

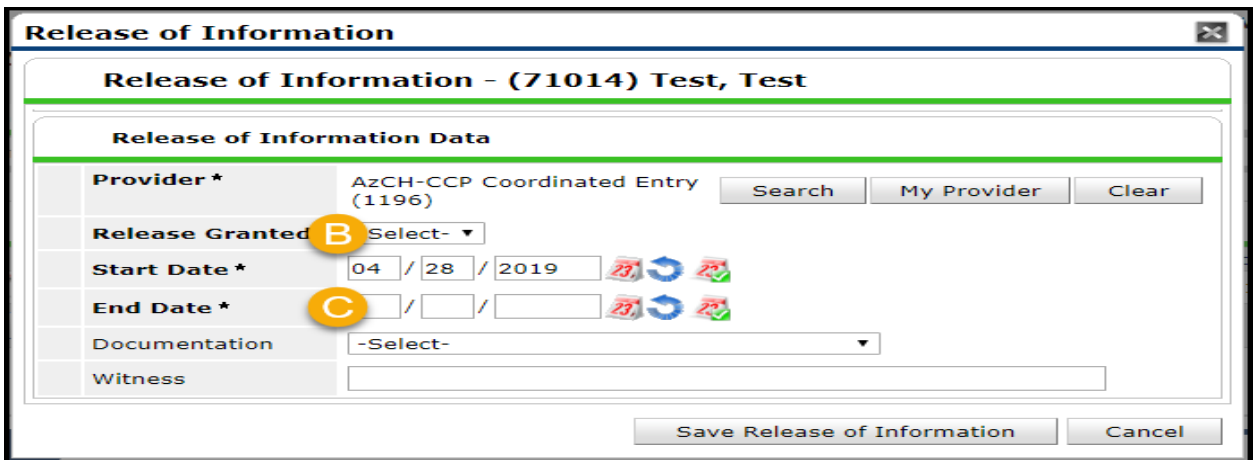
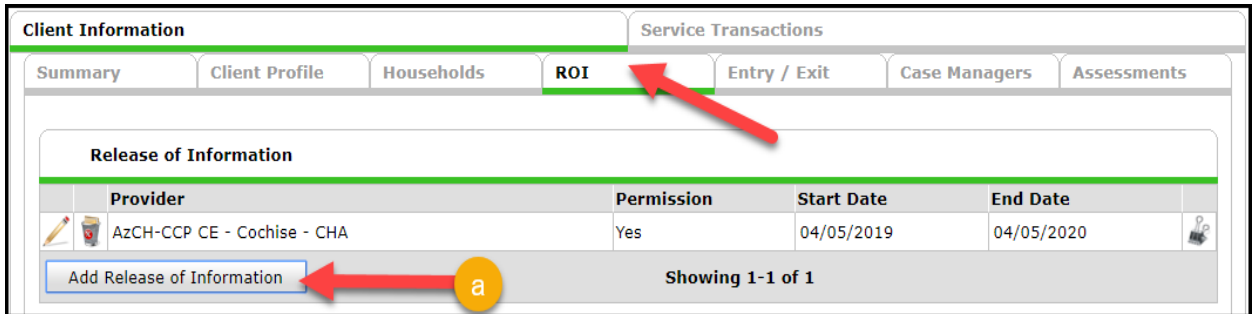
# AzCH-CCP STAFF ADMINISTRATORS STEPS For Coordinating Referrals (AKA Approvals) with Housing Providers

This document details the steps that AzCH-CCP staff administrators use to coordinate housing referrals (AKA push approvals/matches) with AzCH-CCP funded housing providers:

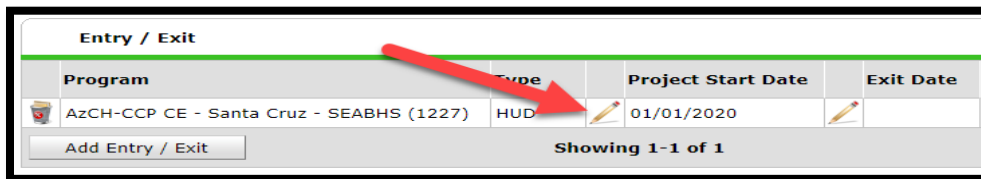
## Updating the “AzCH-CCP Housing List Status” Field

This process explains how to update the “AzCH-CCP Housing List Status” field so that it is visible on the AzCH-CCP BNL/Referral report AND visible to the provider that originally entered the client.

1. Search for and find the client that you want to update.
2. Select the Entry/Exit tab. Make a note of the entry date for the client into the CE program. Select the “ROI” tab
  - a. Select the “Add a Release of Information” button (The ROI from the agency will suffice for a physical ROI from the client, but a designation for AzCH-CCP Coordinated Entry MUST be selected for system visibility reasons. **HOUSING PROVIDERS WILL NOT SEE A REFERRAL (APPROVAL/MATCH) IF A “YES” ROI DESIGNATION IS NOT SELECTED**)
  - b. Enter an ROI designation as “YES” with a start date **that matches the CE program’s entry date.**
  - c. Enter an “End Date” of one year from today.



3. Select the Entry/Exit Tab and find the client’s entry into the AzCH-CCP CE program. Click on the pencil icon to the left of the program entry date.



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4. Select "Save and Continue" for the pop-up
5. Navigate to the AzCH-CCP Custom Assessment

6. Scroll to the bottom of the page and update the field "AzCH-CCP Housing List Status"
7. Select "Save & Exit"

### Sending Referrals (Housing Approvals)

This process explains how to add a referral (push an "approval"/ "match") to an agency within HMIS. **Only** make the referral for the Head of Household.

1. **DO NOT** select an "Enter Data As" mode. Your default EDA should be "AzCH-CCP Coordinated Entry (1196)" as displayed in the upper left had corner of ServicePoint.

2. Go to profile of the Head of Household. The referral will ONLY be for the Head of Household.
3. (You only need to complete this step if you hadn't previously) Select the "ROI" tab
  - a. Select the "Add a Release of Information" button (The ROI from the agency will suffice for a physical ROI from the client, but a designation for AzCH-CCP Coordinated Entry MUST be selected for system visibility reasons. **HOUSING PROVIDERS WILL NOT SEE A REFERRAL (APPROVAL/MATCH) IF A "YES" ROI DESIGNATION IS NOT SELECTED**)
  - b. Enter an ROI designation as "YES" with a start date that matches the CE program's entry date.
  - c. Enter an "End Date" of one year from today.

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The screenshot shows the 'Service Transactions' tab selected in the top navigation bar. Below it, the 'Release of Information' section is visible, containing a table with the following data:

Provider	Permission	Start Date	End Date
AzCH-CCP CE - Cochise - CHA	Yes	04/05/2019	04/05/2020

Below the table is an 'Add Release of Information' button (labeled 'a') and a 'Showing 1-1 of 1' indicator. A second screenshot shows the 'Release of Information - (71014) Test, Test' form with the following fields:

- Provider \***: AzCH-CCP Coordinated Entry (1196) [Search] [My Provider] [Clear]
- Release Granted**: Select- (labeled 'B')
- Start Date \***: 04 / 28 / 2019 [calendar icons]
- End Date \***: / / (labeled 'C')
- Documentation**: -Select-
- Witness**: [text input]

Buttons at the bottom include 'Save Release of Information' and 'Cancel'.

4. Select the "Service Transactions" tab
5. Select "Add Referrals"

The screenshot shows the 'Service Transaction Dashboard' with the following buttons:

- Add Need
- Add Service
- Add Multiple Services
- Add Referrals** (labeled '5')
- View Previous Service Transactions
- View Shelter Stays
- View Entire Service History

The 'Service Transactions' tab is highlighted in the top navigation bar (labeled '4').

6. Ensure only the Head of Household is selected
7. Under "**Needs Assignment**" section and sub-section "**Service Code Quicklist**" select the Service Code "Homeless Permanent Supportive Housing."
8. Click "Add Terms"
9. Select appropriate agency on the "Provider" dropdown. Click "Add Provider"

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10. Under the “Referral Data” section
  - a. The date will auto-populate
  - b. Select the “Referral Ranking” as “Permanent Supportive Housing (Single 8+, Family 9+)”
  - c. (OPTIONAL) For “VI-SPDAT” Score, choose “Search” and click on the green plus icon to include their score.
  - d. (Leave the other items in this section as their default/blank/unselected)

11. Under “Need Data” leave the “Date of Need” as defaulted.
12. Under the “Selected Needs” sub-section select the following
  - a. **Needs Status:** Identified

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- b. **Outcome:** Service Pending
- c. (leave the “Amount if Financial” field and the 3<sup>rd</sup> dropdown option for “If need not met” as their default/blank)

### 13. (OPTIONAL) Add notes into HMIS Notes:

- a. Click the paper icon to open HMIS “Notes”
- b. Save and close HMIS “Notes”

11 **Need Data**

**Date of Need \*** 04 / 28 / 2019 7 : 28 : 41 PM

12 **Selected Needs**

	Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
-	Homeless Permanent Supportive Housing (BH-8400.3000)		<div style="display: flex; flex-direction: column;"> <div style="margin-bottom: 2px;"><span style="background-color: #f09419; color: white; border-radius: 50%; padding: 2px 4px; font-weight: bold;">a</span> Identified</div> <div style="margin-bottom: 2px;"><span style="background-color: #f09419; color: white; border-radius: 50%; padding: 2px 4px; font-weight: bold;">b</span> Service Pending</div> <div style="margin-bottom: 2px;">-Select-</div> </div>	<span style="background-color: #f09419; color: white; border-radius: 50%; padding: 2px 6px; font-weight: bold;">13</span>

Remove All Needs

14. Click **“Save ALL”** to send the referral (push the “approval”/ “match”)

### Reviewing “OUTGOING” Referrals with the Referrals Report

Sometimes it is helpful to check on the status of Outgoing referrals (“Approvals”/ “Matches”). You can do this using the Referrals Report. You can either search for “outstanding” referrals (ones that have not been replied to) or “All” (which includes those that have been accepted or declined).

1. DO NOT select an “Enter Data As” mode. Your default EDA should be “AzCH-CCP Coordinated Entry (1196)” as displayed in the upper left had corner of ServicePoint.
2. Select the tab “Reports”

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**Arizona BOSCOC**  
AzCH-CCP Coordinated Entry  
April 28, 2019

Home > Home Page Dashboard

**Last Viewed**   **Favorites**

- Home
- ClientPoint
- ResourcePoint
- ▶ **Reports**
- ▶ Admin
- Logout

**System News (2)**   **Agency News (0)**

Date	Headline
11/07/2018	<a href="#">New HMIS Data Entry Forms Available</a>
11/13/2017	<a href="#">HMIS HelpDesk Contact Information</a>

[View All](#)

3. Select "Referrals" report.

**Provider Reports**

- Call Record Report
- Client Served Report
- CoC-APR 2018
- Daily Unit Report
- Entry/Exit Report
- ESG CAPER (HDS V1.3) 2018
- Needs Report
- PATH 2018
- Referrals**
- Service Transaction

4. Fill out the Referral Report prompts as follows:
- a. Leave Provider as default "AzCH-CCP Coordinated Entry (1196)"
  - b. Choose "This provider ONLY"
  - c. Select Referral Type as "Outgoing referrals from provider"
  - d. Select Referral Status as "Outstanding" or "ALL", depending on what you want to look for
  - e. Select your choice of Referral Date Range (even one day)

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- f. (OPTIONAL) For the “Sort Order” Choose the “Select” button to customize which fields you would like displayed on the report and in what order.
- g. Click “Build Report”
- h. Choose the “Export Report” button and “Download” to download the report.

### Report Options

Use Previous Parameters

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<b>Provider *</b>	<input type="text" value="AzCH-CCP Coordinated Entry (1196)"/> <span style="margin-left: 10px;">Search</span> <span style="margin-left: 10px;">My Provider</span> <span style="margin-left: 10px;">Clear</span>
	<input type="radio"/> This provider AND its subordinate <input checked="" type="radio"/> This provider ONLY
<b>Referral Type *</b>	<input type="text" value="Outgoing referrals from provider"/>
Referral Status	<input type="radio"/> Outstanding <input type="radio"/> Closed <input checked="" type="radio"/> ALL
Referral Outcome	<input type="text" value="-All-"/>
Referral Date Range	<input type="text" value="04 / 25 / 2019"/> <input type="text" value="04 / 28 / 2019"/>
Sort Order	<input type="text" value="Please Select a Sort Order"/> <span style="margin-left: 10px;">Select</span> <span style="margin-left: 10px;">Clear</span>

Export Report
Build Report
Clear

5. Referral (approval/match) outcomes can also be seen on the AzCH-CCP Referral/ BNL Report on the second tab. For more detail on how to access and run the AzCH-CCP Referral/ BNL Report, please see the document “AzCH-CCP Referral.BNL Report - AzCH-CCP Administrators”

**Please contact the HMIS Help Desk with any questions**

By submitting a ticket: <https://hmisaz.org>

By phone: 602-908-3605