County of Santa Cruz California
Serving the Community ~ Working for the Future

Homeless Management Information System

Santa Cruz County Continuum of Care

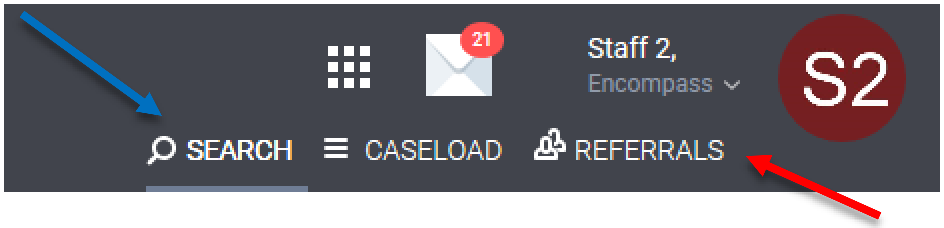
2022

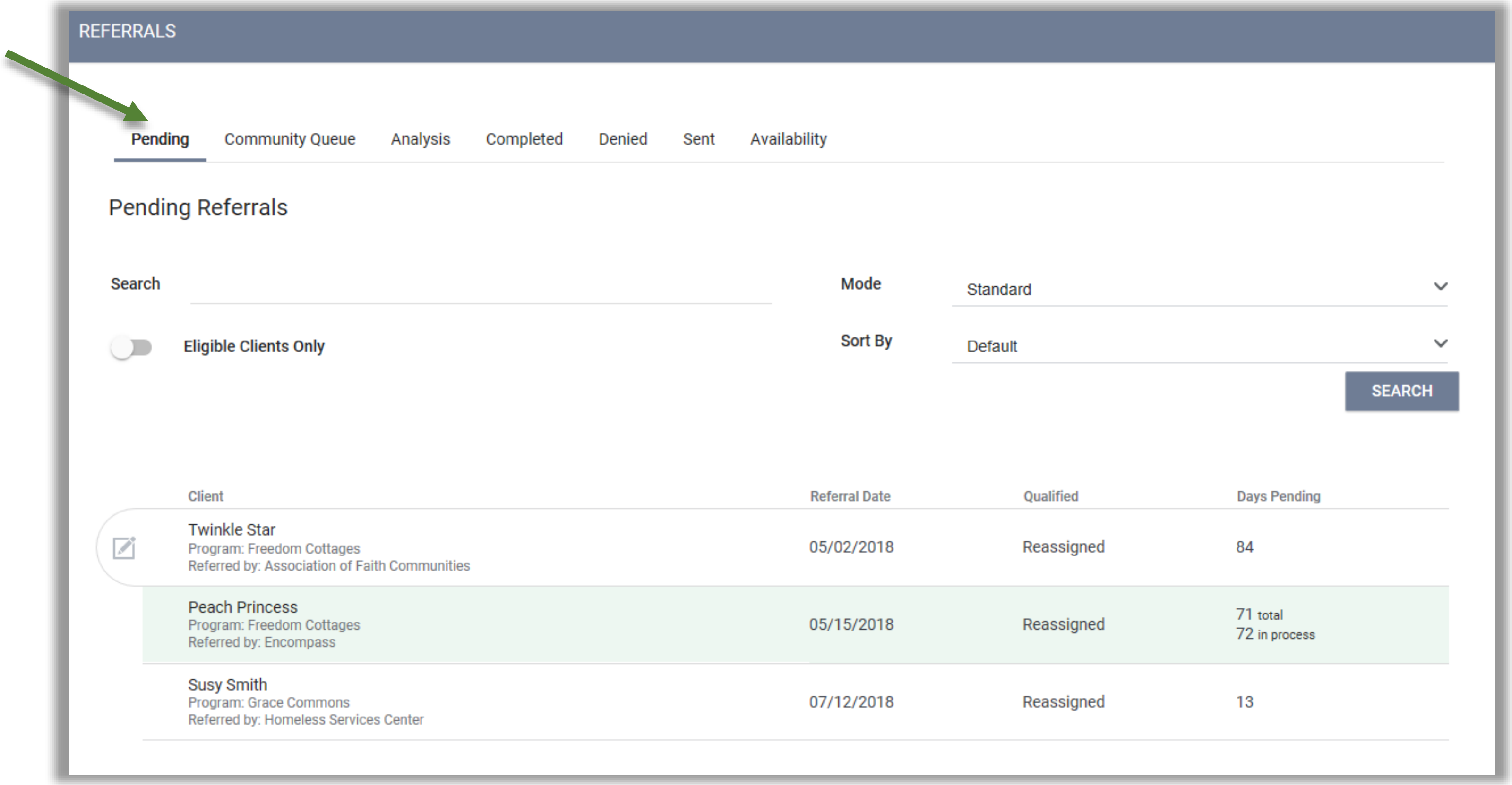
Clarity HMIS workflow
Referrals for Managers

Bitfocus

Smart Path Referrals

Once Smart Path has referred a client to one of your programs, click on the **Referrals** tab (red arrow) located corner right of the screen. Please note that you must be in the Search Homepage (central hub of the system), in order to see the **Referrals** tab. To go to the Search Homepage, click on **Search** tab (blue arrow).





Once the Client is Re-Assigned to a Program, the client's referral will move to the *Pending* referrals tab (green arrow). Click on the client you wish to edit.

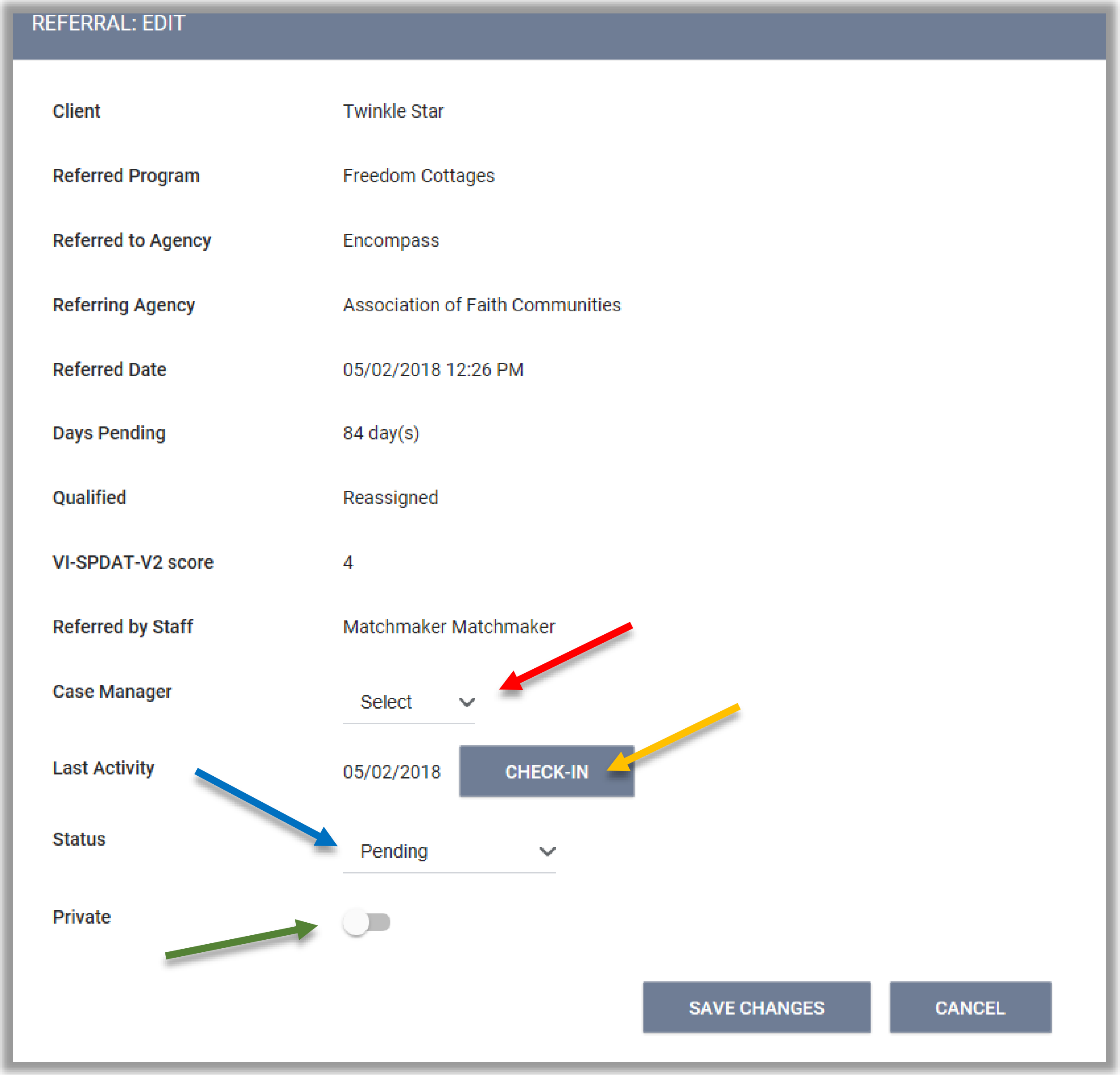
See next page for information about the 6 referral subtabs.

Referral Subtabs

Pending	Shows all referrals sent to your agency that are currently pending.
Community Queue	Shows all pending referrals within the system across all agencies.
Completed	Shows all referral accepted by the agency for which the client was specifically referred to.
Denied	Shows all referrals denied by your agency
Sent	Shows all referrals sent by your agency to both outside agencies and to programs within your own agency. These referrals are either pending, completed, or denied depending on the option chosen in the Status dropdown menu.
Availability	Shows the availability of programs accepting new referrals within an agency.

Referral: Edit

In **Referral: Edit**, you can assign a *Case Manager* (red arrow) and change the *Status* (blue arrow) to Pending, Pending Process, Denied, or Expired (see Status list below for more detail). Choose your *Status* selection and click **Save Changes** then message designated Case Manager the client ID(s) using Clarity's Messaging.



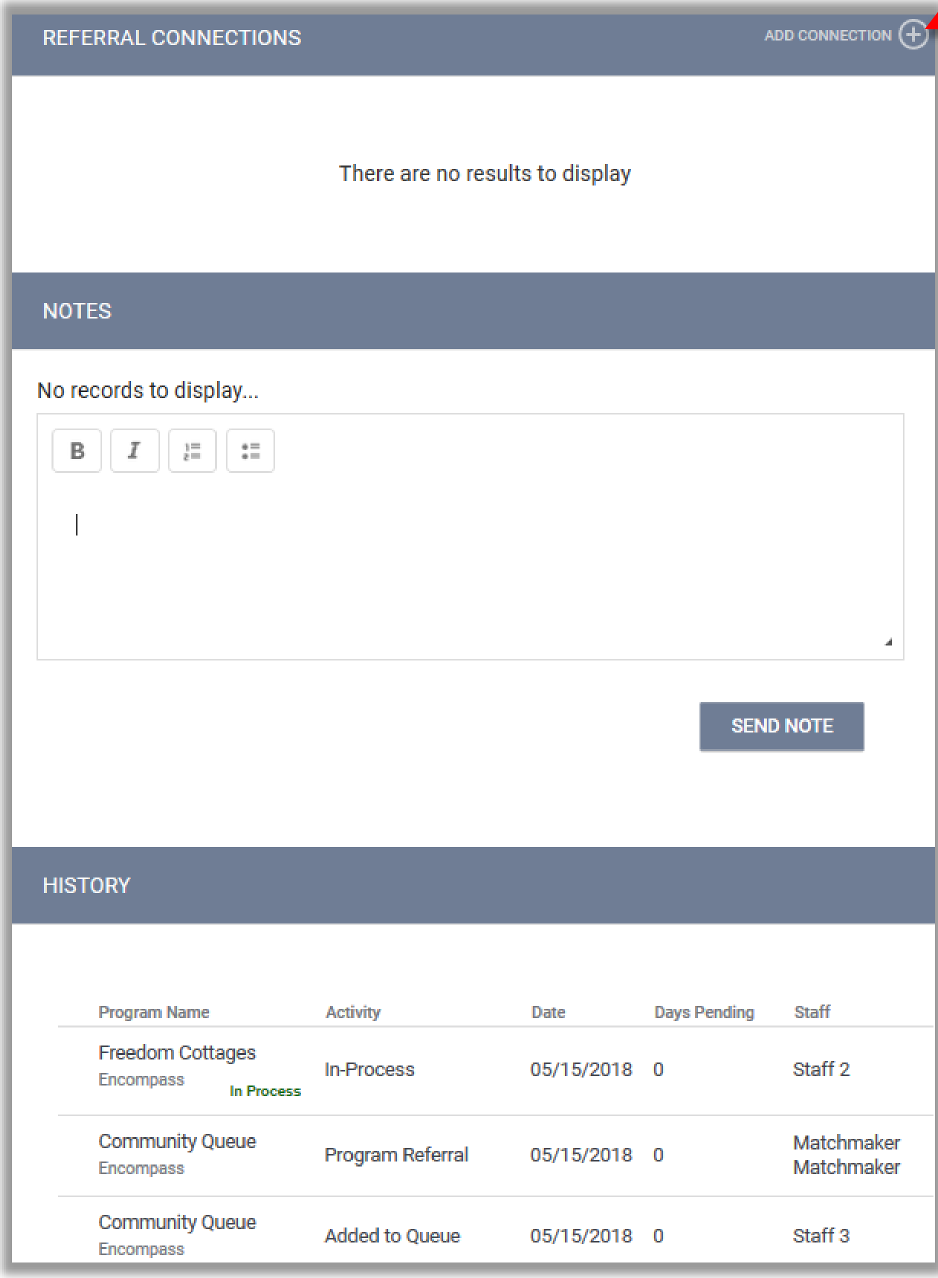
CHECK-IN: After a prescribed number of days, the client will be removed from the Community Queue if there is no activity. To keep the client from being removed from the queue click *Check-In* (yellow arrow).

Status

Pending	This is the default status of the client referral from the Community Queue. Pending status will keep the Clients referral in your pending tab for a specific amount of time
Pending Process	This is an accepted referral, the client is waiting to be enrolled by Agency staff into a program
Denied	Denied applications don't fit the parameters of your Program (When the Client is denied you will have the option to Send to the Community Queue Yes/No)
Expired	The referral expired based on the referral settings set by the System Administrator

Private: When this toggle (green arrow) is switched on, only the referred to agency will be able to see the referral. All referrals marked as private will have a lock icon .

Referrals Connections, Notes & History



Referral Connections: This section is intended for situations where the client has been enrolled to the referred to program before the referral was complete. If the client was prematurely enrolled into the program to which you are referring them to prior to the Community Queue, click **ADD CONNECTION** (red arrow) to link the program.

Notes: Can be added to this area, so there is communication between the Matchmaker and the Manager. Notifications of notes would be sent via email and into the Clarity inbox.

History: You can follow the referral's history here.