# Solari
### CRISIS & HUMAN SERVICES

## 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 \*\***

1.  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).



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

**Step 2:** ROI
(**Refer to the ROI Tab Instructions document**.)

1.  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".
        o  **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.**
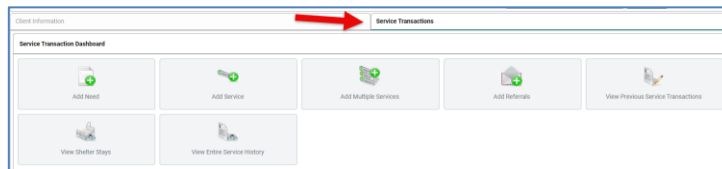
2. Click Save Release of Information

**Step 3**: Referral
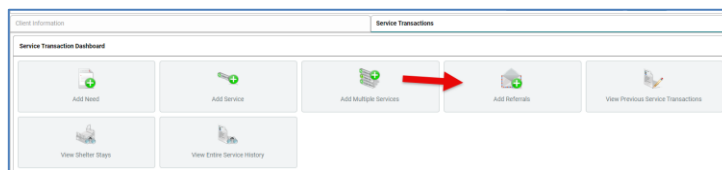This process explains how to add a referral ("approval"/ "match") to an agency within HMIS.
**\*\* Only make the referral for the Head of Household. \*\***
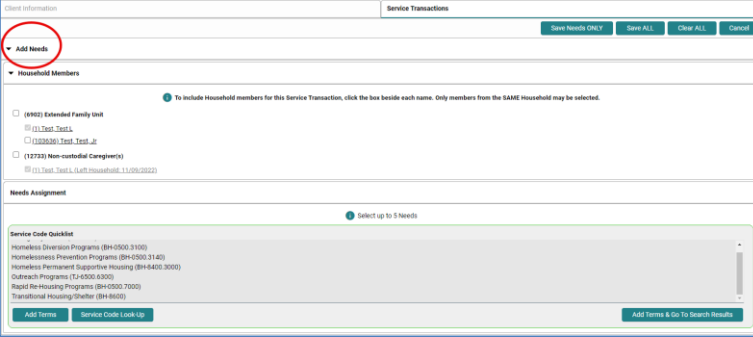(Refer to the Case Management Referrals document)
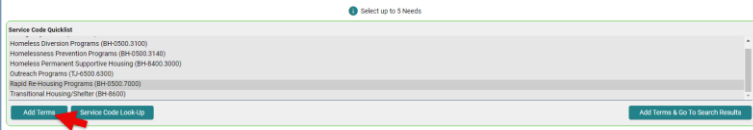
1. Go to the Service Transactions tab.



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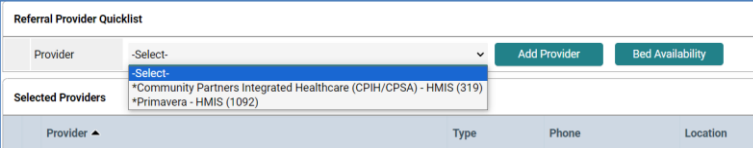
ii. At the sub-section, "**Service Code Quicklist**", select the Service Code for the referral (usually, Rapid Re-Housing (BH-0500.7000).



   1. Only select 1 Service Code for each CE service entry.
   2. Click "Add Terms"
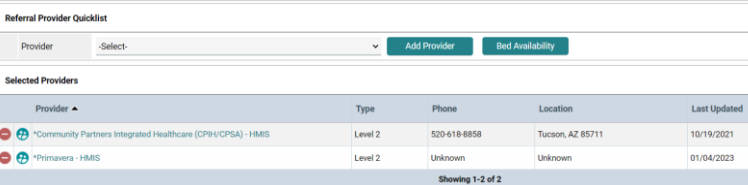
iii. The Referral Provider Quicklist sub-section is pre-set by the project administrator and HMIS.
   (Contact your administrator to add Providers to the list or remove Providers from the list.)
   1. Choose at least 1 Provider from the list.



   2. Click "Add Provider" for each Provider selected.
   * Note that the **Selected Providers** are shown below the Search Results.
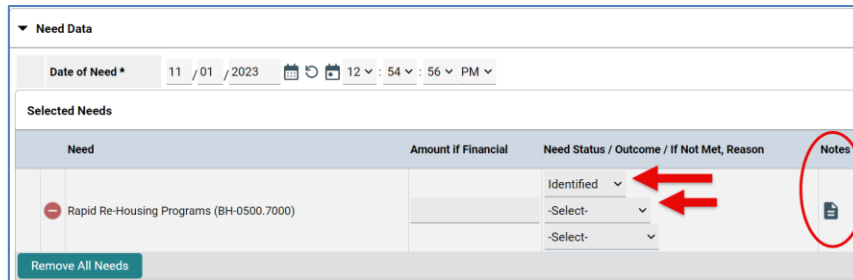


4. Under the "**Referral Data**" section,
   i. The date will auto-populate to Current Date
   ii. (Leave the other items in this section as their default/blank/unselected)

5. In the **Referrals** section be sure to check the box next to each "Referred to Provider".

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



   ** 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"
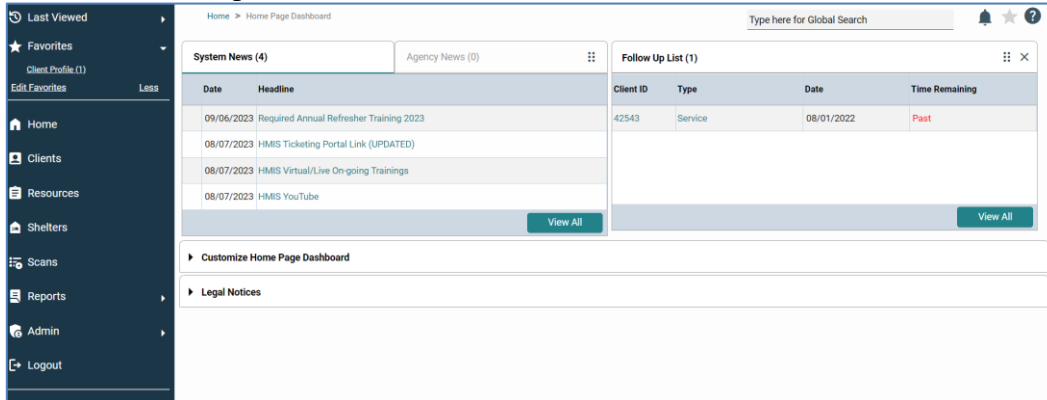


2. Select the Referrals report.
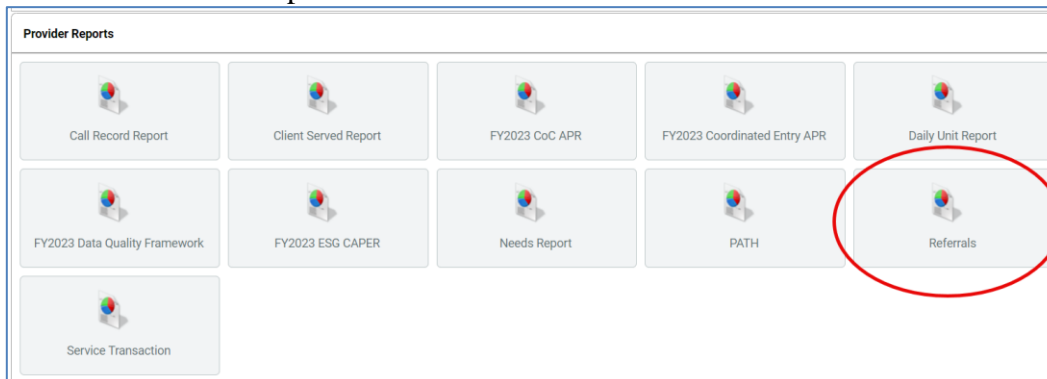


3. Fill out the Referral Report prompts as follows:
    a. <u>Provider</u> will default to the County-level CE EDA.
    b. Choose "This provider ONLY"
    c. Select <u>Referral Type</u> as "Outgoing referrals from provider"
    d. Select <u>Referral Status</u> as "Outstanding" or "ALL", depending on what you want to look for.
    e. Select your choice of <u>Referral Date Range</u> (even one day)
    f. Click "Build Report"

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



**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



**Step 2:** Notes
1. When "Need Notes" are present, a Notes icon will be displayed in the Need Notes field(s).

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



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



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