

Case Management Training: Referrals

All example client names depicted herein are completely fictitious. No association with any real organization or persons is intended or should be inferred.

HMIS Permanent Housing Workflow: Entering a Referral on a Client

Entering a Referral:

- Referrals are made to other providers when there are services or client needs your agency does not provide.
- Utilize Enter Data As if needed for your workflow.

Find Client

- Find client on ClientPoint.
- Add referrals from the Service Transactions tab.

Select Need

- Select the client's need from the Service Code Quicklist by highlighting the need, then clicking the "Add Terms" button.

Select Referral Provider

- There are three methods of selecting a referral provider.
- Choose a provider from the Referral Provider Quicklist
- Search for a provider
- Search for providers and click on their names to view which services they provide

Review/ Correct Referrals

- Go to the Services Transactions tab and click the View Entire Service History button.
- Click the pencil next to the referral you want to review.
- If you need to delete a referral due to an error, click on the trash can by the associated "need".

Entering a referral on a client

Utilize Enter Data As if necessary for your work flow

- Find client and click on the Service Transactions tab



- Click the Add Referrals button



- If working with a family, choose which household members you need to record the referral on

Add Service

▼ **Household Members**

To include Household members for this Service,

(15579) Single Parent with Child(ren) (HUD)

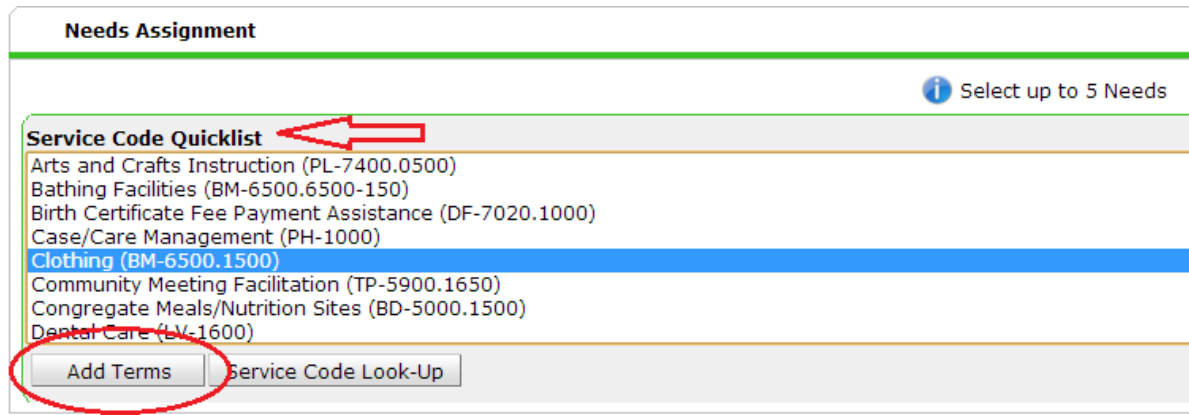
(47404) Testersen, Test (Primary Client)

(395063) testerson, baby

(831443) Testerson, Little

(831658) Testerson, Mini

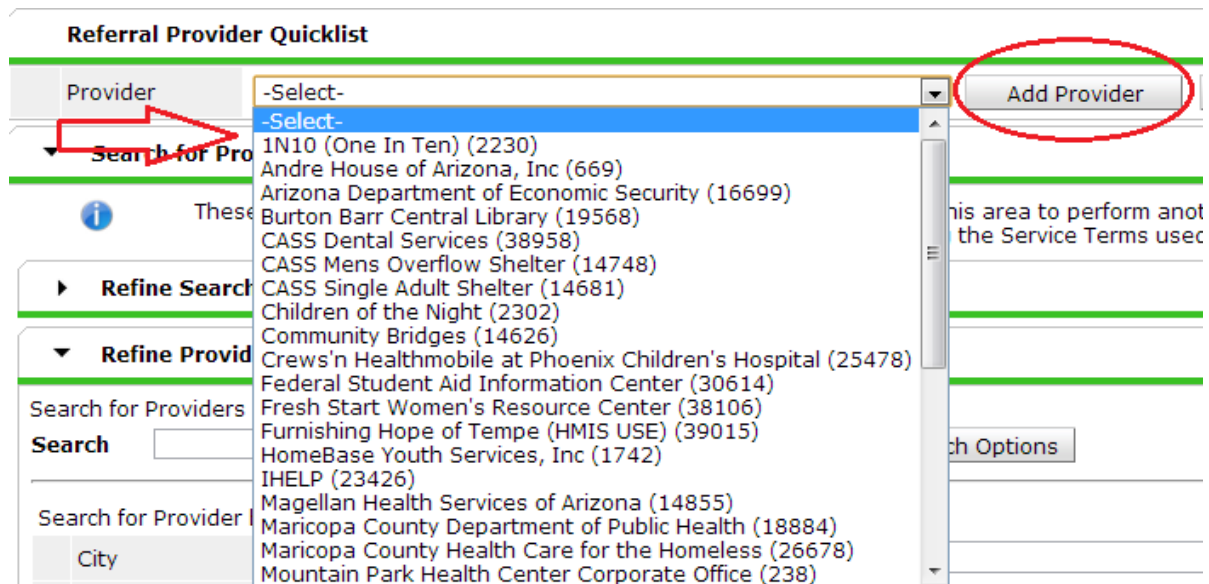
- Select the client’s need from the Service Code Quicklist by highlighting the need, then clicking the “Add Terms” button



Three (3) methods for selecting a Referral Provider

First Method:

- Choose a Referral Provider(s) from the Referral Provider Quicklist. *(This requires initial set up, contact HMIS Helpdesk to do this.)*
- Choose a provider you are going to refer your client to from the drop down list, then click the “Add Provider” button. You can refer to more than one provider if needed.




- Scroll down to the Referrals section (towards bottom of page) and ensure the need you chose is linked

to the referral provider(s) by check marking the box if needed.

Referrals		Send Summary
Referred-To Provider	Clothing	Referred Clients
Phoenix Job Corps Center (37607)	<input checked="" type="checkbox"/>	(47404) Testersen, Test

- Leave the need status as “Identified”, but change the Outcome to “Service Pending”.
- Click the Save ALL button.

Need Status / Outcome / If Not Met, Reason	Notes
Identified <input type="button" value="v"/> -Select- <input type="button" value="v"/> -Select- <input type="button" value="v"/>	

Second Method:

- Choose a Referral Provider(s) using Search Results. The system will provide you with possible referral providers based on the term you chose.
- Scroll down and select the referral provider(s) you want by clicking the green plus sign next to their name. You can select more than one referral provider, and you can hover over the name to get more information on that provider.

Search Results																										
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																					
<input checked="" type="checkbox"/> 2nd Chance Thrift Store	Level 2	928-726-0491	Yuma, AZ 85364-2936	N/A	0/1																					
<input checked="" type="checkbox"/> Agua Fria Food and Clothing Bank	Level 1	623-932-9135	Avondale, AZ 85323-2908	N/A	0/1																					
<input checked="" type="checkbox"/> All Faith Community Services	Level 1	623-386-3513	Buckeye, AZ 85326-2828	N/A	0/1																					
<input checked="" type="checkbox"/> Amphitheater Foundation Clothing Bank	Level 2	520-690-0075	Tucson, AZ 85705-3503	N/A	0/1																					
<input checked="" type="checkbox"/> Annual Back to School Fair	Level 2	520-266-0620	Sierra Vista, AZ 85635-5216	N/A	0/1																					
<input checked="" type="checkbox"/> Assistance League of Flagstaff Operation School Bell	Level 2	928-779-3009	Flagstaff, AZ 86003	N/A	0/1																					
<input checked="" type="checkbox"/> Birthline	Level 1	928-778-5683	Prescott, AZ 86301-1812	N/A	0/1																					
<input checked="" type="checkbox"/> Bisbee Esperanza Resource Center	Level 2	520-432-7839	Bisbee, AZ 85603	N/A	0/1																					
<input checked="" type="checkbox"/> BOSS Clothing Bank	Level 2	623-386-6365	Buckeye, AZ 85326-3223	N/A	0/1																					
<input checked="" type="checkbox"/> BOSS Employment Services	Level 2	623-386-6365 x 1	Buckeye, AZ 85326-3223	N/A	0/1																					

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Note: You can narrow down the amount of providers in your search results by using the Refine Provider Search Criteria section just above the search results

- If you did choose multiple referral providers from the search results, then remember to ensure each referral provider is check marked in the Referrals section below.

Referrals			Send Summary
Referred-To Provider	Clothing	Referred Clients	
Agua Fria Food and Clothing Bank (1338)	<input checked="" type="checkbox"/>	(47404) Testersen, Test	
BOSS Clothing Bank (38534)	<input checked="" type="checkbox"/>	(47404) Testersen, Test	
Desert Mission Food Bank (38565)	<input checked="" type="checkbox"/>	(47404) Testersen, Test	

Third Method:

Note: This method is best when you are unsure of what the providers listed in Search Results offers.

- Choose a potential Referral Provider(s) by clicking on the actual providers name in Search Results.
- You will see a list of Primary Services that provider provides, and to the right of each service type, is a button called "Add Referral", click this button to add this referral provider.

Primary Services			
Service Code	Service Name		
 BD-1800.2000	Food Pantries	<input type="button" value="Add Referral"/>	
 BD-1800.8200-250	Formula/Baby Food	<input type="button" value="Add Referral"/>	
 BM-6500.1500-250	General Clothing Provision	<input type="button" value="Add Referral"/>	
 BM-6500.6500-150	Bathing Facilities	<input type="button" value="Add Referral"/>	
 BM-6500.6500-650	Personal/Grooming Supplies	<input type="button" value="Add Referral"/>	

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Note: If the referral provider's service type name differs slightly from the need you originally selected (i.e. general clothing provision versus clothing), then the Referrals section will have two needs listed instead of one. Get rid of the one you do not need (i.e. general clothing provision) by unchecking the box and deleting the need (RED circles in pic below) and be sure you do check mark the correct need (clothing) (RED arrow below)

Referrals			Send Summary
Referred-To Provider	Clothing	General Clothing Provision	Referred Clients
Agua Fria Food and Clothing Bank (1338)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(47404) Testersen, Test

Need Data

Date of Need* 08 / 01 / 2013 12 : 17 : 30 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
 Clothing (BM-6500.1500)	<input type="text"/>	Identified -Select- -Select-	
 General Clothing Provision (BM-6500.1500-250)	<input type="text"/>	Identified -Select- -Select-	

Adding a Need not on the Service Code Quicklist

- If your client's need is out of the ordinary for your project and none of the terms in the pre-populated Service Code Quicklist will work, you can open the AIRS taxonomy to select a different term.

Note: Please obtain your supervisor's permission before doing this.

- Click on the Service Code Look-up button

Service Code Quicklist
Food Pantries (BD-1800.2000)
Food Stamps/SNAP Applications (NL-6000.2000-220)
Gardening/Landscaping Instruction (PL-7400.2500)
GED Instruction (HH-0500.2500-250)
Health Education (LH-2700)
HIV Testing (LF-4900.2400)
Homeless Drop In Centers (BH-1800.3500)
Housing Search Assistance (BH-3900.3100)

Add Terms Service Code Look-Up

- The AIRS Taxonomy search window opens where you can search for the closest term that meets your client's need. Step 1 search for the Term (i.e. GED), Step 2 review Search Results, Step 3 select the term you want to use by clicking the word "Select" next to it, thus moving the term to the box on the right called Selected Service Codes, Step 4 click Submit.

Service Code Search

Search - Select a term that best describes the need. **Step 1 - search**

Code Set: AIRS Taxonomy Search: Term Search

Beginning with Containing

Search Results Step 2 - review results

Code	Term
Select View B	Basic Needs
Select View D	Consumer Services
Select View F	Criminal Justice and Legal Services
Select View H	Education
Select View J	Environment and Public Health/Safet
Select View L	Health Care
Select View N	Income Support and Employment
Select View P	Individual and Family Life
Select View R	Mental Health and Substance Abuse S
Select View T	Organizational/Community/Internati

Selected Service Codes

Code	Term
<Available>	
<Available>	
<Available>	
<Available>	

Details

Term
Code
Definition
Facet
Created
Updated
Use
References
See Also
References

Showing 10 Service Codes

Reset Search Form Clear All Selected Codes **Step 4 - click submit** Submit Cancel

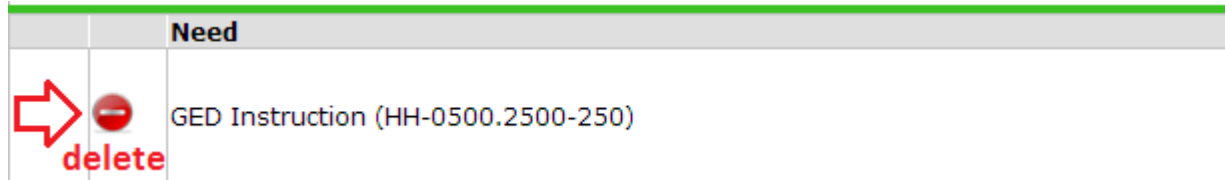
- Your Referral Provider Search Results section will reflect the term you chose from the AIRS taxonomy. Add the appropriate referral provider by either:
 - Clicking the green plus sign next to their name OR
 - Clicking their name link and clicking the “Add Referral” button next to the appropriate need
 - Ensure the need box is checked marked in the Referrals Section
 - Complete the need Outcome (Service Pending)
 - Click Save ALL

**Special Note: If the Referral Provider you need does not come up in the search results, but you know they are in the database, it could be that the term you chose from the Service Code Quicklist is limiting the search results.*

The work around is to delete the need at the very bottom by clicking the red minus sign, then going back to the Search Result section and searching again for the specific provider manually.

Once you find your referral provider and select them by clicking the green plus sign, go back to the Service Code Quicklist at top of page and re-select whichever term you need.

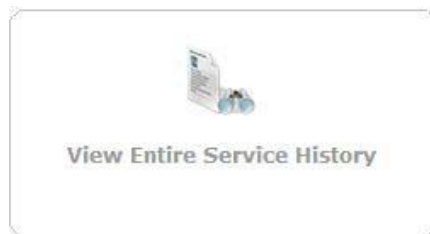
Now scroll back to the bottom and be sure to check mark the need next to the referral provider you chose, update the need status and outcome, then click Save ALL



Review/correction of referrals

Note: Please contact the HMIS Helpdesk for assistance in making corrections that are complicated.

- To check your work, or to make corrections on referrals, go to the Services Transactions tab and click the View Entire Service History button.



- Every time you record a service or a referral, the system automatically records a corresponding *need*. So when you look at the entire service history screen, every service or referral will have at least two

lines, one for the need and one for the service/referral(s).

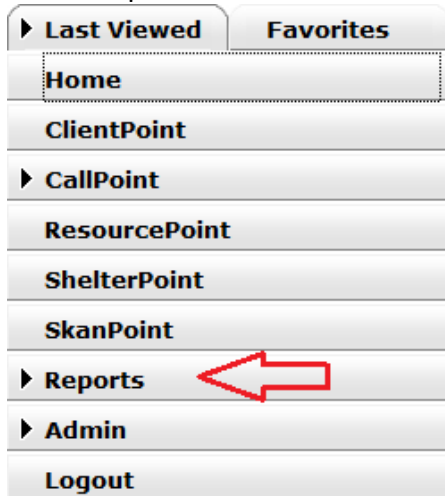
- If you put in more than one referral (blue box), you will have one need with multiple referrals.
- To see the details and make corrections, click the pencil next to the referral you want to review.
- If you need to delete a referral due to an error, delete the associated “need” by clicking the trashcan and it will delete the need and the corresponding referral(s).

All Service Transactions							
Select Dates		Start Date			End Date		
-Select-							Search
	Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal	
	Need	08/01/2013	Tempe Youth Resource Center	GED Instruction	In Progress / Service Pending	1 need	
	Referral	08/01/2013	Burton Barr Central Library	GED Instruction		1 referral	
	Need	08/01/2013	Tempe Youth Resource Center	Clothing	In Progress / Service Pending		
	Referral	08/01/2013	Desert Mission Food Bank	Clothing		1 need	
	Referral	08/01/2013	BOSS Clothing Bank	Clothing		3 referrals	
	Referral	08/01/2013	Agua Fria Food and Clothing Bank	Clothing			
	Need	08/01/2013	Tempe Youth Resource Center	Substance Abuse Education/Prevention	Closed / Fully Met	1 need	
	Service	08/01/2013	Tempe Youth Resource Center	Substance Abuse Education/Prevention		1 service	
	Need	08/01/2013	Tempe Youth Resource Center	Personal/Grooming Supplies	Closed / Fully Met	1 need	
	Service	08/01/2013	Tempe Youth Resource Center	Personal/Grooming Supplies		1 service	

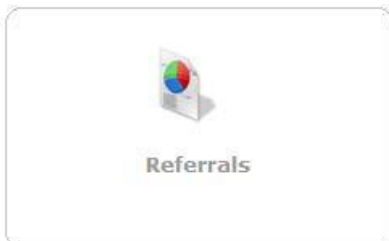
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Referral Report

- Go to the “Reports” button on the menu



- Find the “Referrals” report button and click on it



- Ensure the correct Provider is selected.
- Choose whether you want to see “Incoming” or “Outgoing” referrals.
- Choose if you want to only see “Outstanding” referrals, “Closed” referrals, or “ALL” referrals.
- Choose the date range of referrals you want to see.
- Optional: Choose to customize the “sort order” of the report if you want.
- Click “Build Report” button.

Report Options

Provider* Flagstaff Shelter Services (440)

This provider AND its subordinates This provider ONLY

Referral Type* Incoming referrals to provider

Referral Status Outstanding Closed ALL

Referral Outcome -All-

Referral Date Range 09 / 30 / 2014 10 / 19 / 2014

Sort Order Please Select a Sort Order

Report Results

Referral Date	Name	Group ID	Ranking	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 10/01/2014 12:00:00 PM	(47073) Assessment, Coordinated		Permanent Supportive Housing (Single 10+, Family 12+)	Emergency Shelter	Coordinated Assessment Project	Flagstaff Shelter Services		

Select ALL Showing 1-1 of 1

- The “Outcome” of the referral you received can be updated from this report without having to go into the client record by following these steps:
- Choose which client record(s) you want to update by clicking the check box on the left.
- Click the “Update Referral Outcome” button, choose outcome and click “Save Referral Information”.

Update Referral Outcome

The selected (1) Referral will receive the outcome selected below.

Referral Outcome*

Report Results

Referral Date	Name	Group ID	Ranking	Need Type	Referred By
<input checked="" type="checkbox"/> 10/01/2014 12:00:00 PM	(47073) Assessment, Coordinated		Permanent Supportive Housing (Single 10+, Family 12+)	Emergency Shelter	Coordinated Asses Project

Select ALL Showing 1-1 of 1