

# HMIS Referrals

September 2020

# HMIS Referrals

Part 1: Making Referrals

# Making Referrals

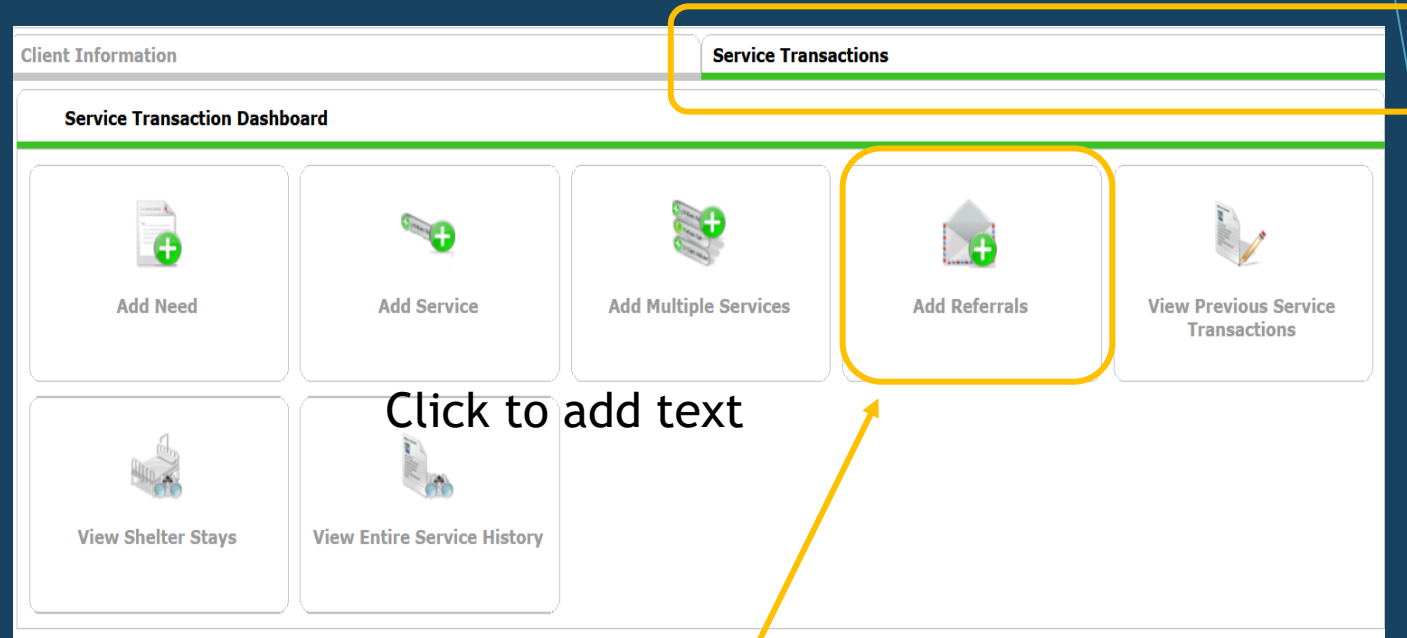
- ▶ Before setting up a referral make sure:
  - ▶ You are EDA into the correct project page, if needed
  - ▶ Client profile search/creation, ROI, and entry/exit are complete
- ▶ Once everything has been completed you can move on to the referral process

# How does “Enter Data As” help with referrals?

- ▶ Referrals are sent from one project to another and NOT from one agency to another agency
- ▶ Enter Data As (EDA) lets you access the correct project so that you can see the incoming referral

# Getting Started

Once you have determined if and where a client will be referred, select “Service Transactions” tab from client profile screen



Click to add text

Select “Add Referrals”  
button

# Service

**Needs Assignment**

Select up to 5 Needs

**Service Code Quicklist**

1. Click "Housing Related Coordinated Entry" in this box so it is highlighted in blue

Housing Related Coordinated Entry (BH-0500.3200)

2. Click "Add Terms & Go to Search Results" button, then continue to the next section

DO NOT USE THESE BUTTONS!!!

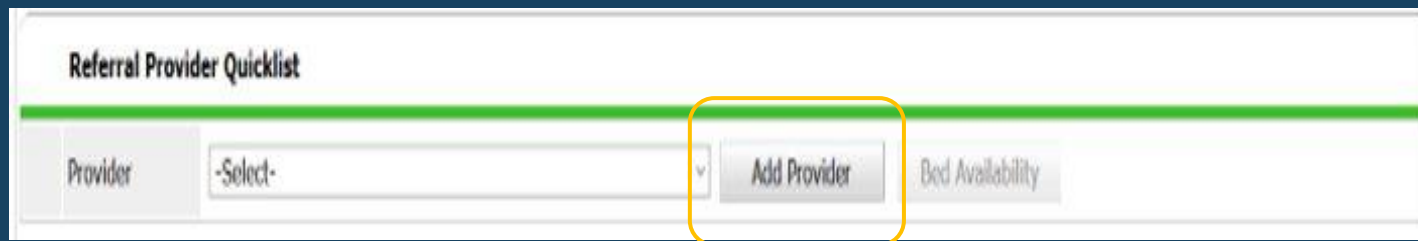
~~Add Terms~~ ~~Service Code Look-Up~~ Add Terms & Go To Search Results

If client is being served as part of a household, check the boxes of all clients being referred under “**Household Members**” section

From the “**Service Code Quicklist**”, choose service the client is being referred for and click “**Add Terms and go to Search Results**” (Housing Related to Coordinated Entry will be prepopulated)

# Referral Provider

- Once you have selected and added a need, you will need to select a project to refer the client.
- Under “**Referral Provider Quicklist**,” select the project the client is being referred to from the dropdown menu and click “**Add Provider**”



The screenshot shows a web interface titled "Referral Provider Quicklist". Below the title is a horizontal green line. Underneath the line, there is a form with a label "Provider" on the left, a dropdown menu showing "-Select-" in the middle, and a button labeled "Add Provider" on the right. The "Add Provider" button is highlighted with a yellow rectangular box. To the right of the "Add Provider" button is a label "Bed Availability".

# Finalizing Referral

- ▶ Review the “Needs Referral Date” to ensure it matches the actual date of referral
- ▶ For “Referral Ranking,” select High, Medium, or Low
  - ▶ High - Client/Family was experiencing unsheltered homelessness at the time of referral
  - ▶ Medium - Client/Family was at imminent risk of experiencing homelessness within 72 hours
  - ▶ Low - Client/Family was at risk of experiencing homelessness in 4 days or more
- ▶ See if the client has a VI-SPDAT already recorded by clicking “Search” button beside VI-SPDAT, VI-FSPDAT, or TAY-VI-SPDAT (as applicable)
  - ▶ If a previously completed VI appears in the pop-up box, click the green plus sign to add score
  - ▶ If there is no SPDAT visible, indicate in the “Notes” section by adding “no VI-SPDAT visible”



# Finalizing Referral

- ▶ Add a referral note
  - ▶ Before adding your note, identify yourself using the following format - “Agency Name\_Staff Name\_Date of Note:”
  - ▶ Example: Raleigh/Wake Partnership\_Thurston Alexander-Smith\_12/12/2018
- ▶ In “Referral” section, check the box under Housing Related to Coordinated Entry
- ▶ Change “Date of Need” to the date of client’s pre-screen/entry
- ▶ Under “Selected Needs,” find pick lists on far right labeled “Need Status / Outcome / If Not Met, Reason”
  - ▶ The top picklist is “Need Status;” select “Identified”
  - ▶ Ignore the “Outcome” and “If Not Met, Reason” picklists
- ▶ Click “Save ALL” button

# HMIS Referrals

Part 2: Resolving Referrals

# Resolving Referrals: EDA

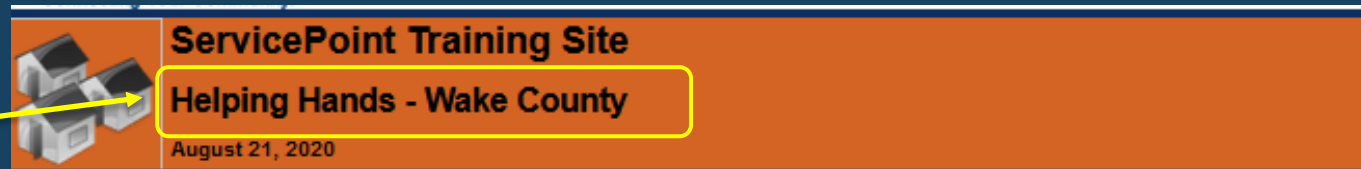
- ▶ If needed, EDA (Enter Data As) into the relevant project page in HMIS
- ▶ On your home screen will now have a new box labeled “Counts Report.” These reports will allow you to quickly check referrals to your project
- ▶ Note: When using EDA to switch programs, the number displayed does not always update properly. Always click the “Refresh” button to update the number even if the display shows “0”

# How does “Enter Data As” help with referrals?

- ▶ Referrals are sent from one project to another and NOT from one agency to another agency
- ▶ Enter Data As (EDA) lets you access the correct project so that you can see the incoming referral
- ▶ Some users such as Agency Administrators and those that only need to access one project don't have to worry about the Enter Data As function → What is your default EDA?

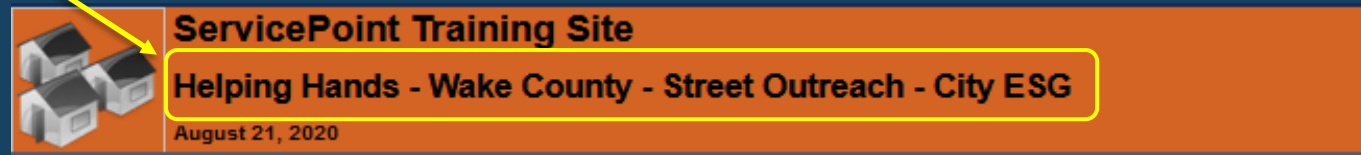
# Do I need to use Enter Data As to see the referral?

YES! - you automatically log in as non-shelter staff



**ServicePoint Training Site**  
Helping Hands - Wake County  
August 21, 2020

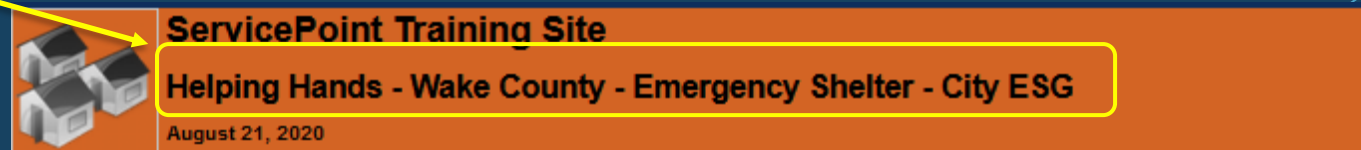
A yellow box highlights the text "Helping Hands - Wake County". A yellow arrow points from the text "YES! - you automatically log in as non-shelter staff" to the icon of three houses on the left side of the card.



**ServicePoint Training Site**  
Helping Hands - Wake County - Street Outreach - City ESG  
August 21, 2020

A yellow box highlights the text "Helping Hands - Wake County - Street Outreach - City ESG". A yellow arrow points from the text "YES! - you automatically log in as non-shelter staff" to the icon of three houses on the left side of the card.

NO! - you automatically log in as shelter staff

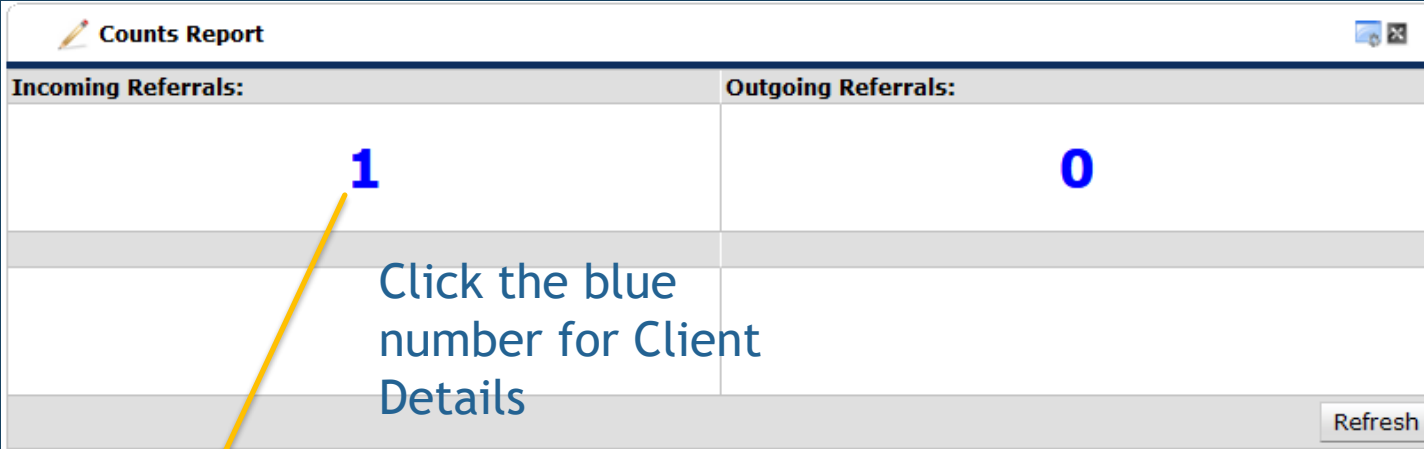


**ServicePoint Training Site**  
Helping Hands - Wake County - Emergency Shelter - City ESG  
August 21, 2020

A yellow box highlights the text "Helping Hands - Wake County - Emergency Shelter - City ESG". A yellow arrow points from the text "NO! - you automatically log in as shelter staff" to the icon of three houses on the left side of the card.

# What is a Counts Report and how does it help me track referrals?

- ▶ After you use Enter Data As (or not!) into the appropriate project you will see a Counts Report. This report tracks referrals to your project and/or from your project.

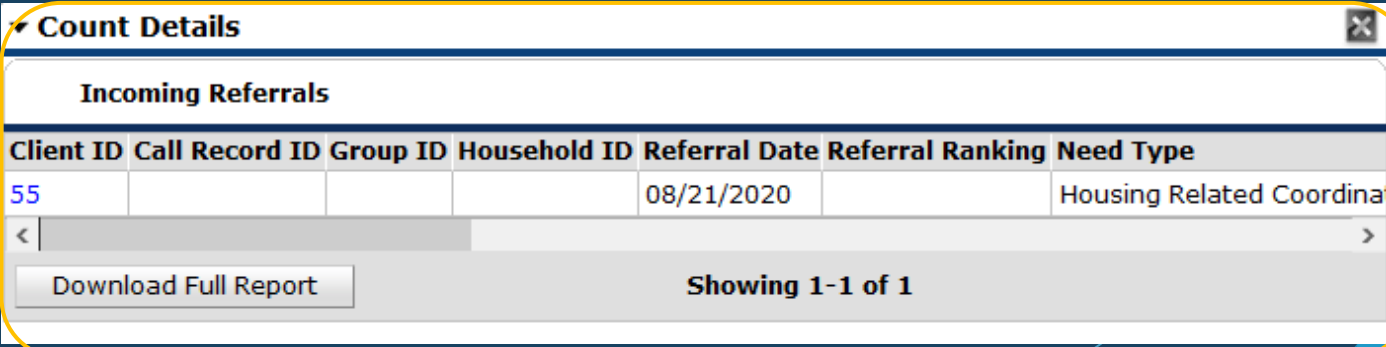


**Counts Report**

Incoming Referrals:	Outgoing Referrals:
1	0

Click the blue number for Client Details

Refresh



**Count Details**

Incoming Referrals

Client ID	Call Record ID	Group ID	Household ID	Referral Date	Referral Ranking	Need Type
55				08/21/2020		Housing Related Coordina

< | >

Download Full Report

Showing 1-1 of 1

# Resolving Referrals

## Check for open referrals

Click the blue number under “**Outstanding Incoming Referrals**”

A list of clients referred to your program will be displayed, including the client ID, referral date, and referral outcome

A client’s **Referral Priority** may be listed as **High, Medium, or Low**

**High** - Client/Family was experiencing unsheltered homelessness at the time of referral

**Medium** - Client/Family was at imminent risk of experiencing homelessness within 72 hours

**Low** - Client/Family was at risk of experiencing homelessness in 4 days or more

Click the client ID from the list to take you to that client’s profile

- ▶ Navigate to the menu and select Reports

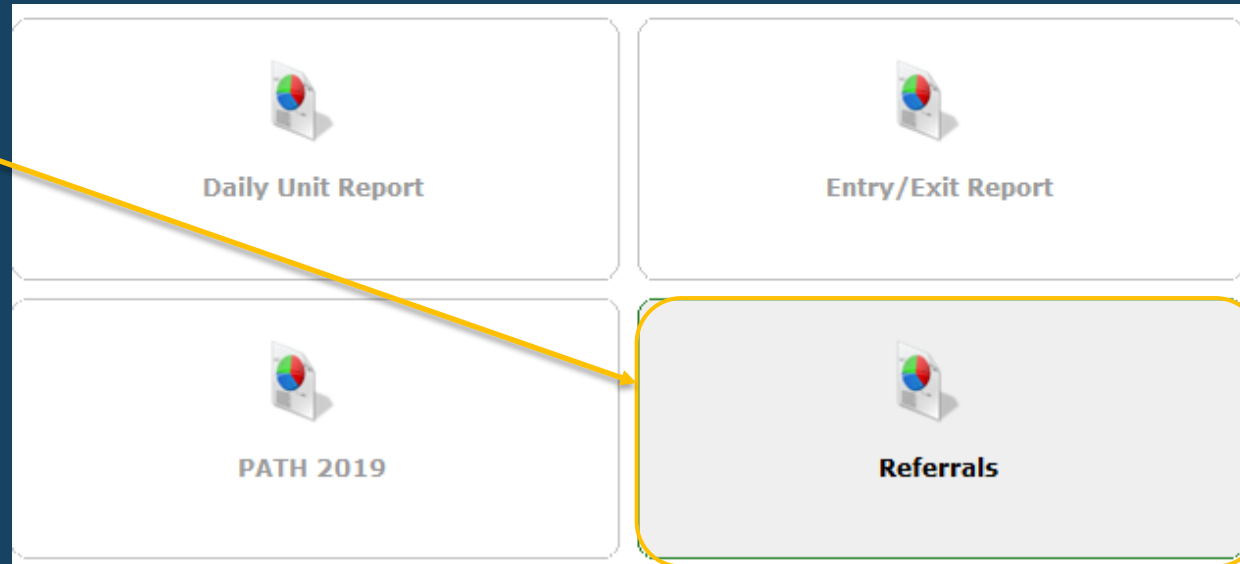


▶ Last Viewed	Favorites
Home	
ClientPoint	
ResourcePoint	
ShelterPoint	
▶ Reports	
▶ Admin	
Logout	









# How do I access the HMIS Referrals Report to see all referrals at once?

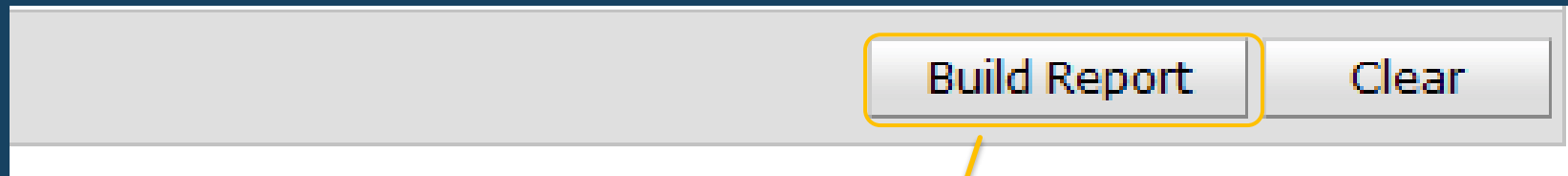
- ▶ Select Referrals under Provider Reports



# Be sure to review all the prompts and select the best options!

Report Options	
Provider *	Helping Hands - Wake County - Emergency Shelter - City ESG (8060) ▾
	<input type="radio"/> <a href="#">This provider AND its subordinates</a> <input checked="" type="radio"/> <a href="#">This provider ONLY</a>
Referral Type *	Incoming referrals to provider ▾
Referral Status	<input checked="" type="radio"/> <a href="#">Outstanding</a> <input type="radio"/> <a href="#">Closed</a> <input type="radio"/> <a href="#">ALL</a>
Referral Outcome	-All- ▾
Referral Date Range	08 / 21 / 2020    08 / 21 / 2020   
Sort Order	Please Select a Sort Order <input type="button" value="Select"/> <input type="button" value="Clear"/>

Click “Build Report” to get list of referrals (all blue words are clickable)



Report Results						
Referral Date ▼	Name	Group ID	Ranking	Need Type	Referred By	Referred To
08/21/2020 4:08:34 PM	(55) Mouse, Minnie			Housing Related Coordinated Entry	Wake Partnership to End Homelessness - Wake County - Coordinated Entry Access Site	Helping Hands - Wake County - Emergency Shelter - City ESG

Click on “Housing Related Coordinated Entry” to get to the referral

# Review all the information in the referral - Does it look correct?

**Client - (55) Mouse, Minnie**

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(55) Mouse, Minnie  
Release of Information: **None**

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Client Information

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**Edit Referral**


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▼ **Household Members**

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**This Client is not a member of any Households.**










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 **Need Information**

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Need	Housing Related Coordinated Entry (BH-0500.3200)
Provider	Wake Partnership to End Homelessness - Wake County - Coordinated Entry Access Site (7536)
Date of Need	08/21/2020 04:08:34 PM
Amount if Financial	No amount entered.
Notes	No notes entered.

# Review all the information in the referral - Does it look correct?

Referral Data	
Referred-To Provider	Helping Hands - Wake County - Emergency Shelter - City ESG (8060)
Needs Referral Date *	08 / 21 / 2020    4 <input type="text"/> : 08 <input type="text"/> : 34 <input type="text"/> PM <input type="text"/>
Referral Ranking	-Select- <input type="text"/>
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
Referral Outcome	-Select- <input type="text"/>
Follow Up Information	
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	Helping Hands - Wake County - Emergency Shelter - City ESG (8060) <input type="text"/> <input type="text"/>
Follow Up Made	-Select- <input type="text"/>
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

# Check for important notes regarding the referral

- ▶ Select “Service Transactions” tab
- ▶ Click the “View Entire Service History” button
- ▶ Select the “Referrals” tab
- ▶ Click the pencil to the left of your program’s referral
- ▶ Notes are displayed under the Need Information section at the top
- ▶ Update the needs status to "in progress"
- ▶ If you need to add a note, click the pencil to the left of Need Information
  - ▶ Before adding your note, identify yourself using the following format - “Agency Name\_Staff Name\_Date of Note:”
  - ▶ Example: Raleigh/Wake Partnership\_Thurston Alexander-Smith\_12/12/2018:

# Navigate to the Summary tab

- ▶ Under the Households Section: Review the Household Size and Composition to ensure the Household is eligible for your project. To view the age of each client, click the pencil next to the Head of Household.
- ▶ Under the Entry/Exit Section: Review recent Entries to see if client is already enrolled in another program.
- ▶ Contact Client.

# What's Next?: Release of Information

Complete the electronic Release of Information 30 days or in-person for 1 year and click “Save Release of Information”

The screenshot shows a software window titled "Release of Information" with a close button in the top right corner. The window has a title bar with "Service Transactions" and "Entry / Exit" tabs. Below the title bar are tabs for "Households" and "ROI", with "ROI" selected. The main content area is titled "Release of Information - (55) Mouse, Minnie".

Under the heading "Household Members", there is a message: "This Client is not a member of any Households."

Under the heading "Release of Information Data", there are several fields:





- Provider \***: A dropdown menu showing "Helping Hands - Wake County - Emergency Shelter - City ESG (8060)".
- Release Granted \***: A dropdown menu showing "Yes".
- Start Date \***: A date field showing "08 / 21 / 2020".
- End Date \***: A date field showing "08 / 21 / 2021" with a calendar icon and a refresh icon.
- Documentation**: A dropdown menu showing "Signed Statement from Client".
- Witness**: A text field containing "Henry Helper".

At the bottom right of the window, there are two buttons: "Save Release of Information" and "Cancel".

Yellow callouts are present: one points to the "Release Granted" dropdown, another points to the "Start Date" and "End Date" fields, and a third points to the "Save Release of Information" button.



# What's Next?: Enter individual and any household members into the project

Entry / Exit			
	Program	Type	Project Start Date
	Wake Partnership to End Homelessness - Wake County - Coordinated Entry Access Site (7536)	HUD	 08/21/2020
	Helping Hands - Wake County - Emergency Shelter - City ESG (8060)	HUD	 08/21/2020

# If you are accepting the referral:

- ▶ After the entry is complete, select the “Service Transactions” tab
- ▶ Select “View Entire Service History”
- ▶ Click the pencil to the left of the referral for your program (NOT the associated need)
- ▶ For “Referral Outcome,” select Accepted
- ▶ Under “Need Status and Outcome,” find pick lists on far right labeled “Need Status / Outcome / If Not Met, Reason”
- ▶ In the top picklist “Need Status,” select “Closed”
- ▶ In the middle picklist “Outcome of Need,” select “Fully Met”
- ▶ PLEASE NOTE \*\*\*Changing the need status to “Closed” will also close this client’s referral to other shelters\*\*\* This will ensure that other programs do not try to contact your client.

# If you are NOT accepting the referral:

- ▶ Select the “Service Transactions” tab
- ▶ Select “View Entire Service History”
- ▶ Click the pencil to the left of the referral for your program (NOT the associated need)
- ▶ For “Referral Outcome,” (near the SPDATS) select appropriate outcome
- ▶ “Declined” - Client not eligible for program
- ▶ If “Declined,” skip remaining steps and click “Save and Exit” at the bottom of the page

# If you are NOT accepting the referral:

- ▶ “Canceled” - Client has self-resolved and is no longer in need of shelter
- ▶ For “If Canceled or Declined, Reason” select applicable response
- ▶ If the referral is “Canceled” (NOT Declined)
- ▶ Proceed to the bottom and the screen to “Need Status and Outcome”
- ▶ Change “Need Status” to “Canceled”
- ▶ Change “Outcome of Need” to “Fully Met”
- ▶ Save and Exit
- ▶ PLEASE NOTE \*\*\*Changing the need status to “Canceled” will also close this client’s referral to other shelters\*\*\* This will ensure that other programs do not try to contact your client.

# Thank You!

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