

BALANCE OF STATE CASE CONFERENCING REFERRAL WORKFLOW - ONLY (ALL LCEH)

Purpose: This document provides a workflow for client Referral to CE housing or other services, and for accessing the Referral report and associated Notes.

FIRST SECTION OF PROCEDURE: REFERRAL TO HOUSING PROVIDER

Step 1: Ensure the correct EDA Mode or Default project choice.
(Refer to the HMIS Introductory Training document)

**** All CE activity begins with the EDA to the appropriate CE project ****

- Users will have a Coordinated Entry project named by County to provide referrals. For example, MCCS will use Mohave – CE(1244), and Crossroads Nogales Mission will use Santa Cruz – CE(1249).

Enter Data As Provider Search ×

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search Show Advanced Options

Search
Clear

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID # Submit

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																											
Provider	Level	Phone	Location	Last Updated																							
+	+	Santa Cruz - CE (1249)	Level 4	Unknown	Unknown	01/08/2024																					
Showing 1-1 of 1																											

Exit

- Search for and select the client that you want to update.

Step 2: ROI

(Refer to the ROI Tab Instructions document.)

- Complete the ROI Tab for **all adults** of the Household, and for all children associated with the Head of Household. Complete the ROI for Provider, [County] - CE (4 digit ID#)
 - For non-CE projects, the ROI tab must be filled out regardless of a Yes or No reply. Either reply must be recorded. For all CE clients, the required response is always “Yes”.
 - **All CE clients must have a valid Release of Information form in their case file prior to users entering client-level data into the HMIS to indicate either approval or denial of sharing their data.**

Release of Information Data

Provider *	Mohave - CE (1244)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Release Granted *	Yes			
Start Date *	11 / 01 / 2023	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Clear"/>
End Date *	11 / 01 / 2024	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Clear"/>
Documentation	-Select-			
Witness	-Select-			

2. Click Save Release of Information

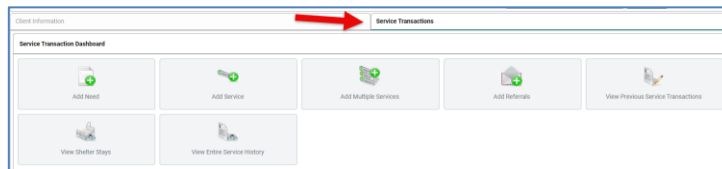
Step 3: Referral

This process explains how to add a referral (“approval”/ “match”) to an agency within HMIS.

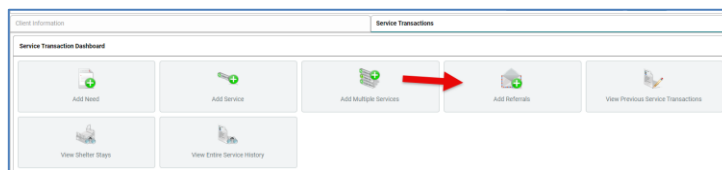
**** Only make the referral for the Head of Household. ****

(Refer to the Case Management Referrals document)

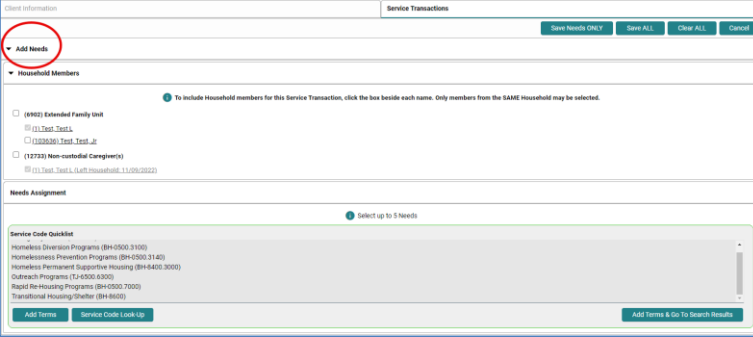
1. Go to the Service Transactions tab.



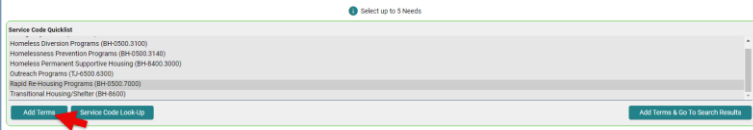
2. Select “Add Referrals”



3. Under the “Add Needs” section are several subsections to create a client “Need” before creating a “Referral”:
 - i. At the Household Members sub-section, **ONLY** select the Head of Household



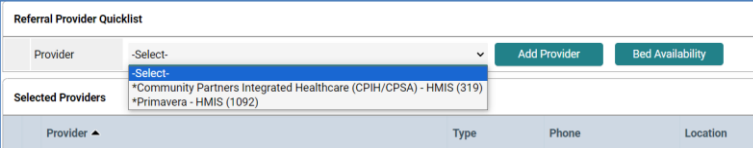
ii. At the sub-section, “**Service Code Quicklist**”, select the Service Code for the referral (usually, Rapid Re-Housing (BH-0500.7000)).



1. Only select 1 Service Code for each CE service entry.
2. Click “Add Terms”

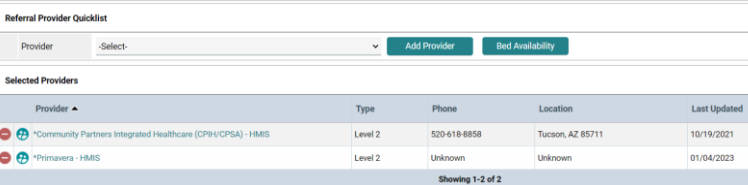
iii. The Referral Provider Quicklist sub-section is pre-set by the project administrator and HMIS.
(Contact your administrator to add Providers to the list or remove Providers from the list.)

1. Choose at least 1 Provider from the list.



2. Click “Add Provider” for each Provider selected.

* Note that the **Selected Providers** are shown below the Search Results.

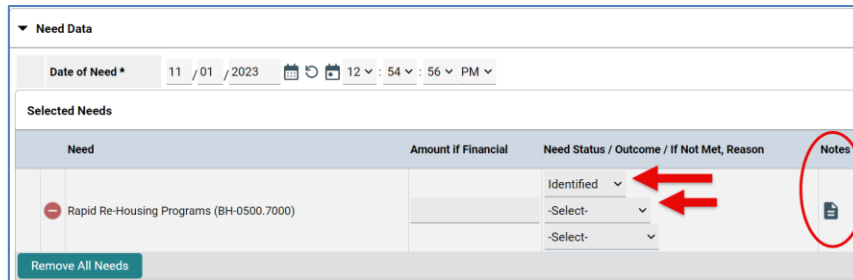


Provider	Type	Phone	Location	Last Updated
*Community Partners Integrated Healthcare (CPIH/CPSA) - HMIS	Level 2	520-618-8858	Tucson, AZ 85711	10/19/2021
*Primavera - HMIS	Level 2	Unknown	Unknown	01/04/2023

4. Under the “**Referral Data**” section,
 - i. The date will auto-populate to Current Date
 - ii. (Leave the other items in this section as their default/blank/unselected)
5. In the **Referrals** section be sure to check the box next to each “Referred to Provider”.

Referrals		Send Summary
Referred-To Provider	Rapid Re-Housing Programs	Referred Clients
*Community Partners Integrated Healthcare (CPIH/CPSA) - HMIS (319)	<input checked="" type="checkbox"/>	(1) Test, Test L
*Primavera - HMIS (1092)	<input checked="" type="checkbox"/>	(1) Test, Test L

6. Under “**Need Data**” leave the “Date of Need” as defaulted.
7. Under the “Selected Needs” sub-section select the following
 - a. **Needs Status:** Identified
 - b. **Outcome:** Service Pending



The screenshot shows the 'Need Data' section of a form. Under 'Selected Needs', there is a table with columns: 'Need', 'Amount if Financial', 'Need Status / Outcome / If Not Met, Reason', and 'Notes'. A single row is visible for 'Rapid Re-Housing Programs (BH-0500.7000)'. The 'Need Status' dropdown is set to 'Identified', and the 'Notes' column has a button icon circled in red. Two red arrows point to the dropdown menu.

**** Note that there is a “Notes” button available to create and save Needs related notes for follow-up users. ****

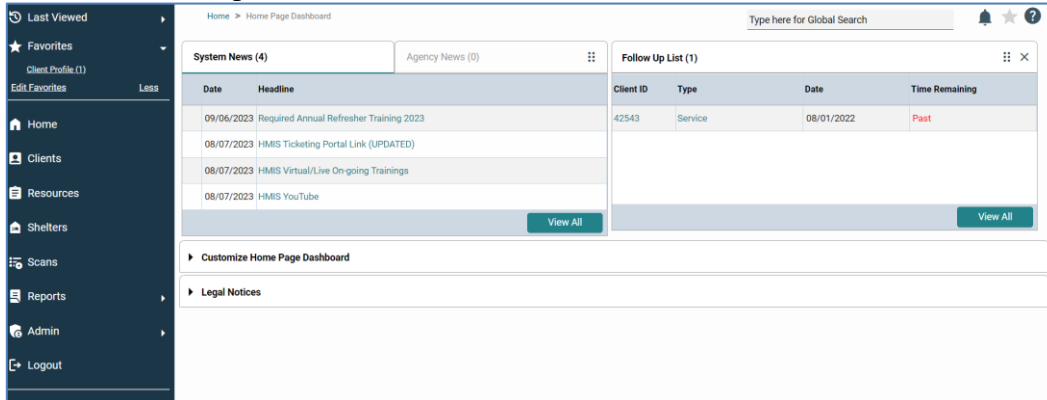
- c. Click **Save ALL**.

SECOND SECTION OF PROCEDURE: REVIEWING “OUTGOING” REFERRALS WITH THE REFERRALS REPORT

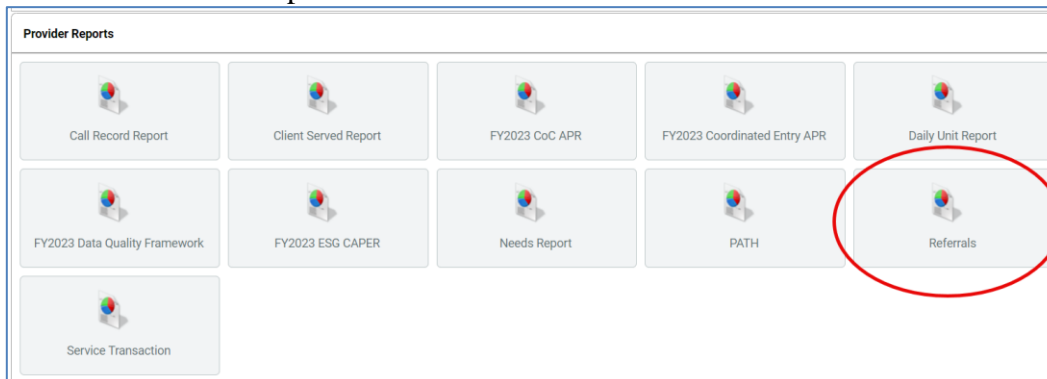
Sometimes it is helpful to check on the status of Outgoing referrals (“Approvals”/ “Matches”). You can do this using the Referrals Report. You can either search for “outstanding” referrals (ones that have not been replied to) or “All” (which includes those that have been accepted or declined).

Step 1: Ensure the correct EDA Mode or Default project choice (e.g., use Mohave - CE (1244) to view Mohave - CE (1244) referrals).

1. Select the tab “Reports”



2. Select the Referrals report.



3. Fill out the Referral Report prompts as follows:
 - a. Provider will default to the County-level CE EDA.
 - 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)
 - f. Click “Build Report”

Report Options

Provider * Mohave - CE (1244)
 This provider AND its subordinates This provider ONLY

Referral Type * Outgoing referrals from provider

Referral Status Outstanding Closed ALL

Referral Outcome -All-

Referral Date Range 10 / 01 / 2023 11 / 01 / 2023

Sort Order Name (Ascending)
 Referral Date (Ascending)
 Referral Outcome (Ascending)
 VI-SPDAT (Ascending)
 Need Notes (Ascending)

Export Report Build Report Clear

g. The Report Results will show all clients referred during the selected date period.

Report Options

Provider * Mohave - CE (1244)
 This provider AND its subordinates This provider ONLY

Referral Type * Outgoing referrals from provider

Referral Status Outstanding Closed ALL

Referral Outcome -All-

Referral Date Range 10 / 01 / 2023 11 / 07 / 2023

Sort Order Please Select a Sort Order

Export Report Build Report Clear

Report Results

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input checked="" type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	*Cornerstone Mission (CSM) - HMIS		
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	CC - Skypointe - Yavapai - COC - RRH		

Select ALL Clear Showing 1-2 of 2

THIRD SECTION OF PROCEDURE: To accept or decline referrals, check the box next to any client or multiple clients.

Step 1: Selecting the Referral

1. Select Update Referral Outcome.
2. Select the Referral Outcome from the dropdown

Referral Type * Outgoing referrals from provider

Referral Status

Referral Outcome

Referral Date

Sort Order

Export Report Build Report Clear

Update Referral Outcome

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

Referral Outcome *

- Accepted
- Accepted on Wait List
- Declined
- Canceled

Save Referral Information Exit

Report Results

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input checked="" type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	*Cornerstone Mission (CSM) - HMIS		
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	CC - Skypointe - Yavapai - COC - RRH		



Select ALL Clear Showing 1-2 of 2

Update Referral Outcome

Step 2: Notes



1. When “Need Notes” are present, a Notes icon will be displayed in the Need Notes field(s).

Report Results

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	*Cornerstone Mission (CSM) - HMIS		
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	CC - Skypointe - Yavapai - COC - RRH		

Select ALL Clear Showing 1-2 of 2

2. Although ‘hover text’ is present, to view the full note requires returning to the Client Service Transaction, Need, and Notes section.

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input checked="" type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	*Cornerstone Mission (CSM) - HMIS		
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	CC - Skvoinite - Yavapai - C		



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Update Referral Outcome

Need Notes

This is an HMIS TEST note

a. A quick way is to click on the Name of the client.


Referral Date	Name	Group	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	*Cornerstone Mission (CSM) - HMIS		
<input type="checkbox"/> 11/07/2023 12:36:01 AM	(1) Test, Test L		Rapid Rehousing (Single 4-7, Family 4-8)	12			Rapid Re-Housing Programs	Mohave - CE	CC - Skvoinite - Yavapai - CCG - RRH		


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b. Then, return to the Service Transactions tab, and using the “View Entire Service History” button, view the Need.


Client Information Service Transactions


Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services


Add Referrals


View Previous Service Transactions


View Shelter Stays


View Entire Service History

Edit Need 

▼ Household Members

No Household Members were originally associated. [Include Additional Household Members](#)

Need Information

Provider * Mohave - CE (1244)

Need * Rapid Re-Housing Programs (BH-0500.7000) [Look Up](#)

Date of Need * 11 / 07 / 2023 12 : 36 : 01 AM

Amount If Financial

Notes This is an HMIS TEST note

Need Status * Identified

Outcome of Need -Select-

If Need is Not Met, Reason -Select-

[Save](#) [Save & Exit](#) [Exit](#)