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

Homeless Management Information System

Santa Cruz County Continuum of Care

2018

Clarity HMIS workflow

Referrals for Case Managers

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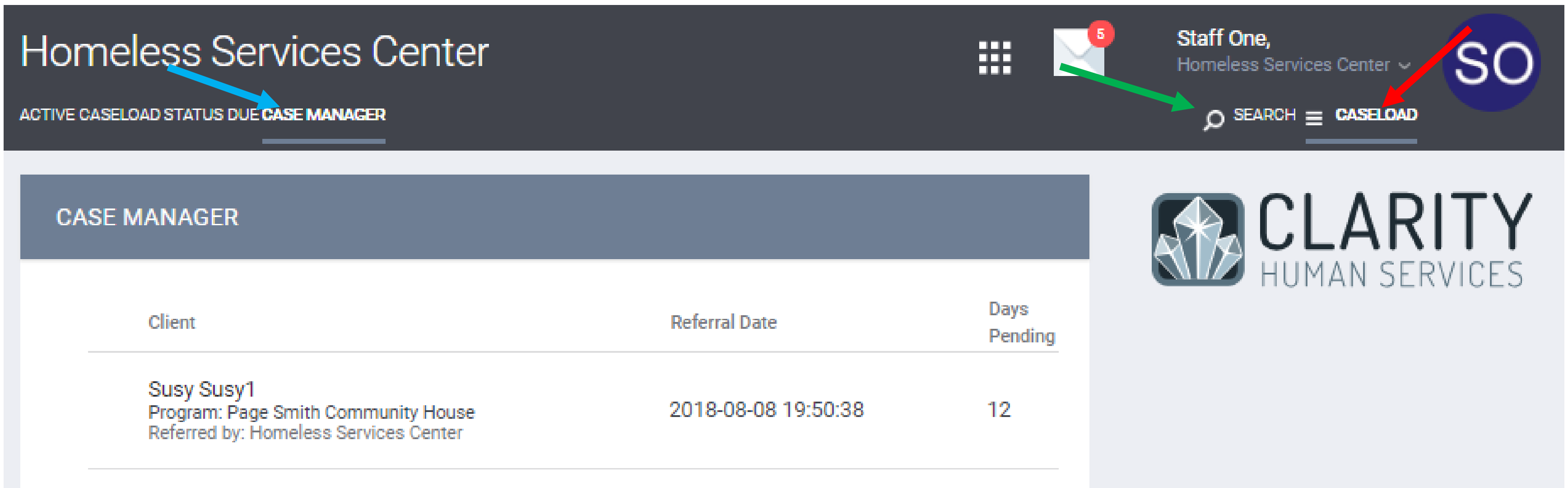
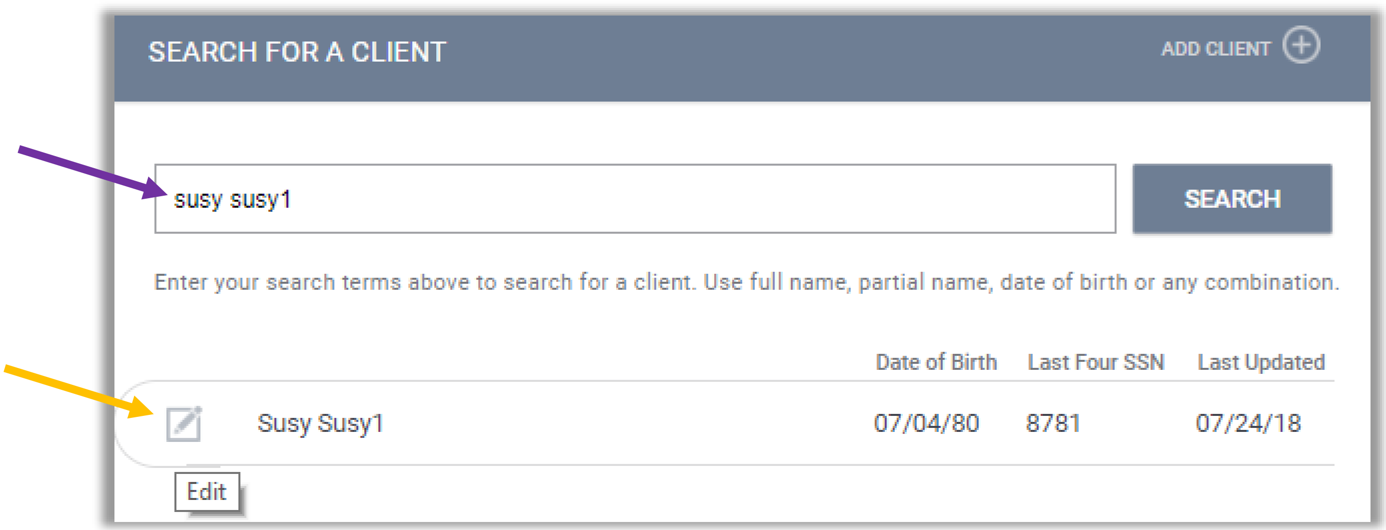
Managing Your Referred Client

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).

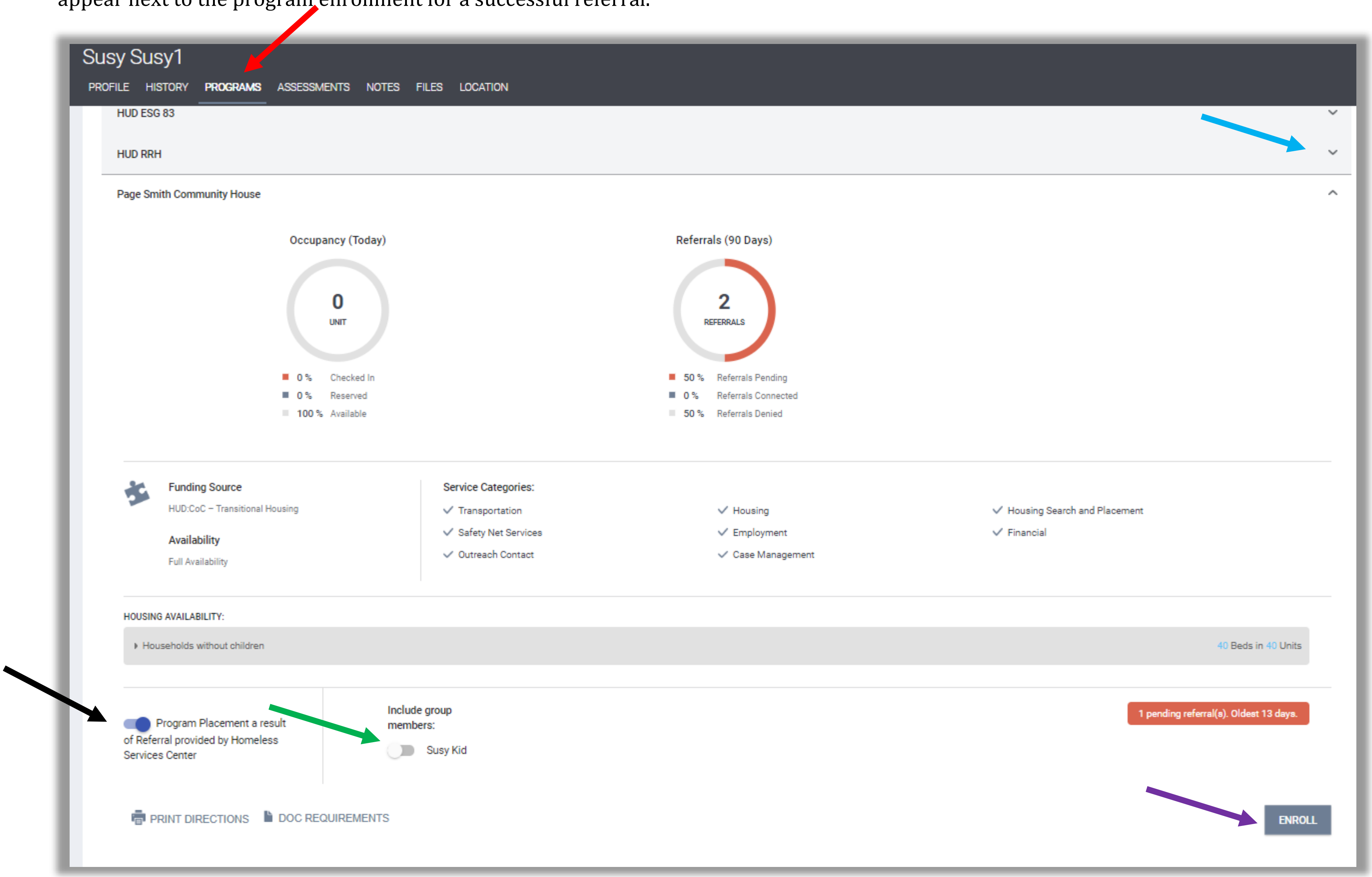




After clicking **Search** in the search box, click on the edit icon next to the client's name (gold arrow). This will take you to the client's profile page.

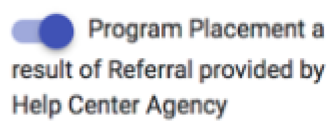
Enrolling the Referred Client

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.



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).