



Homeless Management Information System

# Santa Cruz County Continuum of Care

2018

## Clarity HMIS workflow Referrals for Case Managers



## Managing Your Referred Client

To manage the clients that are referred and assigned to you, check your Clarity inbox for the referral message your manager sent you or click on **CASELOAD** (red arrow), then click **CASE MANAGER** (blue arrow), and copy or search the client you wish to enroll. To copy the client, highlight the client name with your mouse and right click and copy, click on **Search** (green arrow) and paste or type the client name in the **Search** box (purple arrow).

Homeless Services Center

ACTIVE CASELOAD STATUS DUE **CASE MANAGER**

Staff One, Homeless Services Center

SEARCH **CASELOAD**

**CASE MANAGER**


Client	Referral Date	Days Pending
Susy Susy1 Program: Page Smith Community House Referred by: Homeless Services Center	2018-08-08 19:50:38	12

CLARITY HUMAN SERVICES

SEARCH FOR A CLIENT ADD CLIENT +

susy susy1 SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
 Susy Susy1	07/04/80	8781	07/24/18

Edit

After clicking **Search** in the search box, click on the edit icon next to the client's name (gold arrow). This will take you to the client's profile page.

# Enrolling the Referred Client

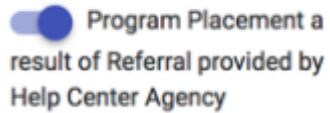
To enroll the client into the referred program, click on **Programs** (red arrow), scroll down to the referred program that the client was referred to and click the down arrow (blue arrow), this will expand to program enroll section. If you are enrolling the entire household, please remember to toggle the *Include group members* (green arrow) and click **Enroll** (purple arrow). Enroll clients and answer all intake questions. Save and click Next if you clicked Include group members. Always remember that the referral toggle (black arrow) need to appear next to the program enrollment for a successful referral.

The screenshot displays the 'Susy Susy1' interface. At the top, the 'PROGRAMS' tab is selected, indicated by a red arrow. Below the navigation bar, a list of programs is shown: 'HUD ESG 83', 'HUD RRH', and 'Page Smith Community House'. A blue arrow points to a downward arrow icon next to 'Page Smith Community House'. Below this, two circular gauges are visible: 'Occupancy (Today)' showing 0 units (0% Checked In, 0% Reserved, 100% Available) and 'Referrals (90 Days)' showing 2 referrals (50% Pending, 0% Connected, 50% Denied). Further down, the 'Funding Source' is 'HUD:CoC - Transitional Housing' and 'Availability' is 'Full Availability'. 'Service Categories' include Transportation, Safety Net Services, Outreach Contact, Housing, Employment, Case Management, Housing Search and Placement, and Financial. A 'HOUSING AVAILABILITY' section shows 'Households without children' with '40 Beds in 40 Units'. A black arrow points to a toggle switch for 'Program Placement a result of Referral provided by Homeless Services Center'. A green arrow points to the 'Include group members' toggle, which is currently off. A purple arrow points to the 'ENROLL' button. A red notification box indicates '1 pending referral(s). Oldest 13 days.' At the bottom, there are links for 'PRINT DIRECTIONS' and 'DOC REQUIREMENTS'.

# Referral Toggle

## Referral Checkbox

If the program enrollment is conducted as a result of a referral, a checkbox will appear. Please leave this toggle on (blue) so there will be a referral linkage.



Selecting the checkbox will make the system automatically include the referral in the client's Program History. This allows users to easily identify whether a program placement is due to a referral.

To check if the program referral was successful you will see a linkage icon (red arrow).

The screenshot shows the user interface for 'Susy Susy1'. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', and 'LOCATION'. A notification banner at the top states: 'Release Of Information is Missing. Please add one to ensure compliance (Click here)'. The main content area is titled 'HISTORY' and features 'Advanced Search Options' with a 'View' dropdown. A table lists program history entries:

Service Name	Start Date	End Date
HSC - Resource Center Homeless Services Center	08/22/2018	Active
Page Smith Community House Homeless Services Center	08/22/2018	Active

A red arrow points to a chain-link icon next to the 'Page Smith Community House' entry, indicating a referral linkage. On the right side of the interface, there are sections for 'Household Members' (listing 'Susy Kid' as 'Daughter') and 'Active Programs' (listing 'Page Smith Community House').