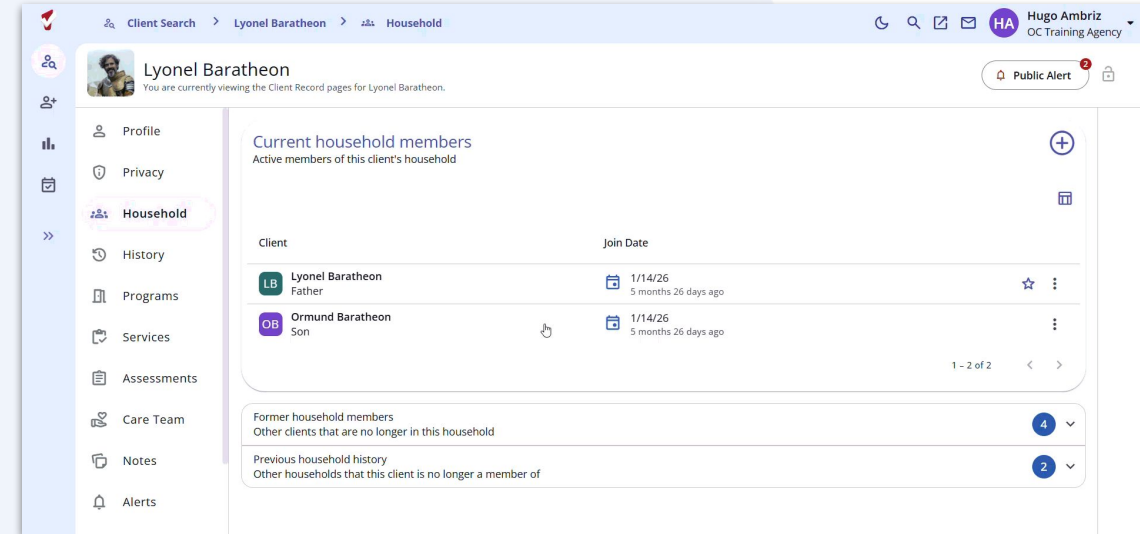
- Quick add from recently accessed client records
- Client search of existing client records
- Add new client record



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.



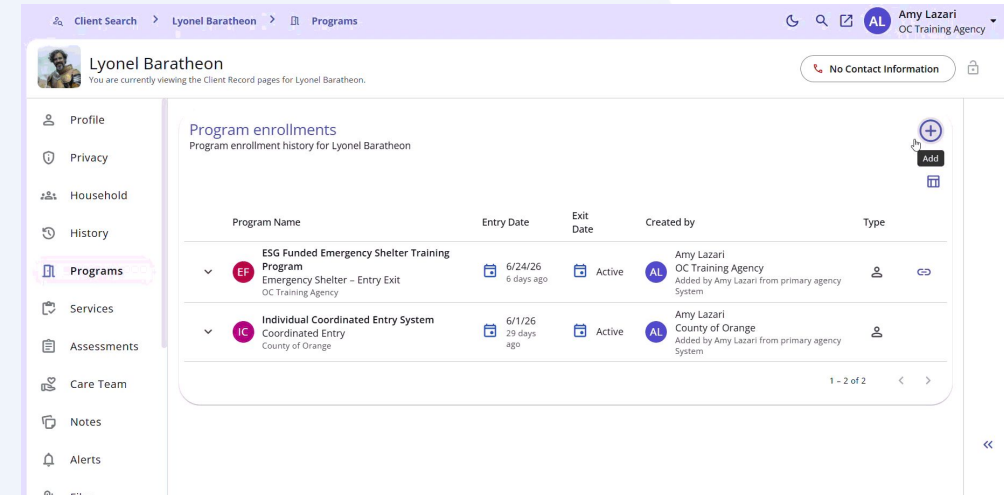
Programs

Creating a new Enrollment

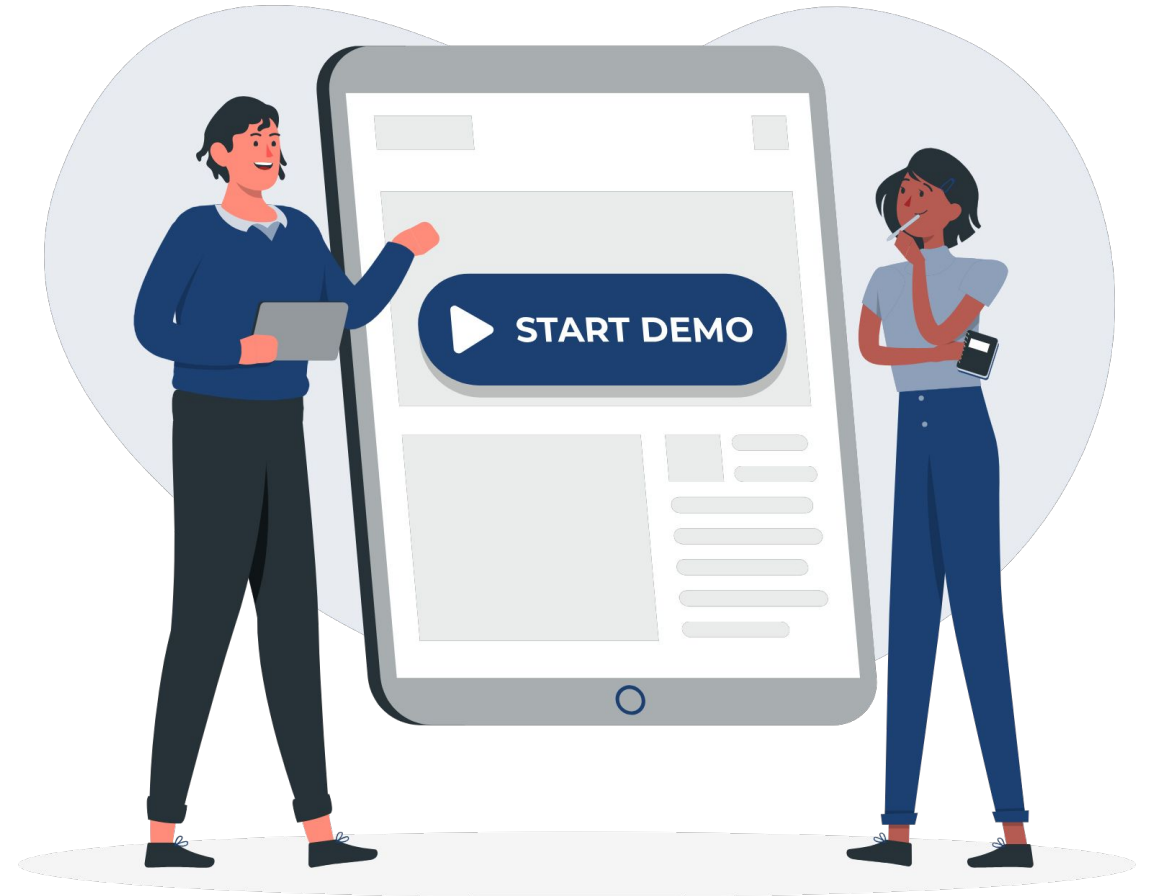
The enroll workflow is broken down into (3) stages:

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.



Create a Client and Program Enrollment Demo



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

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 enrollment screen by filling out the entry screen data elements
4. Complete the **Current Living Situation**
5. Click Save and Complete.

The top screenshot shows the 'Profile' tab for Winnie Sanderson. The 'Switch Agency' dropdown menu is open, and 'County Of Orange' is selected. The bottom screenshot shows the 'Programs' tab, which displays a 'No results yet!' message.

Upload CES Forms

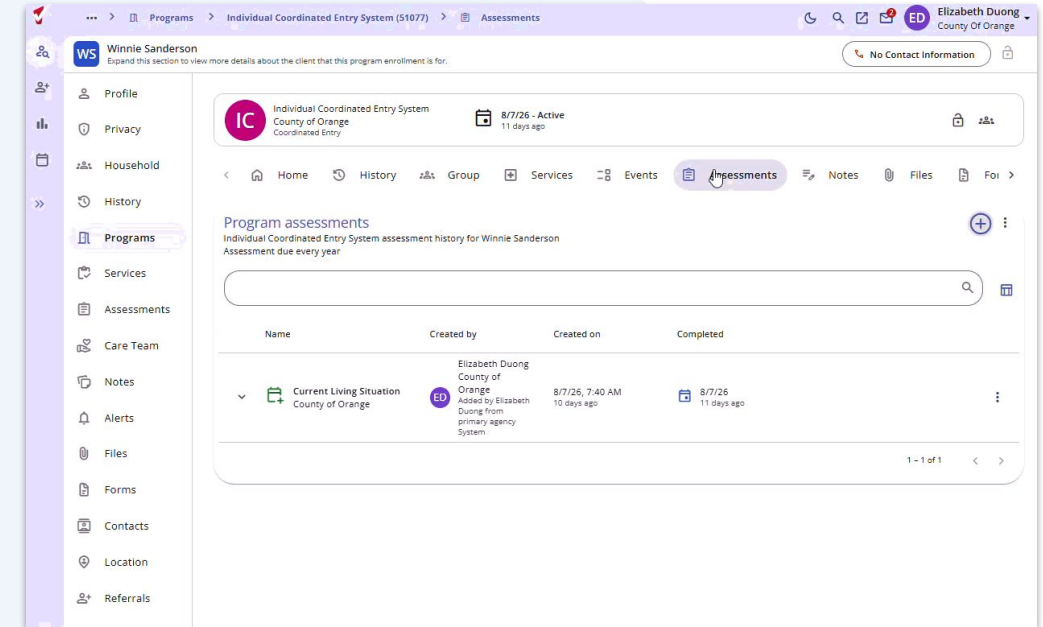
1. Navigate to the **Client Files** screen from the Client Navigation Menu
2. Select the **Add Icon (+)**
3. Select Coordinated Entry Documentations, then select the appropriate file label and upload the CES doc
4. Click **Save**

The screenshot shows a web application interface for a client profile. 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'. 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 navigation menu with icons and labels: Profile, Privacy, Household, History, Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The 'Profile' section is active, displaying various fields and their values:

Winnie Sanderson Client profile information	
Social Security Number	***-**-1098
Quality of SSN	Full SSN Reported
First name	Winnie
Last name	Sanderson
Middle name	No value
Suffix	No value
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	04/05/1955
Age	71
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

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 has a completion date and status (e.g., '8/19/26 1 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)

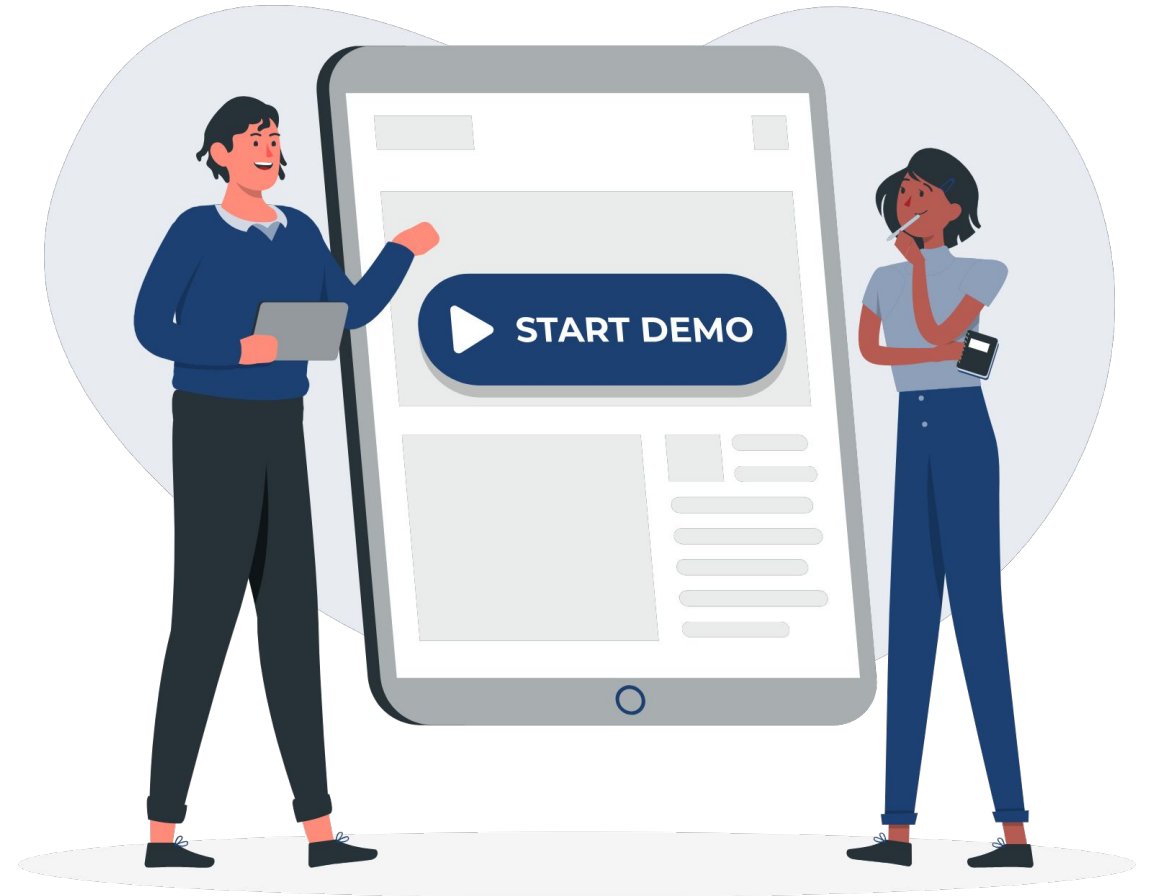
While a household is on the Community Queue, their case manager should check in with them regularly. If a household is on the Community Queue for more than 90 days with no activity, their referral will be automatically removed.

- 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 the 'Individual Coordinated Entry System (51077) > Entry' page for a client named Winnie Sanderson. The page is titled 'Winnie Sanderson' and includes a sub-header 'Expand this section to view more details about the client that this program enrollment is for.' The client's status is '8/7/26 - Active' and '14 days ago'. The page has a navigation bar with tabs: Home, History, Group, Services, Events, Assessments, Notes, Files, and a search icon. The 'Assessments' tab is selected. The main content area is titled 'Edit Client Program' and 'Update client program for Winnie Sanderson in Individual Coordinated Entry System'. It contains several fields for client information:

- 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**

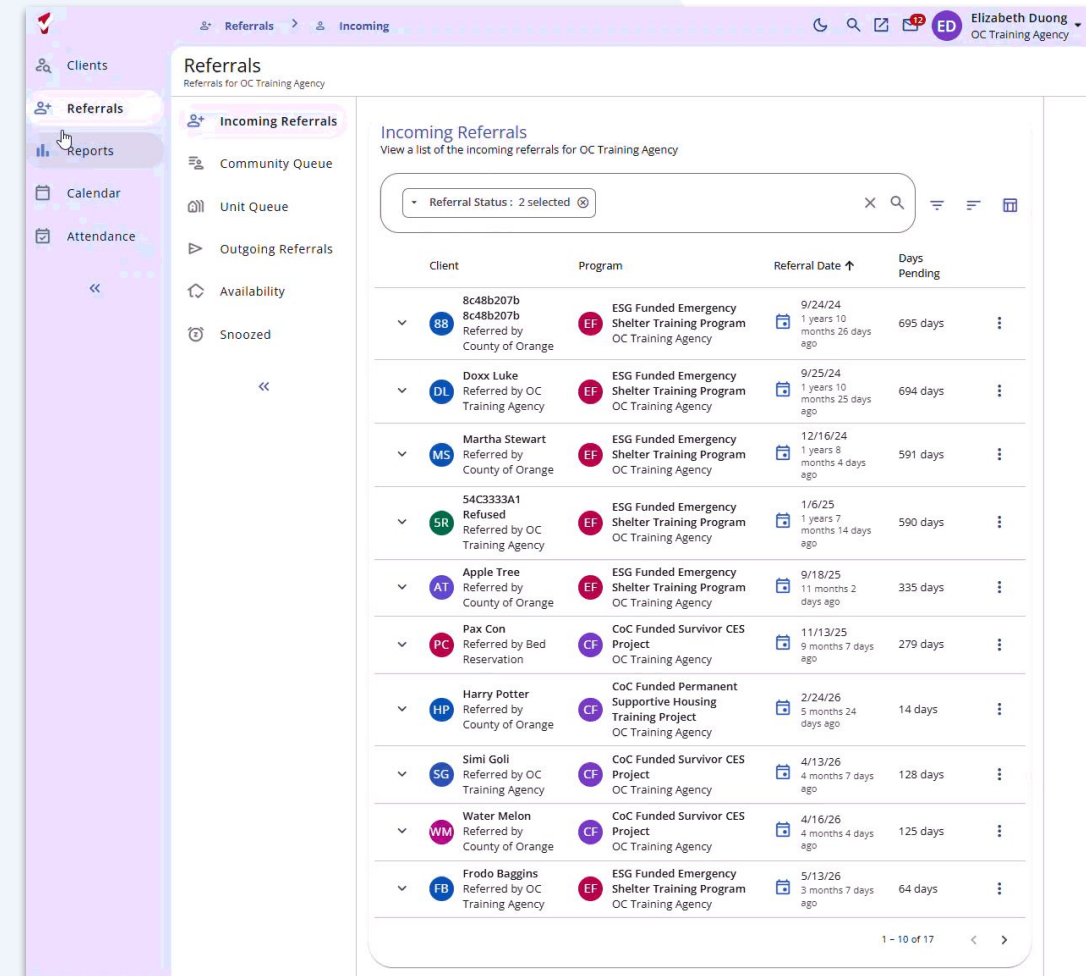
The screenshot shows the 'Referrals' page for the 'OC Training Agency'. The 'Availability' tab is selected, displaying a table of program openings. The table has columns for Program, Availability, Openings, and Community Queues. The 'Coordinated Entry System' is selected as the entry system. The table lists various programs with their respective availability and opening counts.

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



The screenshot shows the 'Referrals' screen for OC Training Agency. The left sidebar contains a navigation menu with options: Clients, Referrals (selected), Reports, Calendar, and Attendance. The main content area is titled 'Referrals' and includes a sub-section 'Incoming Referrals' with the text 'View a list of the incoming referrals for OC Training Agency'. Below this is a search bar with 'Referral Status: 2 selected' and a filter icon. The main table lists incoming referrals with columns: Client, Program, Referral Date, and Days Pending. The table contains 10 rows of data, each with a client ID, name, referral source, program name, referral date, and days pending.

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 Baggins Referred by OC Training Agency	ESG Funded Emergency Shelter Training Program OC Training Agency	5/13/26 3 months 7 days ago	64 days

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.

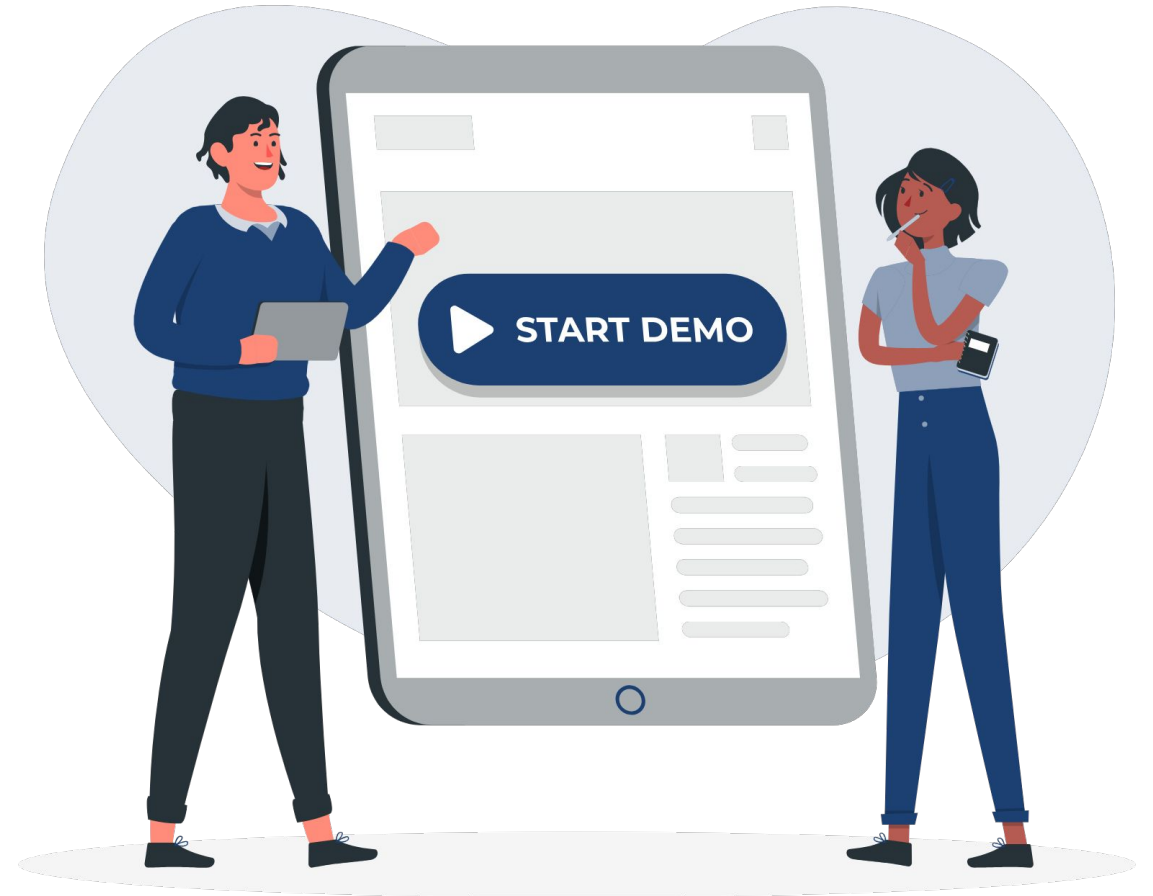
Households referred to a housing opportunity through the Coordinated Entry System will also need to exit the household from the Coordinated Entry System project.

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 displays the 'Harry Potter' client profile page. The left sidebar contains a list of tabs: Profile, Privacy, Household, History (selected), Programs, Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, and Referrals. The main content area shows the 'Client profile information' for Harry Potter. The 'History' tab is active, showing a list of events. The 'OC Custom Questions' section includes fields for Alias, Pronoun(s), Federally Recognized Tribe, and Specify Other Tribe. The 'No Contact Information' button is visible in the top right corner.

Field	Value
Social Security Number	***-**-****
First name	Harry
Quality of Name	No value
Date of Birth	01/01/2000
Gender	No value
Race and Ethnicity	No value
Additional Race and Ethnicity Detail	No value
OC Custom Questions	
Alias	No value
Pronoun(s)	Select
Federally Recognized Tribe	No value
Specify Other Tribe	No value

Workflow for Housing Providers Demo



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

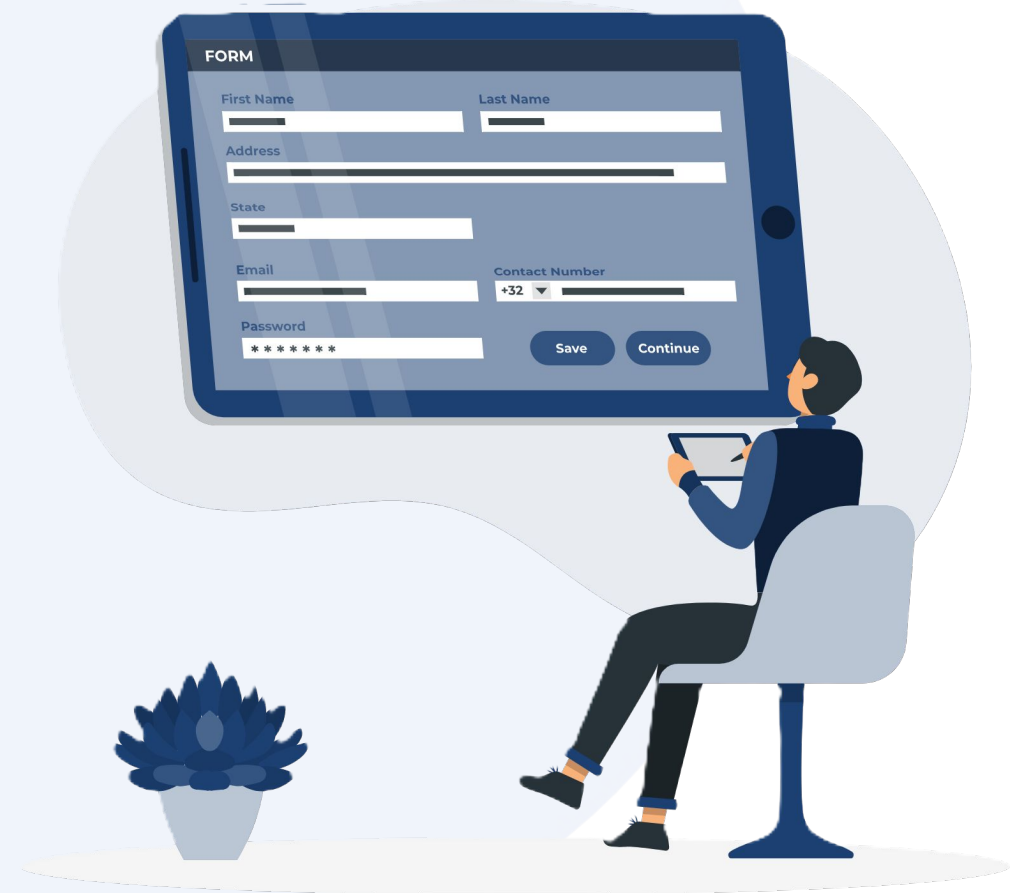
August 2026 Clarity New Interface Survey

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>



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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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