



# Requesting Referrals- Rental Assistance and Prevention Job Aid

This job aid will demonstrate how to request a referral. When a rental assistance or prevention program that participates in coordinated intake has a vacancy, the program can request a referral to work with. The resulting referral is then assigned to the program's bulletin board and cannot be chosen by or sent to any other program. Referrals are assigned to rental assistance and prevention bulletin boards on a first-come, first-served basis.

## Requesting a Referral

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



**Bulletin Board**

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

**Program Inventory**

Unit Type	Currently Available	Total Units	Number on the Waitlist	Exit-Pending Count
Rental Assistance	699	700	0	0
Prevention	700	700	0	0

**Active Referrals**

Referral ID	Referral Date	Referral Time	Host First Name	Host Last Name	Household Size	Unit Size	Referred By	Special Needs	Referral Status
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[Request Referral](#) [Cancel](#)

- Navigate to the *Bulletin Board* screen.
- To request a referral, select the [Request Referral](#) button.
- The resulting referral is now assigned to your bulletin board and cannot be chosen or sent to any other program.



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

**Program Inventory**

Unit Type	Currently Available	Total Units	Number on the Waitlist	Exit-Pending Count
Rental Assistance	888	700	0	0
Prevention	700	700	1	0

**Active Referrals**

Referral ID	Referral Date	Referral Time	Holt First Name	Holt Last Name	Household Size	Unit Size	Referred By	Special Needs	Referral Status
443	12/04/2013	02:57	Amelia	Jones	1	RA	KDTEST36 KDTEST36		Assigned

**Buttons:** Done, Request Referral, Cancel

- e. All requested referrals will appear on the *Bulletin Board* with the status of "Assigned" until it is otherwise changed.
2. Once a referral has been assigned to the program's bulletin board:
  - a. Once a referral is requested, the program must contact that referral within one hour of the request.
  - b. The program must attempt to contact the referral a minimum of 3 times in 72 hours, and as often as needed until they can reach the referred household. Contact the referral as many times as needed in order to reach them, as they are in immediate need.
  - c. Document all contact attempts including the time, date and outcome of each contact attempt in the *Status Change Notes* box.
  - d. Once the program is able to reach the household, an appointment must be scheduled for intake. After intake, if the client is accepted into the program their status can be changed to accepted pending and saved. The program can enter program involvement and enroll the household at the time they are served. Households must be enrolled in HMIS within 3 business days of their program entry.



## Denying a Referral

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

**Client Information**

HH Number	Member Name	Gender	Birth Date	Relationship to HH	Citizenship	SSN	Vet Status	HMIS ID
1	Amanda Jones	Female	01/01/1980	Self			No	1111

**Referral Details**

Referral First Name: Amanda  
Referral Last Name: Jones  
Referral Date: 12/04/2013 1:07:28 PM  
Referred By: KOTESTYAN, KOTESTYAN

Bed Room Size: 10  
Need Wheelchair Accessible Unit: No

Referral Notes:

Program Name: JLDJYDANSTST

Referral Status: Denied Pending  
Client Contacted?: 12/04/2013

**Status Changes Notes \***

- 12/04/13 9 AM called client and left voicemail asking her to return call
- 12/04/13 1 PM called client and left voicemail asking her to return call
- 12/07/13 9 AM called client and left voicemail
- 12/09/13 10 AM called client and left voicemail asking her to call us back

**Other Referral Information**

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

**Reason for Denial \***

- Could not document homelessness
- Missing documentation
- Impaired by alcohol and/or drugs
- Refused to sign program agreement/lease
- No Show
- Does not meet selection criteria
- \*\*\* Consumer no longer interested in program
- \*\*\* Change in Household Composition
- No Contact after 3 Attempts
- \*\*\* Other
- No longer interested in program; client wants all other referrals
- No longer homeless; does not need homeless services
- Still homeless; client wants to remove all referrals
- Could not document Chronic Homelessness
- Could not document length of homelessness
- Could not document veteran status
- Twenty no longer ext-pending

### 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, 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>