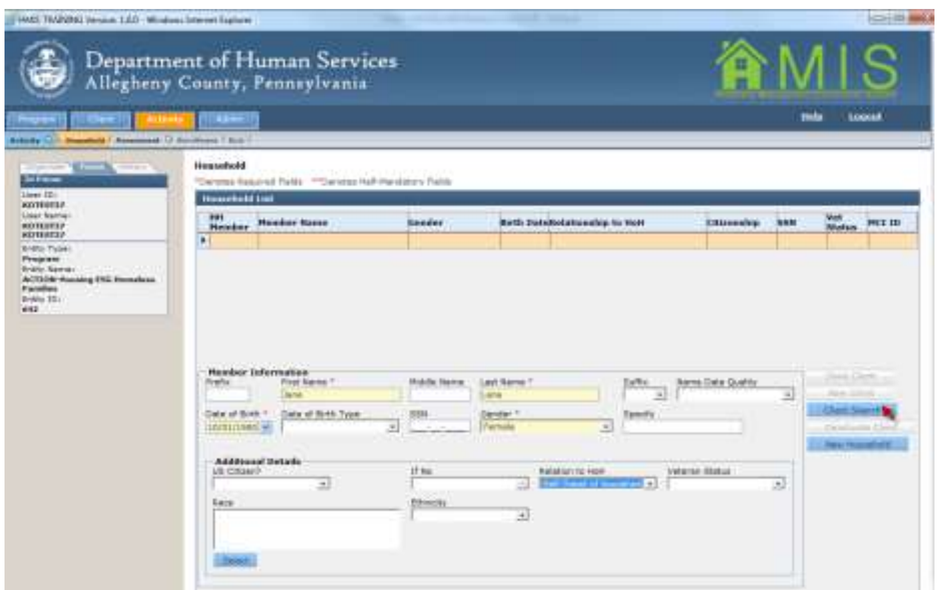
Referral Entry- Walk-In Referral Only Programs Job Aid

This job aid will demonstrate how to enter a walk-in referral. Walk-in referral-only programs will enter all of their referrals onto the bulletin board using the walk-in referral method. All referrals the program posts to the bulletin board will have the status "Assigned." Referrals should be contacted from the top down on the bulletin board, and can stay assigned until an appointment has occurred and the household is accepted into the program. At that point, their status can be changed to "accepted-pending."

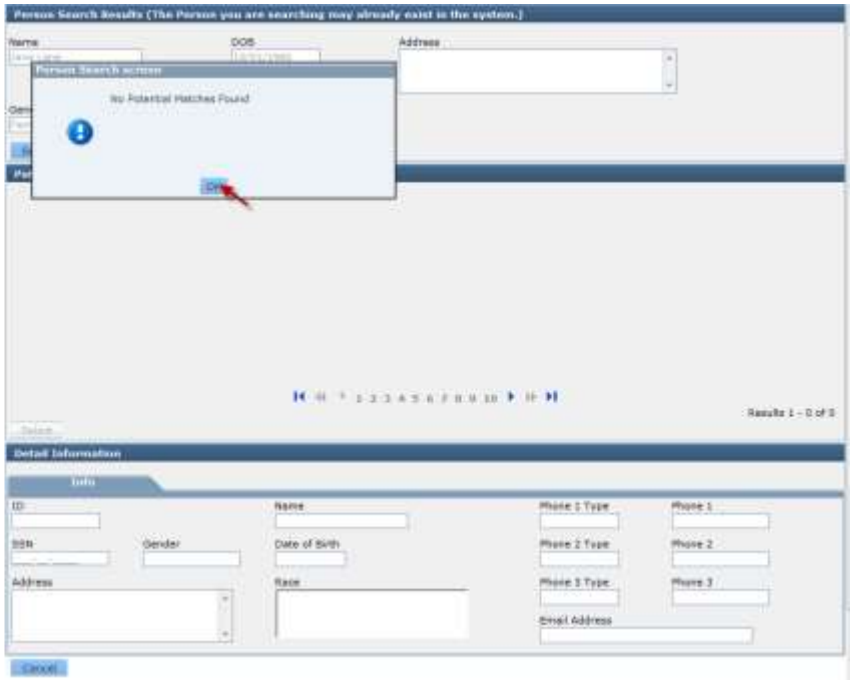
Entering a Referral- Building a Household

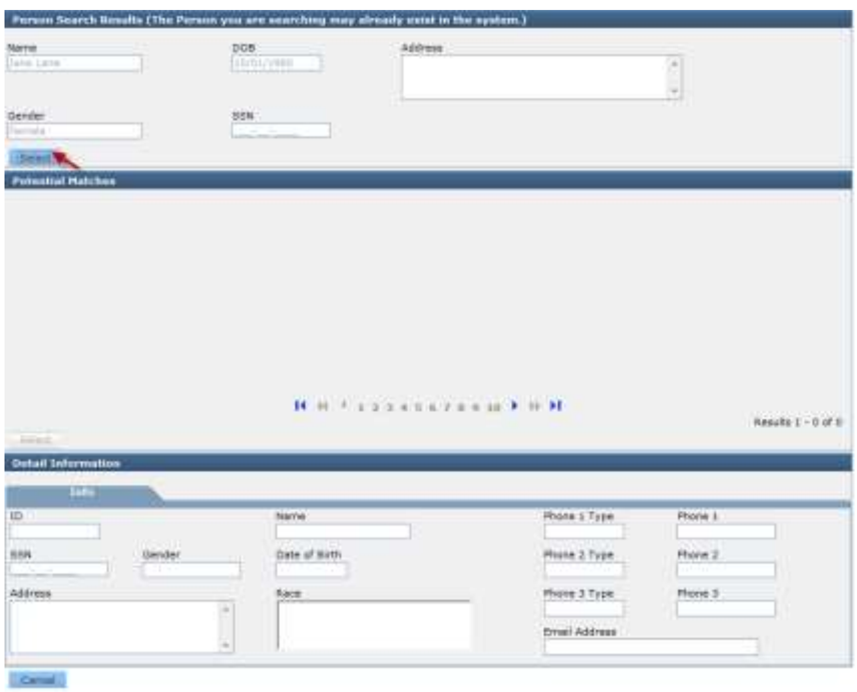
1. To enter a walk-in referral, log in to HMIS and select your program.
   a. Navigate to *Program List.* Select the program to work with and click Show to bring it into focus.

b. You will be taken to the *Dashboard* screen. To add a new walk-in referral, hover over the Activity button and select Household from the dropdown. You will be taken to the Household screen to build the referral.



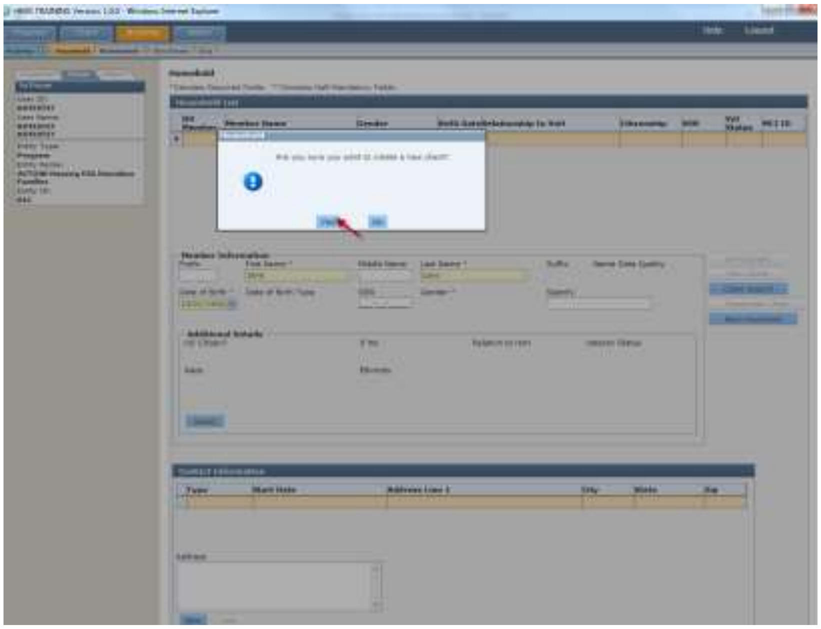
c. Starting with the head of household, enter first name, last name, date of birth, gender and relationship to head of household. Select the Client Search button to search if a record already exists for this client.



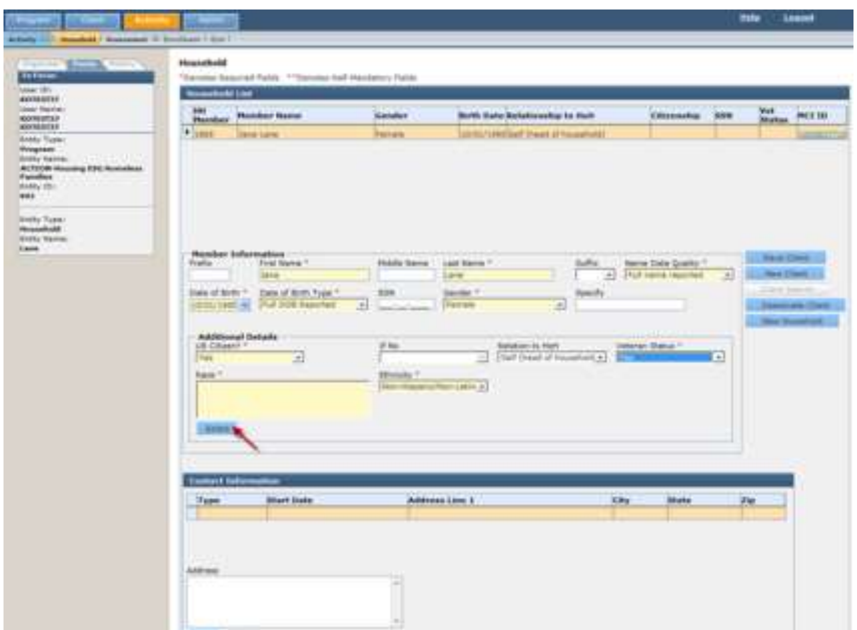


d. If there are potential matches for the client, they will be displayed in the search results pop-up under Potential Matches. If there are no potential matches, you will see a pop-up confirming that there are no matches. Select ***OK.***

e. Click the Select button under *Person Search Results* in the pop-up to create a record for the client.



f. Click ***Yes*** to the pop-up *Are you sure you want to create a new client?*
g. After searching through MCI for the client record using the required information for a search, the remaining information on the *Household* screen becomes mandatory. Enter remaining mandatory fields.



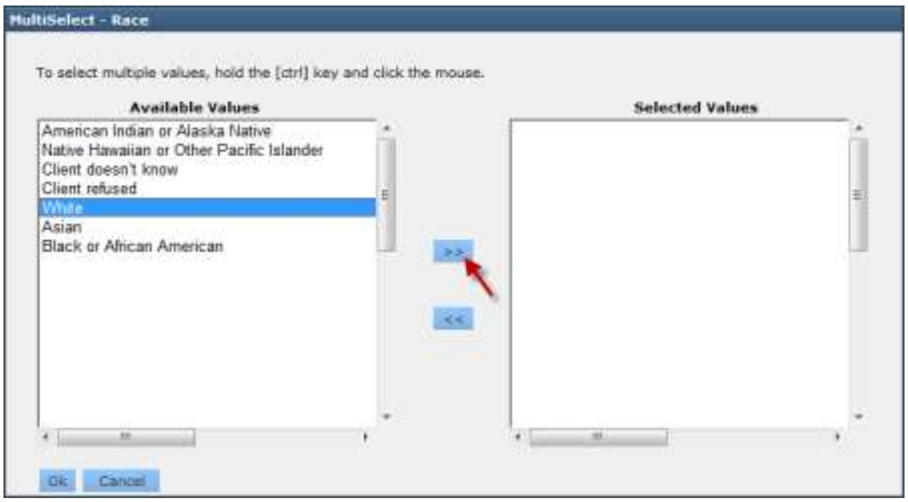
TIP: *Once a head of household has been searched and cleared through MCI, other buttons on the bank of keys to the right of* Member Information *enable.*

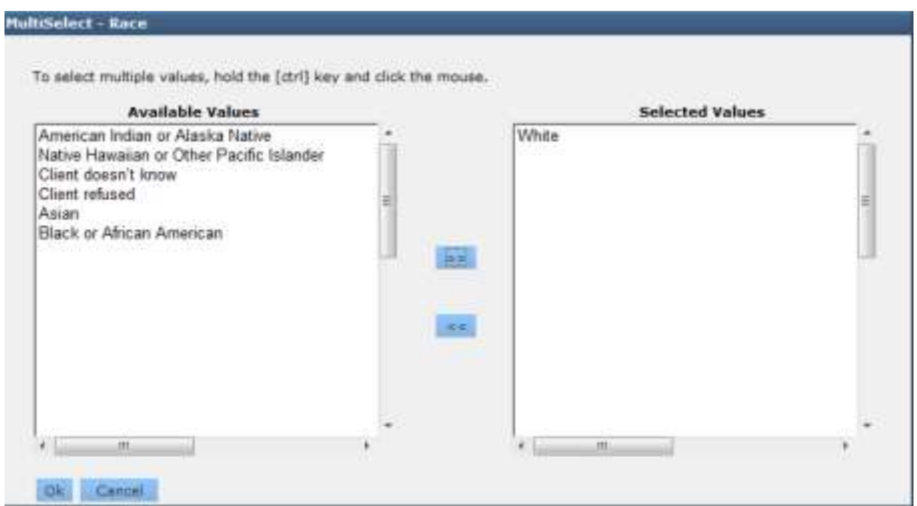
Save Client *will save any information added to or updated on the Household page.*

New Client *will add a row to the Household grid, allowing the user to search for and add additional members to the Household (see below).*

Deactivate Client *should be used sparingly; it will remove selected household members from the grid and will remove all related program involvement and assessments for unenrolled clients.*

New Household *will clear out the household in focus and allow the user to search for a new household.*

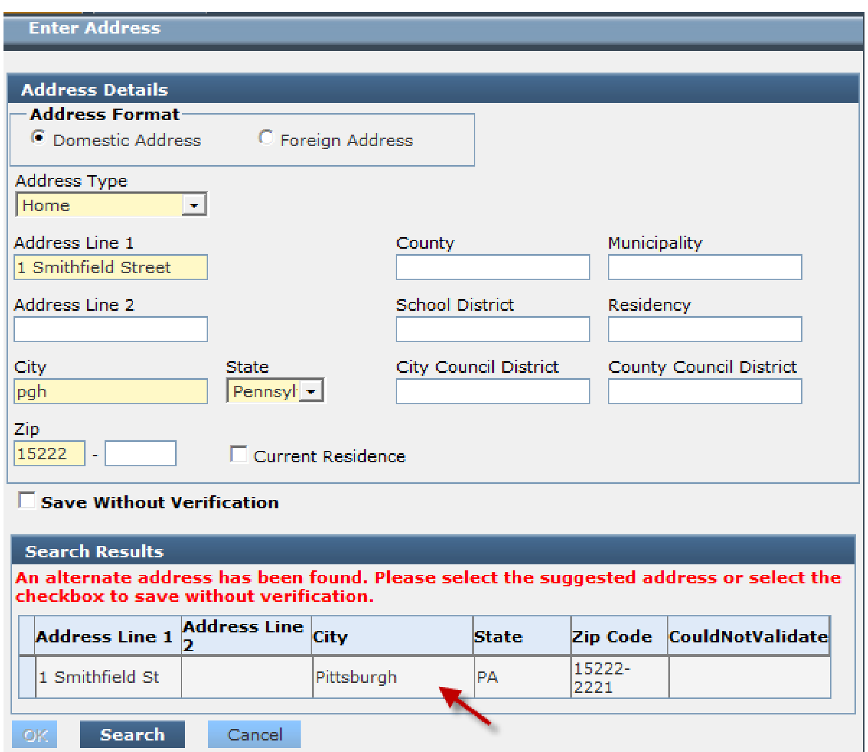


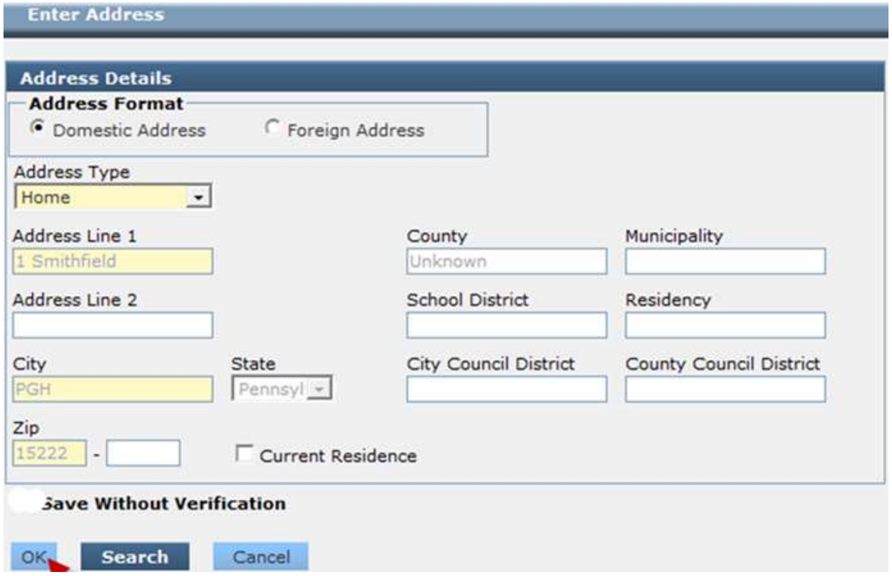


h. To enter *Race,* click the Select button and a multi-select box will appear. Select the applicable race from *Available Values* and click the right arrow button to move the value into *Selected Values*. Click ***OK.***

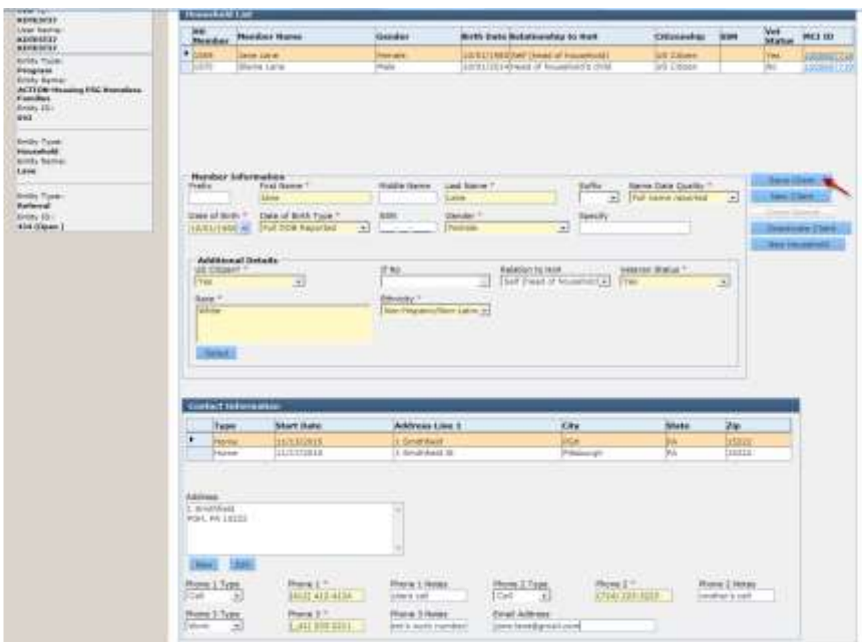
i. To add an address into *Contact Information*, select the New button under the *Address* box. In the pop-up *Address Details,* select the address type and enter the address line 1, city and zip code. Click Search.

TIP: *The Address search is tied to the US Postal Service online. If the client resides in a place not meant for habitation, type in an approximation of their residence and check* ***Save Without Verification*** *to save their residence.*





j. After searching for the address, it will appear in the *Search Results.* Select the result in the search results by clicking anywhere in search results box. Select ***OK.***

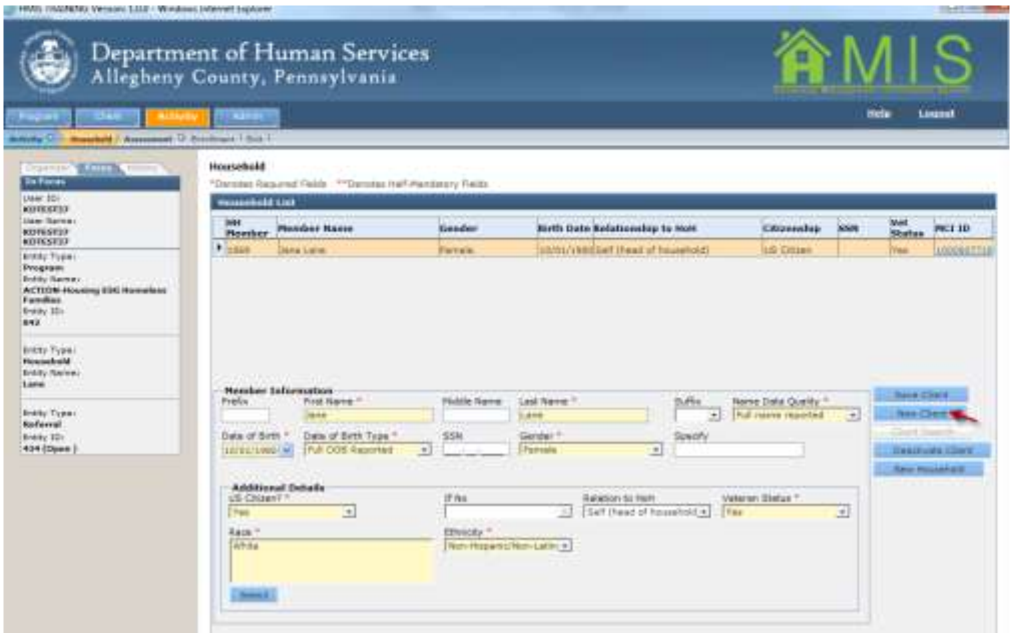


k. Enter the client's phone number by selecting the phone type and entering the number. Up to 3 different phone numbers can be added for one client.

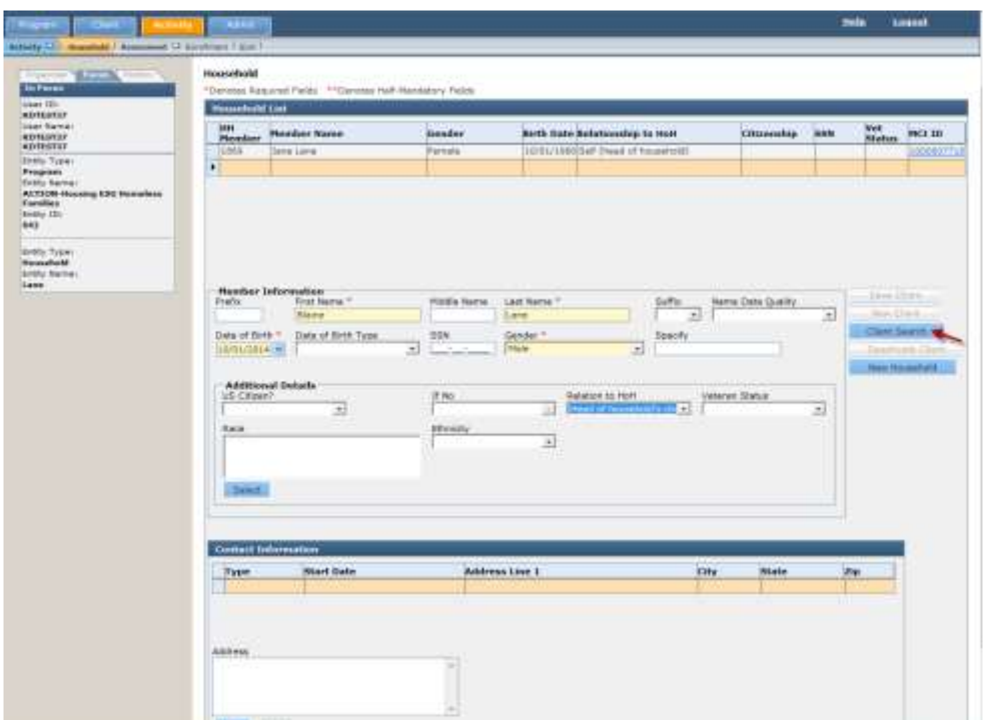
l. Enter the client's email address.

m. To save the client's contact information as well as all ancillary member information, select the Save Client button on the top right of the *Household* screen.

Entering a Referral – Adding Additional Household Members



2. To add an additional household member:
   a. Select the New Client button to the right of *Member Information* on the *Household* screen.



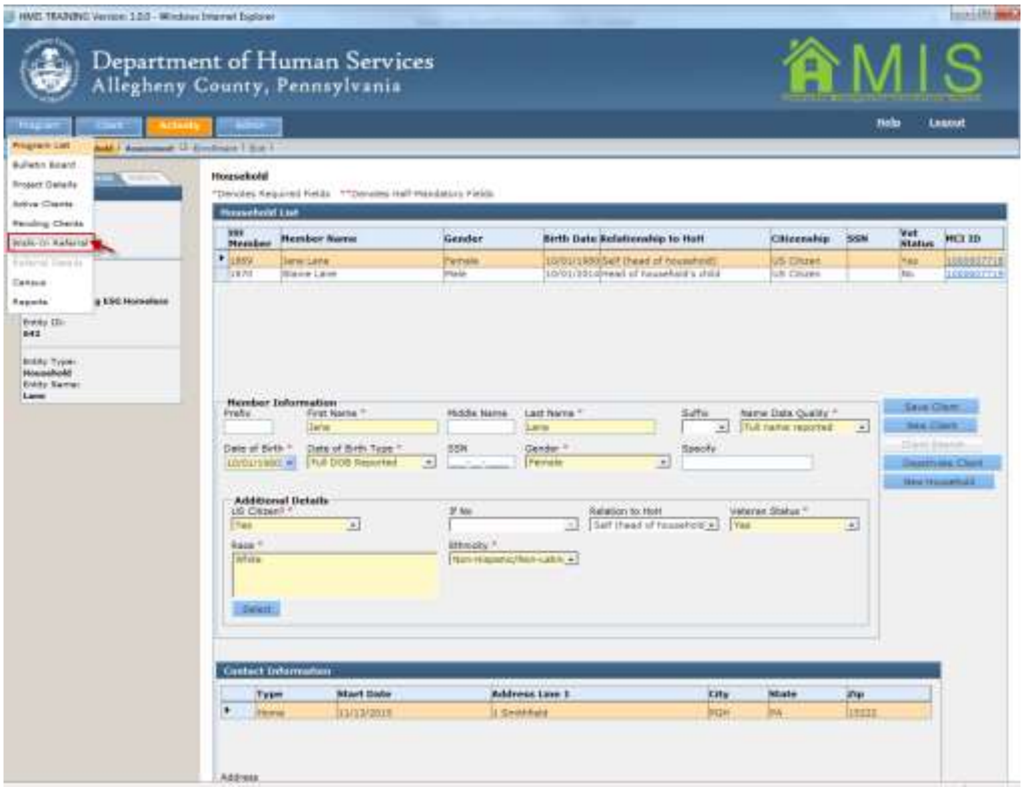
   b. Enter the mandatory fields of first name, last name, date of birth, gender and relationship to head of household, then select *Client Search.*
   c. Follow same process used when searching for and/or creating the head of household. Check

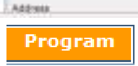
client information for any potential matches or create a new client record if one does not exist or one does not match the client demographic information.

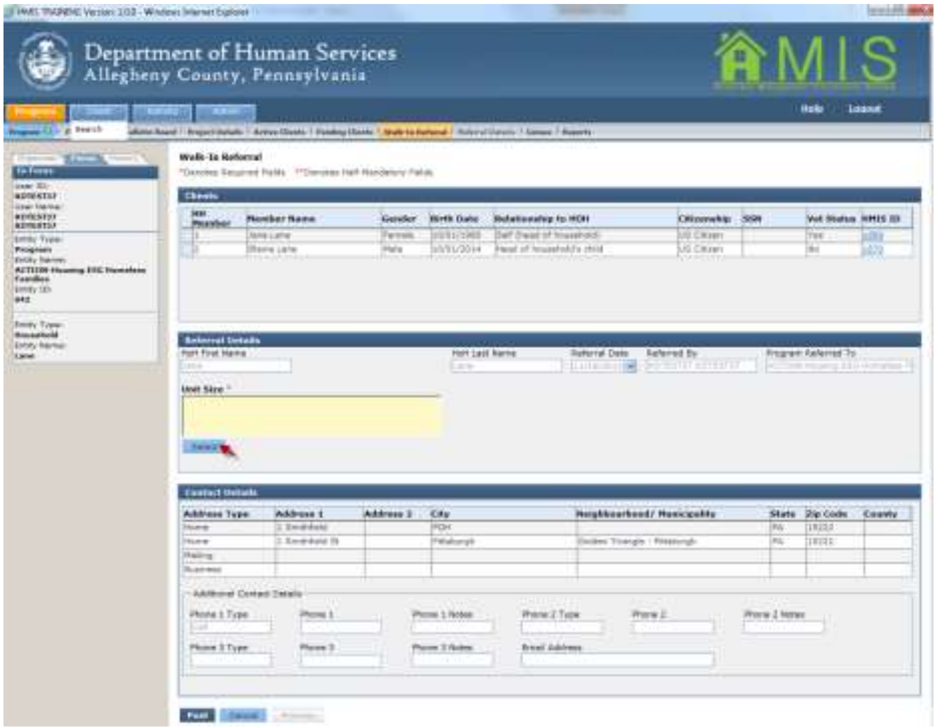
d. Once client is found in MCI or a new record is created, enter and save all mandatory *Member Information*, including contact information if applicable.
e. Repeat process to add all household members to the household grid in HMIS.

Entering a Referral- Posting to the Bulletin Board

3. Once all household members have been added to the household grid and all mandatory information is entered and saved, the household's referral must be posted.

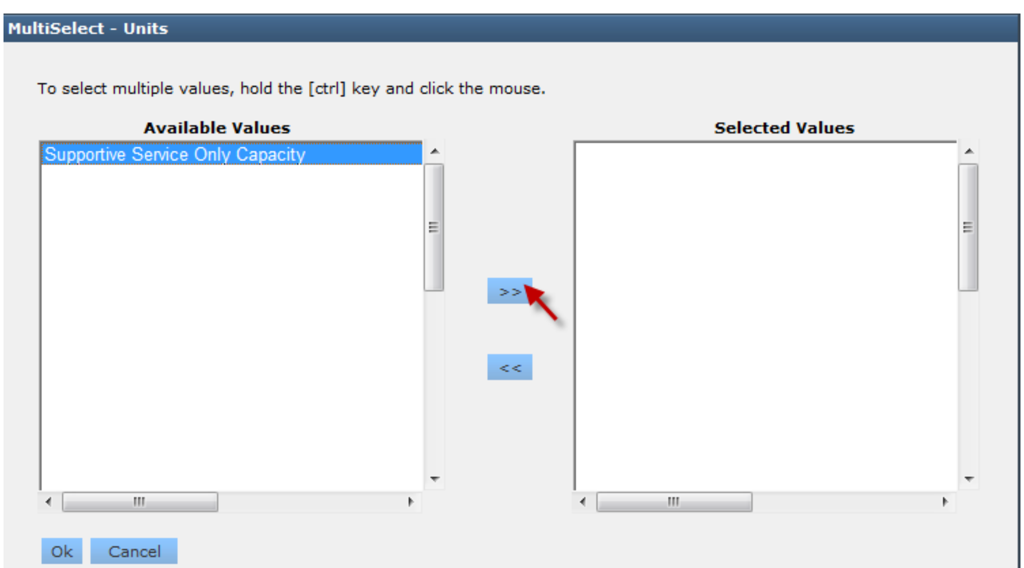


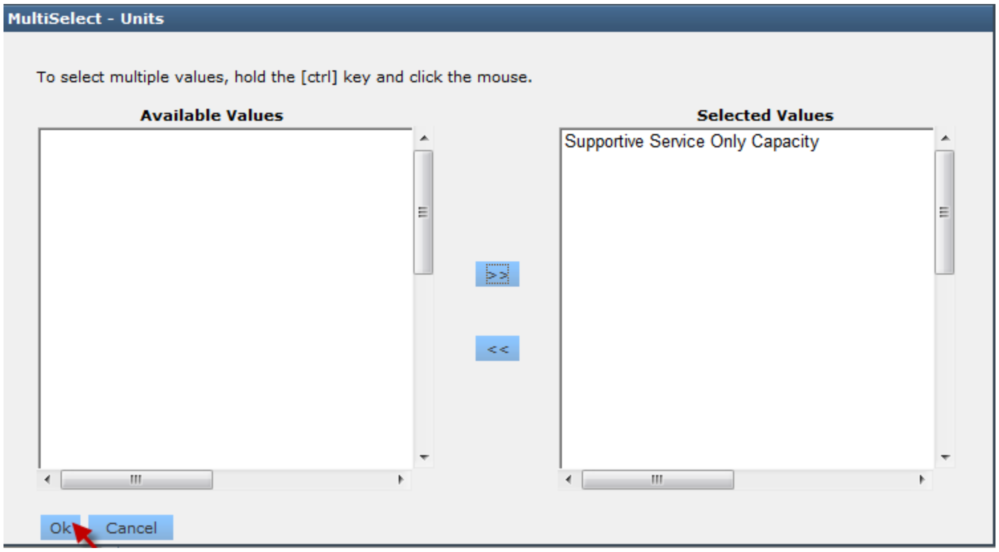
a. Hover over the  button on the top left of the screen, and select Walk-In Referral. You will be brought to the *Walk-In Referral* screen.



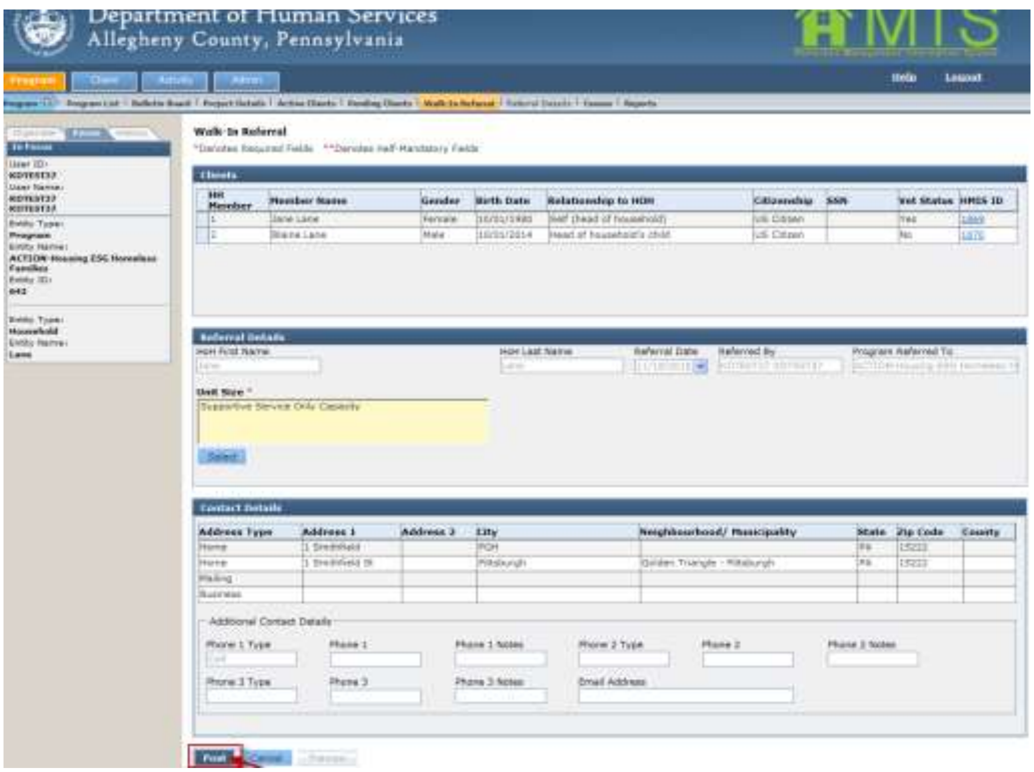
b. Under the *Unit Size* box, click the Select button. A multi-select box showing available values for unit size will appear.

TIP: *Depending on the individual program, the available units may differ. Housing programs may list different bedroom sizes, while supportive service, case management or street outreach programs may show only one available value.*





c. Select the unit type and click the right arrow button to move it from *Available Values* to *Selected Values*. Click ***OK.***



d. When the unit size has been selected, navigate to the bottom of the page and select the **Post** button. This will post the referral to your bulletin board.

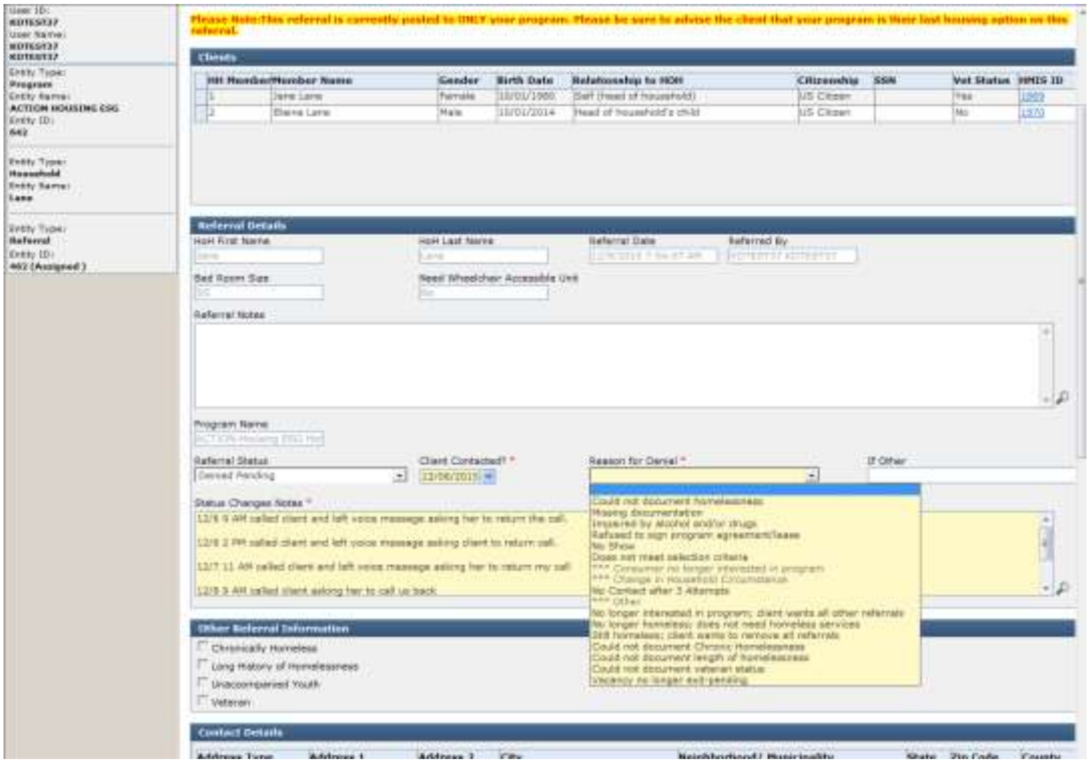
e. All posted referrals will appear with the status of "assigned."

f. Referrals should be contacted from the top down on the bulletin board. Referrals can stay "assigned" until the provider has a vacancy, contacts the client and the client expresses verbal interest in entering the program. At that point, their status can be changed to "accepted-pending."

g. **Please note:** Walk-in referrals done by walk-in only programs are not tied to other referrals as they would be if the client received multiple referrals at one time through the Allegheny Link system. Since the referrals done by walk-in referral only programs stand alone, walk-in referral providers will see the following message on all clients' Referral Details screen: "*Please Note: This referral is currently posted to ONLY your program. Please be sure to advise the client that your program is their last housing option on this referral."*

   i. This message appears on the Referral Details screens for all clients that have a referral ID linked to only one referral, walk-in referral only programs included. Walk-in referral only programs should inform the referral that due to the nature of their specific program, the client's referral is not linked to any others. If the client would like other referrals, they should contact the Allegheny Link.

Denying a Referral



1. Denying a referral
    a. If the client cannot be reached within 72 hours; the client is interviewed and is ineligible, or declines the program at any point prior to enrollment, the referral status must be changed to denied-pending
    b. A reason must be selected from the dropdown and the program should enter a detailed explanation of why the denial occurred into the *Status Changes Notes* text box. Documentation must be thorough with relevant dates, client contacts and all related notes.
    c. All denied-pending referrals are electronically submitted to the Homeless Services Bureau administrators who have 48 hours to approve or reject the denial.
    d. If the denial is approved, the referral will drop off the denying program's bulletin board and return to the master bulletin board to be advertised to other programs that the household's prescreening qualifies them for.
    e. If the denial is rejected, the referral will return to the program's bulletin board with the status of "Assigned" and the program should work with the client towards program enrollment.

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