



## 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.

Service	Preference
Referral to Emergency Shelter bed opening	No Preference
Referral to Prevention Assistance project	No Preference

- 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.

## Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

### 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.

<b>Provider Relationship to PA HMIS</b>	<b>Referral Method</b>	<b>Send Email Via PA HMIS?</b>	<b>Send Email from Your Own Email?</b>
Provider is an active PA HMIS user organization.	PA HMIS	YES	NO
Provider is in PA HMIS <b>but</b> 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

# Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

## 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.

The screenshot shows the ClientTrack interface for a client named Cersei Lannister. The left sidebar contains a menu with 'Referrals' highlighted. The main content area shows the client's profile information and a table of enrollments.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed
CE Homeless Prevention	1	Household without Children	02/08/2021		7		2/8/2021

2. Click "Add New Referral".

The screenshot shows the 'Client Referrals' section of the ClientTrack interface. The '+ Add New Referral' button is highlighted with a red circle. Below the button is a table of existing referrals.

Service	Referral Date	To Provider	Status	Result
Referral to Emergency Shelter bed opening	02/08/2021	Salvation Army Lock Haven (Non-HMIS Provider)	Referral Made	Cancelled
Referral to Emergency Shelter bed opening	02/05/2021	Salvation Army Lock Haven (Non-HMIS Provider)	Referral Made	

# Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

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

The screenshot shows the ClientTrack interface for creating a referral. The client profile for Lannister, Cersei (CLIENTID 224815) is displayed at the top. The referral form is divided into several sections: Referral, Referral Recipient, and Referral Source. The Referral section includes fields for Referral Date (02/15/2021) and Referral Service (Referral to Prevention Assistance project). The Referral Recipient section includes a field for Refer to Provider (Fake Eastern PA Housing Services). The Referral Source section includes fields for Refer from Provider (Connect To Home), Refer from User (Jason Alexander), Location (Connect to Home), and Status (Referral Made). A 'Next' button is located at the bottom right of the form.

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.

The screenshot shows the 'Find Provider' search dialog box. The search criteria include Provider (Fake), Address, City, State (PA), and Zip Code. A dropdown menu for Client's County Preference is open, showing a list of counties including Adams County, Allegheny County, Armstrong County, Beaver County, Bedford County, Berks County, and Blair County. The Provider Type is set to Provider. A 'Search' button is visible. Below the search results, a table shows one result: Fake Eastern PA Housing Services (Non-HMIS Provider) at 1 Mountain Drive, Stroudsburg, PA 18360.

Provider	Address	City	State	Zip Code	Client's County Preference
Fake Eastern PA Housing Services (Non-HMIS Provider)	1 Mountain Drive	Stroudsburg	PA	18360	

## Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

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.

The screenshot shows the ClientTrack interface for a referral. The client is Lannister, Cersei, with a client ID of 224815. The page is titled "Voucher and Information Release" and contains two main sections: "Voucher Information" and "Information Release".

**Voucher Information:** A section with the instruction "Please complete the following information if your organization has authorized a voucher for this service." It contains a checkbox labeled "Voucher is Authorized:" which is currently unchecked.

**Information Release:** A section with the instruction "If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral." It contains a checkbox labeled "Email Authorized:" which is checked. This checkbox is circled in red in the image.

## Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

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.

The screenshot shows a web application interface for "Client Referrals". At the top, there is a user profile for "Lannister, Cersei" with a date "8/10/1978" and a "CLIENTID 224815". A notification bell icon is also present. Below the header, there is a search bar with a star icon and the text "Client Referrals".

On the left side, there is a list of referrals under the heading "Service":

- Referral to Prevention Assistance project
- Referral to Prevention Assistance project
- Referral to Emergency Shelter bed opening
- Referral to Emergency Shelter bed opening

The main content area displays an email composition window titled "E-mail". The email fields are:

- To:
- CC:
- Subject: Incoming Referral

The message body contains the text: "The message will be sent from Jason Alexander (jason@capacityforchange.com)". Below this is a rich text editor with a toolbar and a text area containing the message: "This email is to inform you that a referral to your organization has been sent for Client: 224815." At the bottom of the email window, there are buttons for "Design", "HTML", "Preview", and "Send".

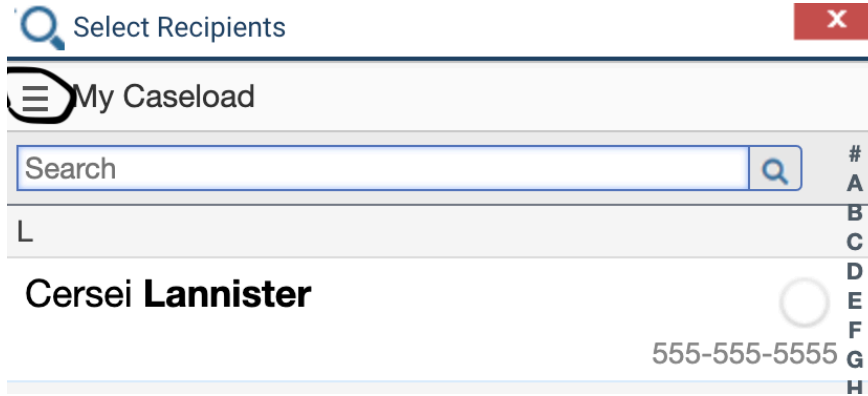
Enter the name of the provider/program's case manager as listed in the CES Referral Partner Matrix. You may cc: someone else from the provider agency and add information to the text box, then press send.

**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

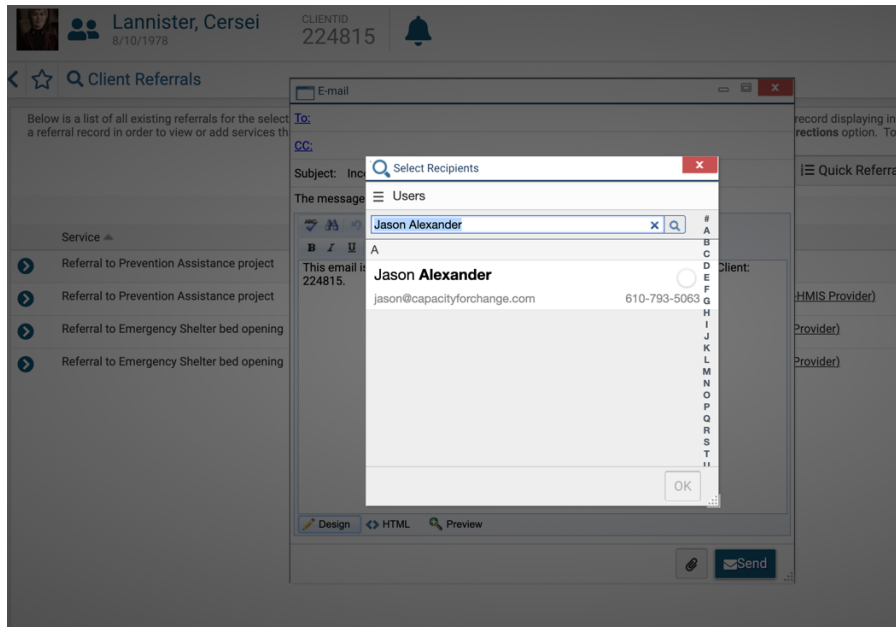
**PRO TIP:** PA HMIS has an address book feature that contains contact information for PA HMIS users.

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



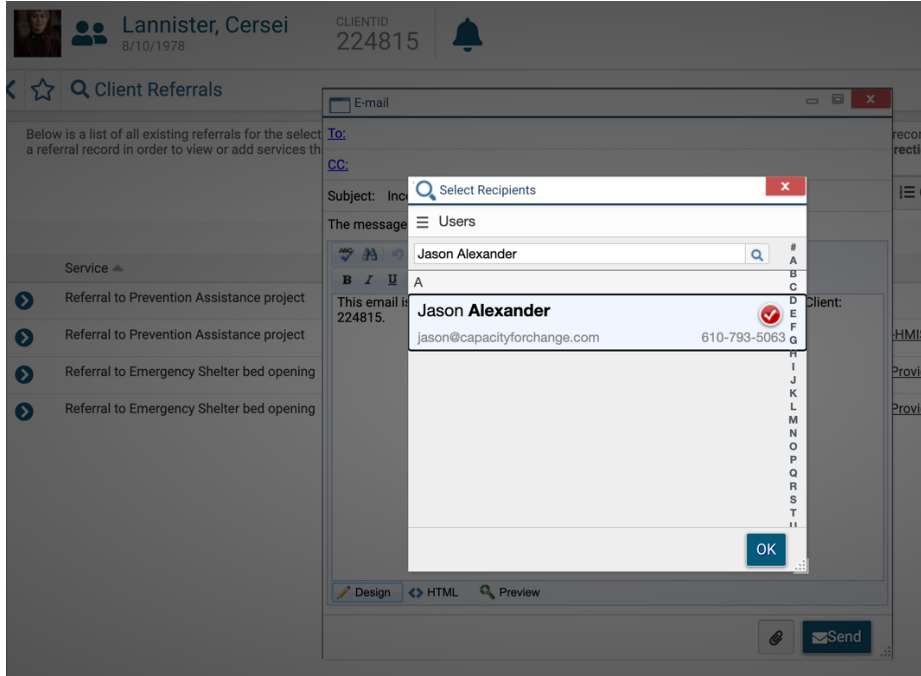
The default address book is "My Caseload" and actually provides contact information for your clients/participants.

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.



## Connect to Home Coordinated Entry Specialist Procedures - Making Referrals

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.