Clarity New Interface Office Hours 3

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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
- Services
- Assessments
- Notes
- Files

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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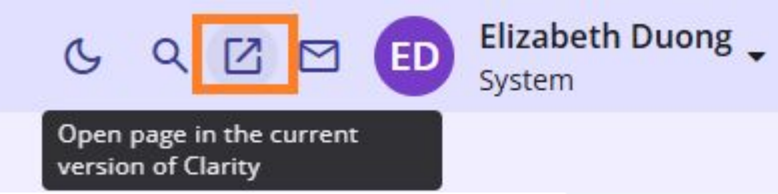
New Clarity Interface Roll Out Schedule

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 Recertificiation] 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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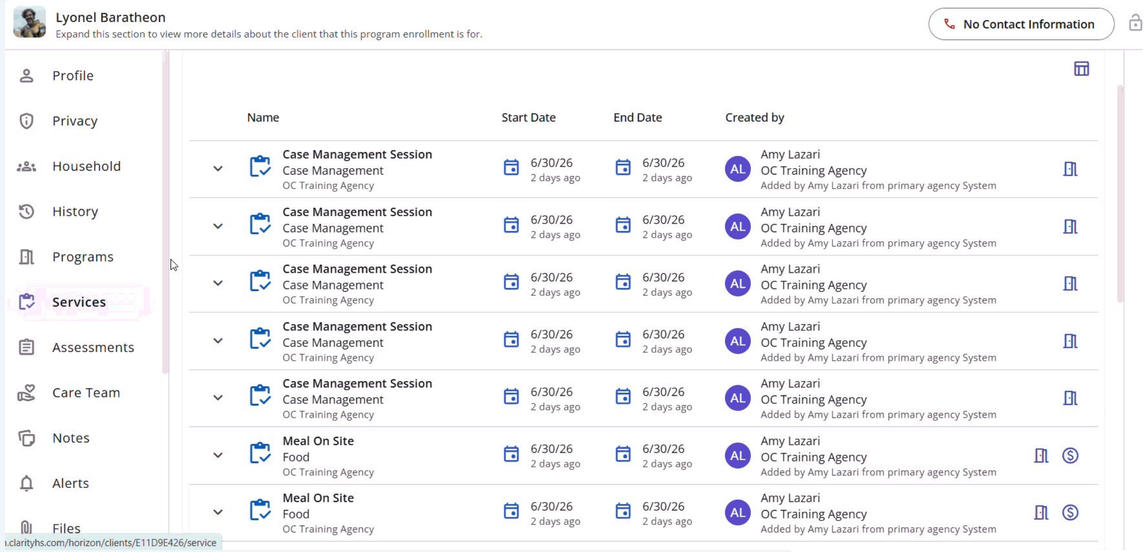
Services

The Services tab includes all service history (agency and program level) and the ability to add and manage services.

- The Service History screen will display the service name, start/end date, and created by fields for all previously recorded services.
- Use the show/hide fields icon to change the order or collapse fields to appear when the user clicks on the caret.
- The door icon on the right indicates that a service was entered at the project level; the dollar icon indicates that an expense was recorded with the service.



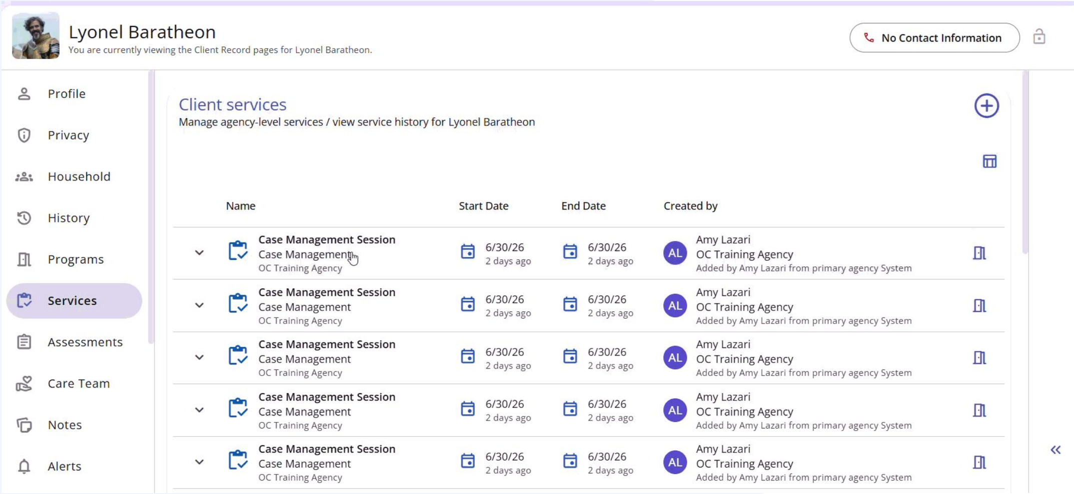
Services

Service Details Screen

Provides a snapshot of the service name, category, and service items recorded as well as the name of the agency and staff that entered the service.

Within the Service Details section there is additional information about the service dates, location and time tracking (if enabled).

If dollar/expense tracking was enabled for the service, that information may be added to an existing service.

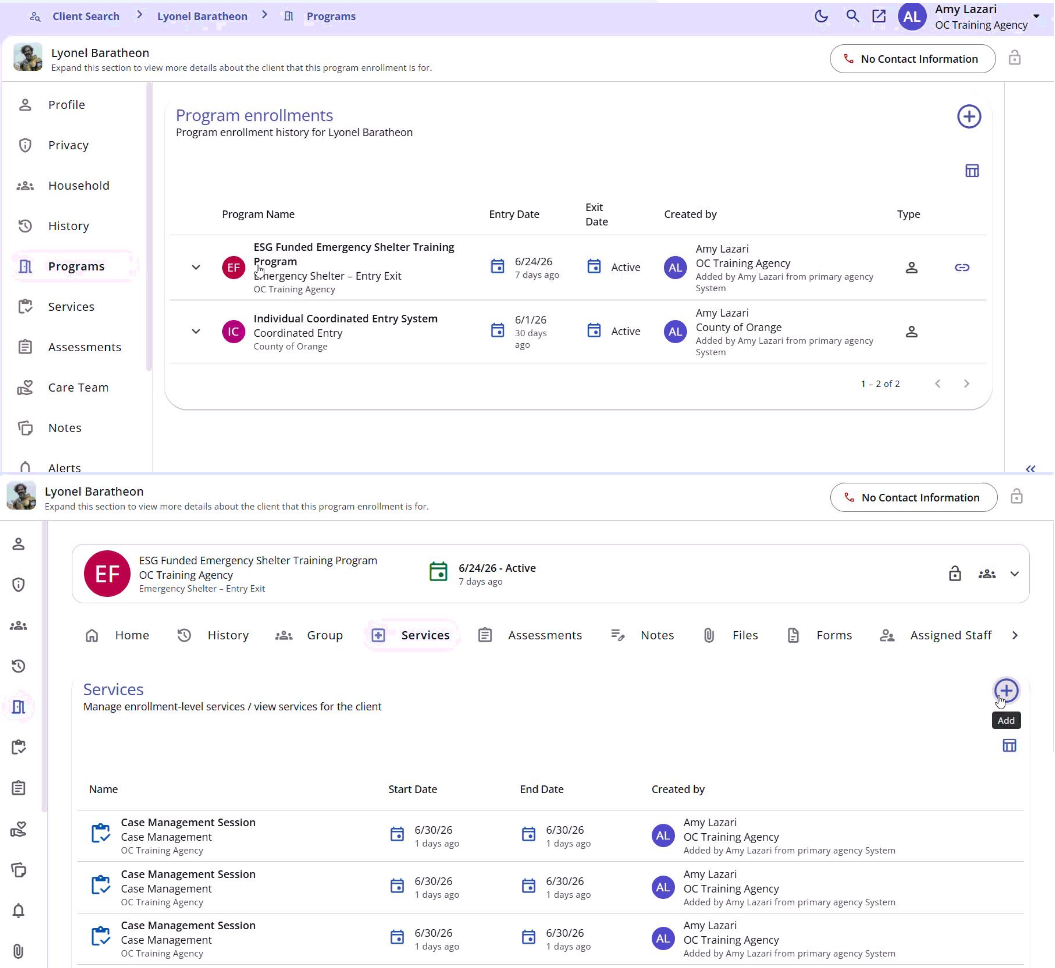


Services

The majority of services entered by users will be set-up at the project level.

To access and add services at the program level…

- Go to Client Navigation menu and select **Programs**.
- Locate and open the enrollment.
- Find and select the **Services button**
- **Click** the Add(+) icon to view services available for the project.
    - Select the service item you want to record.
    - If desired, users may select the lock icon to set the service to Private.
    - Complete the service item information, then select save and complete to record the service.



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Services

Deleting and Editing Service Items

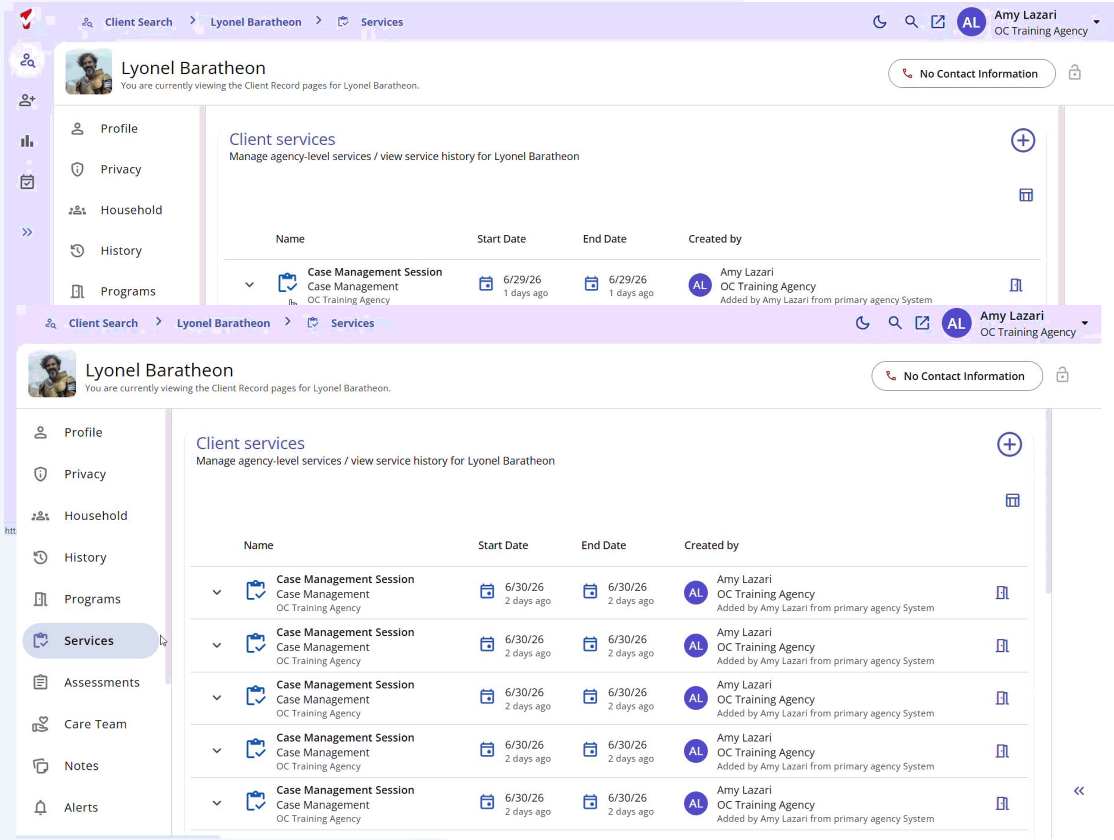
To delete a service, click on the service to view the service details then select the three vertical dots to show *more actions* - select delete.

To edit details of a service, click on the edit icon to expand the service details.

Edit any of the fields and or set the service to private by clicking on the lock icon.

Users who are switched into an agency that is different from the one that provided the service will not delete or edit the service.

[Click here](#) for an interactive guided demo of adding program level services.



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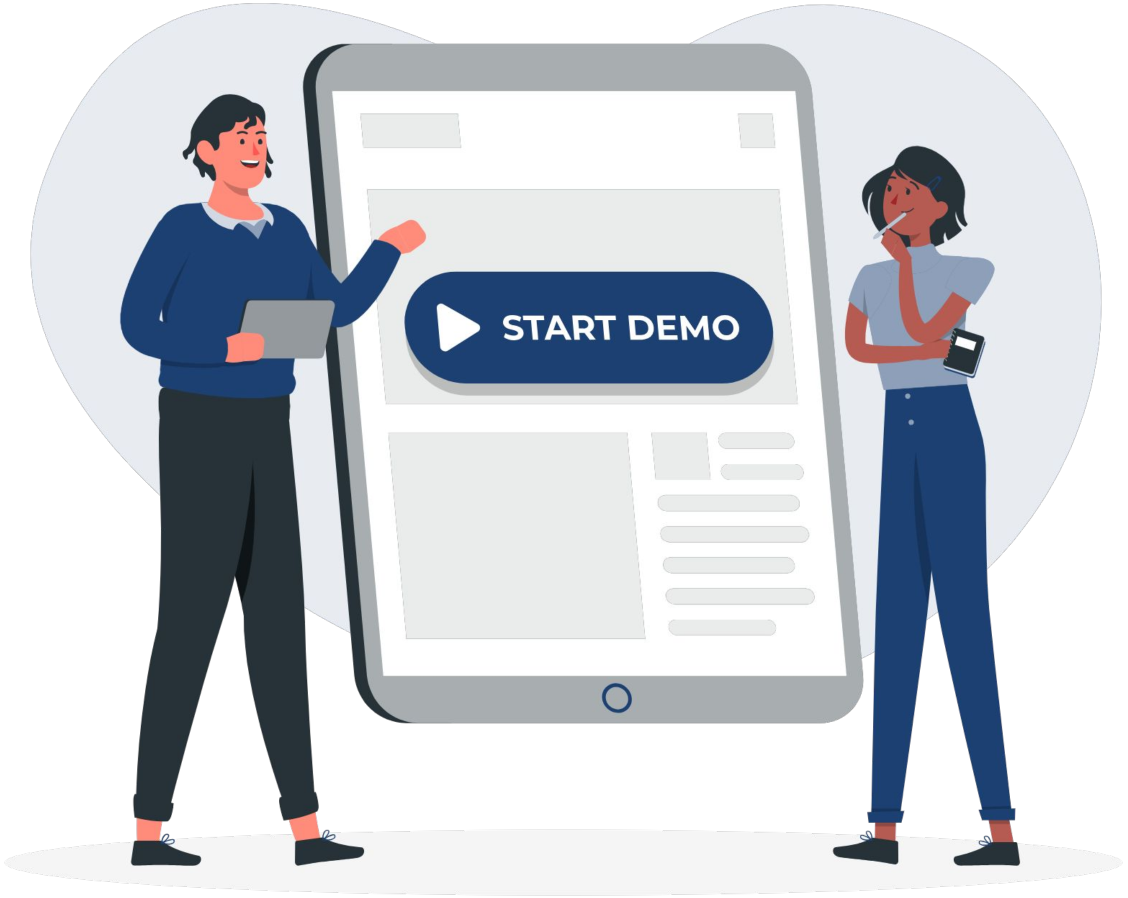
Services Demo



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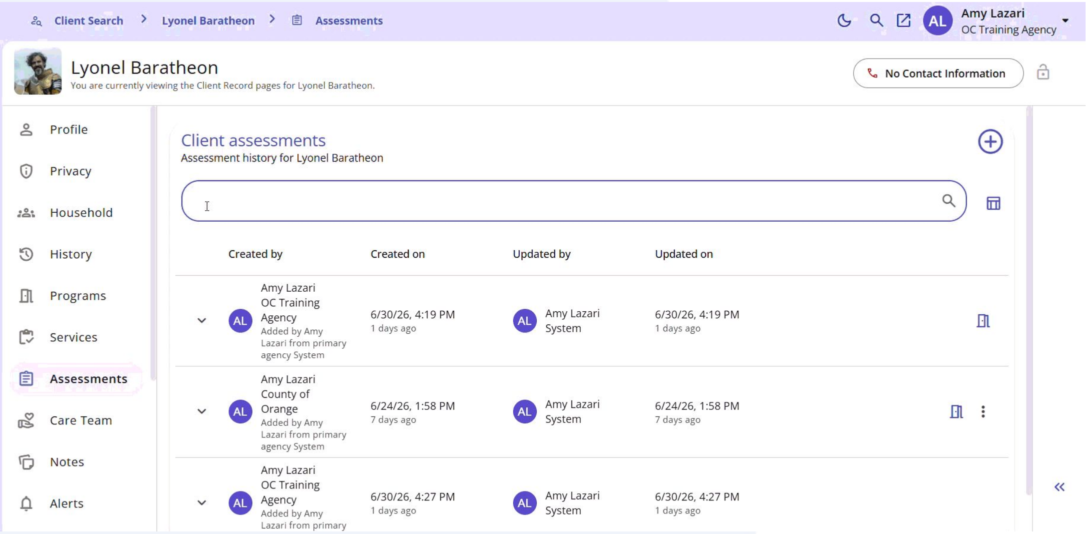
Assessments

The Assessments tab includes all assessment history and the ability to modify or delete assessments depending on a user's access role.

A search bar is located on the page to quickly find a specific assessment previously recorded for the client.

- Use the show/hide feature to order/collapse assessment history information.
- Hover over the door icon for information about which project the assessment was completed under.
- Click on any of the assessment to open/review responses and users with Agency Administrator level access will find the the delete function available on this screen.



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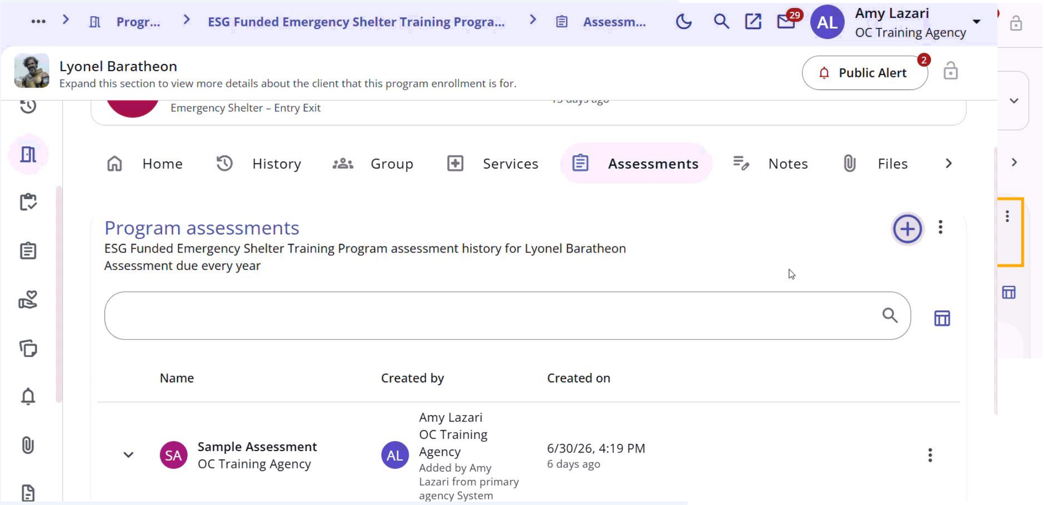
Assessments

Program Level Assessments

To complete an assessment available for a specific project, navigate to the Programs tab.

- Open the enrollment and navigate to the assessment tab.
- Select the Add (+) button.
- Select an assessment from the list.
- Complete the assessment (set to private if needed).
- Select save and close.



Assessments can be edited by clicking on an existing assessment and selecting the edit button.

Assessments can be deleted by Agency Administrators from this screen by selecting the three vertical dots and clicking delete.

Assessments

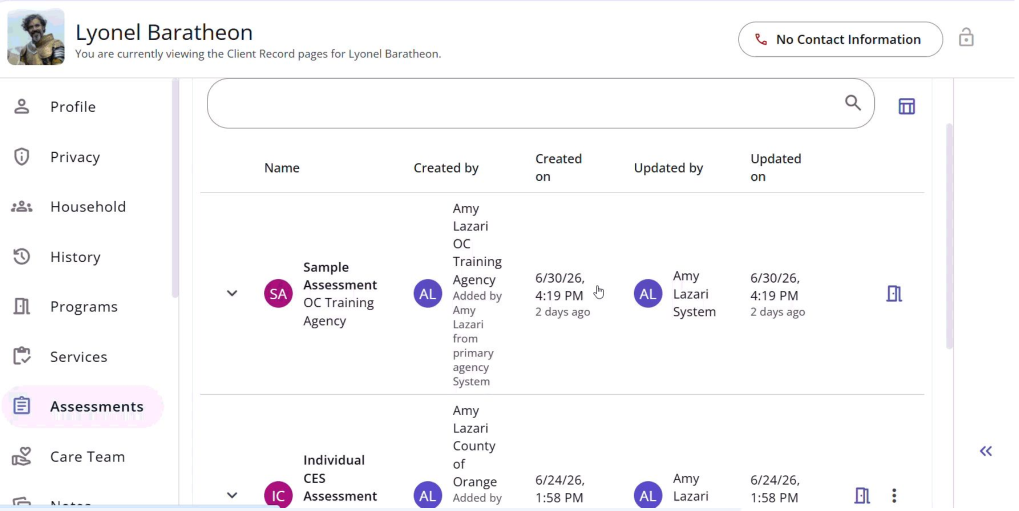
Deleting and Editing Assessments

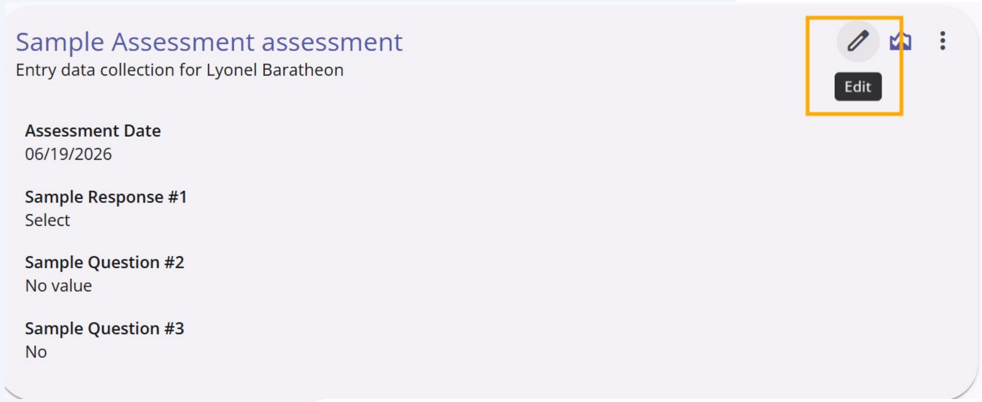
To delete an assessment from the Assessment tab

- Click on an assessment to open it and view details.
- Select the three vertical dots for more actions.
- Delete the assessment.
- For Agency Administrators only.

To edit an assessment from the Assessment tab

- Select the pencil icon instead to edit the assessment date or any of the responses.
- Edits to assessments should only be made if the original responses recorded are incorrect/inaccurate.





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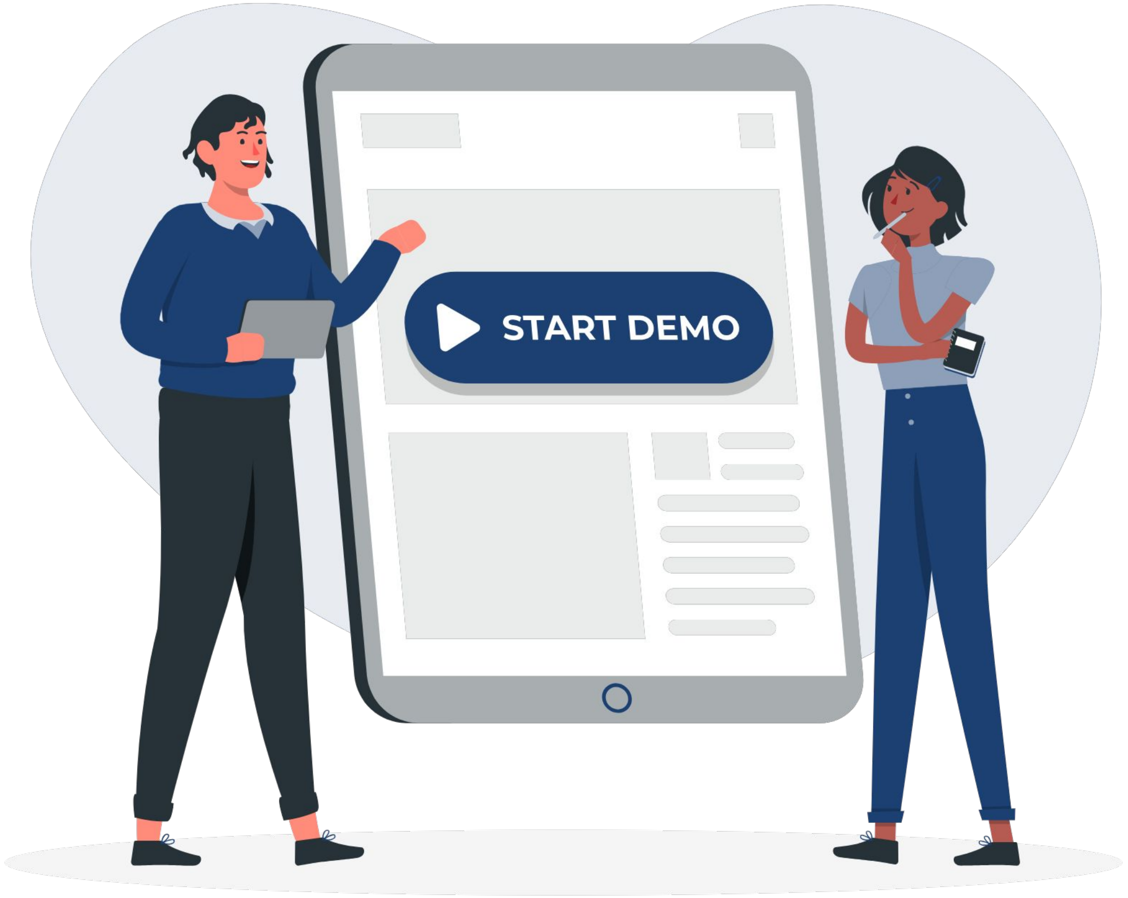
Assessment Demo



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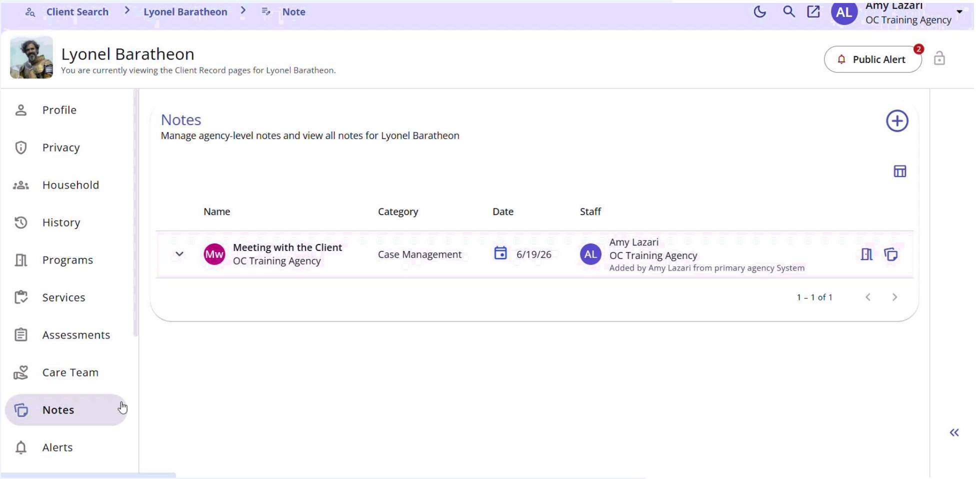
Notes

The Notes tab includes all notes and the ability to add or manage notes.

Notes available to users will display in the Notes History and include the name and agency of the staff member who created the note, the category, and the date the note was created or last modified.

- Use the show/hide fields icon to change the order or collapse information about the notes.
- Hovering over the note icon displays the note text.
- Hovering over the door icon displays the name of the project the note was entered under.
- Select the Add (+) icon to create an Agency level note.



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Notes

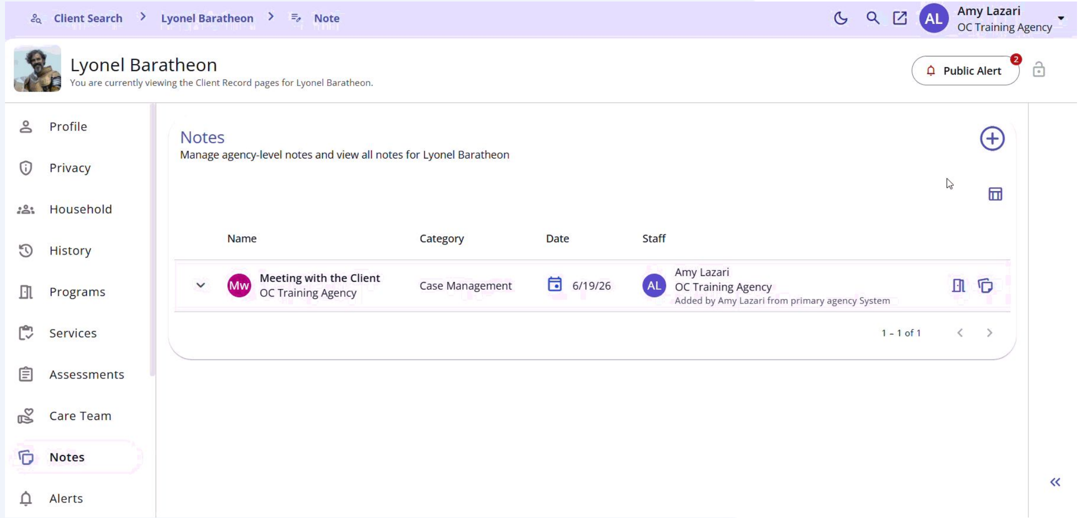
Adding Program Notes

Agency Level notes are viewable by all agencies and staff whereas <u>Project Level notes can only be viewed by agency creating the note</u>.

To add a new program note, open the applicable program enrollment, click the Notes tab, and click the Add (+) icon.

Enter the note details and if needed select the lock icon to set the note to private.

Notes added from within an enrollment will also appear under the main Notes tab and can be edited from that screen.



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Notes

Editing and Deleting Notes

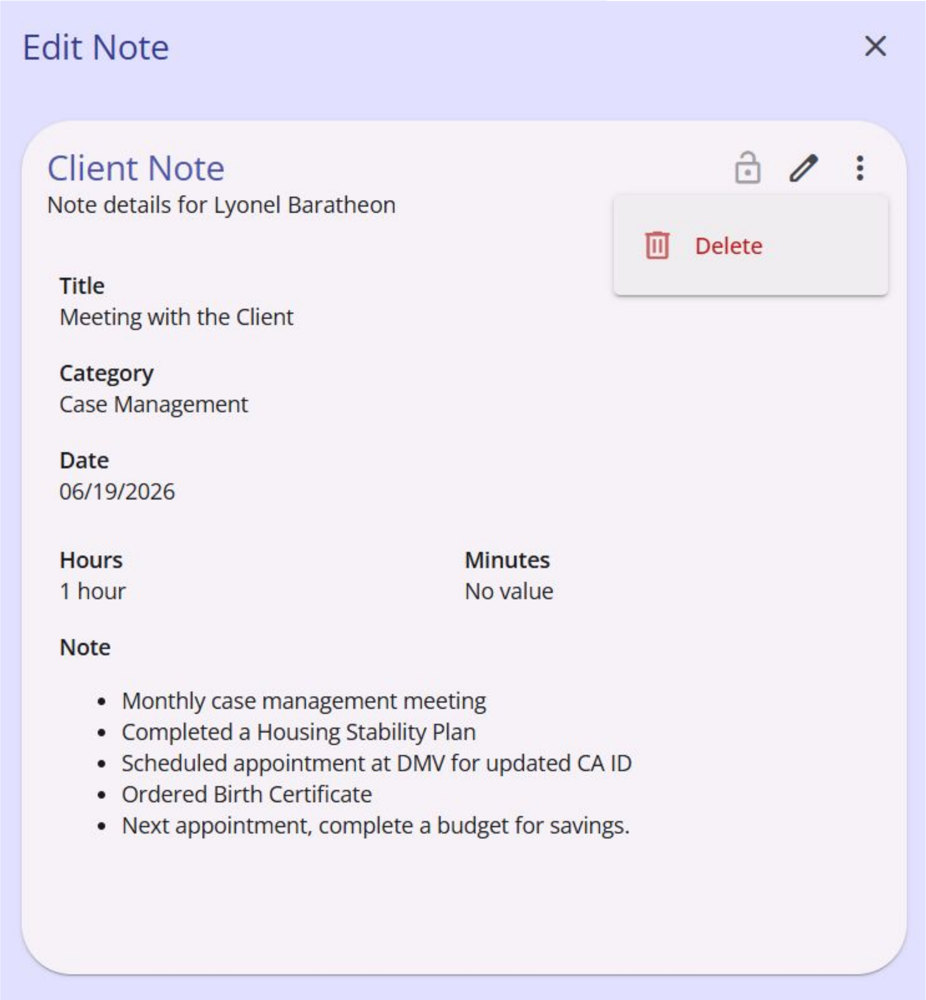
To edit an existing note...

- Click on the note to open it.
- Select the edit icon to begin editing.

To delete an existing note...

- Open the note and select the three vertical dots.
- Click delete.

The delete function is only available to users with Agency Administrator level Access Role type.

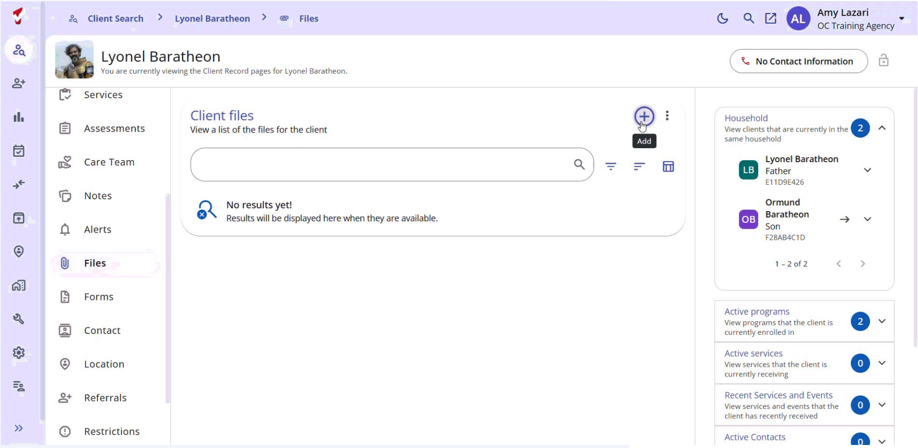


Files

The Files tab includes file history and the ability to add and manage files at the agency and program levels.

To add program level files:

- Navigate to the Files tab within the client record.
- Select the most appropriate Category and Predefined Name for the file.
- Toggle the Privacy button to prohibit the uploaded file being shared with staff members at other agencies.
- Drag and drop files or click Choose A File to upload the file from a computer or other device.
- Click Save.

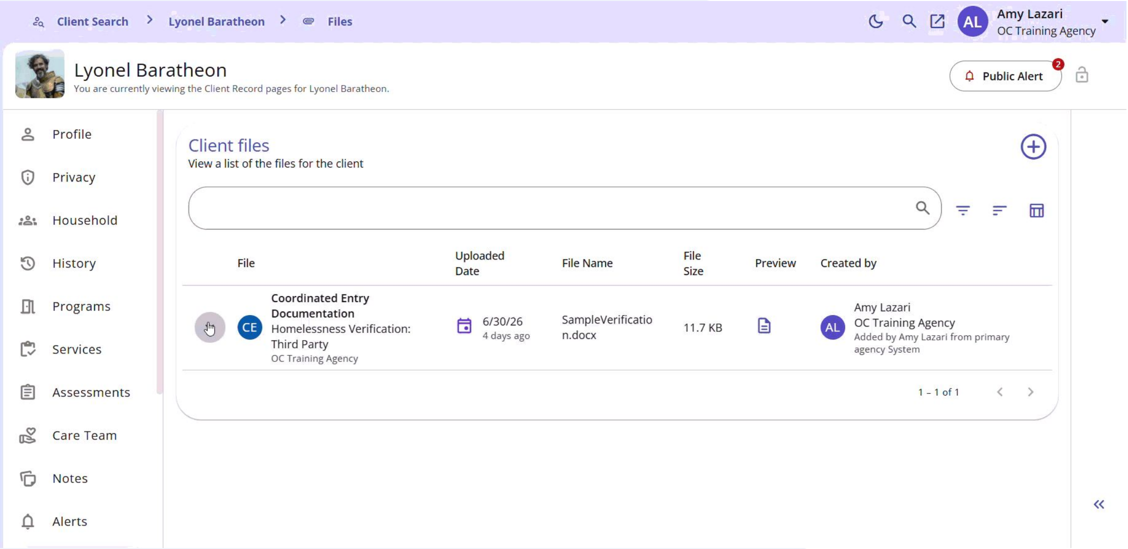


Files

To view, edit, upload, delete, or link files within an enrollment:

- Navigate to the Programs tab.
- Click on the desired enrollment.
- Select the Files tab.
- Click the Add (+) button to access the file upload screen.
- Click the three vertical dots to link any docs uploaded at the Agency Level.

Files added at the project level will only be visible to users from that agency.



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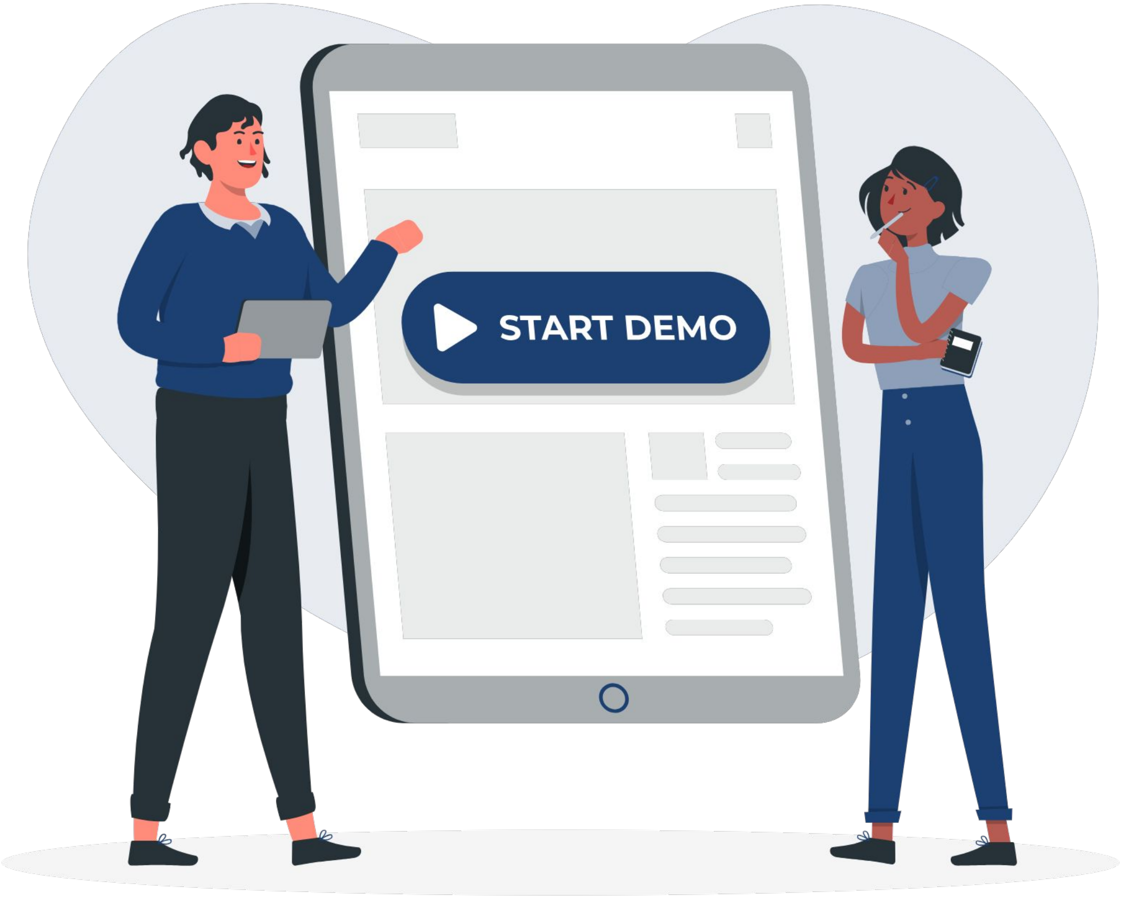
Notes and Files Demo



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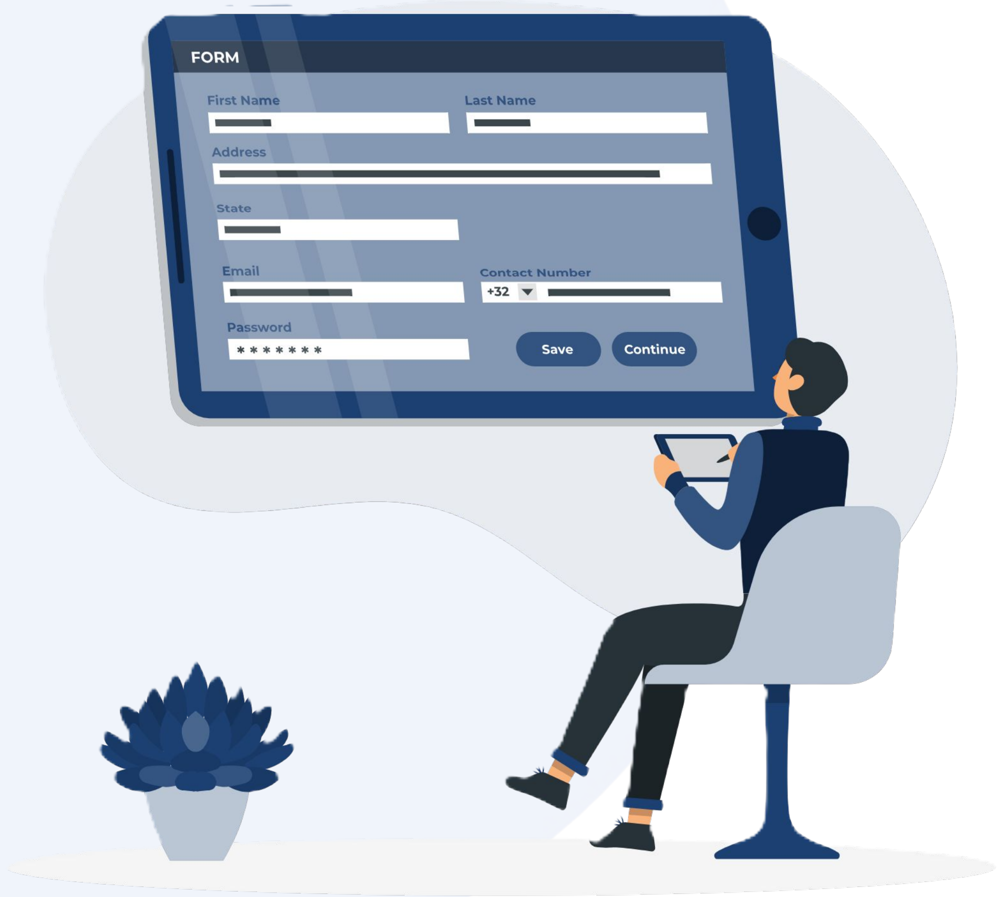
August 2026 Clarity New Interface Survey

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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