COMMUNITY TECHNOLOGY ALLIANCE

Clarity Manager Referral Steps

Program Availability

For Matchmaker to be able to Re-Assign the referral to a program, Managers will need to provide the available beds and the description of the unit to know how many clients to re-assign. **Program Availability** default should be set to 'LIMITED AVAILABILITY' or 'NO AVAILABILITY'. To edit these availability, follow steps below:

☐ Step 1: Click on **Referrals** tab

☐ Step 2: Click on **Availability**

☐ Step 3: Set the **Program Availability** by clicking **LIMITED AVAILABILITY**.

☐ Step 4: Click *Add Single Opening* or *Add Multiple Openings.*

☐ Step 5: If *Single Opening:* Enter the date the bed will be available for the client and add the description of the unit available. If *Multiple Openings*: Enter the Number of Openings available, then enter the date those beds will be available, add the description of the unit available.

☐ Step 6: Message Matchmaker the Program's Availability using Clarity's Messaging.

Client Referrals

☐ Step 1: Click on **Referrals** tab

☐ Step 2: From the Referrals page under **Pending**, click on the edit icon next to a client you wish to edit.

☐ Step 3: Assign a **Case Manager**

☐ Step 4: Change **Status** to *Pending, Pending Process, Denied, or Expired*

☐ Step 5: Click **Save Changes**

☐ Step 6: Message designated Case Manager the client ID(s) using Clarity's Messaging.

For more detailed steps on how to refer a client, go to Clarity Referral Manual for Managers.