Unit Management and CCAN Referrals in Clarity

HMIS Workflow for Housing Providers

September 2022

Cambridge CONTINUUM OF CARE

Overview

Bed and Unit Inventory Setup in Clarity

Listing Available Units

Managing Pending Referrals from CCAN

Bed and Unit Inventory: Project Setup

- The HMIS Lead, in coordination with an Agency Manager/HMIS Agency Admin, sets up bed and unit inventory information based on the number and type of beds in a project

- Part of the Project Descriptor Data Elements (PDDEs), a necessary part of HMIS setup

- Accuracy of this information is necessary for the Housing Inventory Chart (HIC) and Longitudinal Systems Analysis (LSA) reports to HUD

Bed and Unit Inventory: Referrals Availability Tab

- This feature is what the Cambridge CoC relies on for information on available housing units

- Designated staff in Permanent Housing and Rapid Rehousing projects are responsible for maintaining this information and keeping it updated

- This feature is accessible by clicking on "Referrals" and clicking on the "Availability" tab

Referrals Tab Navigation

Helpful features on individual client referral pages:

- **Notes**: real-time updates between CCAN staff, agency management, and housing providers (you)

- **History**: displays a log of all relevant activity for the client's referral and placement on the queue

- **Pending**: all clients/households matched to a housing opportunity at your agency that are currently Pending or Pending/In Process

- **Completed**: all clients/households that were enrolled into a housing project within your agency as a result of a CCAN match to housing

- **Denied**: all clients/households that were matched to a housing opportunity at your agency but were not enrolled in a housing project

- **Availability**: where housing providers update the bed and unit availability to which referrals are matched

Listing Available Units

1. From the Availability tab, select the appropriate queue (Streamlined, RRH, or EHV)

2. Residential programs should be set to "Limited Availability"

3. Click on the downward tick symbol next to your program to view, edit, or add available units
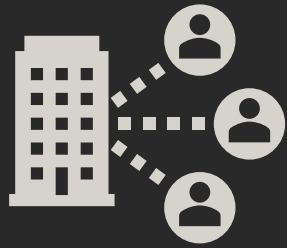
Listing Available Units

1. Add an available unit or units by clicking on "Add single opening" or "Add multiple openings"

2. Record the date the unit will become available

3. **Record the unit's address (including unit number) in the "Additional Notes" field**, including additional notes if needed. Do not include any PII

4. Complete the remaining fields

*Accurate unit availability information from **all** housing providers is used by CCAN staff to identify vacancies and make referrals.*

Managing Pending Referrals

CCAN Referrals to Open Units

- When CCAN staff identify a match for one of your projects' openings, they will refer directly to that unit in Clarity

- You will receive a Clarity message and email notification when this happens. Note that no one will receive any replies to this automated message

- Navigate to the client's referral page to see real-time notes between CCAN staff, agency management, and housing providers (you)

- In order to know the best method of connecting with the client or client contacts, navigate to the Contact tab
  - If you obtain updated or new contact information for the client or one of their contacts, please add it to this tab

Receiving a Referral from CCAN

1. Access the Referrals tab in Clarity

2. Click on the Pending tab to see any pending referrals in your agency

3. Click on the edit button next to the client's name. Click "Check In" to let others know you have seen the referral. Once you have connected with the client and accepted the referral, then change the referral status to "Pending/In Process"

Update referral status and save
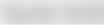
The unit will now appear under "Reserved Openings" in the Availability tab:

Recording Referral Notes

- Used for information related to housing the client

- Shared with others in order to streamline the housing process for the client and to coordinate care among multiple agencies

- Note: only the user who created the referral will receive a notification when there is a new referral note

Enrolling the Client into Your Program

If the client or family is a match for your project, you'll enroll them the same way you do now, via the Programs tab. However, since the enrollment resulted from a CCAN referral, the software will maintain a connection that will inform our report output

Remember that it is extremely important to enter a **Housing Move-In Date** when the client physically moves into the unit. The client will continue to appear as homeless in the system without it

Denying a Referral

- If you have to deny a referral, update the referral status to "Denied" and additional fields will appear

- Unless the client is deceased or has self-resolved/found housing elsewhere, select "Yes" for Send to Community Queue. Do not send the client back to queue if they are housed!

- **Important**: the unit of a denied referral will automatically be made available again after a denial. You do **not** have to go into the Availability tab and add the unit again—doing so will create a duplicate unit

Status	Denied
Send to Community Queue	Yes
Denied By Type	Provider
Denied Reason	Client could not be located
Denial Information	Shelter staff have not seen client in two weeks; calls are not answered or returned

Questions?

Cambridge
CAN
coordinated access network
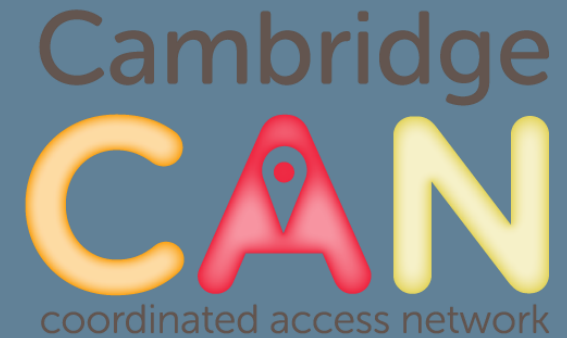
More CCAN HMIS resources: cambridgecoc.org/ccan