



## **Making Referrals in HMIS for Coordinated Entry – Ohio Balance of State HMIS**

### **HMIS Referral Guidance – June 2019**

A referral is required in HMIS to document Coordinated Entry (CE) movement for every client entering any project with the exceptions of clients entering the Unsheltered Clients – OUTREACH or PATH Street Outreach projects, Diversion projects, Homelessness Prevention projects and non-HMIS participating projects.

Projects making referrals should be those providers where the client is coming from. For example, for clients going from Access Points (AP) to emergency shelter, the AP will make the referral in HMIS to the emergency shelter. For clients going from emergency shelter to rapid re-housing, the emergency shelter will make the referral in HMIS to the rapid re-housing project.

The access point (AP) provider end users can use that provider to create the client or household, possibly record a VI-SPDAT, and refer the client to emergency shelter or permanent housing. The AP will not create a Project Entry or fill out the HUD assessment. Once the referral is received by the emergency shelter or housing provider, then that provider accepts and closes the HMIS referral and creates the Project Entry. If the agency that creates the referral is the same agency that accepts the referral, such as when the local AP and RRH provider are the same agency, then the user will need to switch EDA from one project to the other during the process.

HMIS participating projects needing to refer clients to non-HMIS participating projects won't need to document the referral in HMIS. If clients eventually return to an HMIS participating project however, they will need a referral for that step in the process. Please refer to the detailed HMIS referral workflows available here for details.

Clients going from HMIS non-participating projects, such as non-HMIS participating emergency shelters, to HMIS participating projects, such as RRH, will need referrals documented in HMIS. In these cases, the HMIS participating project that is receiving the referral from the non-HMIS participating project will need to contact the local AP project and request that they create the client/household, providing enough client-level information for them to do so, and make the referral to the HMIS-participating project. Alternatively, the non-HMIS participating project may contact the AP to create the client/household and make the referral. Either way, the referral in HMIS to the HMIS participating project must be initiated by the AP. This workflow will account for cases where a client is coming from a DV shelter or non-HMIS shelter and entering into an HMIS participating project, and will show that a client passed through an AP and the Coordinated Entry process. This workflow will not reflect specifically where the client came from, just that the AP managed the referral.

### **Veteran Homelessness and Coordinated Entry**

Supportive Services for Veterans and their Families (SSVF) grantees have recently been added as APs for the Ohio BoSCoC CE processes, and their AP projects have been created in HMIS. As APs, SSVF projects will enter clients who have been diverted into the Diversion provider and will use the same process as other APs for referring Unsheltered clients to emergency shelter or permanent housing, or for referring clients to their own project from a non-HMIS participating provider.



## Access Points: HMIS Workflows for Referrals

**Diversion** - If a client is diverted the user will record that through the Diversion workflow.

### Referral to Emergency Shelter

If the client is going to an HMIS participating emergency shelter, the user will start from their AP, create the client/household, then refer them to shelter. If the AP is not the shelter, then the AP is done and the shelter provider will accept the referral and enter the client into their project in the normal manner.

If the AP is also the emergency shelter, then they will switch to the shelter EDA to accept and close the HMIS referral, then enter the client in the shelter project.

If the client is going to a non-HMIS participating shelter, the user will do nothing in HMIS unless the client comes back to an HMIS participating provider for assistance. In that case, use the **Referral from non-HMIS provider to HMIS provider** steps.

### Referral from HMIS provider to HMIS Permanent Housing provider (RRH PSH TH)

If a client is referred from an HMIS participating provider, the participating provider will make the referral to the permanent housing provider. The receiving provider then accepts and closes the referral and creates a project entry and serves the client as usual. If the agency is both providers, the user will have to switch EDA from one project to the other during the process.

(These conditions would also apply to clients being managed in the Unsheltered – OUTREACH project.)

### Referral from non-HMIS provider to HMIS provider

If a client is referred from a non-HMIS participating (doesn't use HMIS) provider, the receiving provider will contact the local AP project and request that they create the client/household, providing enough client-level information for them to do so, and make the referral to the HMIS-participating project.

If the receiving provider also happens to be the local AP, the user will EDA to the AP in HMIS, create the client record (and household), enter the client's birthdate, input the VI-SPDAT (if applicable), and refer the client to the permanent housing provider. The user will then EDA to the permanent housing provider to accept the HMIS referral, and enter the client into the project.

### Referral from HMIS provider to non-HMIS provider

If a client is referred from an HMIS participating provider to a non-HMIS participating provider, the participating provider does NOT need to document a referral in HMIS. The client will simply exit the HMIS project when appropriate.

(This condition would also apply to clients managed in the Unsheltered – OUTREACH project.)