

# 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).

Provide	er Se	arch																							
Search fo	r Pro	iders	by us	ing k	eywo	ords f	from	n the	Prov	ider	Nam	e or	Desc	ripti	on.										
Search															Sho	w Ad	lvano	ced C	Optio	ns					
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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".
    - 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.

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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)

Verification from Other Institution

1. Go to the Service Transactions tab.

Client Information	•	Service Transactions		
Service Transaction Dashboard				
Add Need	Add Service	Add Multiple Services	Add Refemals	View Previous Service Transactions
View Sheller Stays	View Entire Service History			

2. Select "Add Referrals"

Client Information		Service Transactions		
Service Transaction Dashboard				
Add Need	Add Service	Add Multiple Services	Add Refemals	View Previous Service Transactions
View Shelter Stays	View Entire Service History			

- 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

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Client Information	Service Transactions
$\frown$	Save Needs ONLY Save ALL Clear ALL Cancel
🗸 Add Needs	
▼ Household Members	
To include Household members for this Service Transaction, click the box	beside each name. Only members from the SAME Household may be selected.
G (6902) Extended Family Unit	
(1) Test Test L	
(100636) Test_Test_Jr	
(12733) Non-custodial Caregiver(s)	
🖾 (1) Test. Test. (Left Household: 11/09/2022)	
Needs Assignment	
<ul> <li>Select t</li> </ul>	ip to 5 Needs
Service Code Quicklist	
Homefacts Detrosion Programs (BH-9000, 2110) Internetises Permanent Disportine FW-900, 1401 Homefacts Permanent Disportine FW-900, 1401 Distracts Perspanse (BH-9000, 2000) Biglig Directicapes Pergnams (BH-9000, 2000) Transitional FW-9000, 2000) Transitional FW-9000, 2000 Transitional FW-9000, 2000 Tra	
Add Terms Service Code Look-Up	Add Terms & Go To Search Results

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

Gelect up to 5 Needs	
Service Code Quicklist	
Kenneksis Densen Programs (BH-0003 200) Hondessis Program (BH-003 2014) Hondessis Program (BH-003 2014) Hondessi Programs (DH-003 200) Beach	
Add Terma Service Code Look Up	Add Terms & Go To Search Results

- 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.

Re	ferral Provider Quic	klist			
	Provider	-Select-	~	Add Provider	Bed Availability
		-Select-			
Se	ected Providers	*Community Partners Integrated Healthcare (CPIH/CPSA) - HMI *Primavera - HMIS (1092)	S (319)		
	Provider 🔺		Туре	Phone	Location

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

•	Refer	ral Provider Quick	list				
	P	rovider	-Select-	V Add F	Provider Bed Avail	ability	
	Select	ted Providers					
		Provider 🔺		Туре	Phone	Location	Last Updated
C	•	*Community Par	ners Integrated Healthcare (CPIH/CPSA) - HMIS	Level 2	520-618-8858	Tucson, AZ 85711	10/19/2021
C	•	*Primavera - HM	s	Level 2	Unknown	Unknown	01/04/2023
					Showing 1-2 of 2		

- 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)	۵	(1) Test, Test L		
*Primavera - HMIS (1092)		(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

			-			
•	Need	l Data				
	Da	te of Need *	11 / 01 / 2023 🛗 🖯 🖬 12 🗸 : 54	✓ : 56 ✓ PM ✓		
s	elect	ed Needs				
		Need		Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
					Identified V	
	0	Rapid Re-Housing	Programs (BH-0500.7000)		-Select-	
					-Select-	$\bigcirc$
	Remo	ve All Needs				

\*\* 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"

Last Viewed		Home > Ho	ome Page Dashboard				<b>T</b>			
	<b>'</b> .						тур	e here for Global Search		<b>=</b> ^ `
Favorites	•	System News	(4)	Agency News (0)		Follow Up	List (1)			∷ ×
dit Favorites Les	<u>s</u>	Date	Headline			Client ID	Туре	Date	Time Remainin	ng
Home		09/06/2023	Required Annual Refresher Trainin	ng 2023		42543	Service	08/01/2022	Past	
Olionto		08/07/2023	HMIS Ticketing Portal Link (UPDA	TED)						
Clients		08/07/2023	HMIS Virtual/Live On-going Traini	ngs						
Resources		08/07/2023	HMIS YouTube							
Shelters				Viev	w All					View All
Scans		<ul> <li>Customize H</li> </ul>	Iome Page Dashboard							
Reports	•	Legal Notice	5							
Admin										
Logout										

#### 2. Select the Referrals report.

Provider Reports				
Call Record Report	Client Served Report	FY2023 CoC APR	FY2023 Coordinated Entry APR	Daily Unit Report
FY2023 Data Quality Framework	FY2023 ESG CAPER	Needs Report	Path	Referrals
Service Transaction			, <b>`</b>	

- 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"

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ovider *	Mohave - CE (1244)		*	
	O This provider AND its subordinates	This provider ONLY		
eferral Type *	Outgoing referrals from provider $\checkmark$			
eferral Status	Outstanding     Closed     ALL			
eferral Outcome	-All- ~			
eferral Date Range	10 / 01 / 2023 🛗 🖯 🖬	11 / 01 / 2023 🛗 🖯 🖬		
ort Order	Name (Ascending) Referral Date (Ascending) Referral Outcome (Ascending) VI-SPDAT (Ascending) Need Notes (Ascending)	Select Clear		

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

Provider *	Mohave	e - CE (1244)					~			
	• This p	provider AND its subordinat	tes	◯ <u>This</u>	provider ON	LY				
Referral Type *	Outgoin	g referrals from provider •	~							
Referral Status	Outst	anding O <u>Closed</u> O <u>A</u>	ш							
Referral Outcome	-All-	$\sim$								
Referral Date Range	10 / 01	/ 2023 🛅 🖯 🖬		11 /0	7 / 2023	🛱 C 🛗				
Cast Order	Diesse 9	Relect a Sort Order		Se	lect	Clear				
xport Report	Fielde							Build R	eport	Clear
xport Report port Results	Piedoe							Build R	eport	Clear
xport Report port Results Referred Date > Nam	me Group	Ranking	VI- SPDAT	TAY-VI- SPDAT	VI- FSPDAT	Need Type	Referred By	Build R	eport Referral Outcome	Clear Need Note
xport Report port Results Referred Date Nam 2236-01 AM Test	me Group ID fest, t L	Ranking Rapid Rehousing (Single 4-7, Family 4-8)	VI- SPDAT 12	TAY-VI- SPDAT	VI- FSPDAT	Need Type Rapid Re-Housing Programs	Referred By Mohave - CE	Build R Referred To *Cornerstone Mission (CSM) - HMIS	eport Referral Outcome	Clear Need Note

**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	•	Outgoin	g referrals from provider	~							
	Referral Stat	Update Ref	erral Ou	tcome					×			
	Referral Out			The colored (1) D	oforcol wil	I receive the		leated below				
	Referral Date			The selected (1) H	elerral wil	receive the	succome se	nected below.				
	Sort Order	Referral 0	utcome *	Accepted		~						
Re	oport Report		_	Accepted Declined Canceled	on Wait I	.ist	Save Ref	erral Information	Exit	Build R	eport	Clear
	Referral Date	Name	Group ID	Ranking	VI- SPDAT	TAY-VI- SPDAT	VI- FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need
2	Referral Date 11/07/2023 12:36:01 AM	(1) Test, Test L	Group ID	Ranking Rapid Rehousing (Single 4-7, Family 4-8)	VI- SPDAT 12	TAY-VI- SPDAT	VI- FSPDAT	Need Type Rapid Re-Housing Programs	Referred By Mohave - CE	Referred To *Cornerstone Mission (CSM) · HMIS	Referral Outcome	Need
2	Referral Date 11/07/2023 12:36:01 AM 11/07/2023 12:36:01 AM	(1) Test, Test L (1) Test, Test L	Group ID	Ranking Rapid Rehousing (Single 4-7, Family 4-8) Rapid Rehousing (Single 4-7, Family 4-8)	VI- SPDAT 12 12	TAY-VI- SPDAT	VI- FSPDAT	Need Type Rapid Re-Housing Programs Rapid Re-Housing Programs	Referred By Mohave - CE Mohave - CE	Referred To           *Cornerstone Mission (CSM) - HMIS           CC - Skypointe - Yavapai - COC - RRH	Referral Outcome	Need
2	Referral Date 11/07/2023 12:36:01 AM 11/07/2023 12:36:01 AM Select ALL	<ul> <li>Name</li> <li>(1) Test, Test L</li> <li>(1) Test, Test L</li> <li>Clear</li> </ul>	Group ID	Ranking Rapid Rehousing (Single 4-7, Family 4-8) Rapid Rehousing (Single 4-7, Family 4-8)	VI- SPDAT 12 12	TAY-VI- SPDAT	VI- FSPDAT	Need Type Programs Rapid Re-Housing Programs Show	Referred By Mohave - CE Mohave - CE ing 1-2 of 2	Cornerstone Mission (CSM) - HMIS CC - Skypointe - Yavapai - COC - RRH	Referral Outcome	Need

Step 2: Notes

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

Referral Date	Name	Group ID	Ranking	VI- SPDAT	TAY-VI- SPDAT	VI- FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
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		8
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						Show	ing 1-2 of 2			

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

R	eport Results											
	Referral Date	Name	Group ID	Ranking	VI- SPDAT	TAY-VI- SPDAT	VI- FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
•	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		8
	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 - Yayapa		
	Select ALL	Clear Showing 1-2 of 2 This is an HMIS TEST note										
	Update Referral Ou	ıtcome										

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

F	Report Results										
	Referral Date	Name Group	Ranking	VI- SPDAT	TAY-VI- SPDAT	VI- FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
	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		
C	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		
ſ	Select ALL	Clear					Show	ing 1-2 of 2			

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 Multipl	e Services	Add Referrals	View Previous Service Transactions
View Shelter Stays	View Entire Service History	)			

Edit Need	ð
Household Members	
No Household Members we	ere originally associated.
Need Information	
Provider *	Mohave - CE (1244) 🗸
Need *	Rapid Re-Housing Programs (BH-0500.7000) v 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 & Exit