



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.)



HMIS Referral of a Client from an Access Point to a Shelter

This process is for clients that are entering shelter after meeting with an Access Point (AP). The AP will create a client record/household, add a birthdate, maybe add a VI-SPDAT, and create the referral to shelter. If your agency is both the AP and also the shelter you will then switch your EDA to the shelter, accept the referral, and enter the client into the shelter project. If your agency is not the AP, but is only the shelter, you will start at the **Accept Referral** step.

AP - Add VI-SPDAT

*In most cases, the AP will not be entering a VI-SPDAT into the AP project prior to referring to shelter. However, if the client has been unsheltered, it's possible the AP will have VI-SPDAT information that can be entered into the client record.

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.

AP - Create Referral

Click the Add Referral button at the bottom of the Summary

In the Service Code Quicklist, pick the Need: *Emergency Shelter BH 1800*

Click Add Term

In the Search Results, select the shelter provider (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

If your agency is also the shelter provider, you will follow the next section as well. If your agency is not the shelter provider you are finished.

Accept Referral

Use Enter Data As to switch to the shelter project, if your shelter is also the AP

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 shelter, Add Entry/Exit to shelter.



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-SPDAT 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.



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.



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 is 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-SPDAT, 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 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.