

## AzCH-CCP HOUSING PROVIDER STEPS

### For Coordinating Referrals (Approvals/Matches) From AzCH-CCP

This document details the steps that Housing Providers use to coordinate referrals (approvals/matches) from AzCH-CCP:

Step 1: Managing Referrals (approvals/matches)

Table: Acceptable Referral Outcomes

Step 2: Next Steps for data entry if Referral (approval/match) is accepted

AzCH-CCP Clarification: Housing providers will follow the steps below to respond to an “Approval”

#### Clients that decline housing offer:

- For any client that has been approved by AzCH-CCP but when presented with a housing option does not accept the offer, please complete the steps 1-7 **ONLY** and mark the approval/referral was declined or cancelled. (You do not need to do any additional steps to exit them from their open CE enrollment or enter them into your housing program). When an approval is declined or cancelled, the client will still continue to come onto the AzCH-CCP report and the report will be updated to show the response to the approval/referral.

#### Clients that accept housing offer:

- For any client that has been approved by AzCH-CCP and **DOES** accept the approval, **DO NOT** complete any of the below steps until the date the client is able to physically move into the unit (their Housing Move-In Date).

## Managing Referrals – Housing Providers

Use this process to find existing referrals to your service provider.

- Do not “Enter Data As” any specific project.
- Select the tab “Reports”

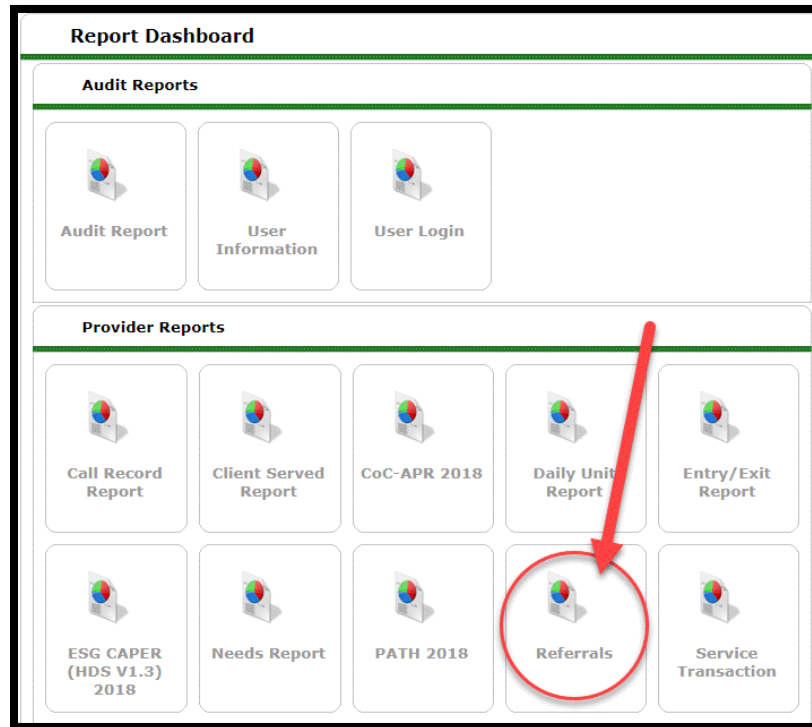
The screenshot shows the ServicePoint Training Site Home Page Dashboard. The page title is "ServicePoint Training Site" and "Community Information & Referral". The date is "March 28, 2019". The user is logged in as "Shadow DataQuality". The dashboard includes a "Home > Home Page Dashboard" breadcrumb, a search bar, and a sidebar with navigation options: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, and Logout. The main content area displays "System News (4)" and "Agency News (6)". A red arrow labeled "1" points to the "Enter Data As" button in the top right corner. Another red arrow labeled "2" points to the "Reports" tab in the sidebar.

Date	Headline
11/07/2018	New HMIS Data Entry Forms Available
04/27/2018	New User Packet Revision
04/04/2018	CHANGE FOR NEW USER REQUESTS
03/01/2018	HMIS HelpDesk Contact Information

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3) Select "Referrals" report.




4) Fill out the prompts as follows:

- Typically, leave Provider as default (normally the level 1 agency. If it is not the Level 1 agency you may need to choose the Level 1 agency)
- Choose "This provider AND its subordinates"
- Select Referral Type as "Incoming referrals to provider"
- Select Referral Status as "Outstanding"
- Select your choice of Referral Date Range (even one day)
- Click "Build Report"

Report Options	
<b>Provider*</b>	CBI - Supportive Services for Veteran Families (SSVF) (42580) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
	<input checked="" type="radio"/> <a href="#">This provider AND its subordinates</a> <input type="radio"/> <a href="#">This provider ONLY</a>
<b>Referral Type*</b>	Incoming referrals to provider <input type="button" value="v"/>
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- <input type="button" value="v"/>
Referral Date Range	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="21"/> <input type="button" value="22"/> <input type="button" value="23"/> <input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="21"/> <input type="button" value="22"/> <input type="button" value="23"/>
Sort Order	Please Select a Sort Order <input type="button" value="Select"/> <input type="button" value="Clear"/>
<input type="button" value="Export Report"/> <input type="button" value="Build Report"/> <input type="button" value="Clear"/>	

5) Select the client referral you want to accept or decline by clicking on the "Need Type."

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Report Results										
	Referral Date	Name	Group ID	Ranking	VI-SPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/>	04/17/2019 11:10:33 AM	(47404) Testerson, Test R.				Rapid Re-Housing Programs	SACE – CRRC Entry Point – CE	CBI - Supportive Services for Veteran Families (SSVF)		

6) Scroll down to the “Referral Data” section and the “Referral Outcome” field

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7) Under Referral Outcome you will select from the following options.

Referral Outcome:	Need Status:	Outcome of Need:	If Need is Not Met, Reason?
<p><b>Accepted:</b> Select this option as soon as you can confirm client acceptance into the housing program. Providers will often be updating the client referral status from “Accepted on Waitlist” to “Accepted.” Should a provider know upon receipt of referral the client is accepted into the program they may wish to update referral outcome status instantly to “Accepted”. <b>(NOTE: This process does not replace HMIS data standards on enrollment for RRH and PSH programs).</b></p>	Closed	Fully Met	(Leave blank)
<p><b>Declined:</b> The housing provider should make this selection only after the provider agency has determined they do not wish to enroll the client into their program. Declined referrals must also have a reason for decline. Providers are encouraged to provide narrative in HMIS documenting these cases.</p>	Closed	Not Met	(Pick from dropdown)
<p><b>Canceled:</b> Canceled – The housing provider should make this selection to signify a referral as null and void. The provider should only cancel referrals for circumstances beyond their control. Canceled referrals must also have a reason for cancellation. Providers are encouraged to provide narrative in HMIS documenting these cases.</p>	Closed	Not Met	(Pick from dropdown)

**Referral Data**
Send Summary

Referred-To Provider: CBI - Supportive Services for Veteran Families (SSVF) (42580)

Needs Referral Date\*: 03/20/2018 2:41:53 PM

Referral Ranking: -Select-

VI-SPDAT Score: Please Select a VI-SPDAT Score Search Clear

TAY-VI-SPDAT Score: Please Select a TAY-VI-SPDAT Score Search Clear

VI-FSPDAT Score: Please Select a VI-FSPDAT Score Search Clear

**Referral Outcome**: Declined

If Canceled or Declined, Reason: -Select-

**Follow Up Information**

Projected Follow Up Date: [ ]/[ ]/[ ]

Follow Up User: CBI - Peer Support/Outreach (39388) Search My Provider Clear

Follow Up Made: -Select-

Completed Follow Up Date: [ ]/[ ]/[ ]

**Need Status and Outcome**

Need Status\*: Identified

**Outcome of Need**: Service Pending

If Need is Not Met, Reason: -Select-

## AzCH-CCP HOUSING PROVIDER STEPS For Coordinating Referrals (Approvals/Matches) From AzCH-CCP

8) If a client is accepted for the referral (approval/match) – Next Steps:

1) Choose the Enter Data As option of the housing provider the client has been referred to (approved for)

2) Choose the ROI tab, and

- Add an ROI by selecting the appropriate client designation
- Enter an end date of one year from the entry date

3) Choose the Entry/Exit tab, and

- Click on the exit date pencil icon for the open AzCH coordinated entry program
- The **Reason for Leaving** should be “Completed Program”
- The **Destination** should be “Permanent housing (other than RRH) for formerly homeless persons”
- Choose **Save & Continue**
- For the coordinated entry exit assessment question, **Assessment Disposition**, please choose the option for “Permanent Supportive Housing.”

4) Choose the **Add Entry/Exit** to record the client’s entry into your housing program

- Review and/or enter the questions on the UDE assessment
- The **Housing Move In Date** field should be updated if the client is able to move into housing on the same day they are accepted into the housing program
  - If the client is not able to immediately move into housing on the same day:
    - If there is a date entered for the **Housing Move In Date**, please remove it and leave the field blank
    - If no date is entered, leave the field blank
    - **When the client is housed**, create an Interim Update and enter their **Housing Move In Date**.