



Homeless Management Information System

Santa Cruz County Continuum of Care

Clarity HMIS workflow Referrals for Managers



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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 the Program Availability, click on **Referrals** (red arrow), then click on **Availability** (blue arrow). Click on the drop down arrow on the program you wish to edit the availability (green arrow).

The screenshot displays the Encompass software interface. The top navigation bar includes the Encompass logo, a search icon, a case load icon, and a 'REFERRALS' menu item highlighted with a red arrow. Below the navigation bar, the 'Availability' tab is selected, indicated by a blue arrow. The main content area shows a list of programs with their availability status. The 'Encompass - Housing for Health 2 (PSH)' program is highlighted with a green arrow pointing to its dropdown menu. The right sidebar shows a message: 'There are no results'.

| Program | Full Availability | Limited Availability | No Availability |
|---|--------------------------|-------------------------------------|--------------------------|
| Casa Linda (PSH) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Encompass - Housing for Health 2 (PSH) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Encompass - River Street Shelter (ES) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Encompass - River Street Shelter PATH (S) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Program Availability-continued

Once you are in the right program you wish to edit the availability, click on **LIMITED AVAILABILITY** or **NO AVAILABILITY**. With **Limited Availability**, manager users can add additional openings or delete openings for the program by clicking **Add Single Opening** or **Add Multiple Openings** (red arrows). After completing this step, message the Matchmaker with the Program's Availability using Clarity Messaging.

Encompass - Housing for Health 2 (PSH)

FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

There are no reserved openings

+ ADD SINGLE OPENING + ADD MULTIPLE OPENINGS

ADD AN OPENING

Date 03/06/2019

Additional Notes

SAVE CHANGES CANCEL

For **Single Opening**, enter the date the bed will be available for the client and add the description of the unit available.

For **Multiple Openings**, enter the *Number of Openings* available and enter the date the beds will be available. Then enter a description of the units in *Additional Notes* for the Matchmaker.

ADD OPENINGS

Number of Openings 2

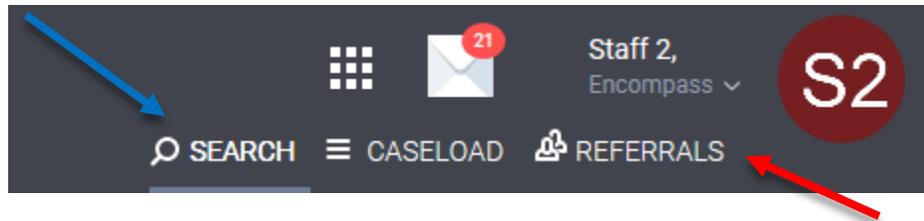
Date 03/06/2019

Additional Notes

SAVE CHANGES CANCEL

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).



REFERRALS

Pending Community Queue Analysis Completed Denied Sent Availability

Pending Referrals

Search Mode Standard ▼

Eligible Clients Only Sort By Default ▼

SEARCH

| Client | Referral Date | Qualified | Days Pending |
|---|---------------|------------|---------------------------|
|  Twinkle Star Program: Freedom Cottages Referred by: Association of Faith Communities | 05/02/2018 | Reassigned | 84 |
| Peach Princess Program: Freedom Cottages Referred by: Encompass | 05/15/2018 | Reassigned | 71 total 72 in process |
| Susy Smith Program: Grace Commons Referred by: Homeless Services Center | 07/12/2018 | Reassigned | 13 |

Once the Matchmaker re-assigns the client to a program, the client's referral will move to the **Pending** referrals tab (green arrow). Click on the edit icon next to the client's name.

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 System.

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).

REFERRAL: EDIT

| | |
|--------------------|---|
| Client | Twinkle Star |
| Referred Program | Freedom Cottages |
| Referred to Agency | Encompass |
| Referring Agency | Association of Faith Communities |
| Referred Date | 05/02/2018 12:26 PM |
| Days Pending | 84 day(s) |
| Qualified | Reassigned |
| VI-SPDAT-V2 score | 4 |
| Referred by Staff | Matchmaker Matchmaker |
| Case Manager | Select ▼ ↖ |
| Last Activity | 05/02/2018 CHECK-IN ↖ |
| Status | Pending ▼ ↖ |
| Private | <input type="checkbox"/> ↖ |

SAVE CHANGES
CANCEL

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 ADD CONNECTION +

There are no results to display

NOTES

No records to display...

B I ☰ ☰

SEND NOTE

HISTORY

| Program Name | Activity | Date | Days Pending | Staff |
|-------------------------------|--|------------|--------------|--------------------------|
| Freedom Cottages Encompass | In-Process In Process | 05/15/2018 | 0 | Staff 2 |
| Community Queue Encompass | Program Referral | 05/15/2018 | 0 | Matchmaker Matchmaker |
| Community Queue Encompass | Added to Queue | 05/15/2018 | 0 | Staff 3 |

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.