



Provider Bulletin Board

Requesting a Referral

Effective Date: April 29, 2017

Effective April 28, 2017, the HMIS application will allow programs (excluding Emergency Shelter, Prevention, and Rental Assistance), to request a referral ahead of time, prior to an actual vacancy in their program. The benefit of this change is that providers can “work ahead”, and begin meeting with a potential future client and gathering necessary documentation so there is less lapse in service between clients. Therefore, this job aide will explain the new process of requesting a client for a program.

Introduction to New Grids on Provider Bulletin Board:

The screenshot displays the HMIS Provider Bulletin Board interface. On the left is a sidebar with a 'Log Out' button and user information for KDTEST24. The main area has a top navigation bar with tabs like 'Program List', 'Bulletin Board', and 'Project Details'. Below this is a 'Bulletin Board' section with a 'Program Inventory' table. A red circle '1' highlights the 'Over Capacity Units' column in this table. Below the inventory table is a 'Requested Referrals' table. At the bottom is an 'Active Referrals' table. A red circle '2' highlights the 'Request Referral' button at the bottom of the interface.

| Unit Type | Currently Available | Total Units | Over Capacity Units | Assigned to Bulletin Board |
|--------------------------|---------------------|-------------|---------------------|----------------------------|
| Street Outreach Capacity | 197 | 200 | 2 | 2 |

| Request Date | Request Time | Requested By | Estimated Date Needed | Unit Size |
|--------------|--------------|--------------|-----------------------|-----------|
| 08/08/2016 | 02:58 | IMTTest | 08/08/2016 | SO |
| 08/16/2016 | 05:16 | KDTEST137 | 08/16/2016 | SO |
| 08/17/2016 | 05:58 | KDTEST137 | 08/17/2016 | SO |
| 08/18/2016 | 02:03 | KDTEST137 | 08/18/2016 | SO |
| 08/18/2016 | 02:03 | KDTEST137 | 08/18/2016 | SO |

| Referral ID | Referral Date | Referral Time | MoH First Name | MoH Last Name | Household Size | Unit Size | Referred By | Special Needs | Referral Status |
|-------------|---------------|---------------|----------------|---------------|----------------|-----------|-------------|---------------|------------------|
| 5366 | 08/08/2016 | 02:58 | Uganadada | Yiop | 1 | SO | IMTTest | | Accepted Pending |
| 5414 | 08/16/2016 | 05:16 | Giorno | Rahimo | 1 | SO | KDTEST137 | | Accepted Pending |
| 5420 | 08/17/2016 | 05:58 | Giorno | Rahimo | 1 | SO | KDTEST137 | | Assigned |
| 5428 | 08/18/2016 | 02:03 | Timothi | Riat | 1 | SO | KDTEST137 | | Assigned |
| 5429 | 08/18/2016 | 02:03 | Timothi | Riat | 1 | SO | KDTEST137 | | Accepted Pending |

Buttons: Show, Request Referral, Edit, Void, Cancel, Ch Report, VI-SPDAT Report

1. Provider Staff navigates to their Program List, and then selects Bulletin Board
2. Definitions:
 - a. Program Inventory
 - i. Unit Type: Details of what program is in focus
 - ii. Currently Available: number of open units a program currently has
 - iii. Total Units: number of units a program is contracted to have
 - iv. Over Capacity Units: number of units a program can request when the program is at capacity, in order to work ahead and begin intake process for new referrals



- v. Assigned to Bulletin Board: number of referrals currently assigned to a program awaiting contact by that program
- b. Requested Referrals: the tracking grid for how many referrals are currently requested by a program, and documents when they were requested
 - i. Request Date: the date that program staff requested a referral
 - ii. Request Time: the time that program staff requested a referral
 - iii. Requested By: Name of program staff that had requested the referral
 - iv. Estimated Date Needed: The date the program is expecting to enroll a new referral into the program
 - v. Unit Size: the type of unit that a referral was requested for

How to Request a Referral

Bulletin Board
*Denotes Required Fields **Denotes Half-Mandatory Fields

Program Inventory

| Unit Type | Currently Available | Total Units | Over Capacity Units | Assigned to Bulletin Board |
|--------------------------|---------------------|-------------|---------------------|----------------------------|
| Street Outreach Capacity | 197 | 200 | 2 | 2 |

Requested Referrals

| Request Date | Request Time | Requested By | Estimated Date Needed | Unit Size |
|--------------|--------------|--------------|-----------------------|-----------|
| 08/08/2016 | 02:58 | IMTTest | 08/08/2016 | SO |
| 08/16/2016 | 05:16 | KDTEST137 | 08/16/2016 | SO |
| 08/17/2016 | 05:58 | KDTEST137 | 08/17/2016 | SO |
| 08/18/2016 | 02:03 | KDTEST137 | 08/18/2016 | SO |
| 08/18/2016 | 02:03 | KDTEST137 | 08/18/2016 | SO |

Active Referrals

| Referral ID | Referral Date | Referral Time | MoH First Name | MoH Last Name | Household Size | Unit Size | Referred By | Special Needs | Referral Status |
|-------------|---------------|---------------|----------------|---------------|----------------|-----------|-------------|---------------|------------------|
| 5366 | 08/08/2016 | 02:58 | Uganadada | Yiop | 1 | SO | IMTTest | | Accepted Pending |
| 5414 | 08/16/2016 | 05:16 | Giorno | Rahimo | 1 | SO | KDTEST137 | | Accepted Pending |
| 5420 | 08/17/2016 | 05:58 | Giorno | Rahimo | 1 | SO | KDTEST137 | | Assigned |
| 5428 | 08/18/2016 | 02:03 | Timothi | Riat | 1 | SO | KDTEST137 | | Assigned |
| 5429 | 08/18/2016 | 02:03 | Timothi | Riat | 1 | SO | KDTEST137 | | Accepted Pending |

Buttons: Show, Request Referral, Edit, Void, Cancel, CH Report, VI-SPDAT Report

1. Requesting a Referral

- a. Staff can request a referral if they have *Over Capacity Units* marked on the *Program Inventory* grid (See number one above)
- b. To request a referral, staff select the Request Referral button (see number two above)



Department of Human Services
Allegheny County, Pennsylvania

Bulletin Board
*Denotes Required Fields **Denotes Half-Mandatory Fields

| Unit Type | Currently Available | Total Units | Over Capacity Units | Assigned to Bulletin |
|-------------|---------------------|-------------|---------------------|----------------------|
| 2 Bed Room | 11 | 28 | 1 | 0 |
| 3 Bed Room | 2 | 5 | 1 | 0 |
| 4 Bed Room | 5 | 5 | 1 | 2 |
| 5+ Bed Room | 0 | 0 | 1 | 0 |

Requested Referrals

| Request Date | Request Time | Requested By | Estimated Date Needed | Unit Type |
|--------------|--------------|--------------|-----------------------|------------|
| 04/10/2017 | 04:55 AM | Ann Boyd | 04/14/2017 | 2 Bed Room |

Request Referral

Estimated Date Needed: * 04/20/2017

Unit Type: 2 Bed Room

Request Cancel

Active Referrals

| Referral ID | Referral Date | Referral Time | HoH First Name | HoH Last Name | Household Size/Unit Size | Referred By | Referral Status | Assigned Date |
|-------------|---------------|---------------|----------------|---------------|--------------------------|-------------|-----------------|---------------|
|-------------|---------------|---------------|----------------|---------------|--------------------------|-------------|-----------------|---------------|

1 2 3

- c. Once Request Referral is selected, staff will see the above pop-out, *Request Over Capacity Referral*
 - i. Staff select the date they believe they will need this unit and press the Request button
 1. Staff will only be allowed to select a date within 10 days from the current date
 - ii. If Staff need an immediate referral, they select the current date and press the Request button
 - iii. Staff will be allowed to request as many referrals as they have current vacancies in addition to overcapacity units.
- d. Once staff press the Request button, this content will be saved in the Requested Referrals grid
 - i. This includes the name of staff who requested the referral, along with the time and date it was requested
- e. For every referral that is requested, staff will see this reflect and change the numbers in the *Program Inventory* list
 - i. Staff will be unable to request more referrals than the number of vacancies they have in addition to the allotted *over capacity* referrals provided to the program by the system



How to Edit a Requested Referral:

The screenshot shows the HMIS interface with the 'Requested Referrals' grid. The grid has columns: Request Date, Request Time, Requested By, Estimated Date Needed, and Unit Type. The first row shows a request for 04/20/2017 at 05:55 PM by Ann Boyd, with an estimated date needed of 04/20/2017 for a 2 Bed Room. The second row shows a request for 04/10/2017 at 04:55 AM by Ann Boyd, with an estimated date needed of 04/14/2017 for a 2 Bed Room. Below the grid, there is an 'Edit' button (1) and a 'Void' button. A red box highlights the 'Edit' button (1). A red box highlights the 'Request Referral' pop-up window (2). A red box highlights the 'Update' button in the pop-up (3).

| Request Date | Request Time | Requested By | Estimated Date Needed | Unit Type |
|--------------|--------------|--------------|-----------------------|------------|
| 04/20/2017 | 05:55 PM | Ann Boyd | 04/20/2017 | 2 Bed Room |
| 04/10/2017 | 04:55 AM | Ann Boyd | 04/14/2017 | 2 Bed Room |

Request Referral

Estimated Date Needed: * 04/20/2017

Unit Type: 2 Bed Room

Update **Cancel**

1. At any point, staff can return to the *Provider Bulletin Board* and amend or update a request
 - a. Staff should navigate to the *Provider Bulletin Board*
 - b. Staff then highlight the request they wish to update in the *Request Referrals* grid
 - c. Staff then press the "Edit" button and receive the above pop up
 - d. Staff can then change the date of when they estimate needing a new referral
 - i. Staff can pick a date closer or further out
 - ii. These changes will update instantaneously for the Homeless Resource Coordinator
 - iii. Staff can select another date within 10 days from the date they are editing the field
 - e. Once the date is changed, staff press the "Update" button which then saves the updated request in the grid
 - f. If there was a requested referral that was NOT fulfilled by the date needed, staff do NOT need to update the date needed
 - i. Homeless Resource Coordinator should address requests by earliest date needed, including past-dates



How to Cancel a Requested Referral

Bulletin Board
*Denotes Required Fields **Denotes Half-Mandatory Fields

Program Inventory

| Unit Type | Currently Available | Total Units | Over Capacity Units | Assigned to Bulletin Board |
|-------------|---------------------|-------------|---------------------|----------------------------|
| 2 Bed Room | 1 | 0 | 1 | 0 |
| 3 Bed Room | 1 | 0 | 1 | 0 |
| 4 Bed Room | 1 | 2 | 1 | 0 |
| 5+ Bed Room | 1 | 0 | 1 | 0 |

Requested Referrals

| Request Date | Comments |
|--------------|----------|
| 04/20/2017 | |
| 04/10/2017 | |

Void Confirmation

Are you sure you want to Void this referral request?

Reason: * Vacancy No Longer Available

Enrolled household will not be exiting as anticipated

Yes No

Active Referrals

| Referral ID | Referral Date | Referral Time | Holt First Name | Holt Last Name | Household Size/Unit Size | Referred By | Referral Status | Assigned Date |
|-------------|---------------|---------------|-----------------|----------------|--------------------------|-------------|-----------------|---------------|
|-------------|---------------|---------------|-----------------|----------------|--------------------------|-------------|-----------------|---------------|

1. At any point, staff can return to the *Provider Bulletin Board* and cancel a request
 - a. If after staff have requested a referral, it is determined that there will NOT be a vacancy in their program, staff will need to cancel or "void" their request
 - b. Staff will navigate to their *Provider Bulletin Board*
 - c. Staff will highlight the referral that they need to cancel in the *Requested Referrals* grid and press the "Void" button
 - d. Staff will then receive the above pop out:
 - i. Staff select a reason from the drop down values offered for why they are cancelling a request.
 - ii. Staff then write up to 250 characters explaining the reason for voiding this request
 - iii. Staff press the "yes" button
 - e. Once this pop out closes, the previously highlighted referral will be erased from their *Requested Referrals* grid
 - i. This will impact the numbers of available *over capacity* units in the *Program Inventory* grid



How to Enroll a Client in a Program:

1. The Homeless Resource Coordinator will process these requested referrals and send a client to the program's *Active Referrals* grid
 - a. Once the referral has been "pushed" from to the program's bulletin board by the Homeless Resource Coordinator, the staff who requested the referral will be notified via an email.
 - b. Once the referral has been assigned to the program by the Homeless Resource Coordinator, the request will disappear from the *Requested Referrals* grid
 - c. Program staff will see the client's name, referral ID , and household information on *their Active Referrals* grid, in *Assigned Status*
 - d. Staff are then able to work with this client, documenting contacts, interactions and appointment information on the *Referral Details* screen.
 - e. Referrals that were requested over capacity will be able to be enrolled once there is a vacancy in the program.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>

