Incoming CHA Referrals- HMIS Work Instructions

1.0 Overview

These work instructions provide the steps a housing and service provider must complete to perform the Incoming CHA Housing Referrals Procedure.

2.0 Work Instructions

1. **Notify the CHA Data team (via email at chareferrals@clackamas.us) when openings are available, including type (youth, family, single adult, etc.).**
   a. The HMIS team will reply and inform providers once referrals are added in HMIS.
   b. Housing and service providers are to access referrals directly via HMIS.
   c. New incoming referral will be visible on requesting housing and service providers HMIS homepage on the upper-right-hand side labeled, "Follow Up List."
   Select **referral** to view the client referral.
      i. Select **client ID** to view the client profile.
      ii. The date will show you the date the referral was made
      iii. Time remaining shows how many days until you are expected to update the referral status

1. **Notify the CHA Data team (via email at chareferrals@clackamas.us) when openings are available, including type (youth, family, single adult, etc.).**

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Page | 1 of 8

1.1 Viewing Referrals as a Report
   a. If you did not request the referral or cannot see it on your home screen, you can also check the reporting tab.
   b. To view referrals sent to a specific agency:
      i. Select **Reports** in the left column.
   c. Under provider reports,
      i. Select
         1. **"Referrals"**
   d. Select the applicable agency and program by searching provider.
   e. in the referral type dropdown,
      i. select,
         1. **"Incoming referrals to provider."**
   f. Select the referral status you would like to see.
   g. Enter the date range.
      a. If no date range is selected, it will default to all dates.
      b. Select a sort order if desired.
         i. Sort will default to showing the newest referrals at the top.

Reports ▾

Audit Access Report

Audit Report

User Information

User Login

Call Record Report

Client Served Report

FY2024 CoC APR

FY2024 Coordinated Entry APR

Daily Unit Report

FY2024 Data Quality Framework

Duplicate Client Report

FY2024 ESG CAPER

Fund Availability Report

Fund Usage Report

My Managed Funds Report

Needs Report

PATH

Referrals

Service Transacti...

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Effective Date: 7/15/2024

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Page | 2 of 8

2. Change the referral outcome in HMIS to "Accepted" to indicate referral is received.

   a. When a referral is received, you must immediately,

      i. Update:

         1. Referral Outcome to "**accepted**"

         2. Need Status to "**In progress.**"

Performing these two, actions indicate the referral has been received and the provider plans to contact the client.

2. Change the referral outcome in HMIS to "Accepted" to indicate referral is received.

2.1 Updating Status of Referrals Ongoing

   a. Once provider has made contact with the client and determined eligibility, the referral outcome must be updated.

      ii. If unsuccessful referral because client is not interested, status must be marked **declined**

      iii. If unsuccessful referral because client is not eligible or any reason aside from the client declining, status must be marked as **cancelled**.

2.1 Updating Status of Referrals Ongoing

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Page | 3 of 8

3.0 Change the Need Status of the referral from "identified" to "in progress."

 a. Once the client is **enrolled** into a Housing or Service Program or

 b. a household is not eligible to move forward with a program,

   i. providers must change the Need Status, to

    1. **"Closed."**

3.1 Change the Outcome of Need

 a. If the client is housed by your program or the client reported that they self-resolved their housing crisis,

   i. Change Outcome of Need as,

    1. **"Fully Met."**

 b. If client is housed through a different program,

   i. Change Outcome of Need as,

    1. **"Fully Met – Other Provider."**

 c. If client is still experiencing homelessness, but not able to move forward with your program,

   i. Change Outcome of Need as.

    1. **"Not Met."**

 d. If need is not met,

  a. Select the appropriate reason in the drop down.

   i. For example, if multiple outreach attempts resulted in no with contact client, select the dropdown option,

    1. **"Attempted, Unable to Contact Client."**

 e. Select,

  a. **"Save"** or **"Save and Exit"**

3.0 Change the need status of the referral from "identified" to "in progress."

3.1 Change the Outcome of Need

3.2 Batch Updates to Outcomes

a. When a provider requests multiple referrals, a provider can choose to update them all at once using the following steps:
   i. Navigate to referral report,
   ii. Enter the report options
   iii. Select clients with unresolved outcomes.
   iv. Click on the **Update Referral Outcome** button.
   v. Select the **Referral Outcome** from the drop-down box.
   vi. Click **Save Referral Information**.

3.2 Batch Updates to Outcomes

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Page | 5 of 8

4.0 Log outreach attempts following the steps outlined in section 1.2 Rules and Regulations.

    a. Incoming referral housing or service provider must make initial contact with household or designated Housing Navigator/Case Manager within five (5) days of receiving incoming referral.

    b. A total of three (3) attempts within five (5) business days must be completed by incoming referral housing or service provider.

    c. Providers may decide to continue to outreach to household(s) an additional 5 days.

Summary Notes:

    a. For unsuccessful outreach attempts when a household does not answer or return communication,

        i. Include:

            1. Full name of caller

            2. Eligible housing program

            3. Date contact attempted

5.0 Accept or Deny households based on the provided eligibility criteria.

    a. Regardless of either reason above,

        i. Change **Need Status**, to

            1. "**Closed**".

    b. Select **Outcome of Need** from dropdown list,

        a. If need was met by requesting provider,

            i. Change Need Outcome, to

                1. "Fully Met"

        b. If need was met by another provider

            i. Change Need Outcome, to

5.0 Accept or Deny households based on the provided eligibility criteria.

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Page | 6 of 8

1. **"Fully Met- Other Provider"**

c. If need was not met for any reason
  i. Change Need Outcome, to
    1. **"Not Met"**
      a. When a need is not met, a **reason is required.**

c. If referral was made in error by county or provider,
  i. Change the Referral Outcome, to
    1. **"Cancelled"**.

6.0 Notify households of acceptance or denial.
   a. If denied, include reasons for denial.

7.0 Exit household(s) from Coordinated Entry (CHA) in HMIS when they are no longer eligible for CHA within 72 hours (three business days). Follow the CHA Exit Guidance.

Referral Data

Referred-To Provider	HACC RLRA Pop A (SHS) PSH Clackamas (8316)
Needs Referral Date *	07 / 09 / 2024 9 ∨ : 12 ∨ : 52 ∨ AM ∨
Referral Ranking	Referral from BNL
Referral Outcome	-Select- ∨

-Select-
Accepted
Accepted on Wait List
Declined
Canceled

Follow Up Information

Projected Follow Up Date

Need Status and Outcome

Need Status *	Closed ∨
Outcome of Need	Not Met ∨
If Need is Not Met, Reason	Client Not Eligible ∨

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Page | 7 of 8

3.0 Resources

3.1 Referenced Material
- CHA Incoming Housing Referral Procedure
- CHA Exit Guidance
- 1.2 Rules and Regulations: Outreach Procedure

3.2 Related Material
- 2024 HUD Data Standards Manual

3.3 Contacts
- HMISAdmin@clacmamas.us
- CHAReferrals@clackamas.us

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Page | 8 of 8