



Referring a Client from the Unsheltered – OUTREACH project to an HMIS provider

In this process, you would have already entered the client or household into the Unsheltered – OUTREACH project, and added the VI-SPDAT. Now you will make a referral in HMIS from the Unsheltered – OUTREACH project to the shelter or housing project, then switch to that project and accept and close the referral. Finally, you proceed with the normal process of creating and ROI and entering the client into the shelter, TH, RRH, or PSH.

Add VI-SPDAT

Use Enter Data As to switch to the Unsheltered - OUTREACH project where the client is entered in HMIS. Search for and create or open the Client record from ClientPoint. Create a household is necessary.

Add ROI for Unsheltered

Add Entry/Exit for Unsheltered, using **Standard** type

Answer Unsheltered Assessment, then Save and switch to Coordinated Entry Assessment

Click Add in the appropriate VI-SPDAT section to input the results of whichever VI-SPDAT was done with the client or head of household.

Create Referral

Use Enter Data As to switch to the Unsheltered - OUTREACH project

Open the Client record and click the Add Referral button at the bottom of the Summary (either Add Referral button, they open the same window)

In the Service Code Quicklist, pick the Need: *Emergency Shelter BH 1800, Rapid Re-Housing Programs BH 0500.7000, Transitional Housing/Shelter BH-8600, or Supportive Housing BH 8400*

Click Add Term

In the Search Results, select the provider that will provide the assistance (find the provider and click the green plus sign)

Set the Referral Date (if you need to change it)

Set the Ranking to Single or Household

Click the Search button for the appropriate SPDAT type you had entered in the previous steps

Click the green plus sign next to the SPDAT score to add it to the referral

Set the Need Date to match the referral date (if you changed it)

Click Save All

Accept Referral

Use Enter Data As to switch to the permanent project.

Click the Incoming Referrals number on your Counts Dashboard, click the ClientID number in the list.
or open the client via ClientPoint

Go to the Outstanding Incoming Referral box on the Summary and click the Referral pencil.

Set the Referral Outcome to 'Accepted'

Set Need Status to 'Closed'

Set Need Outcome to 'Fully Met'

Save & Exit

ROI, Project Entry

From here it's the same old workflow: Add ROI ES, RRH, or PSH, Add Entry/Exit to ES, RRH, or PSH, and add Service Transactions if required.