OHIO
Balance of State
Continuum of Care

HMIS Referral of a Client from a non-HMIS Provider to an HMIS RRH/PSH

This process works for clients entering an HMIS provider from a non-HMIS provider. This could be a scenario where the client in a DV shelter, or some other non-HMIS location but has been prioritized and needs the referral to the HMIS providing project, such as an RRH or PSH project. You create the client record/household, add a birthdate, VI-SDPAT, and create a referral for housing. In cases where the housing project that is the HMIS Provider is also the local AP, the provider will EDA to the AP project and create the referral to themselves. If the HMIS provider is NOT a local AP, they will need to notify the local AP that they need the referral created.

Add VI-SPDAT
Use Enter Data As to switch to the access point (AP) project.
Search for and create (or open) the Client record from ClientPoint. Create a household if necessary.
The Client Summary Tab should provide the Coordinated Entry Assessment by default.
If the birthdate info is blank, fill it in and then click Save at the bottom.
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
In the AP project, 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 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

If you are also the HMIS participating housing provider follow the next section. If you are not the housing provider you are finished.

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 Ooutcome 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.

CE 2019 - non-HMIS to HMIS – revised 7/22/2019