CHECK YOUR AGENCY'S REFERRALS IN HMIS

Each agency utilizing HMIS is able to review their referrals by following the steps below. Referrals can be sent to the agency for any services listed under that agency in HMIS. Referrals should be acknowledged within 3 business days of a referral being sent.

1. Switch your active workspace
2. Select the providers workspace from the carousel of workspaces
3. Find your agency
4. Select referrals to your agency
5. Find new referrals listed and review them
6. Acknowledge referrals by putting an acknowledged date in the field for the client
7. When you have a result for a client, record a result date, type and any comments related
CHECK REFERRALS SENT FOR A CLIENT

Checking referrals for a client can be a helpful step when working with a client towards housing. It can allow you to double check what referrals have been sent by yourself or other case managers and allows you to see if a referral to an agency has an update.

Follow the steps below to check your client's referrals in HMIS.

1. **GO TO YOUR CLIENT'S DASHBOARD IN HMIS**

2. **DEPENDING ON WHAT WORKGROUP YOU'RE IN, YOU WILL FIND THE REFERRALS MENU OPTION TO SELECT**

   - Select the main referral option. You do not need to select one of the pop out menu options.

3. **VIEW ANY REFERRALS LISTED AND ADD MORE AS NEEDED**

   - Shelter / Housing Workgroup View
   - Coordinated Entry Workgroup View

### Example:

- **Referral Details**
  - Service: Rapid Re-Housing (Coordinated Access)
  - Referral Date: 04/11/2020
  - To Provider: OFC / Missionforce King Outreach Center
  - Status: Referral Made

- **Referral Details**
  - Service: Rapid Re-Housing (Coordinated Access)
  - Referral Date: 04/11/2020
  - To Provider: OFC / Our Daily Bread
  - Status: Referral Made

- **Referral Details**
  - Service: Rapid Re-Housing (Coordinated Access)
  - Referral Date: 04/11/2020
  - To Provider: OFC / Giving Hope, Inc.
  - Status: Referral Made