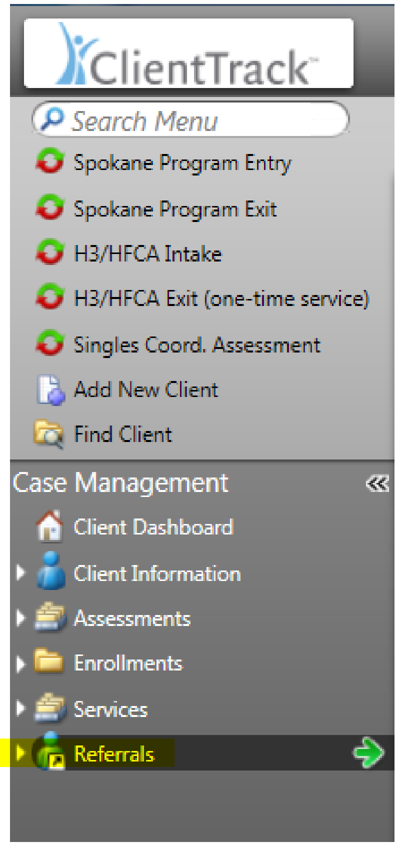
8.4.2015

City of Spokane HMIS

Sending Referrals in HMIS for Coordinated Entry Assessors

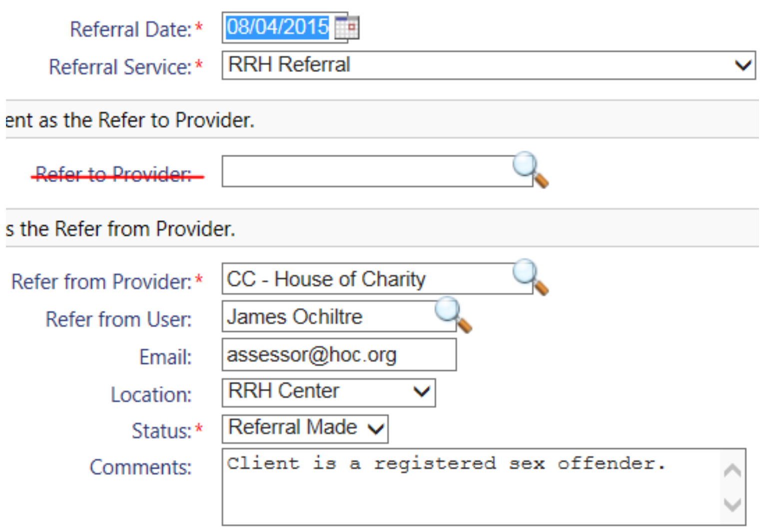
- Referrals are to be completed when a client completes an SHCA intake in order to place them on the eligibility list for housing
- Referrals are to be completed by authorized coordinated entry assessors.
- Only assessors with specific housing placement duties should fil in the ‘Refer to Provider’ section.
- 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.

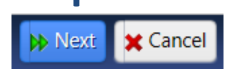


Step 2: Add New Referral by clicking on **Add New** in the referral section.

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

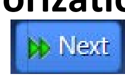


Step 3a: Click **Next**



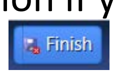
to advance to the next section in the referral. The button is located in the bottom right corner of the screen.

Step 4:

The second page of the referral form is simply an **Email Authorization** ~~Email Authorized:~~ 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** 

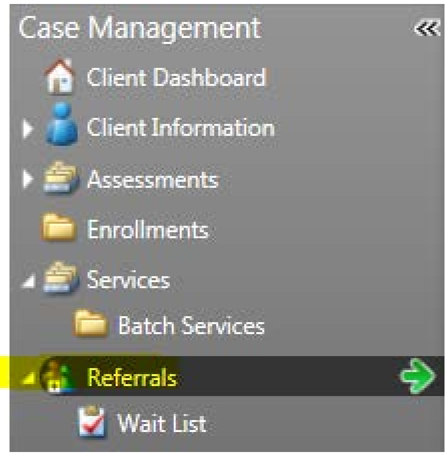
to complete the referral. The referral will now be viewable on the client’s **Dashboard** and in the **Referral** section.

City of Spokane HMIS

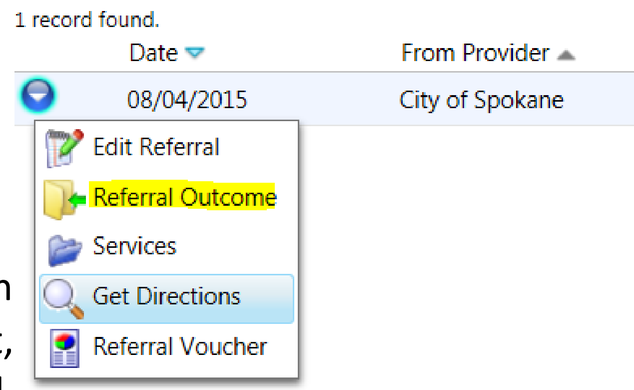
Reporting Referral Outcomes in HMIS for SHCA Assessors

- Complete the referral outcome immediately after you receive it to ensure accuracy of the coordinated entry system's referral process.
- Only assessors with specific housing placement duties should fil in the 'Refer to Provider' section.
- Use the comment section to put information that may be useful in the future or for other providers.
- If you have any issues with creating a referral please contact: Daniel Ramos dramos@spokanecity.org

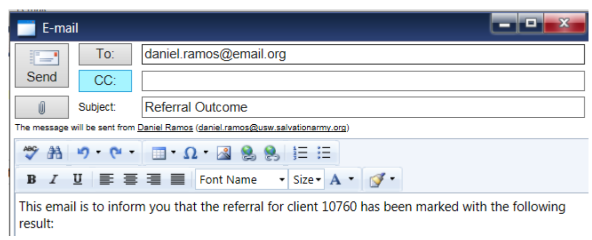
Step 1: While in the **Clients** tab, locate the **Referral** section in the navigation pane.

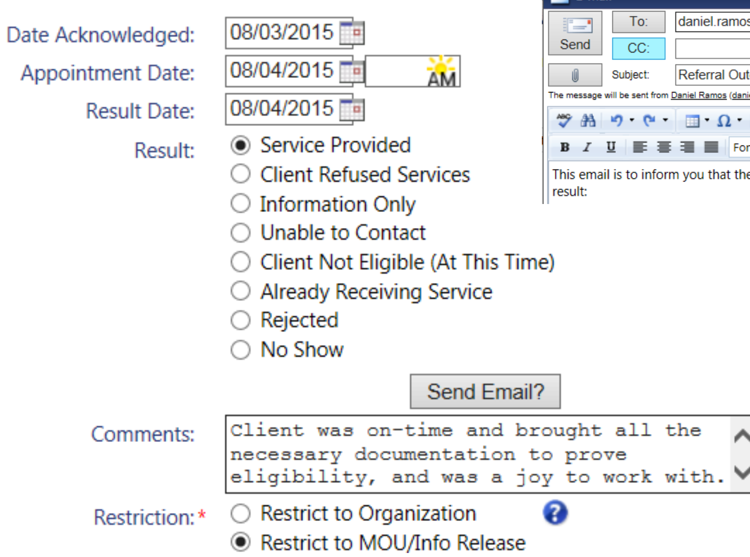


Step 2: Select the **Referral** you would like to update the outcome. Click on the blue action button. In the drop down menu select **Referral Outcome**.



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





Step 5: Finish Referral Outcome

Click **Finish** 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.