

How to Process an FDA Referral from Coordinated Entry

As a TH, RRH or PSH Provider, you will contact the Coordinated Entry Lead with a request for a CWL referral when you have a current or upcoming vacancy in your project. ES providers will automatically receive referrals.

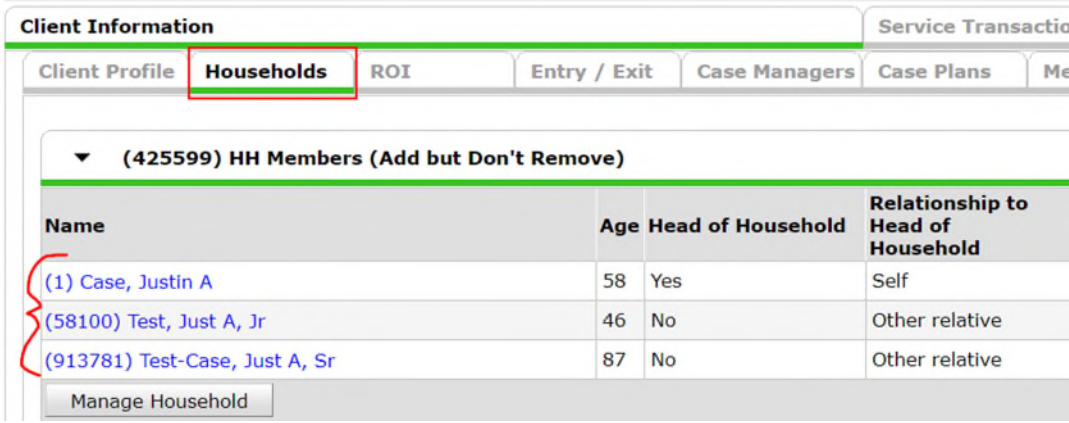
- a. Email your request to the Coordinated Entry Lead:
James Ewell at James.EWELL@lanecountyor.gov

The Coordinated Entry Lead will review the most recent Central Waitlist (CWL) and:

- a. Create a referral in HMIS for the Head of Household referred to your project
- b. Send you the Client ID for the Head of Household
- c. You have **two weeks** to process a referral

ES, TH or PSH Providers

1. In ClientPoint:
 - a. Review the Client’s record and determine eligibility.
 - b. Confirm that all the household members are associated with the Head of Household in ClientPoint on the **Households** tab.





Client Information		Service Transaction	
Client Profile	Households	ROI	Entry / Exit
Case Managers	Case Plans	Me	
▼ (425599) HH Members (Add but Don't Remove)			
Name	Age	Head of Household	Relationship to Head of Household
(1) Case, Justin A	58	Yes	Self
(58100) Test, Just A, Jr	46	No	Other relative
(913781) Test-Case, Just A, Sr	87	No	Other relative
Manage Household			

2. In ShelterPoint, open the Unit List. You will see the referred client at the bottom of the Unit List in the **Outstanding Referrals** section.



▼ Outstanding Referrals - LC - Provider SHELTERPOINT test (4836) - 1 total								Check Unit Availabil
Referral Date	Name	VI-SPDAT	VI-FSPDAT	TAY-VI-SPDAT	Need Type	Referred By	Date of Birth	Gender
11/01/2020	(1) Case, Justin A	1			Homeless Permanent Supportive Housing	Lane County (OR-500) (3227)	01/11/1962	Male
Showing 1-1 of 1								

- a. If you are **accepting** this referral, click on the Check-In icon  to begin the enrollment.
Checking the client into your project automatically closes the referral as “Needs Fully Met”.
- b. If you are **declining** this referral, click in the pencil icon  to edit the Referral Outcome.

- i. Complete the Referral Outcome (Declined)

- ii. The Reason (must be completed)

Referral Outcome	Declined
If Canceled or Declined, Reason	-Select-

- iii. Complete this step by clicking on **Save Referral Information**

RRH Providers

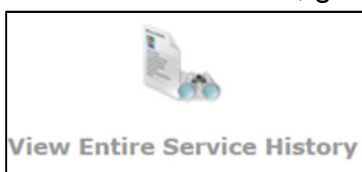
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<input type="button" value="Manage Household"/>				


2. Go to the **Services Transactions** tab


- a. From the Dashboard, go to **View Entire Service History**



b. Click on the Referrals tab

The screenshot shows a navigation menu with two main sections: 'Client Information' and 'Service Transactions'. Under 'Service Transactions', there are five tabs: 'Needs', 'Services', 'Referrals', 'Shelter Stays', and 'Entire Service History'. The 'Referrals' tab is highlighted with a green bar and a red arrow pointing to it.

3. From the **Previous Referrals** list, click on the pencil icon  to begin processing the referral.

Previous Referrals							
	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
	11/10/2020	11/10/2020	LC - Provider SHELTERPOINT test		Homeless Permanent Supportive Housing	Identified	

a. If you are **accepting** this referral:

i. Update the Referral Outcome to Accepted

The screenshot shows a form field labeled 'Referral Outcome' with a dropdown menu. The dropdown is open, and 'Accepted' is selected.

ii. Change the Needs Status to "In Progress"

The screenshot shows a dialog box titled 'Need Status and Outcome'. It has a section for 'Need Status *' with a dropdown menu set to 'In Progress'.

iii. Complete by clicking on **Save Referral Information**

iv. Begin your Entry/Exit workflow for RRH

b. If you are **declining** this referral:

i. Update the Referral Outcome to Declined and list your reason

The screenshot shows a form with 'Referral Outcome' set to 'Declined'. Below it, the 'If Canceled or Declined, Reason' field contains the text 'Client did not return contact within allotted time'.

ii. Leave the needs status as "Identified"

The screenshot shows a dialog box titled 'Need Status and Outcome'. It has a section for 'Need Status *' with a dropdown menu set to 'Identified'.

iii. Complete by clicking on **Save Referral Information**