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:

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

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)

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:

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

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