

Clarity New Interface Office Hours 3

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.

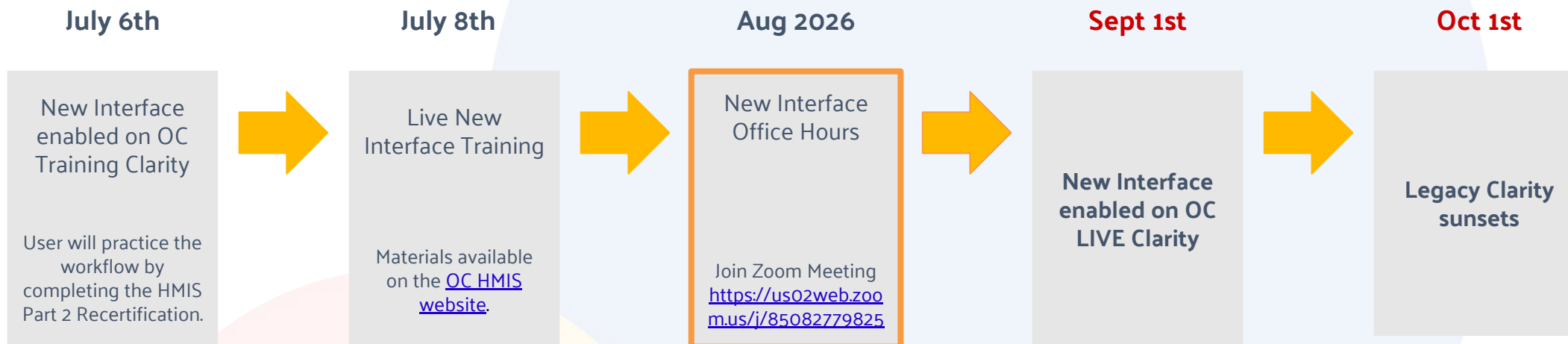
Agenda

- New Clarity Interface Roll Out Schedule
- Services
- Assessments
- Notes
- Files

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.

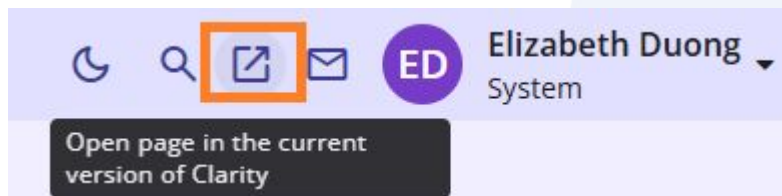


Please keep an eye out for the weekly newsletters to review the new functionality of the New Clarity Interface.

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 Recertification](#) 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>

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.

Lyonel Baratheon
Expand this section to view more details about the client that this program enrollment is for.

No Contact Information

	Name	Start Date	End Date	Created by	
▼	 Case Management Session Case Management OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	 Case Management Session Case Management OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	 Case Management Session Case Management OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	 Case Management Session Case Management OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	 Case Management Session Case Management OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
▼	 Meal On Site Food OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	 
▼	 Meal On Site Food OC Training Agency	 6/30/26 2 days ago	 6/30/26 2 days ago	 AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	 

lclarityhs.com/horizon/clients/E11D9E426/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.

Lyonel Baratheon
You are currently viewing the Client Record pages for Lyonel Baratheon.

No Contact Information

Client services
Manage agency-level services / view service history for Lyonel Baratheon

Name	Start Date	End Date	Created by
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

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.

The screenshot shows the OC Training Agency software interface. The top navigation bar includes 'Client Search', 'Lyonel Baratheon', and 'Programs'. The left sidebar contains a navigation menu with 'Profile', 'Privacy', 'Household', 'History', 'Programs' (highlighted), 'Services', 'Assessments', 'Care Team', 'Notes', and 'Alerts'. The main content area displays 'Program enrollments' for Lyonel Baratheon, showing 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'. The 'Services' button is highlighted in the left sidebar, and the 'Services' tab is selected in the top navigation bar of the program enrollment view.

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 7 days ago	Active	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	
Individual Coordinated Entry System Coordinated Entry County of Orange	6/1/26 30 days ago	Active	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	

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.

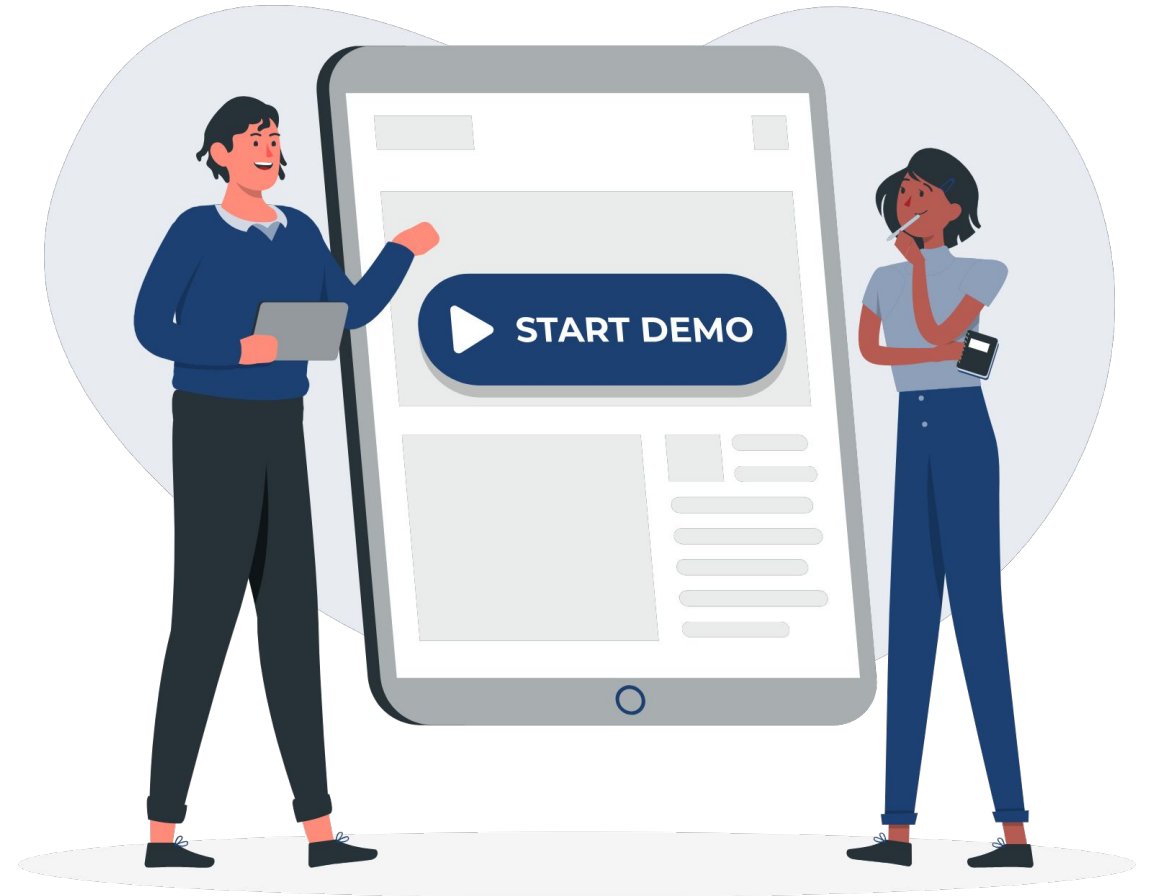
Users who are switched into an agency that is different from the one that provided the service will not delete or edit the service.

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

The screenshot displays the 'Client services' page for Lyonel Baratheon. The interface includes a sidebar with navigation options: Profile, Privacy, Household, History, Programs, Services (selected), Assessments, Care Team, Notes, and Alerts. The main content area shows a table of services. The table has columns for Name, Start Date, End Date, and Created by. There are five rows of 'Case Management Session' services, all created by Amy Lazari from the OC Training Agency. Each row has a dropdown arrow on the left and a lock icon on the right. The top of the page shows the client's name, a search bar, and the user's name (Amy Lazari) with a dropdown menu.

Name	Start Date	End Date	Created by
Case Management Session Case Management OC Training Agency	6/29/26 1 days ago	6/29/26 1 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System
Case Management Session Case Management OC Training Agency	6/30/26 2 days ago	6/30/26 2 days ago	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

Services Demo



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

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 delete function available on this screen.

The screenshot shows the 'Assessments' tab for a client named Lyonel Baratheon. The interface includes a sidebar with navigation options: Profile, Privacy, Household, History, Programs, Services, Assessments (highlighted), Care Team, Notes, and Alerts. The main content area displays 'Client assessments' with a search bar and a table of assessment history. The table has columns for 'Created by', 'Created on', 'Updated by', and 'Updated on'. Three assessments are listed, each with a dropdown arrow on the left and a door icon on the right. The top assessment was created by 'Amy Lazari OC Training Agency' on 6/30/26 at 4:19 PM. The middle assessment was created by 'Amy Lazari County of Orange' on 6/24/26 at 1:58 PM. The bottom assessment was created by 'Amy Lazari OC Training Agency' on 6/30/26 at 4:27 PM. The user 'Amy Lazari OC Training Agency' is logged in, as indicated by the top right header.

	Created by	Created on	Updated by	Updated on
▼	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	6/30/26, 4:19 PM 1 days ago	AL Amy Lazari System	6/30/26, 4:19 PM 1 days ago
▼	Amy Lazari County of Orange Added by Amy Lazari from primary agency System	6/24/26, 1:58 PM 7 days ago	AL Amy Lazari System	6/24/26, 1:58 PM 7 days ago
▼	Amy Lazari OC Training Agency Added by Amy Lazari from primary	6/30/26, 4:27 PM 1 days ago	AL Amy Lazari System	6/30/26, 4:27 PM 1 days ago

Assessments

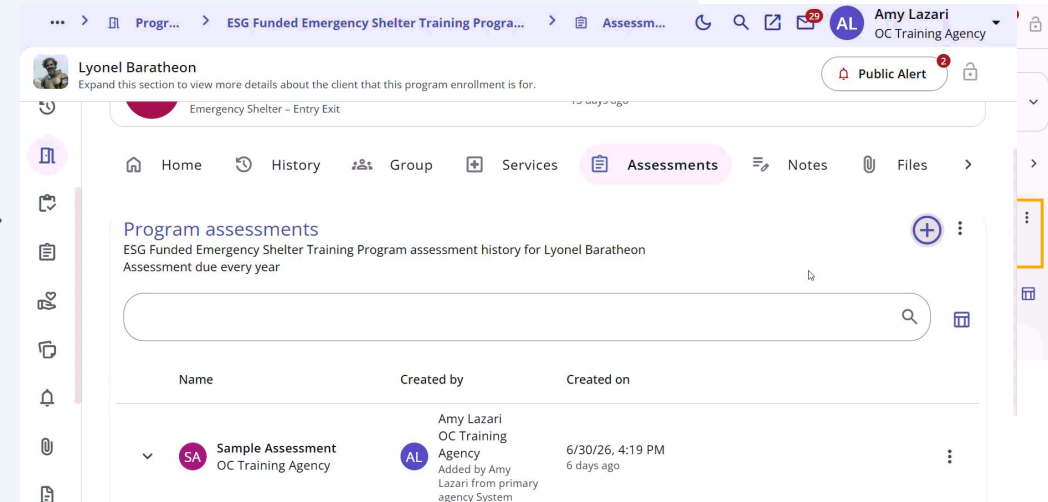
Program Level Assessments

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.

Lyonel Baratheon
You are currently viewing the Client Record pages for Lyonel Baratheon.

No Contact Information

Profile
Privacy
Household
History
Programs
Services
Assessments
Care Team

Name	Created by	Created on	Updated by	Updated on
SA Sample Assessment OC Training Agency	AL Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System	6/30/26, 4:19 PM 2 days ago	AL Amy Lazari System	6/30/26, 4:19 PM 2 days ago
IC Individual CES Assessment	AL Amy Lazari County of Orange Added by	6/24/26, 1:58 PM	AL Amy Lazari	6/24/26, 1:58 PM

Sample Assessment assessment
Entry data collection for Lyonel Baratheon

Assessment Date
06/19/2026

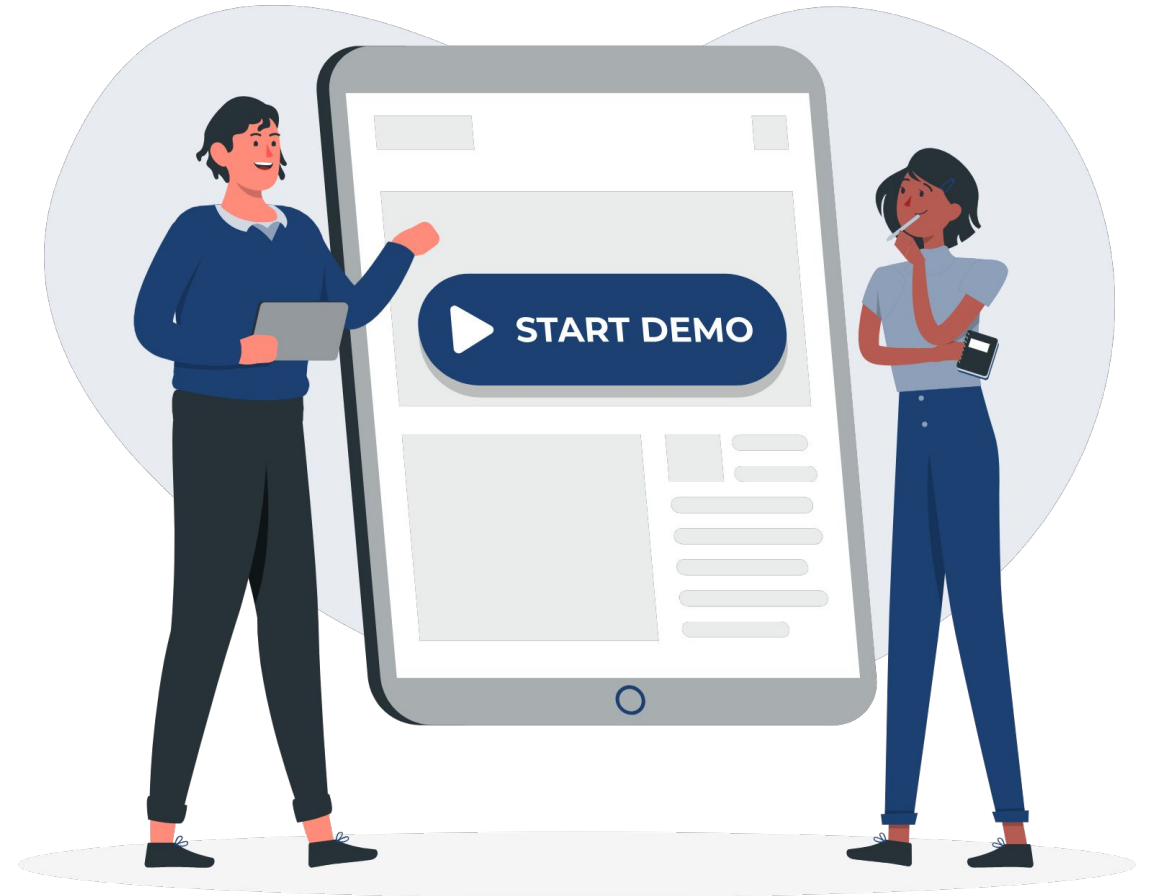
Sample Response #1
Select

Sample Question #2
No value

Sample Question #3
No

Edit

Assessment Demo



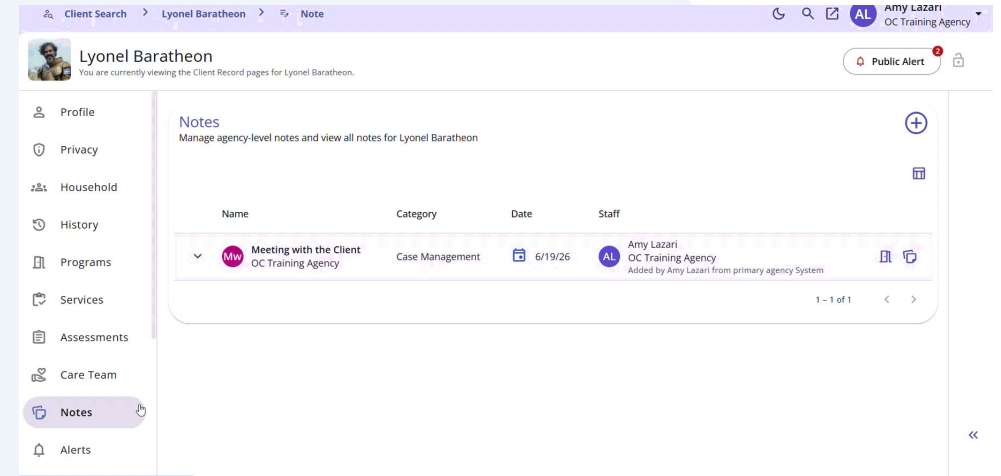
Graphic by: <https://storyset.com/online>

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.



Notes

Adding Program Notes

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

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.

The screenshot shows a web application interface for a client record. The top navigation bar includes 'Client Search', 'Lyonel Baratheon', and 'Note'. The user is identified as 'Amy Lazari' from 'OC Training Agency'. A 'Public Alert' button is visible. The left sidebar contains a menu with 'Profile', 'Privacy', 'Household', 'History', 'Programs', 'Services', 'Assessments', 'Care Team', 'Notes' (highlighted), and 'Alerts'. The main content area is titled 'Notes' and includes the subtitle 'Manage agency-level notes and view all notes for Lyonel Baratheon'. It features a table with columns: Name, Category, Date, and Staff. One note is listed: 'Meeting with the Client' by 'OC Training Agency' in the 'Case Management' category, dated '6/19/26', added by 'Amy Lazari'. A lock icon is present next to the note. The bottom right of the table shows '1 - 1 of 1' and navigation arrows.

Name	Category	Date	Staff
Meeting with the Client OC Training Agency	Case Management	6/19/26	Amy Lazari OC Training Agency Added by Amy Lazari from primary agency System

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.

Edit Note

Client Note

Note details for Lyonel Baratheon

Delete

Title

Meeting with the Client

Category

Case Management

Date

06/19/2026

Hours

1 hour

Minutes

No value

Note

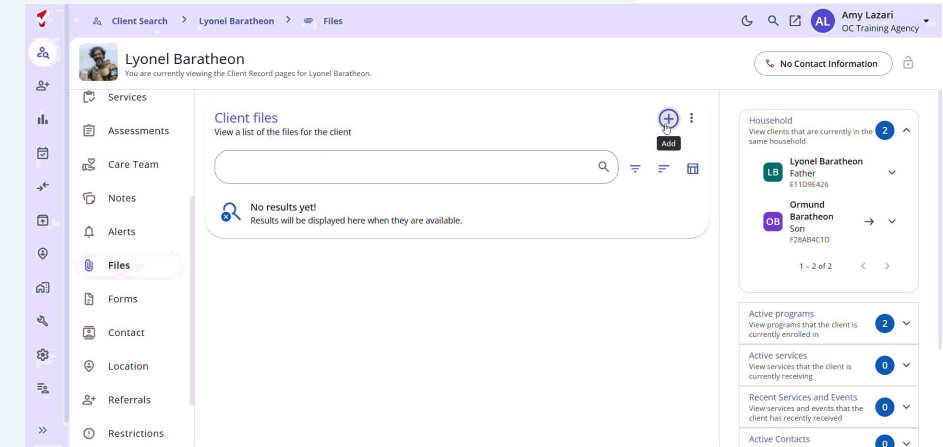
- Monthly case management meeting
- Completed a Housing Stability Plan
- Scheduled appointment at DMV for updated CA ID
- Ordered Birth Certificate
- Next appointment, complete a budget for savings.

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.

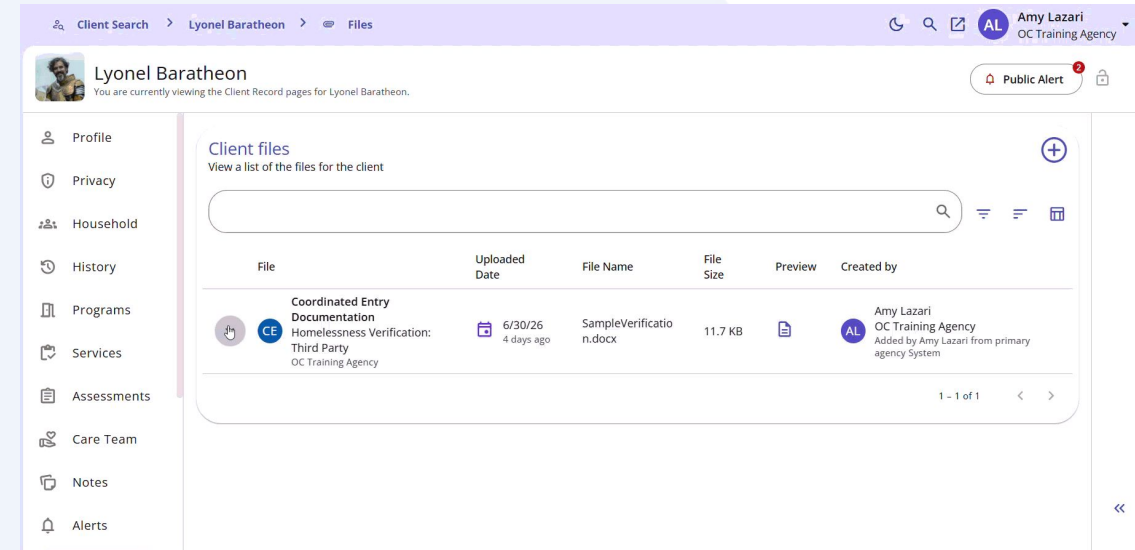


Files

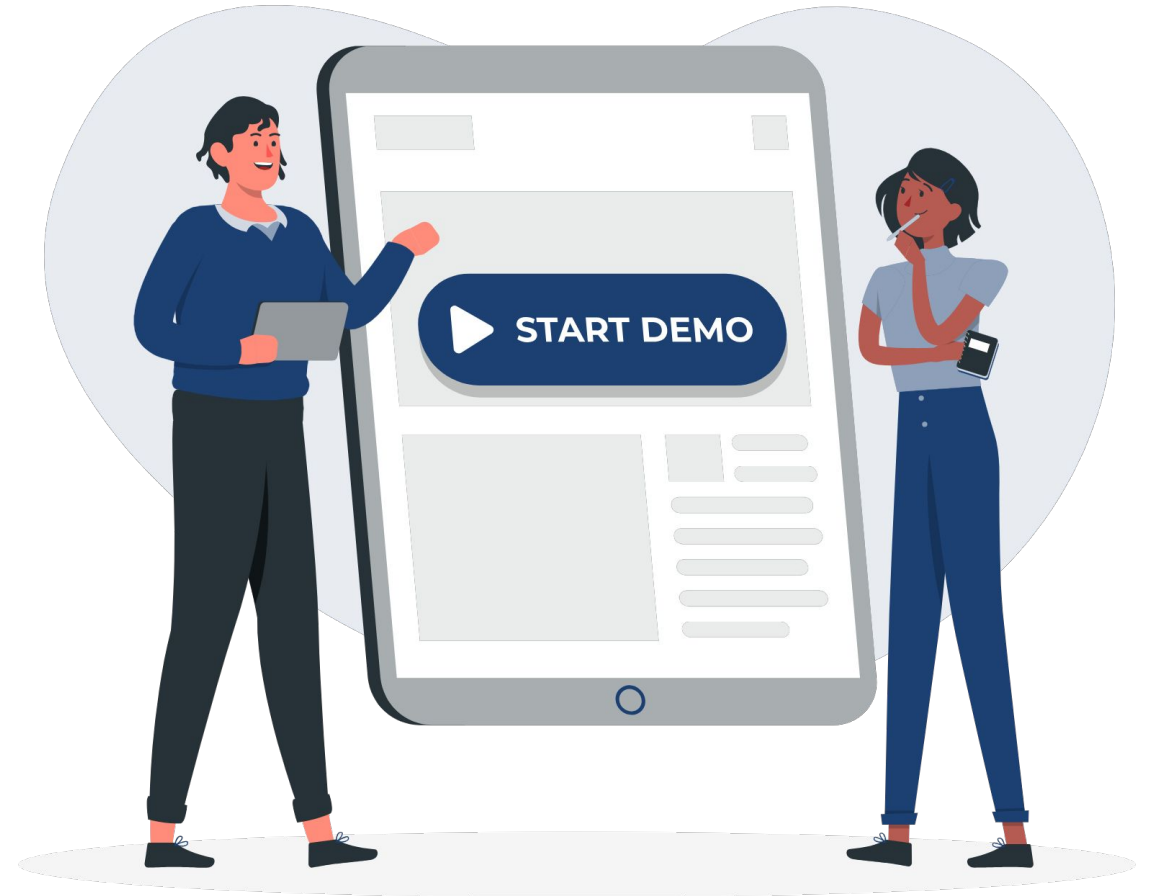
To view, edit, upload, delete, or link files within an enrollment:

- 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.



Notes and Files Demo



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

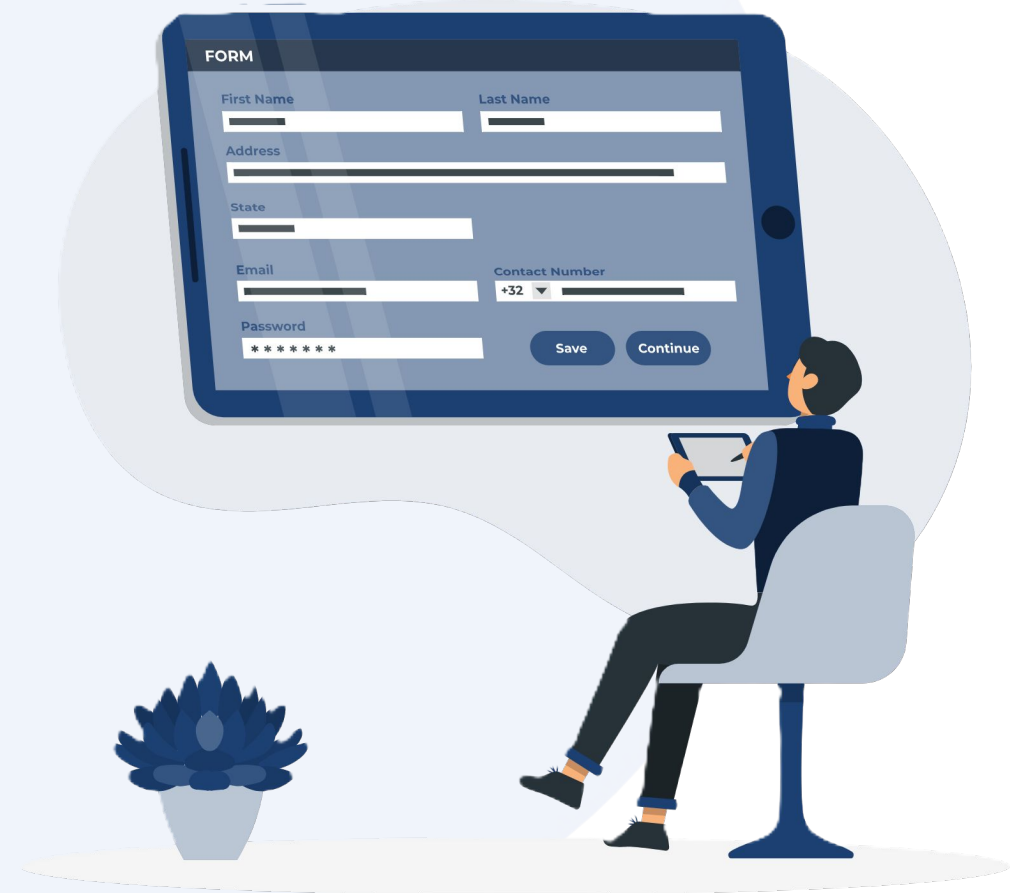
August 2026 Clarity New Interface Survey

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](#)



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