

NWCoC Coordinated Entry Procedure Manual

Appendix E: Coordinated Entry Referral Process

V: 4/11/23



NW CoC REFERRAL PROCESS

There are 3 steps in the referral process: Request a Referral, Acknowledge the Referral, and Resolve the Referral.

A. Request a Referral:

When you have an opening in one of your housing programs, you will notify the Priority List Manager through the **Referral Request form**. Contact the Priority List Manager for access to this form.

1. Attend the Case Conference meeting. Households on the Priority List are discussed at Case Conferencing meetings and referrals are made at that time. In the event of an urgent, time-sensitive situation, fill out the referral request form and e-mail the Priority List Manager with the client HMIS number and details on the household situation.
2. PL Manager puts the referral in Coordinated Entry Event.
3. PL Manager e-mails you that the referral is made.

B. Acknowledge the Referral

Acknowledge the referral within 3 days after you have received the e-mail advising you of the referral. You do not need to have contact with the household before you acknowledge the referral. By putting in the Date Acknowledged, you are letting the Priority List Manager know you have received the referral.

Referrals should be Acknowledged within 3 working days after being notified of the referral.

1. **EDA to your Housing Program that received the referral (PSH, THP, YHDP, etc).**
2. Open the client record.
3. In the Entry/Exit tab, find the Coordinated Entry line. **Click on Interims.**

Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Cou
Coordinated Entry Assessment Provider (1353)	01/01/2020				

4. Click on the edit pencil on the newest review date – Choose Save & Continue
5. Go to the Coordinated Entry Event. Choose the edit pencil next to the Start Date of the Referral to your housing project.
6. Enter the Date that you are acknowledging receipt of the Referral.

Housing Agency's Response to Housing Referral							
Date Referral Acknowledged		/		/			
Referral Notes	<input type="text"/> G						

C.

Resolve the Referral

Once you have acknowledged the referral, the next step is to reach out to the client to offer them the housing voucher. Referrals, either successful or unsuccessful, should be resolved within two weeks of receiving the referral.

Successful Referral: Mark the referral as successful when you make contact with the client and confirm their eligibility and intent to enroll in your housing program.

1. EDA to your Housing Program that received the referral (PSH, THP, YHDP, etc).
2. Open the client record.
3. In the Entry/Exit tab, find the Coordinated Entry line. **Click on Interims. (See the example in Acknowledging the referral)**
4. Choose Add Interim Review –
 - a. Review type is **Update**.
 - b. Review Date is the date HH accepted the offer.
5. Choose Save & Continues
6. In the Coordinated Entry Event, click on the Edit Pencil next to the referral to your Housing Program.
7. In the drop-down box next to the Referral Result, choose “Successful referral: client accepted.
8. Enter the Date of Result. The Date of Result is the date you talk to the client and they accepted the referral.

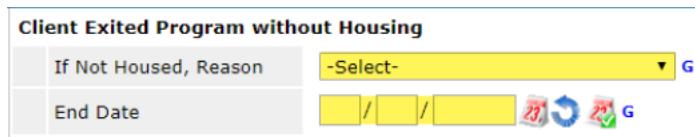
Coordinated Entry Event							
Start Date *	End Date	Event *	Location of Crisis Housing or Permanent Housing Referral	Date Referral Acknowledged	Referral Result	Date of Result	
03/17/2020		Referral to PSH project resource opening	(1413) ICA PSH D HCC HUD CoC Training Provider	03/18/2020 A	Successful referral: client accepted B	03/21/2020 B	
<input type="button" value="Add"/>		Showing 1-1 of 1					

9. **Enroll the client in the Housing Program that accepted the referral.** Once you have determined this Household is eligible for the program, you will enroll them in your Housing Program (PSH, Rapid Rehousing, THP, YHDP, etc.).

Enrollment in the program is not dependent on the household having found housing. Enrollment in the Housing Program should take place once a Referral is marked Successful.

If, after you enroll the HH in your Housing Program (PSH, TH, RR etc.) the HH does not find housing, self-resolves or leaves the area, you will end the referral with the following steps:

1. EDA to the Housing Provider that accepted the referral.
2. Open the client record.
3. Choose Interim on the Coordinated Entry Assessment line.
4. Choose Add Interim Review (make sure all HH members are checked)
5. Go to the Coordinated Entry Event and click on the edit pencil next to the referral to your project.
6. **Do not change the referral to unsuccessful.** The referral itself is still successful.
7. Go to “Client Exited Program without Housing
8. Choose an answer from the drop-down in the question If Not Housed, Reason.
9. Add an end-date.



10. Update the Assessor Notes.
11. This will return them to the Priority List. If you know that they should not be on the Priority List because they found other housing (Section 8, other subsidized housing) or they have left the CoC, you should exit them from CES so their name does not come up on the PL.
12. Exit them from the Housing Program that received the referral.

Unsuccessful Referral: If the client declines the offer of the voucher, or, if after speaking with the client you determine they don't meet your program's eligibility requirements, mark the referral as Unsuccessful and choose the most appropriate reason in the drop-down box. Add the date of result. This will return the HH to the Priority List. If you cannot accept the referral, do not “cancel” the referral; use the “declined” option. **[Note: If the referral was initially successful (client accepted the referral), but the client does not find housing or does not follow through, do not change the “successful” referral to “unsuccessful”. See #6 above.]**

You should make 3 attempts to contact the Household over a two week period using the different contact information the client has provided (phone, text, e-mail, etc.). Give the client a deadline in which to respond. Document the contact attempts (date and type of contact) in the Assessor notes. If you do not hear back after the final attempt, mark the referral as unsuccessful, close their Coordinated Entry Assessment, and exit them from Coordinated Entry.

If the client is already housed, or no longer in need of homeless services, mark the referral as unsuccessful. Choose a reason, end-date, and Save. Remove the HH from the priority list by creating an Exit from Coordinated Entry.

If a client refuses 3 separate voucher offers, the Priority List Manager may bring the client up for discussion at Case Conferencing.

REMEMBER TO PUT IN THE DATES: DATE REFERRAL ACKNOWLEDGED, DATE OF RESULT, AND END DATE.

Resources: <https://www.hmismn.org/coordinated-entry>

Reports in HMIS (Business Objects)

MIN-00-CES-222 CE Assessor Agency Check

MIN-00-CES-248 Client Coordinated Entry Status

MIN-00-258-CE Housing Referral