Connect to Home Coordinated Entry Specialist Procedures – Making Referrals
Updated: February 15, 2021

Connect to Home Coordinated Entry Call Center and Access Site Specialists should use the following procedures for making referrals to all three Connect to Home Programs.

- CE Specialists should *never* send electronic referrals by direct email from their own email address to any referral providers (this is a recent procedural change).

- We are in the process of creating "fake" provider accounts in PA HMIS for Non-HMIS participating organizations to streamline the referral process for CE Specialists and to create a more accurate report of how many referrals are made (and to which providers for each project type). A "fake" provider account has the phrase "(Non-HMIS Provider)" at the end of their agency name in PA HMIS.

- CE Specialists are required to send electronic referrals through PA HMIS using the "Email Authorized" checkbox **only** for referral providers that are HMIS-participating organizations.

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How We Make Referrals Depends on the Provider's Relationship to PA HMIS.

- Always reference the most recent CES Referral Partner Matrix (in Excel) to ensure 1) household eligibility and 2) the referral provider is accepting referrals.

- Always give the client/participant the agency name, address, and phone number of the referral provider.

Provider Relationship to PA HMIS	Referral Method	Send Email Via PA HMIS?	Send Email from Your Own Email?
Provider is an active PA HMIS user organization.	PA HMIS	YES	NO
Provider is in PA HMIS **but** has the phrase "(Non-HMIS Provider)" next to their name.	PA HMIS	NO	NO
Provider is not in PA HMIS at all.	Give participant name, address, and phone number of the referral provider.	NO	NO

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Steps for Making A Referral in PA HMIS

After completing a household's enrollment into any of Connect to Home's programs, including: 1) Eastern PA Coordinated Entry (HUD Categories 1 and 4 literal homelessness), 2) CE Homeless Prevention (HUD Categories 2, 4, and At-Risk of Homelessness), and 3) CE Shelter Referrals Only CAT. 2 (HUD Category 2 Households Seeking a Referral to Emergency Shelter and nothing else), the steps for making a referral in PA HMIS are identical.

1. After exiting the program enrollment workflow, scroll down the Client Menu to Enrollment and Services, then select Referrals.

2. Click "Add New Referral".

3. Complete the required referral information fields and select Next.

To Refer to a specific provider/program, you must click the magnifying glass next to "Refer to Provider". The following dialogue box appears. Enter your search parameters (if any) and click Search. Click the name of the provider you want from the list that appears in the search results.

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If you know the provider's name, enter it into the Provider search box. You may also search by the city in which the provider's office is in.

You may also try to check every county the client/participant is willing and able to travel to for services by using the Client's County Preference checklist. However, at this time not all PA HMIS providers are coded to the counties they serve. If this feature does not return any providers, try the Provider Search again with nothing checked.

Note: Specific Homeless Prevention programs may be found under Referral to Prevention Assistance OR Rental Assistance. You may have to try selecting first one and then the other from the Referral Services pull-down menu and search for the provider under both (we are working to recode all of them to Referral to Prevention Assistance).

Note: Specific Emergency Shelter programs may be found under Referral to Emergency Shelter bed opening OR Emergency Shelter Housing. You may have to try selecting first one and then the other from the Referral Services pull-down menu and search for the provider under both (we are working to recode all of them to Referral to Emergency Shelter bed opening).

4. On the Voucher and Information Release page, ignore Voucher Information completely.

Check the Email Authorized checkbox ***if and only if*** the provider is in PA HMIS and does **not** have the phrase (Non-HMIS Provider) after their name. Otherwise, leave the entire page blank and select Next.

5. Skip over the Referral Outcomes page completely and press Finish.

6. If you selected "Email authorized", a system-generated email will appear for you to complete and send.


Enter the name of the provider/program's case manager as listed in the CES Referral Partner Matrix. You may cc: someone else from the provider agency and add information to the text box, then press send.

NOTE: Never put the client/participant's Personally Identifiable Information (PII) into the email subject, narrative, or file attachments.

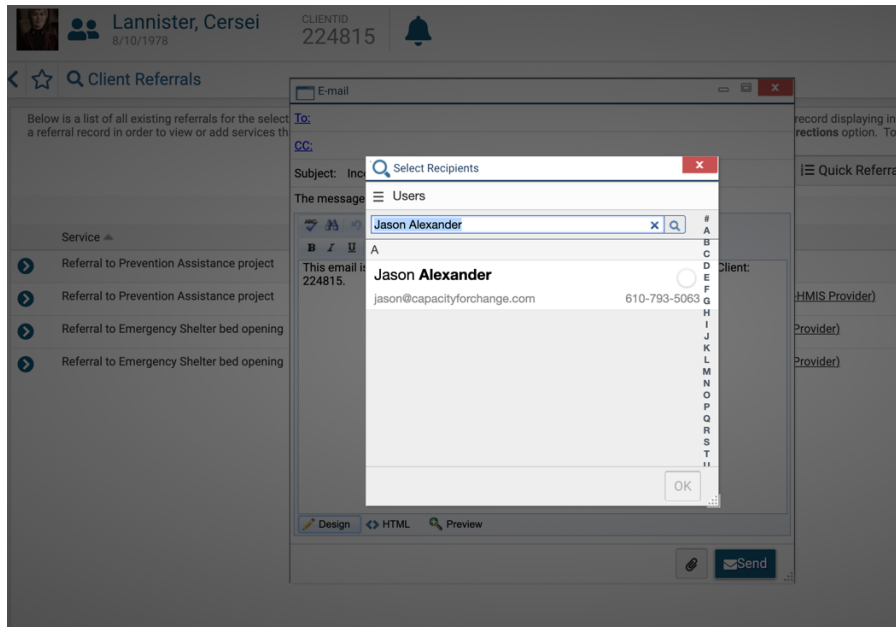**Connect to Home Coordinated Entry Specialist Procedures – Making Referrals**

PRO TIP: PA HMIS has an address book feature that contains contact information for PA HMIS users.

If you click "To:" in the email before sending, your address book launches.
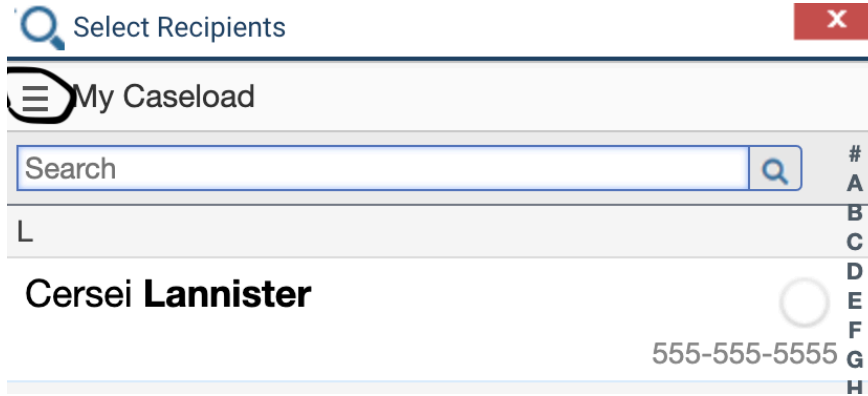

The default address book is "My Caseload" and actually provides contact information for your clients/participants.

If you click on the three horizontal lines to the left of My Caseload, you will see a list of contact files. Select the one called Users, then search for the provider/project case manager by first or first and last names.

If you find the person you are searching for, check the circle button to the right of their name (just above their phone number), and then press OK. Their email address will then be filled into the To: field of the email.
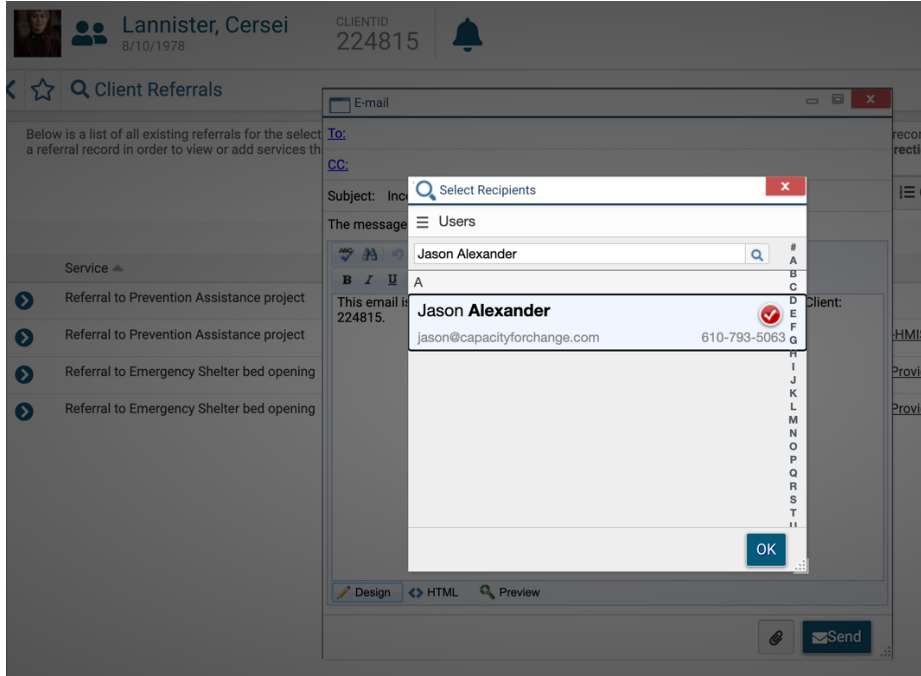
7. If you need to create additional referrals, repeat Steps 1 – 6 as needed.