Clarity New Interface Office Hours 1

211

Get Connected. Get Help.™

Orange County
UNITED WAY

Q&A

To better organize questions the HMIS Help Desk receives during the Office Hour, 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 Office Hour.

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
- Primary Navigation Menu
- Caseload Widgets
- Client Search (Default Home Screen) Functions
- Client Profile Creation & Decision Pathways
- Client Privacy

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.

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.

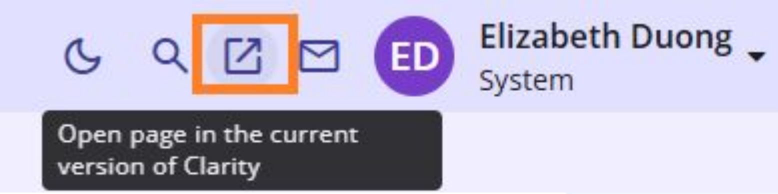
Get Connected. Get Help.™

Orange County UNITED WAY

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

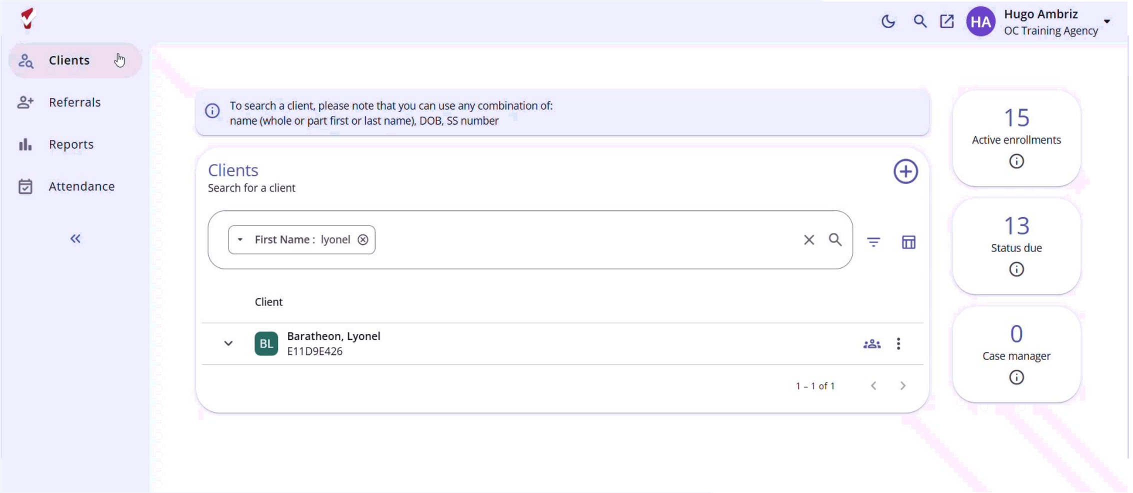
Primary Navigation Menu

The primary navigation menu is located on the left side of the screen and is always visible to the user, regardless of which page they're currently on.

The following key pages are now housed under the primary navigation menu:

- Client Search
- Referrals
- Reports
- Attendance

The primary navigation menu can either be collapsed or expanded depending on user preference.



211
Get Connected. Get Help.™

Orange County
UNITED WAY

Primary Navigation Menu - Information Bar

An updated information bar is located on the top of the screen and is always visible to the user, regardless of which page they're currently on.

The following items are housed in the information bar:

- Light/Dark Mode toggle
- Global client search field
- Switch Interface
- Inbox
- Current Staff Member

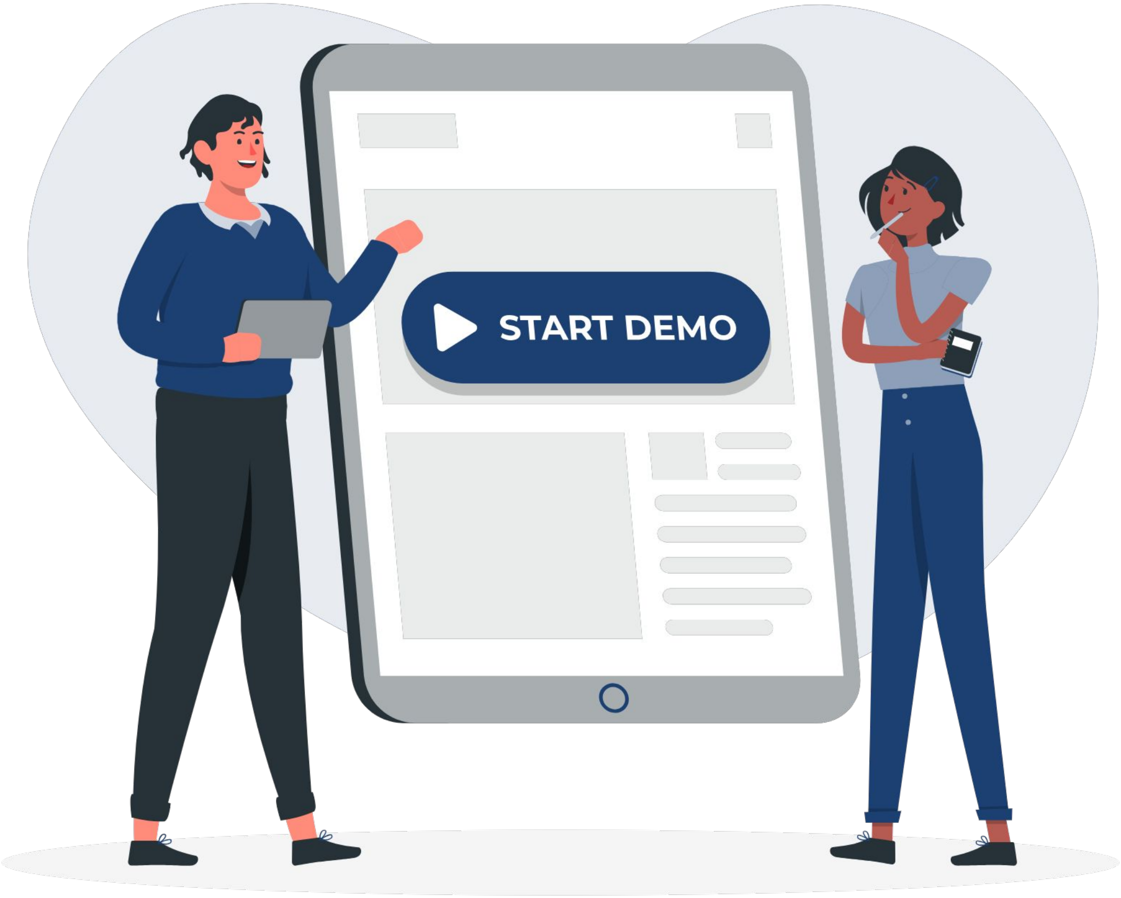
Caseload Widgets

Users can locate their caseload by utilizing the caseload widgets on the right-hand side of the client search page. The following information from the user's current agency is included:

- **Active enrollments:** Displays the number of active enrollments a user has created or was assigned
- **Status due:** Displays the number of upcoming, due or past due annual assessments
- **Case manager**: Displays the number of active referrals a user is assigned

Context about specific widgets can be found by selecting the information icon.

Primary Navigation Menu Demo



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

Get Connected. Get Help.™

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:

- Name (full, first or last)
- UID
- SSN (full or partial)
- DOB
- Birth year

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.

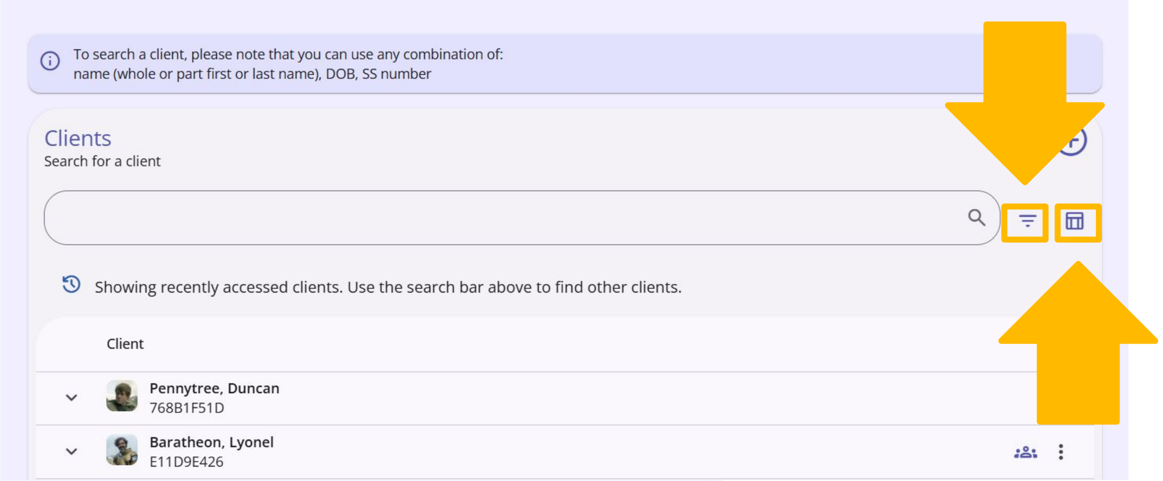
Client Search - New Functions

Client search results can be filtered to more accurately search for clients. Users can utilize the filter icon to filter search results by:

- Name (first or last)
- Alias

Users can also customize the look of the search results view by adding columns to the display using the column selector icon to more easily identify clients.

[Click here](#) for hands-on experience to practice searching for client records



Client Profile Creation Decision Pathways

As part of the client intake process, users are required to ask clients if they consent to share their information in OC HMIS. Client consent is not needed to ask for the information or enter it into the HMIS, client consent is needed for data sharing.

Clients who provide consent to share their information should have their client profiles set to **public**, while clients who do not provide consent should have their client profiles set to **private**. Unaccompanied minor clients cannot provide consent to share their information and must have private client profiles created.

Scenario	Result
Client provides consent to share information and provides PPI	User creates a public client profile with PPI
Client declines consent to share information and provides PPI	User creates a private client profile with PPI
Client provides consent to share information and does not provide PPI	User creates a public client profile with the ”Consent Refused” toggle enabled
Client declines consent to share information and does not provide PPI	User creates a private client profile with the ”Consent Refused” toggle enabled

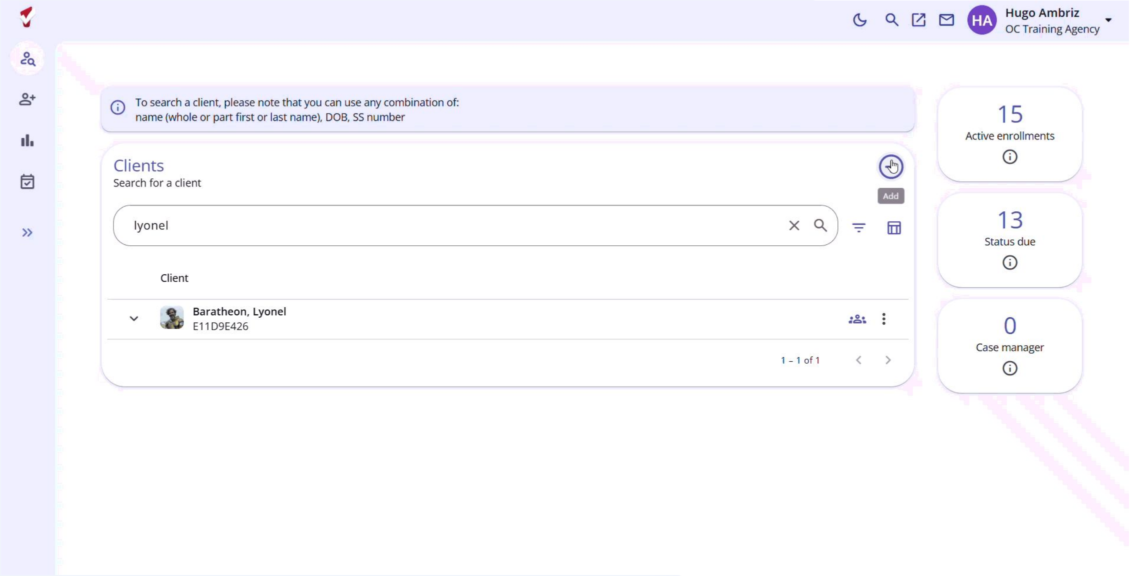
Client Profile Creation

New client records can be created on the client search page by selecting the add icon.

On the client profile form that opens, record core data about the client. The following fields are required:

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

Click here for hands-on experience to practice creating new client records.



211
Get Connected. Get Help.™

Orange County UNITED WAY

Client Profile - Information Bar

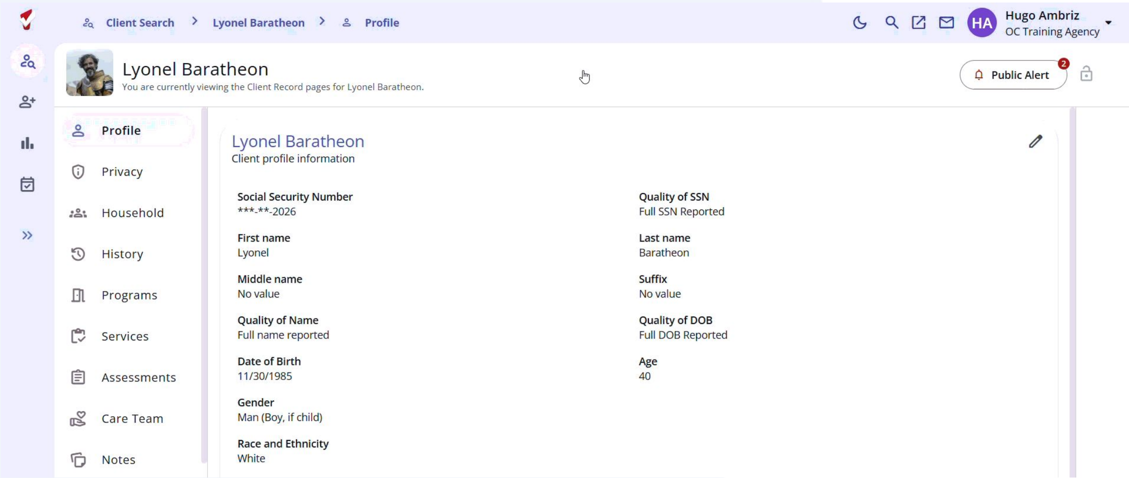
In the client record, a client information bar is located at the top of the screen and is always visible to the user, regardless of which client subtab they're currently on.

The client information bar will always display the following information:

- Name
- Photo/Initials
- Privacy Status

The client information bar may also display missing contact information, missing ROI records, and active public alerts if needed.

The client UID is now located in the client information bar, and is visible if the user expands the section.



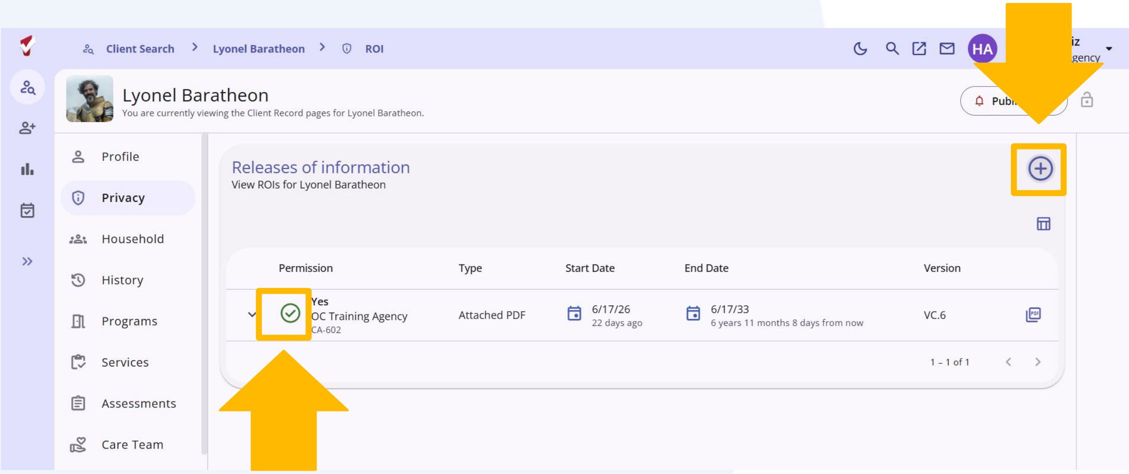
Client Privacy

In the client record, the client privacy tab displays private data, consent refused options, and Release of Information (ROI) data.

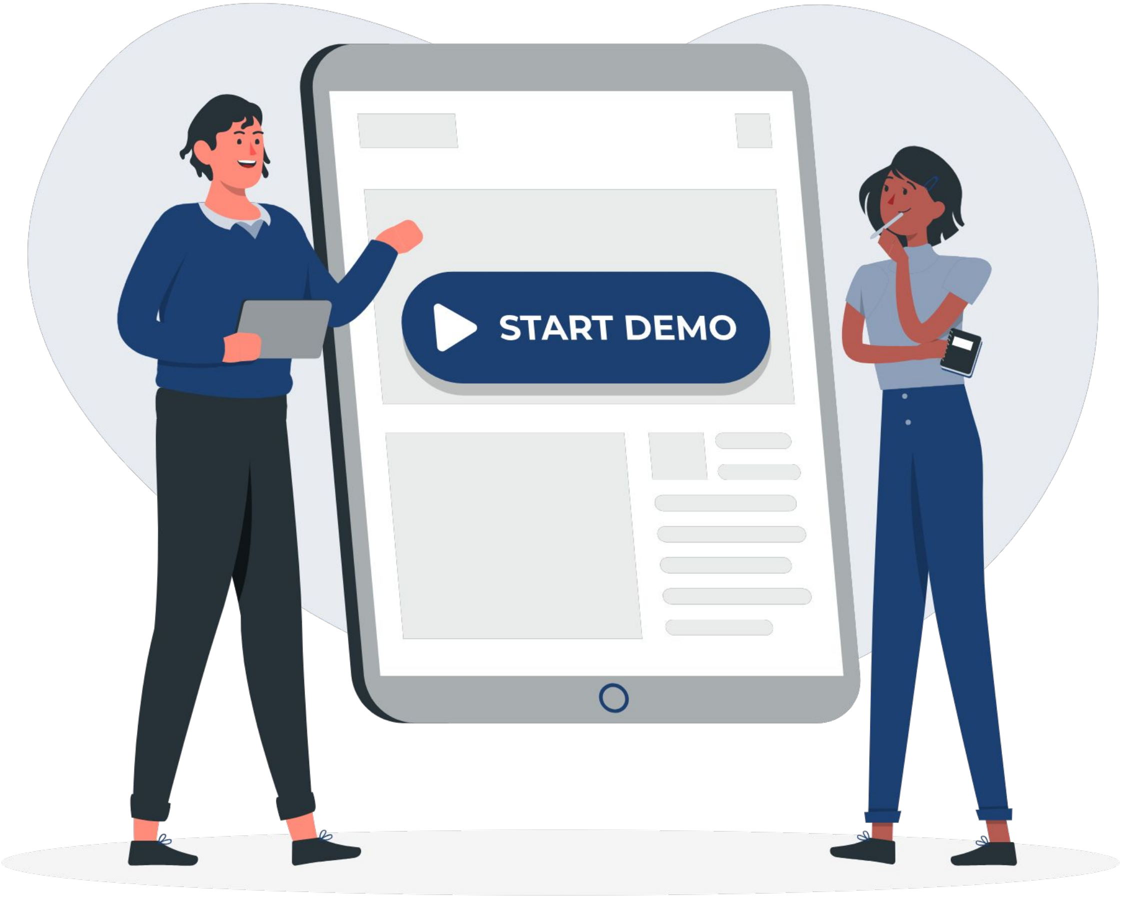
To edit an existing ROI, select the green checkmark icon next to the record and then select the edit icon in the ROI form that opens. More information about a specific ROI record can be obtained by by selecting the caret icon next to the record.

To add a new ROI record, select the add icon and complete the fields in the ROI form that opens.

[Click here](#) for hands-on experience to practice adding ROI records.



Client Profile Creation and Privacy Demo



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

Get Connected. Get Help.™

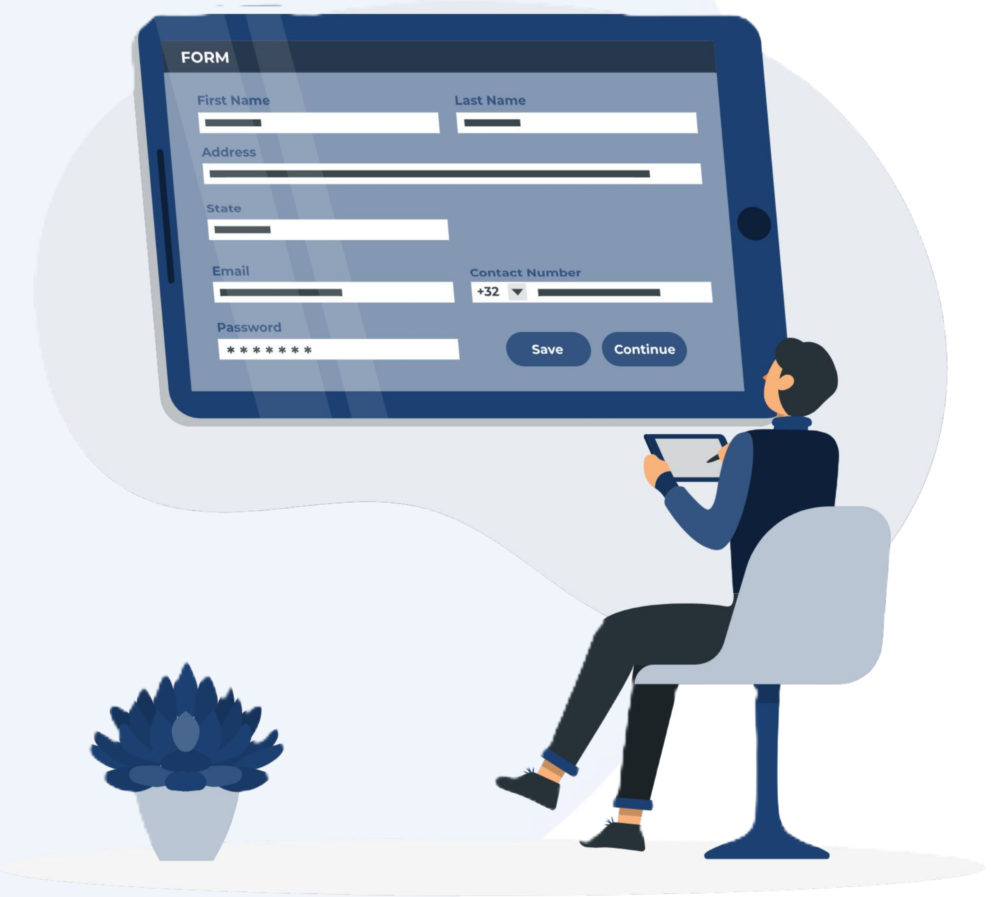
August 2026 Clarity New Interface Survey

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!

Orange County
UNITED WAY®