HMIS Referral of a Client from an HMIS provider to an HMIS RRH/PSH

This process works for clients being referred from an HMIS provider of any type to another HMIS provider of any type. This could be a case where the client is in a shelter or some other HMIS project but has been prioritized and needs the referral to the HMIS participating permanent housing project. This process will have you create the client record/household, add a birthdate and VI-SDPAT at the appropriate time, and create the referral for housing. If your agency is both the referring agency and the permanent housing provider then you would switch to the EDA for the RRH or PSH project, accept the referral, and enter the client into the RRH or PSH project. If your agency is not the housing provider, you are done. If your agency is only the housing provider, start from the **Accept Referral** step.

Add VI-SPDAT
Use Enter Data As to switch to the emergency shelter (ES) project (ES).
Search for and create (or open) the Client record from ClientPoint. Create Household if necessary.
If the client has been homeless before and you have already completed the VI-SPDAT with them, you will enter them into the shelter and, while answering the HUD Entry Assessment, you will switch to the Coordinated Entry Assessment, and follow the steps on that screen.
If the client is first-time homeless you will wait 5 days before completing the VI-SPDAT with them and creating an Interim, switch to Coordinated Entry Assessment, and then follow the steps to record the VI-SPDAT.

Create Referral
Click the Add Referral button at the bottom of the Summary
In the Service Code Quicklist, pick the Need: *Rapid Re-Housing Programs BH 0500.7000* 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 VI-SPDAT type you had entered in the previous steps
Click the green plus sign next to the VI-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 housing 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 for RRH or PSH, Add Entry/Exit to RRH or PSH, and add Service Transactions if required.