



# 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

HMIS TRAINING Version 1.0.0.0 - Windows Internet Explorer

Department of Human Services  
Allegheny County, Pennsylvania

HMIS

Program List

\*Denotes Required Fields \*\*Denotes Half-Mandatory Fields

Program List Details

Select Provider Agency:  
ALLEGHENY COUNTY TO IMPROVE OUR

Program ID	Program Name
642	ACTION-Housing ESG Homeless Families
653	ACTION-Housing ESG in McKeesport (Former YMCA)

Service Details

Service ID	Service Name
77	Case Management/ESG County

Show Cancel

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.



HMIS TRAINING Version 2.0.0 - Windows Internet Explorer

Department of Human Services  
Allegheny County, Pennsylvania

Activity | Client | Household | Add New

Dashboard - (K0TEST37 K0TEST37)

PCI ID	First Name	Last Name	SSN	Date of Birth/Gender	Due Date	Program verification assessment is completed?
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- 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.

HMIS TRAINING Version 2.0.0 - Windows Internet Explorer

Department of Human Services  
Allegheny County, Pennsylvania

Activity | Client | Household | Add New

Household

Household List

PCI ID	Member Name	Gender	Date of Birth	Relationship to HOH	Relationship	SSN	Vol Status	PCI ID
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Member Information

First Name: [Text] Middle Name: [Text] Last Name: [Text] Gender: [Dropdown] Date of Birth: [Text] Date of Birth Type: [Dropdown] SSN: [Text] Relationship: [Dropdown] Relationship to HOH: [Dropdown] Relationship Status: [Dropdown]

Additional Details

US Citizen: [Dropdown] Race: [Dropdown] Ethnicity: [Dropdown]

Client Search

- 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.



The image displays two screenshots of the HMIS Person Search Results interface. The top screenshot shows a 'Person Search Results' pop-up window with a 'No Potential Matches Found' message and a 'Select' button highlighted by a red arrow. The bottom screenshot shows the same interface with the 'Select' button highlighted by a red arrow.

- 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.



The screenshot shows the HMIS software interface. A pop-up dialog box is displayed in the center, asking "Are you sure you want to create a new client?" with "Yes" and "No" buttons. The background shows the "Household" form with various fields for client information, including "First Name", "Last Name", "Date of Birth", "Sex", "Race", "Ethnicity", "Religion", "Marital Status", "Employment Status", "Income", "Housing Status", "Substance Use", "Mental Health", "Physical Health", "Social Support", "Cultural/Language", "Other Information", and "Comments".

- 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.

The screenshot shows the HMIS software interface with the "Household" form. The form contains various fields for client information, including "First Name", "Last Name", "Date of Birth", "Sex", "Race", "Ethnicity", "Religion", "Marital Status", "Employment Status", "Income", "Housing Status", "Substance Use", "Mental Health", "Physical Health", "Social Support", "Cultural/Language", and "Other Information". The "Save" button is highlighted with a red arrow.



**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.





**Enter Address**

**Address Details**

**Address Format**  
☒ Domestic Address ☐ Foreign Address

Address Type  
Home

Address Line 1  
1 Smithfield

County  
Unknown

Municipality

Address Line 2

School District

Residency

City  
PGH

State  
Pennsyl

City Council District

County Council District

Zip  
15222 -  ☐ Current Residence

**Save Without Verification**

OK Search Cancel

- 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**.

**Household List**

ID	Member Name	Gender	Birth Date Relationship to Head	Citizenship	DOB	Ver Status	REC ID
1000	Jane Lane	Female	10/01/1950 (Head of Household)	US Born	10/01/1950	Yes	1000000000
1001	John Lane	Male	10/01/1950 (Spouse of Household)	US Born	10/01/1950	No	1000000000

**Member Information**

First Name: Jane Middle Name: Last Name: Lane Suffix: Name Date Display: Full Name Selected

Date of Birth: 10/01/1950 Date of Birth Type: DDMM Year of Birth: 1950 Gender: Female Specify:

**Additional Details**

SSN: 123-45-6789 If No: Relation to Head: Spouse of Household: Yes Member Status: Yes

Sex: Female Ethnicity: Non-Hispanic/Latino

**Contact Information**

Type	Start Date	Address Line 1	City	State	Zip
Home	10/01/2010	1 Smithfield	PGH	PA	15222
Home	11/11/2010	1 Smithfield St	Pittsburgh	PA	15222

Address: 1 Smithfield PGH, PA 15222

Phone 1 Type: Cell Phone 1: 412-412-4124 Phone 1 Notes: Phone 1 Type: Cell Phone 2: 412-412-4124 Phone 2 Notes: Phone 3 Type: Cell Phone 3: 412-412-4124 Phone 3 Notes: Email Address: jane.lane@allegany.pa.gov

**Save Client**

- 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

The screenshot shows the HMIS Household entry form. The 'New Client' button is highlighted with a red arrow. The form includes fields for Member Information (First Name, Last Name, Date of Birth, Gender, Relationship to Head of Household, etc.) and Additional Details (US Citizen, Race, Ethnicity, etc.).

2. To add an additional household member:

- Select the **New Client** button to the right of *Member Information* on the *Household* screen.

The screenshot shows the HMIS Household entry form. The 'Client Search' button is highlighted with a red arrow. The form includes fields for Member Information (First Name, Last Name, Date of Birth, Gender, Relationship to Head of Household, etc.) and Additional Details (US Citizen, Race, Ethnicity, etc.).

- Enter the mandatory fields of first name, last name, date of birth, gender and relationship to head of household, then select *Client Search*.
- 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.

Member	Member Name	Gender	Birth Date	Relationship to Head	Citizenship	SSN	Vet Status	HES ID
1	Jane Lane	Female	10/01/1955	Self (head of household)	US Citizen	***	Yes	1000000001
2	Steve Lane	Male	10/01/1955	Spouse of household's child	US Citizen	***	No	1000000002

  

Type	Start Date	Address Line 1	City	State	Zip
Home	10/12/2015	1 Smithfield	Pgh	PA	15222

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



**Walk-In Referral**

\*Denotes Required Fields \*\*Denotes Half-Hour Denial Fields

**Client Information**

MR Number	Number Name	Gender	Birth Date	Relationship to MCH	Citizenship	DOB	Unit Status	HMIS ID
1	John Doe	Female	03/10/1980	Self (Head of Household)	US Citizen		Yes	1234
2	John Doe	Male	03/10/1980	Head of Household's child	US Citizen		No	5678

**Referral Details**

Referral First Name:  Referral Last Name:  Referral Date:  Referred By:  Program Referred To:

**Unit Size**

**Select**

**Contact Details**

Address Type	Address 1	Address 2	City	Neighborhood / Municipality	State	Zip Code	County
Home	1234 Main St		Pittsburgh	Northside	PA	15212	
Home	1234 Main St		Pittsburgh	Southside	PA	15212	
Phone							
Business							

**Additional Contact Details**

Phone 1 Type:  Phone 1:  Phone 1 Name:  Phone 2 Type:  Phone 2:  Phone 3 Name:

Phone 3 Type:  Phone 3:  Phone 3 Name:  Email Address:

- 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.

**MultiSelect - Units**

To select multiple values, hold the [ctrl] key and click the mouse.

**Available Values**

- Supportive Service Only Capacity

**Selected Values**

**>>** **<<**

**Ok** **Cancel**





The screenshot displays the HMIS Bulletin Board interface. On the left is a sidebar with navigation links: Program, Client, Activity, Admin, and a search bar. Below these are tabs for Program List, Bulletin Board, Project Details, Active Clients, Pending Clients, Walk-In Referral, Referral Details, Census, Reports, and Help. The main content area is titled 'Bulletin Board' and includes a 'Program Inventory' table and an 'Active Referrals' table. The 'Program Inventory' table has columns: Unit Type, Currently Available, Total Units, Number on the Waitlist, and Exit-Pending Count. The 'Active Referrals' table has columns: Referral ID, Referral Date, Referral Time, Host First Name, Host Last Name, Household Size, Unit Size, Referred By, Special Needs, and Referral Status. A red arrow points to the 'Assigned' status in the 'Active Referrals' table.

Unit Type	Currently Available	Total Units	Number on the Waitlist	Exit-Pending Count
Supportive Service Only Capacity	197	200	2	0

Referral ID	Referral Date	Referral Time	Host First Name	Host Last Name	Household Size	Unit Size	Referred By	Special Needs	Referral Status
434	11/13/2015	04:40	Jane	Lane	2	55	KDTEST37 KDTEST37		Assigned

- 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

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 the referral.

Client ID	Client Name	Gender	Birth Date	Relationship to HOB	Citizenship	SSN	Ver Status	HMIS ID
1	Dana Lane	Female	10/01/1980	Self (head of household)	US Citizen		Yes	1203
2	Dana Lane	Male	10/01/2014	Head of household's child	US Citizen		No	1203

**Referral Details**

Referral Name:  Referral Date:  Referred By:

Referral Notes:

Program Name:

Referral Status:  Client Contacted?:  Reason for Denial:  If Other:

Status Changes Notes:

- 12/6 9 AM called client and left voice message asking her to return the call.
- 12/6 2 PM called client and left voice message asking client to return call.
- 12/7 11 AM called client and left voice message asking her to return my call.
- 12/9 3 AM called client asking her to call us back.

**Other Referral Information**

☐ Chronically Homeless  
☐ Long History of Homelessness  
☐ Unaccompanied Youth  
☐ Veteran

**Contact Details**

Address Type:  Address 1:  Address 2:  City:  Neighborhood:  Zip:  State:  Zip Code:  Country:

### 1. Denying a referral

- 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
- 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.
- All denied-pending referrals are electronically submitted to the Homeless Services Bureau administrators who have 48 hours to approve or reject the denial.
- 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.
- 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](mailto: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>