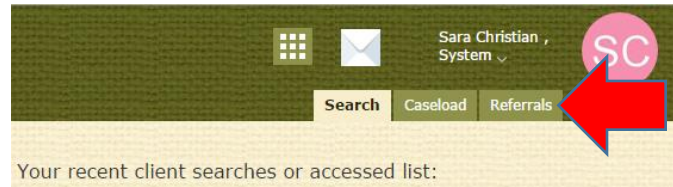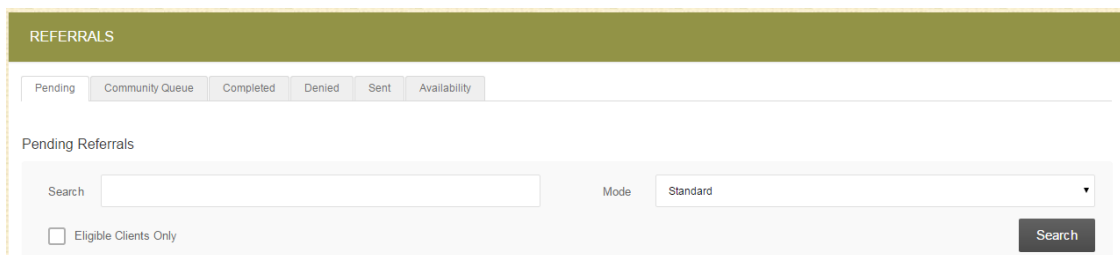# Sacramento CoC HMIS
WORKING WITH THE REFERRALS TAB

This section details the most common tasks performed in the Referrals section:

- How to View and Enroll a Client from the Pending tab
- How to Place a Client as "Pending - In Process"
- How to Deny a Referral
- How to View Completed and Denied Tabs

How to View a Client from the Pending Tab

When a referral is sent to your Agency and you are the person that has been identified to receive the referrals for a project in the system, an email will come to you that includes the Unique Identifier (UI) of the client that is being referred. Paste the UI in the search box in the Pending tab.

To work with that client in the Pending tab of the Referrals section, mouse over the Client Name (e.g. Willie Winston):

Selecting the "Edit" link will take you to the actual Referral where you can view the referral, any notes along with it, place the person as "Pending - In Process," or deny the referral and send it to the Community Queue tab.

Selecting the client name will take you to the Profile screen of the client record. This is where you will enroll the client into your project once you have housed them.
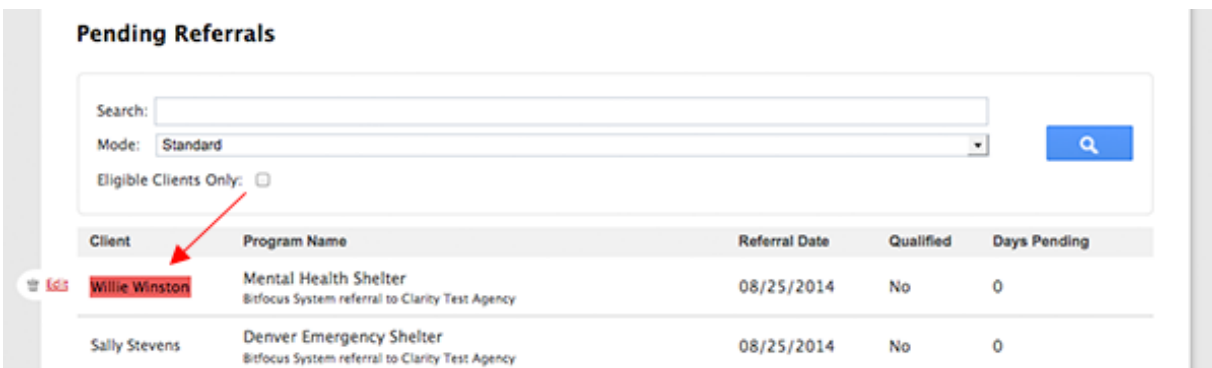
Sacramento CoC HMIS
How to change referral status to "Pending - In Process"

(**For PSH Projects Only**) If your project does not move the client in the day of your intake appointment, you will need to utilize the "Pending - In Process" option to update the status of the client. This lets the Coordinated Entry team know that you have met with the client and determined they are a good fit for your project and that you will be continuing to work with them to secure their housing. After opening the referral by selecting the "Edit" link, you will use the drop down to change the status to "Pending – In Process" then click "Save Changes".

Referred Date	04/13/2015 12:48 PM
Days Pending	170 day(s)
Qualified	Reassigned
VI-SPDAT score	7
Referred by Staff	Kenneth Thomas
Last Activity	08/03/2015 Check-In
Status	Pending ▼
	Pending
	Pending - In Process
	Denied
Private	
	Save changes or Cancel

After you save the change in their status, scroll down to the "Notes" section and write a brief note. Select the "Send Note" button to save it. **We ask that you enter a note weekly during the process between your intake appointment and when you secure them housing and enroll them into your project.**

NOTES

No records to display...

B Bold *I* Italic ⋮≡ Numbers ⁞≡ Bullets

Send Note

HISTORY

There is never a reason that you will need to use the "Referral Connections" section of this referral screen.

REFERRAL CONNECTIONS   Add Connection

There are no results to display

NOTES

Sacramento CoC HMIS
How To Enroll A Client/Household Into Your Project

(**For RRH**) - When you have determined you will be working with the client to find housing or (**For PSH**) -When you have secured housing for the client that was referred to your project and you are giving them their keys, you will need to complete the referral process by enrolling them into the project.

From the Pending tab in the Referral screen, **select the client name** (rather than hovering over it to edit the referral). This will take you to the Profile screen of the client record. From there you will go to the "Programs" tab and select the arrow down to open the information for the project the client was referred to.

The box at the bottom left will have a blue check-mark and it contains the statement that links the enrollment with the referral. Please keep it checked to ensure the referral results are properly tracked.
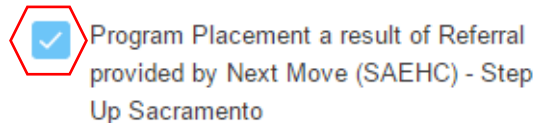
If the referral was for a family you should see the group members listed at the bottom. If this family is new to the system, you will need to create profiles for all family members and connect them as a household prior to this step so they will all appear on this screen *(remember to underline search for each client before creating a profile)*. Select any additional family members that are being enrolled into your project at this point so the enrollment stays linked.

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How to Deny a Referral

If you need to deny a referral, including because a client is refusing your services, go into the Pending tab in the referral screen open the referral by selecting the "Edit" link.

You will use the drop down to change the status to "Denied," which will trigger the additional boxes to appear: Send to Community Queue, Denied Reason, Denied Message, and Private.

Set the "Send to Community Queue" box to Yes. All denied referrals must be referred back to the Queue in order for them to be referred to another project.

Then, at "Denied Reason" select the answer from the drop-down menu that best fits why your Agency is denying the referral. Once you have made the appropriate selection, write a note in the "Denied Message" with more detail as to exactly why the client is being denied from that project (Do Not Check the "Private" box). Click "Save Changes".
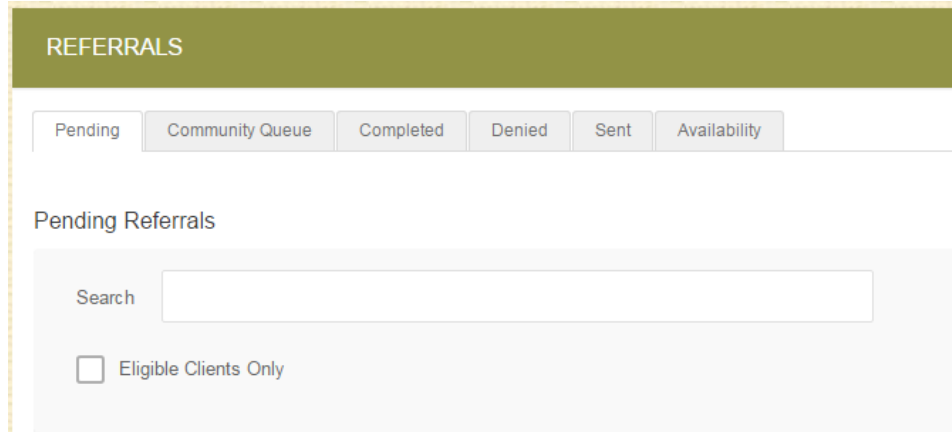

You will also need to upload a denial letter into the system that can be given to the client. Upload this in the "Files" tab of the client's profile page.

<u>Working With The Additional Tabs</u>

In addition to the Pending tab, you will also see five additional tabs that are available for you to view data in.

Community Queue: This tab shows the name of every client in the *full* Community Queue and is managed by SSF. *You will never need to work in this tab*

Completed: This tab shows the name of every client that was referred to you and that you have accepted into your project by completing an enrollment in the system.

Denied: This tab shows the name of every client that was referred to you and that you have denied in the system.

Sent: This tab shows the names of clients that your Agency referred. We *do not* have direct referral between Agencies at this time and we are only using the Community Queue that is managed by SSF. *You will never need to work in this tab*

Availability: This tab lists all of the housing projects in your Agency and will allow you to change the availability of each to reflect if you have openings. This will eventually be used since many agencies are not currently doing live data entry. Because there are other steps involved with this tab, including showing the number of beds and units when you select "limited availability", there will be additional training provided when we begin to use this option. *For now you do not need to work in this tab*