



HOW TO COMPLETE A DCA REFERRAL IN CLARITY HMIS

STEP ONE:

Search for the client and select the client's profile.

Client Search > Martha Test > Programs

MT Martha Test
You are currently viewing the Client Record pages for Martha Test.

Profile
Privacy
Household
History
Programs
Assessments
Units/Beds
Care Team
Notes
Alerts

Program enrollments
Program enrollment history for Martha Test

Program Name	Entry Date	Exit Date	Created by
YMCA - VB Family ES Emergency Shelter - Entry Exit YMCA	8/12/26 1 days ago	Active	Jennifer McCloskey-Haas YMCA Added by Jennifer McCloskey-Haas from primary agency System
MCH - Outreach Street Outreach Mount Carmel Health	6/30/26 1 months 13 days ago	7/8/26 1 months 5 days ago	Jennifer McCloskey-Haas Mount Carmel Health Added by Jennifer McCloskey-Haas from primary agency System

1 - 2 of 2

Navigate to the client's active program. Click on the active program.

Client Search > Martha Test > Programs

MT Martha Test
Expand this section to view more details about the client that this program enrollment is for.

Profile
Privacy
Household
History
Programs
Assessments
Units/Beds
Care Team
Notes
Alerts
Files
Forms
Contacts
Location
Referrals
Restrictions

Program enrollments
Program enrollment history for Martha Test

Program Name	Entry Date	Exit Date	Created by
YMCA - VB Family ES Emergency Shelter - Entry Exit YMCA	8/12/26 1 days ago	Active	Jennifer McCloskey-Haas YMCA Added by Jennifer McCloskey-Haas from primary agency System
MCH - Outreach Street Outreach Mount Carmel Health	6/30/26 1 months 13 days ago	7/8/26 1 months 5 days ago	Jennifer McCloskey-Haas Mount Carmel Health Added by Jennifer McCloskey-Haas from primary agency System

1 - 2 of 2



Click on “Assessments” at the program level.

The screenshot shows the client profile for Martha Test. The top navigation bar includes 'Programs' and 'YMCA - VB Family ES (1138843)'. The 'Assessments' tab is highlighted with a blue arrow. The main content area shows the 'Edit Client Program' form with fields for Program Date, Translation Assistance Needed, Shelter Bed Number, Prior Living Situation, Type of Residence, Length of Stay in Prior Living Situation, Approximate date this episode of homelessness started, Number of times on the streets, in ES, or Safe Haven in the past three years, and Total number of months homeless on the streets, in ES, or Safe Haven in the past three years.

Click on the plus sign to add a program level assessment.

The screenshot shows the 'Program assessments' page. The 'Assessments' tab is highlighted with a blue arrow. A plus sign icon is highlighted with a blue arrow. The page displays a table of assessments with columns: Name, Created by, Created on, and Completed. The table shows one assessment: 'Current Living Situation' created by Jennifer McCloskey-Haas on 8/12/26 at 10:00 AM, completed on 8/12/26.

Name	Created by	Created on	Completed
Current Living Situation	Jennifer McCloskey-Haas YMCA Added by Jennifer McCloskey-Haas from primary agency System	8/12/26, 10:00 AM Today	8/12/26 1 days ago



Select “DCA Referral”.

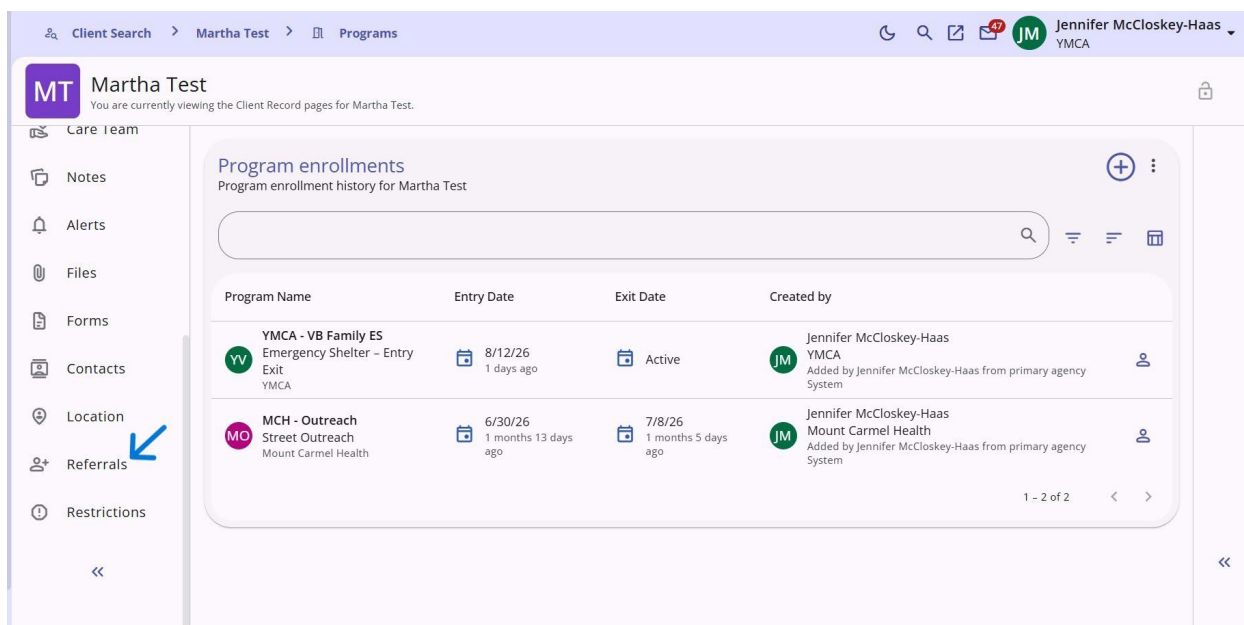
The screenshot shows the 'Add a program assessment' dialog box. The 'Available Assessments' list includes: CL Current Living Situation, SU Status Update Assessment, AA Annual Assessment, DR DCA Referral (selected with a blue arrow), RP Rapid-Rehousing Prioritization Tool (RPT), So Severity of Service Needs Assessment (SSNA), and TA TAY Assessment. The 'Next' button is highlighted with a blue arrow.

Complete the DCA Referral and click “Save”, then “Complete”.

The screenshot shows the 'Martha Test assessment' form. The 'Assessment Date' is set to 08/12/2026. The 'Total DCA Amount Requested' field is empty. The form includes sections for 'Rental Assistance', 'Past Due Rental Assistance', 'Security Deposit Assistance', 'Utility Assistance', 'Past Due Utility Assistance', and 'Rental Application Fees'.

STEP TWO:

Next, at the client/agency level, scroll down to the Referrals tab and click on “Referrals”.

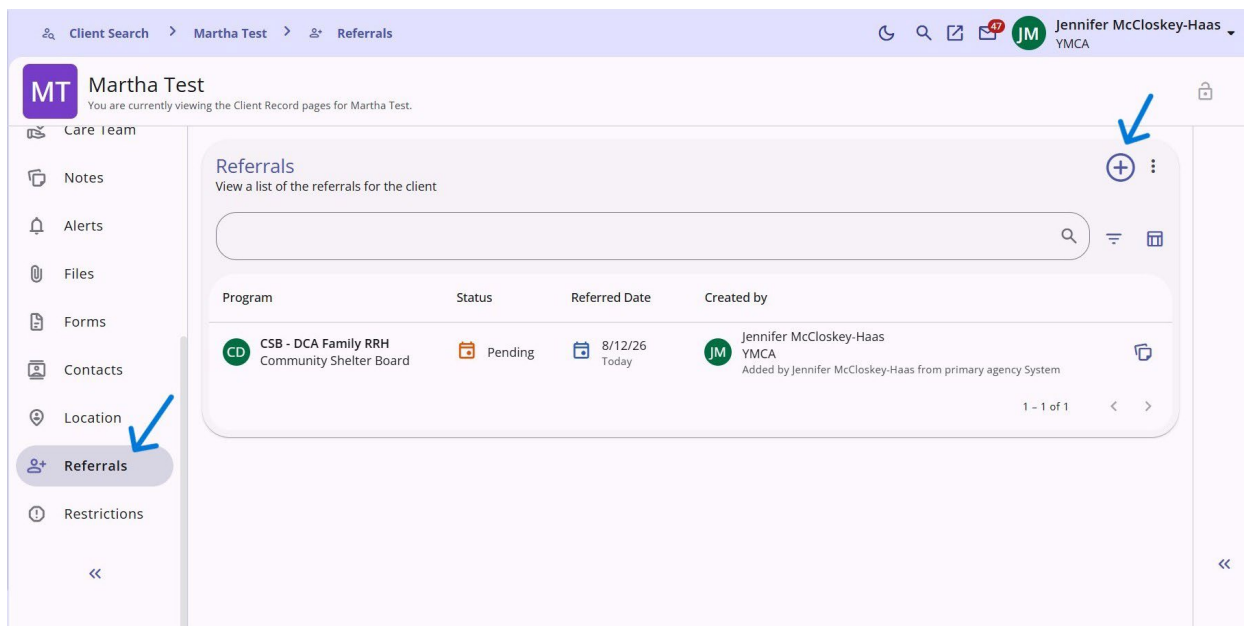


Program enrollments
Program enrollment history for Martha Test

Program Name	Entry Date	Exit Date	Created by
YMCA - VB Family ES Emergency Shelter - Entry Exit YMCA	8/12/26 1 days ago	Active	Jennifer McCloskey-Haas YMCA Added by Jennifer McCloskey-Haas from primary agency System
MCH - Outreach Street Outreach Mount Carmel Health	6/30/26 1 months 13 days ago	7/8/26 1 months 5 days ago	Jennifer McCloskey-Haas Mount Carmel Health Added by Jennifer McCloskey-Haas from primary agency System

1 - 2 of 2

Click the plus sign to add a new referral.

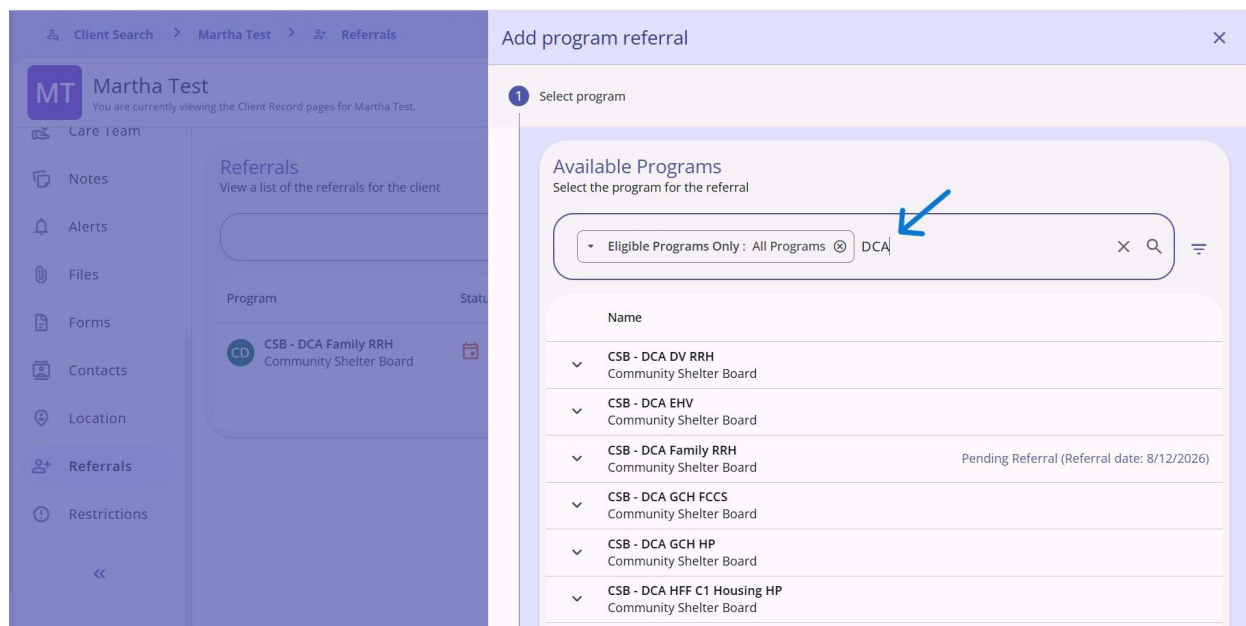


Referrals
View a list of the referrals for the client

Program	Status	Referred Date	Created by
CSB - DCA Family RRH Community Shelter Board	Pending	8/12/26 Today	Jennifer McCloskey-Haas YMCA Added by Jennifer McCloskey-Haas from primary agency System

1 - 1 of 1

Type “DCA” in the search box to filter the list.



Add program referral

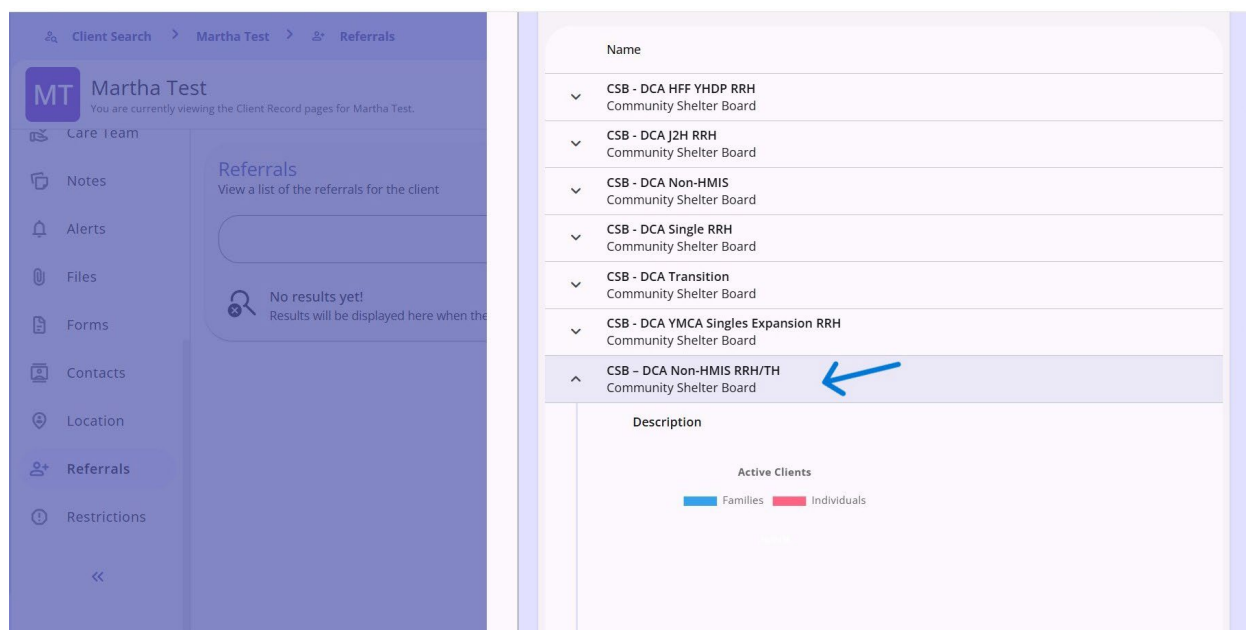
1 Select program

Available Programs
Select the program for the referral

Eligible Programs Only: All Programs

Name
CSB - DCA DV RRH Community Shelter Board
CSB - DCA EHV Community Shelter Board
CSB - DCA Family RRH Community Shelter Board
CSB - DCA GCH FCCS Community Shelter Board
CSB - DCA GCH HP Community Shelter Board
CSB - DCA HFF C1 Housing HP Community Shelter Board

Select the appropriate program to refer to.



Add program referral

1 Select program

Available Programs
Select the program for the referral

Eligible Programs Only: All Programs

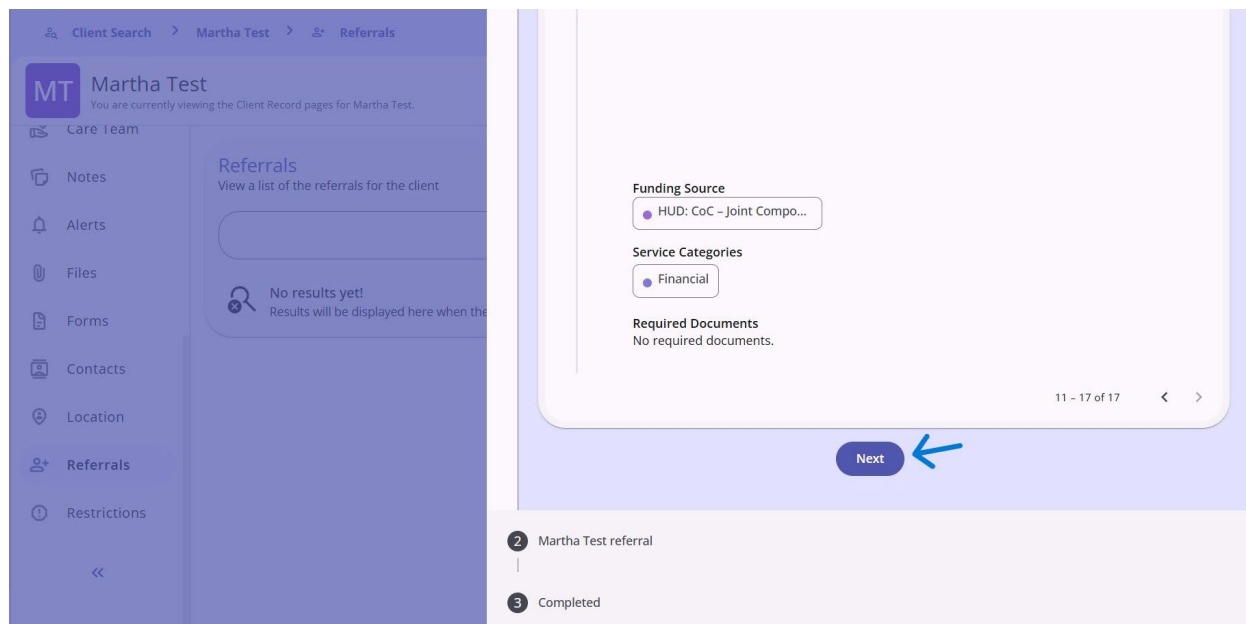
Name
CSB - DCA HFF YHDP RRH Community Shelter Board
CSB - DCA J2H RRH Community Shelter Board
CSB - DCA Non-HMIS Community Shelter Board
CSB - DCA Single RRH Community Shelter Board
CSB - DCA Transition Community Shelter Board
CSB - DCA YMCA Singles Expansion RRH Community Shelter Board
CSB - DCA Non-HMIS RRH/TH Community Shelter Board

Description

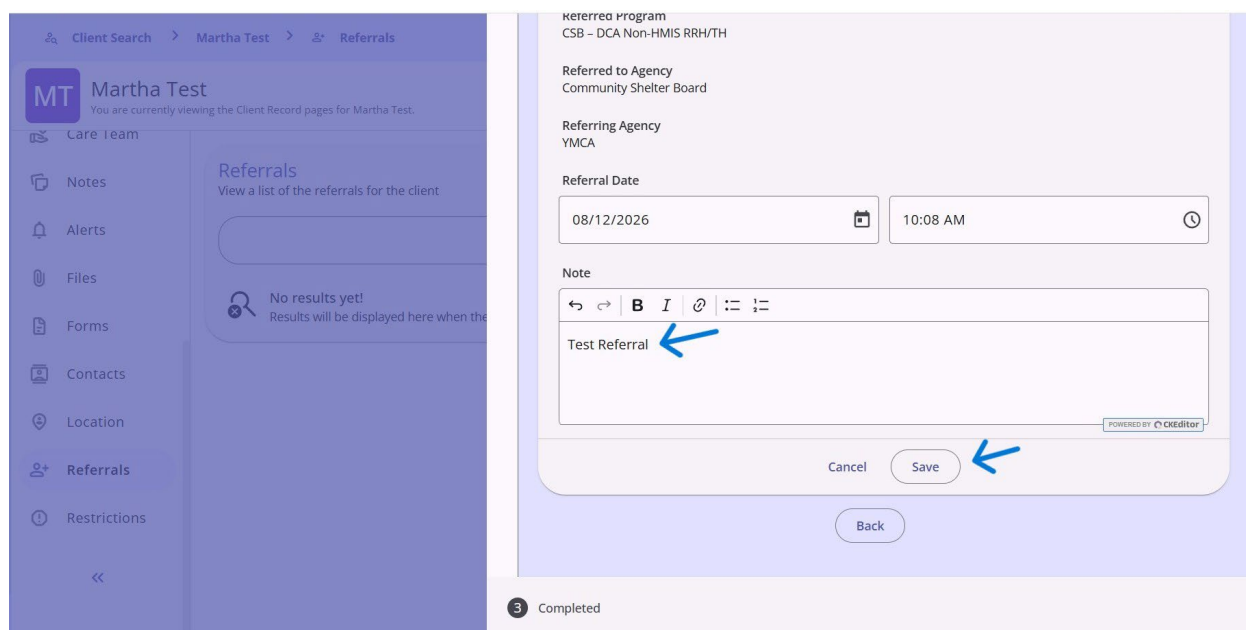
Active Clients

Families Individuals

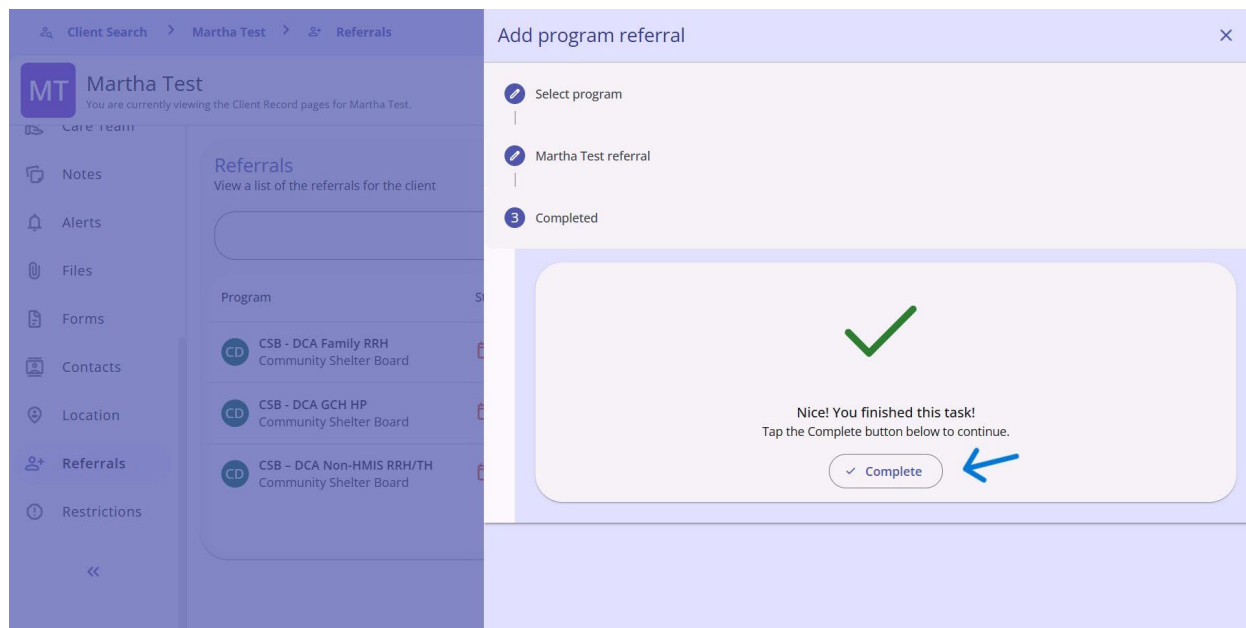
Scroll down to click “Next”.



Update the referral date if needed. Add notes. Click “Save”.



Click “Complete”.



The screenshot shows the CSB software interface. On the left is a sidebar with navigation options: Client Search, Martha Test, Referrals, Care Team, Notes, Alerts, Files, Forms, Contacts, Location, Referrals, and Restrictions. The main area displays the 'Add program referral' dialog box. The dialog box has a title bar with a close button (X). Below the title bar is a list of steps: 'Select program', 'Martha Test referral', and 'Completed'. The 'Completed' step is highlighted with a green checkmark. Below the list is a large white box with a green checkmark and the text 'Nice! You finished this task! Tap the Complete button below to continue.' A blue arrow points to the 'Complete' button, which is a rounded rectangle with a green checkmark and the text 'Complete'.