Sending Referrals in HMIS for Coordinated Entry Assessors

- Referrals are to be completed when a client completes an SHCA intake in order to place them on the eligibility list for housing.

- Referrals are to be completed by authorized coordinated entry assessors.

- Only assessors with specific housing placement duties should fill in the ‘Refer to Provider’ section.

- Use the comment section to put any important information that may be useful for placement determination or relevant to other providers.

- Clients with an RRH referral will be contacted directly when an opening occurs, you will be contacted for all other referral types to collect documentation and/or complete a SPDAT.

**Step 1:** While in the Clients tab, locate the Referral section in the navigation pane.

**Step 2:** Add New Referral by clicking on Add New in the referral section.

**Step 3:** Complete the referral form. Leave Refer to Provider blank.

**Step 3a:** Click Next to advance to the next section in the referral. The button is located in the bottom right corner of the screen.

**Step 4:** The second page of the referral form is simply an Email Authorization request, do not click. Click Next to advance.

**Step 5:** Finish Referral

The last page in the referral is left completely blank. DO NOT ENTER any information if you are the one sending this referral. Click Finish to complete the referral. The referral will now be viewable on the client’s Dashboard and in the Referral section.
Step 1: While in the Clients tab, locate the Referral section in the navigation pane.

Step 2: Select the Referral you would like to update the outcome. Click on the blue action button. In the drop down menu select Referral Outcome.

Step 4: Complete each field in the form including date, result, and any comments. Click Send Email to send a message to notify the assessor of the referral outcome.

Step 5: Finish Referral Outcome
Click Finish to complete the referral outcome. The referral will now be viewable on the client’s Dashboard and in the Referral section with an updated result.