



councilofcommunityservices.org/hmis-user-training-center/

Coordinated Entry Training

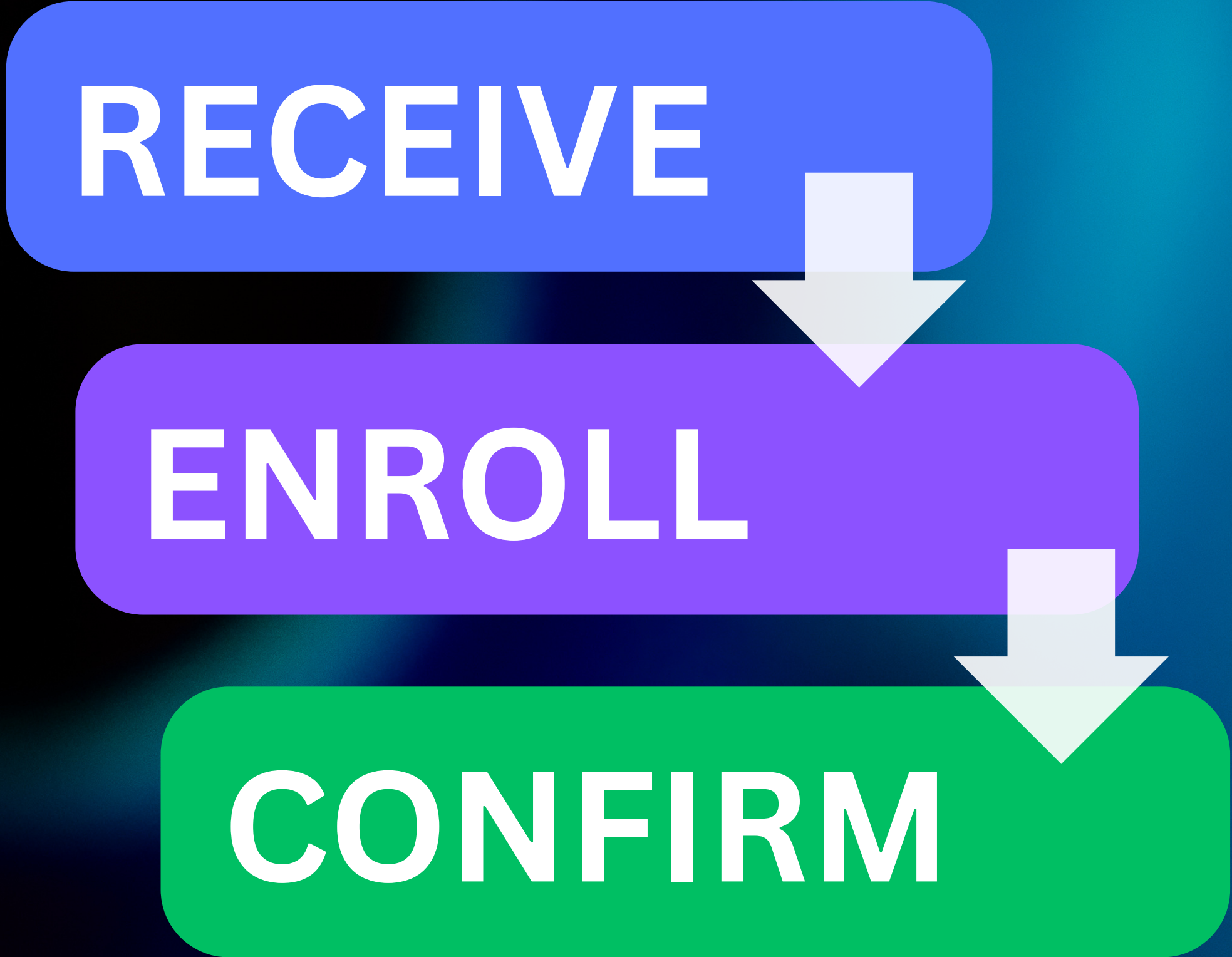
PROGRAM REFERRAL MANAGER - ACCEPTING CE REFERRALS

Updated August 2026 for new Clarity User Interface

The Referral Management Process

- RECEIVE a housing program referral for a client on the COMMUNITY QUEUE
- ENROLL the client in your agency's HOUSING PROGRAM
- CONFIRM that the program enrollment is connected to the Coordinated Entry REFERRAL

RECEIVE



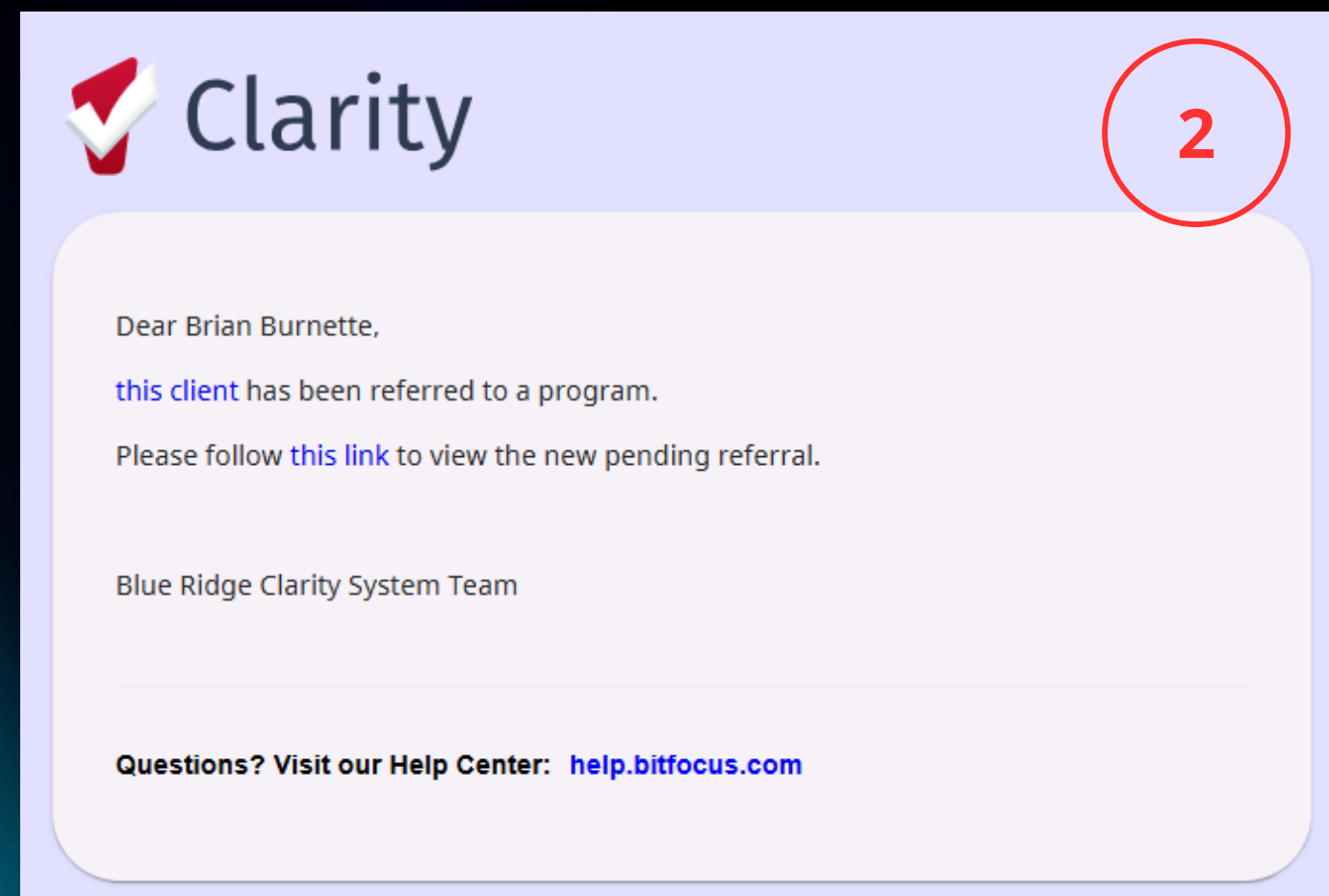
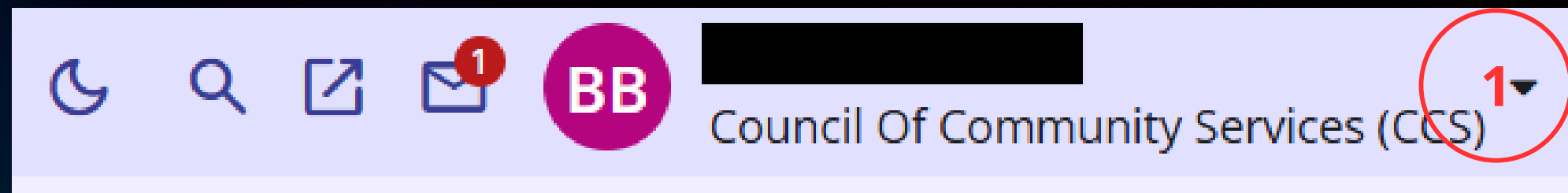
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graph TD; A[RECEIVE] --> B[ENROLL]; B --> C[CONFIRM];
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ENROLL

CONFIRM

RECEIVING A REFERRAL FROM CE STAFF

When a Coordinated Entry Referral Matchmaker reassigns a client from the Community Queue to your housing program, you will receive a notification in two ways:

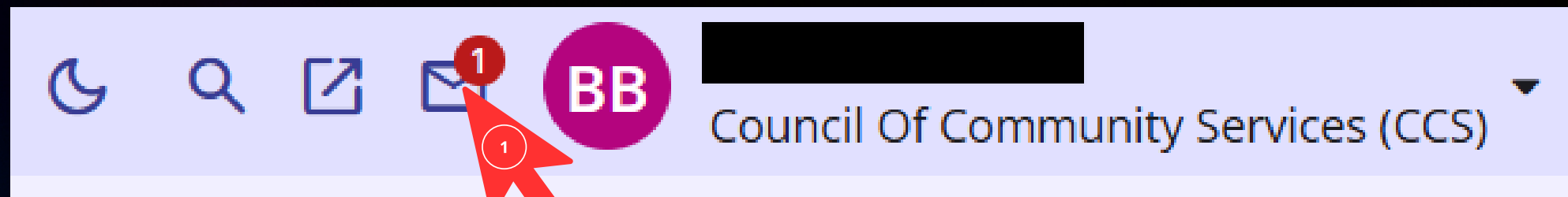


1. HMIS Inbox - A new message will be sent to your internal HMIS Inbox with links to the referral and the client's profile.
2. User Email Address - An email with the same links will also be sent to the email you have linked to your HMIS User Account.

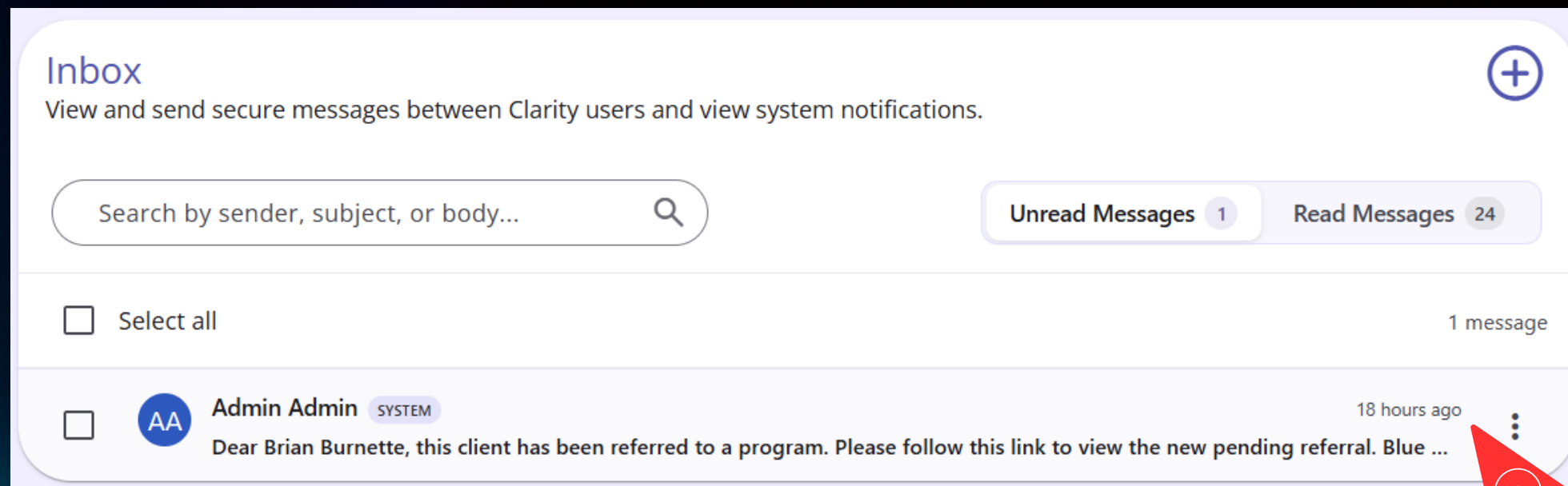
RESPONDING TO THE REFERRAL

OPTION #1 - HMIS INBOX

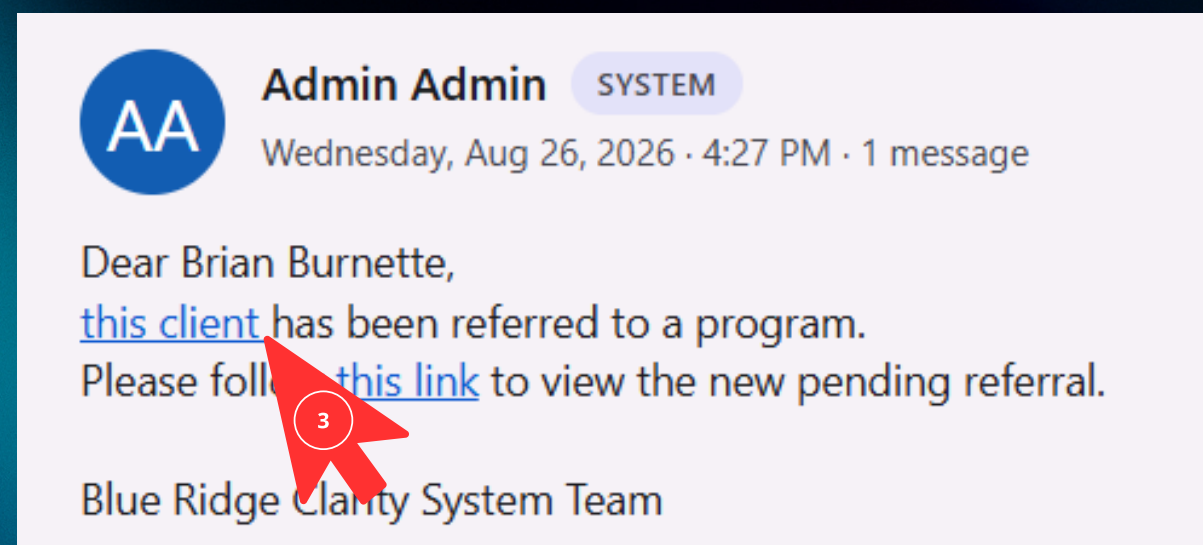
Follow these steps to access the client from the HMIS Inbox message:



1. CLICK on the envelope/ message icon to navigate to your HMIS Inbox.



2. When your Inbox loads, click on the message to open it.

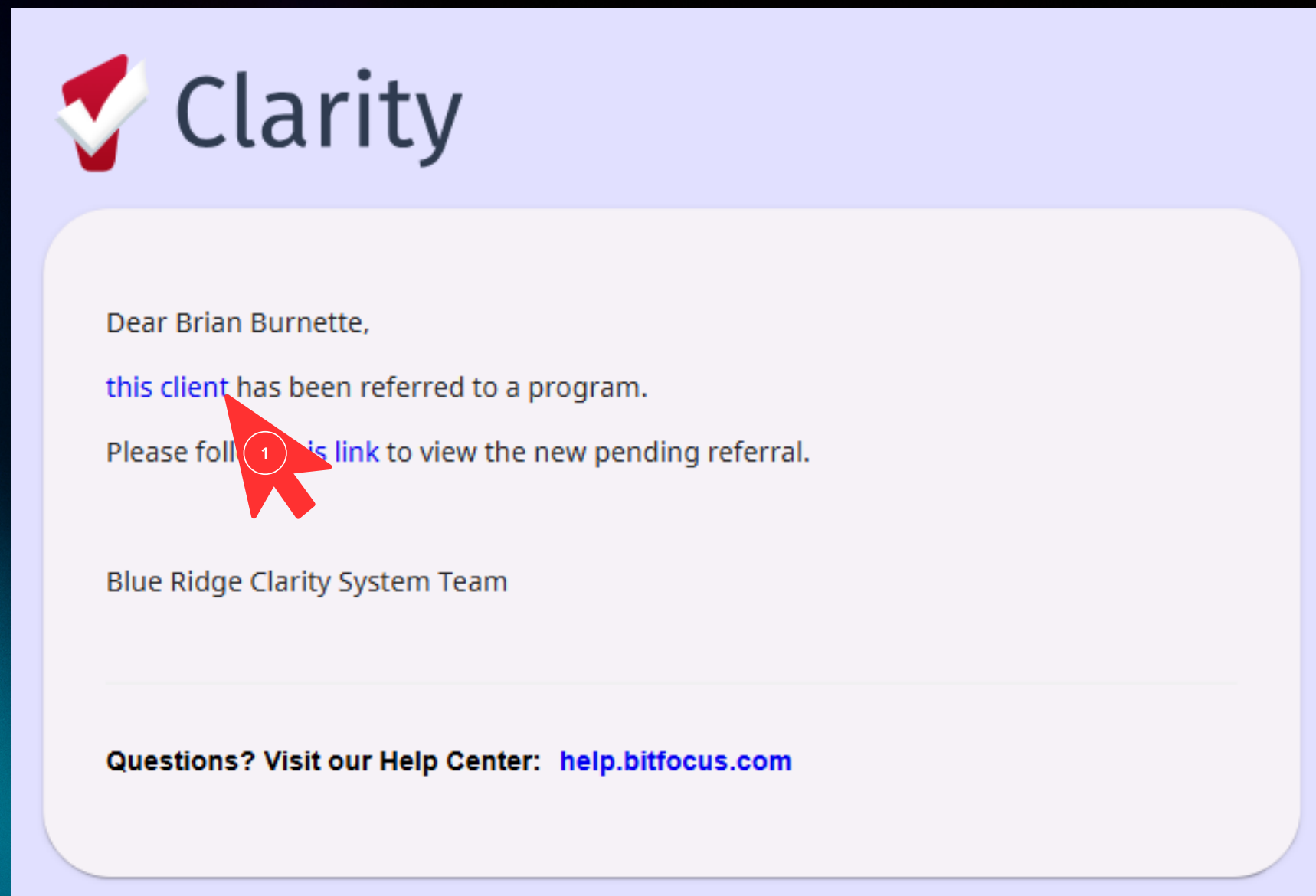


3. When the message loads, CLICK on the link for “this client” to navigate directly to the client’s profile page.

RESPONDING TO THE REFERRAL

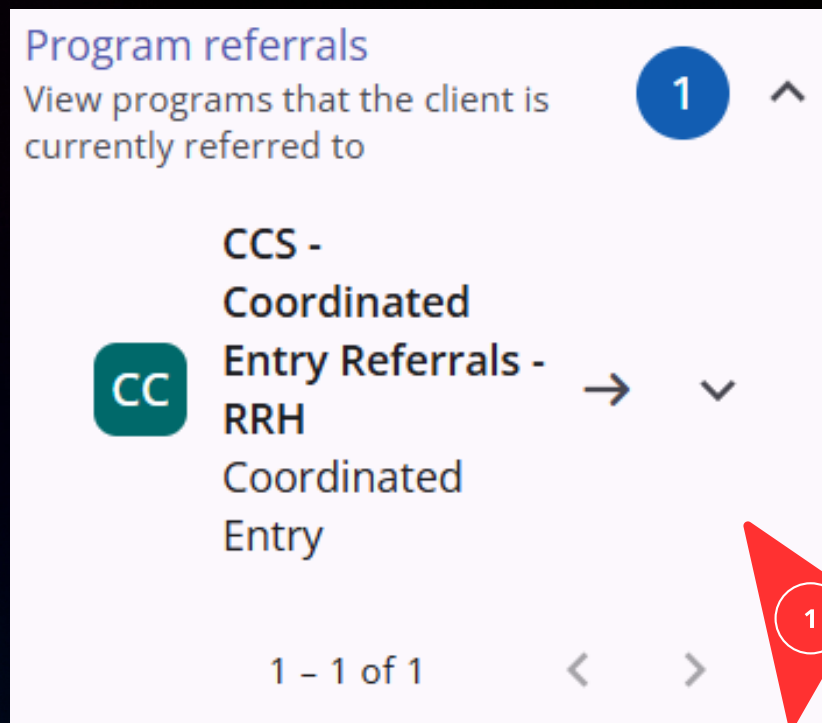
OPTION #2 - EMAIL

If you wish to navigate to the client's profile from your email, open the message in your email inbox (Outlook, Gmail, etc...). The contents to the email are the same as in the message received in you HMIS Inbox.

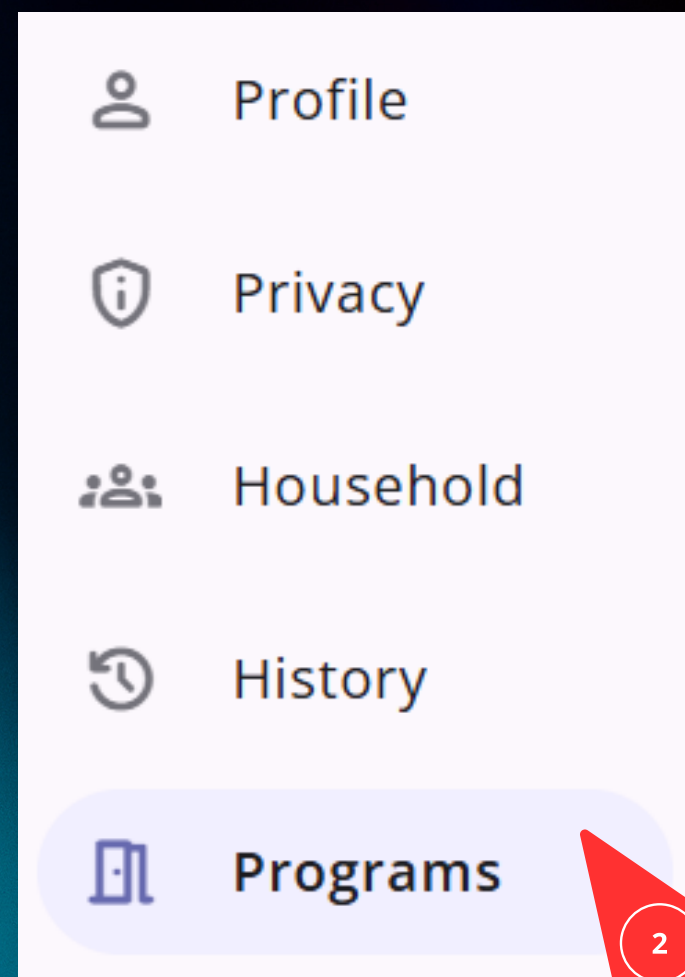


1. Go to the body of the email sent to you from “Blue Ridge Clarity System” and CLICK on the link for “this client” to navigate directly to the client’s profile page.

ENROLLING THE CLIENT IN YOUR HOUSING PROGRAM



1. When the Client Profile Screen loads, you can double-check that the referral was made to your correct program by looking at the “Program Referrals” box on the right-hand side of the screen. If the client was referred to the wrong program, please contact the CE Matchmaker staff at Central Intake or your HMIS System Admins to make the necessary corrections.

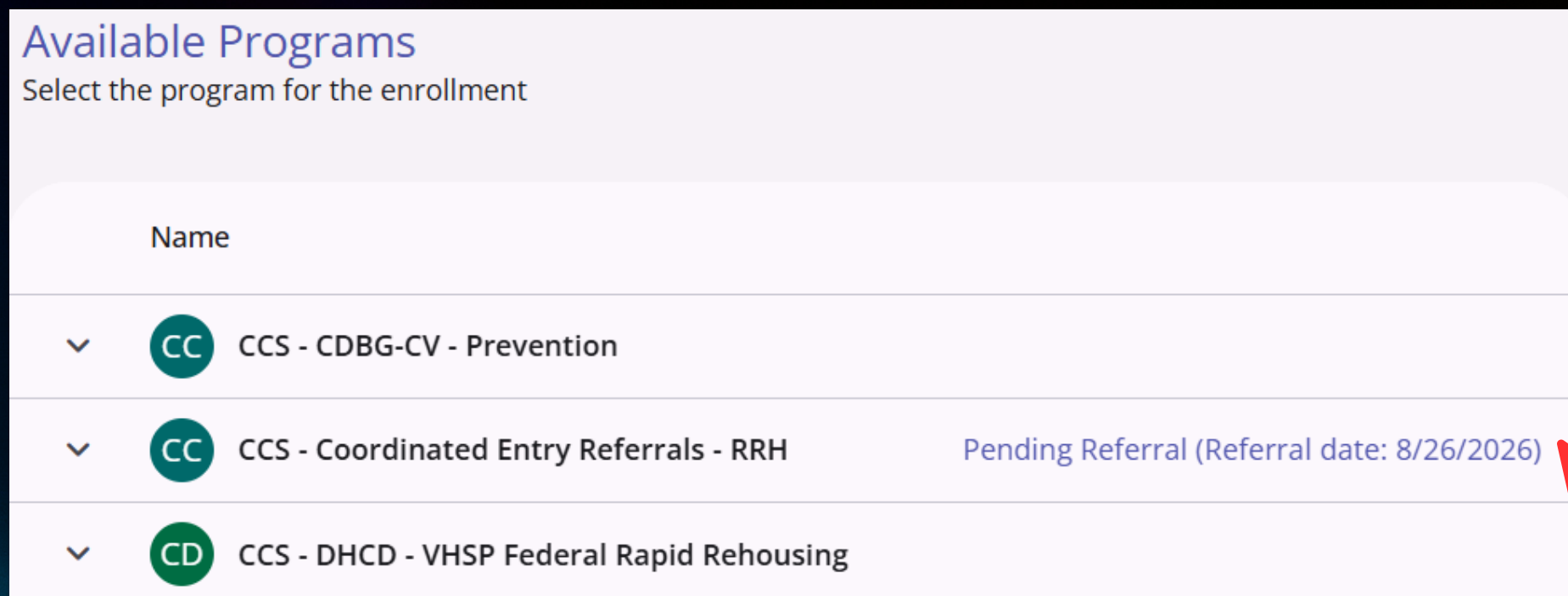


2. If the referred-to program is correct, then go to the Client Profile Navigation Bar on the left-hand side of the screen. CLICK “Programs” to navigate to the “Program Enrollments” screen.

ENROLLING THE CLIENT IN YOUR HOUSING PROGRAM



1. When the “Program Enrollments” screen loads, click the (+) or “Add Program” icon in the top right corner of the box to open the list of available programs.



2. When the “Available Programs” screen loads, look for the correct program name. Notice that the CE-connected program will have a “Pending Referral” notice next to its name. CLICK on the program name to highlight it and then CLICK “Next” at the bottom of the screen open the “New Client Program” enrollment screen.

ENROLLING THE CLIENT IN YOUR HOUSING PROGRAM

New Client Program
Create client program for Some Client

Project Start Date *

08/27/2026

MM/DD/YYYY

Translation Assistance Needed

Translation Assistance Needed *

No



Prior Living Situation

Type of Residence *

Select

Length of Stay in Prior Living Situation *

Select

Additional Notes on Homeless History



Additional Information

Sex *

Male

Cancel Save



1. Begin filling in the Program Enrollment as you normally would. If the client has an active Coordinated Entry enrollment, then much of their data fields should cascade with existing data.
2. Confirm the client's current homeless living situation and update the fields in the "Prior Living Situation" section.
3. When all the data fields are filled in, CLICK "Save" and the "Current Living Situation" box will appear.

ENROLLING THE CLIENT IN YOUR HOUSING PROGRAM

Record Current Living Situation
Current Living Situation is required for this program at each client contact. Complete the initial assessment below.

Date of Contact *

08/27/2026

MM/DD/YYYY

CURRENT LIVING SITUATION

Location of Current Living Situation

Search for an address

1

Current Living Situation *

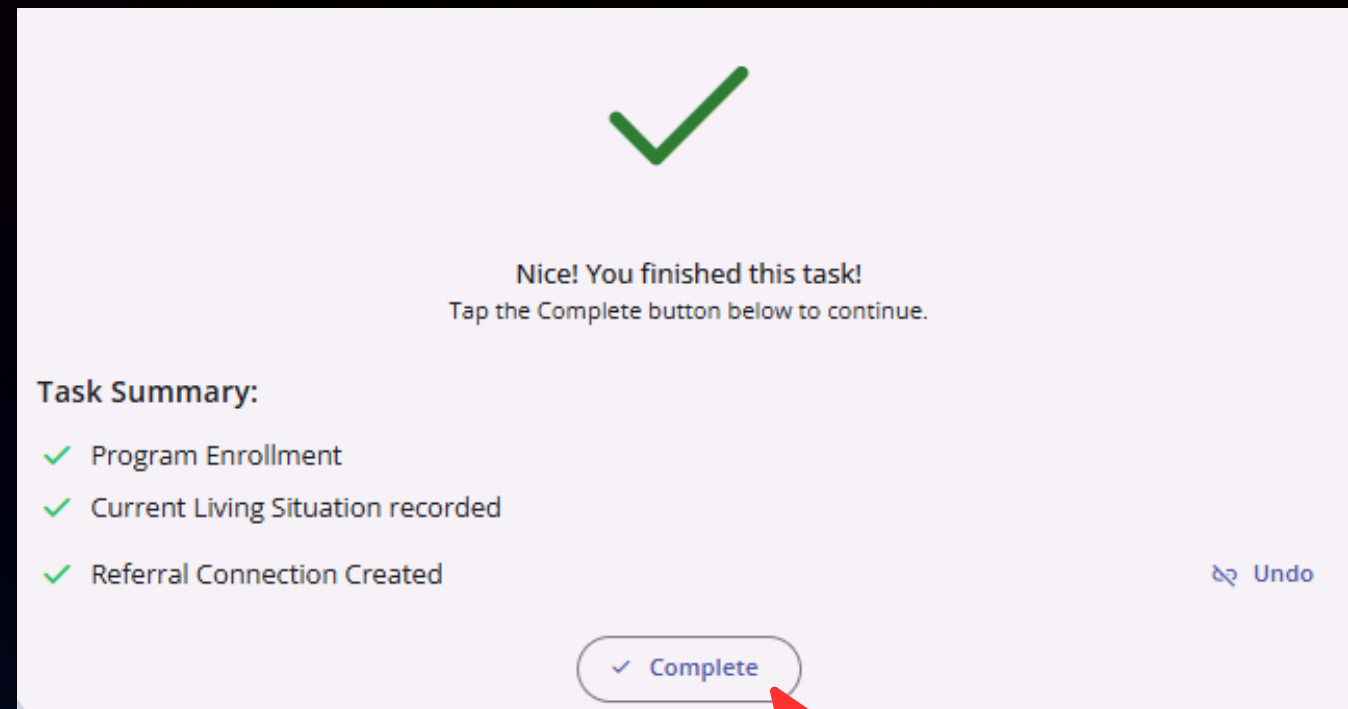
Select

This field is required.

Location Details

1. When the “Record Current Living Situation” screen loads, you can fill in the client’s current address (shelter or unsheltered location), but the only REQUIRED data field is the “Current Living Situation” field. SELECT “Place not meant for habitation...” or “Emergency Shelter...” At the bottom of the screen, CLICK “Save” and a “Task Summary” box will appear.

CONFIRMING THE REFERRAL CONNECTION



1. Check the “Task Summary” box to confirm that “Referral Connection Created” is displayed to ensure that this program enrollment is connected to the Coordinated Entry referral. CLICK “Complete” and you will return to the “Program Enrollments” screen.

Program Name	Entry Date	Exit Date	Created by	
 CCS - Coordinated Entry Referrals - RRH PH – Rapid Re-Housing Council of Community Services (CCS)	 8/27/26 1 days ago	 Active	 Brian Burnette Council of Community Services (CCS) Added by Brian Burnette from primary agency System	
 Coordinated Entry Coordinated Entry Coordinated Entry	 8/26/26 2 days ago	 Active	 Brian Burnette Coordinated Entry Added by Brian Burnette from System	

2. Once you return to the “Program Enrollments” screen, you can confirm the Referral Connection one final time by hovering over the “Referral Icon” at the right side of the program entry. A “Referral” box should appear that confirms the connection.

QUESTIONS?



Brian Burnette

Director of Housing Services/HMIS System Administrator

brianb@councilofcommunityservices.org

Ben Bristoll

HMIS Database Administrator

benb @councilofcommunityservices.org