



Homeless Management Information System

# Santa Cruz County Continuum of Care

2018

## Clarity HMIS workflow Referrals for Case Managers



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## 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).

The screenshot shows the Homeless Services Center dashboard. At the top, there is a navigation bar with the title "Homeless Services Center" and a "CASE MANAGER" link highlighted with a blue arrow. To the right, there is a "CASELOAD" link highlighted with a red arrow and a notification icon with the number 5. Below the navigation bar, there is a "CASE MANAGER" section with a table of clients. The table has columns for "Client", "Referral Date", and "Days Pending". The first row shows a client named "Susy Susy1" with a referral date of "2018-08-08 19:50:38" and "12" days pending. To the right of the table is the "CLARITY HUMAN SERVICES" logo.

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

The screenshot shows the "SEARCH FOR A CLIENT" interface. At the top, there is a search box containing "susy susy1" and a "SEARCH" button. Below the search box, there is a table of search results. The table has columns for "Date of Birth", "Last Four SSN", and "Last Updated". The first row shows a client named "Susy Susy1" with a date of birth of "07/04/80", last four SSN of "8781", and last updated date of "07/24/18". There is an "Edit" button next to the client name.

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

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

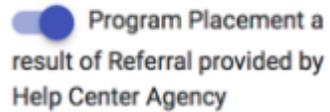
To enroll the client into the referred program, click on **Programs** (red arrow), scroll down to the referred program that the client was referred to and click the down arrow (blue arrow), this will expand to program enroll section. If you are enrolling the entire household, please remember to toggle 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' client management interface. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', and 'LOCATION'. A red arrow points to the 'PROGRAMS' tab. Below the navigation, the client's profile is shown with 'HUD ESG 83' and 'HUD RRH' listed. A blue arrow points to a dropdown arrow next to 'HUD RRH'. The main content area features two circular gauges: '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). Below these are sections for 'Funding Source' (HUD:CoC - Transitional Housing), 'Availability' (Full Availability), and 'Service Categories' (Transportation, Safety Net Services, Outreach Contact, Housing, Employment, Case Management, Housing Search and Placement, 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 a toggle switch for 'Include group members: Susy Kid'. A red box indicates '1 pending referral(s). Oldest 13 days.'. At the bottom, there are links for 'PRINT DIRECTIONS' and 'DOC REQUIREMENTS', and a purple arrow points to the 'ENROLL' button.

# 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 Susy Susy1 client profile page. The top navigation bar includes the client name, a grid icon, a notification icon with a red '6', the user 'Staff One, Homeless Services Center', and a search icon. Below the navigation bar is a yellow warning banner: 'Release Of Information is Missing. Please add one to ensure compliance (Click here)'. The main content area is divided into a 'HISTORY' section and a right-hand sidebar. The 'HISTORY' section has a sub-header 'Advanced Search Options View' and a table with the following data:

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 in the 'Active' column of the second row. The right-hand sidebar contains icons for printing, calendar, and profile, followed by sections for 'Household Members' (Susy Kid, Daughter), 'Active Programs' (Page Smith Community House), and 'Household Members' (Mana).