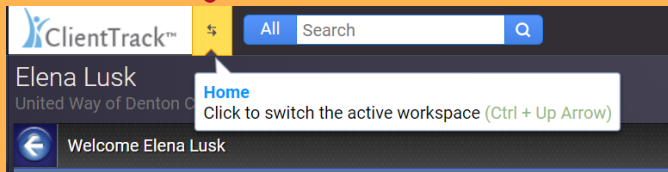


CHECK YOUR AGENCY'S REFERRALS IN HMIS

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.

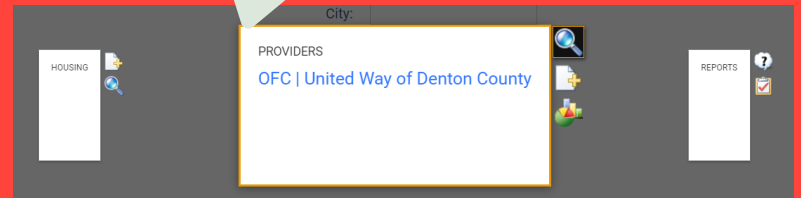
1

SWITCH YOUR ACTIVE WORKSPACE



2

SELECT THE PROVIDERS WORKSPACE FROM THE CAROUSEL OF WORKSPACES

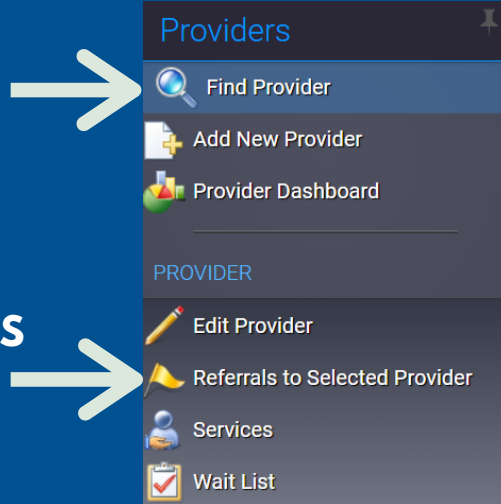


3
&

FIND YOUR AGENCY

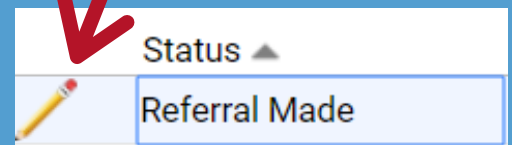
4

SELECT REFERRALS TO YOUR AGENCY



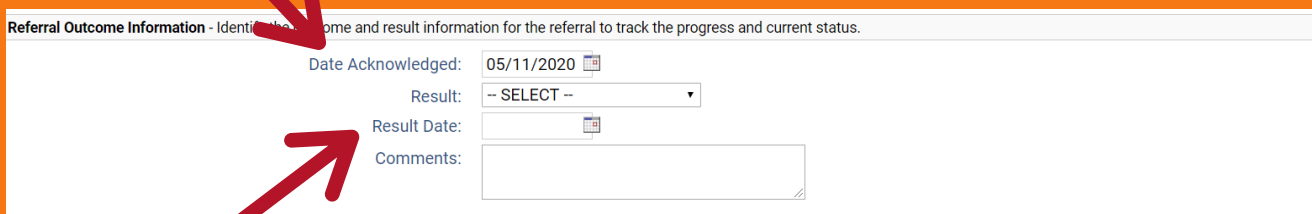
5

FIND NEW REFERRALS LISTED AND REVIEW THEM



6

ACKNOWLEDGE REFERRALS BY PUTTING AN ACKNOWLEDGED DATE IN THE FIELD FOR THE CLIENT



7

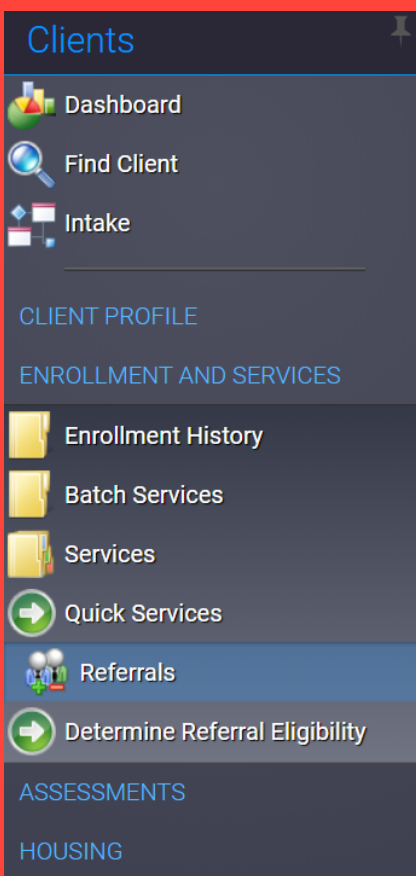
WHEN YOU HAVE A RESULT FOR A CLIENT, RECORD A RESULT DATE, TYPE AND ANY COMMENTS RELATED

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

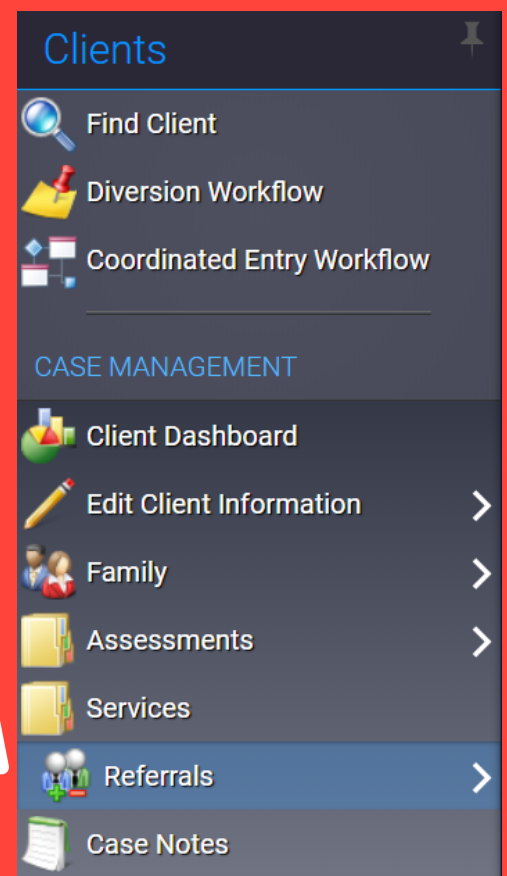


Shelter / Housing Workgroup View

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.



Coordinated Entry Workgroup View

3 VIEW ANY REFERRALS LISTED AND ADD MORE AS NEEDED

Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

+ Add New Referral - Quick Referrals → Housing Referral → Referral Eligibility → Add CE Event

3 results found.

Service	Referral Date	To Provider	Status	Result
Rapid Re-Housing (Coordinated Access)	04/11/2020	OFC Monsignor King Outreach Center	Referral Made	
Rapid Re-Housing (Coordinated Access)	04/11/2020	OFC Our Daily Bread	Referral Made	
Rapid Re-Housing (Coordinated Access)	04/11/2020	OFC Giving Hope, Inc	Referral Made	Information