



CES REFERRALS GUIDE

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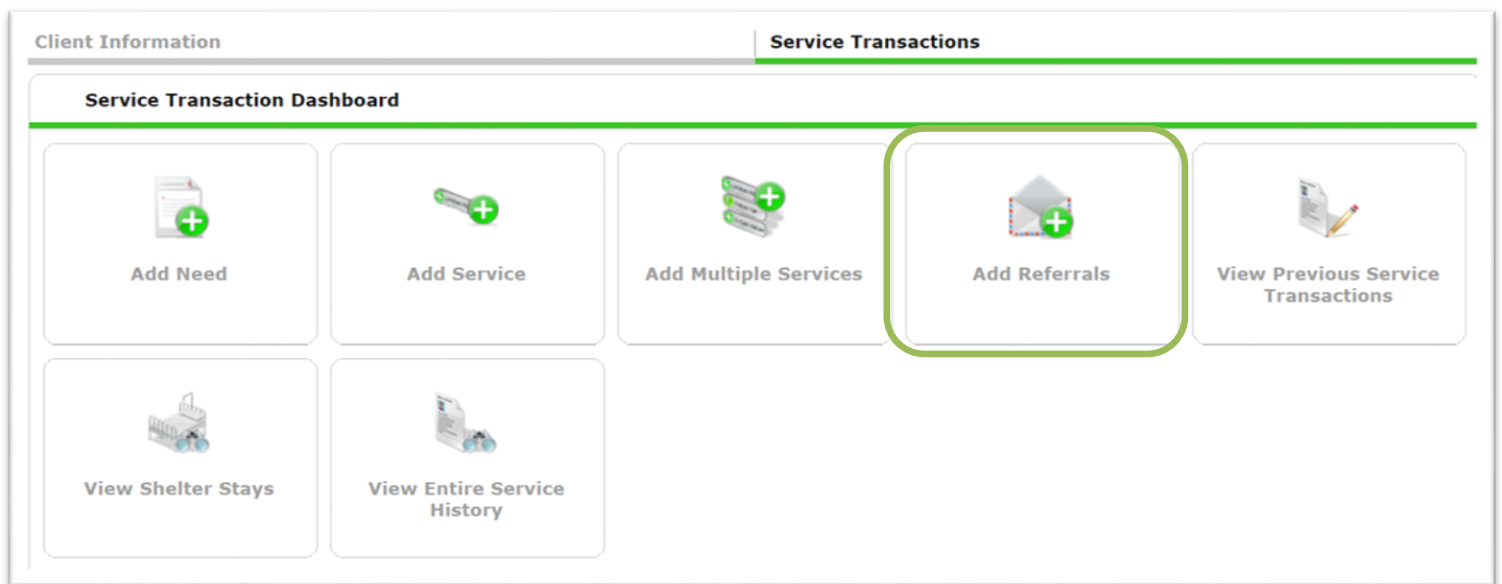
PURPOSE

The purpose of this document is to describe the workflow for providers who are submitting referrals to CES for Non-Veteran programs, including RRH, ROPAL, PSH.

SUBMITTING REFERRALS IN HMIS

A referral to CES should only be submitted once the Assigned Navigator has ensured a participant is “Doc Ready.” Navigators get a participant doc ready by ensuring the HMIS profile reflects the current household, sufficient homeless history, and uploads any supporting documents required, such as ID’s, proof of disability, proof of homelessness, income, etc. For an overview of what documents are required prior to a referral, see *Overview of PSH / RRH Programs* via FORMS tab at <https://hsncfl.org/navigator-forms>. Once the Navigator has ensured that the client is Doc Ready, they submit a referral to CES:

- 1) EDA into your Navigator Provider in HMIS
- 2) Locate the client
- 3) Click on *Service Transactions*
- 4) Click the *Add Referrals* icon
 - a) For households, only the Head of Household is selected.



- 5) **ADD NEED** > Under *Need Assignment*>*Service Code Quicklist*,
 - a) select one of the following needs depending on which project referral is being sent for
 - i) *Homeless Permanent Supportive Housing* for PSH referrals
 - ii) *Rapid Re-Housing Programs* for RRH or ROPAL referrals
 - b) Hit *Add Terms* to add the selected program need to the referral



Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Benefits Assistance (FT-1000)
- Case/Care Management (PH-1000)
- Document Authentication Services (FT-1900)
- Homeless Permanent Supportive Housing (BH-8400.3000)**
- Housing Search Assistance (BH-3900.3100)
- Rapid Re-Housing Programs (BH-0500.7000)
- Rental Deposit Assistance (BH-3800.7250)
- Rent Payment Assistance (BH-3800.7000)

Add Terms Service Code Look-Up Add Terms & Go To Search Results

- 6) ADD PROVIDER > Under Referral Provider Quicklist,
 - a) select one of the following:
 - i) Permanent Supportive Housing Match CES 812 for PSH referrals
 - ii) Rapid Rehousing Match CES 811 for RRH or ROPAL referrals
 - b) Hit Add Provider to add the selected provider to the referral. (HINT: You won't see the provider until you scroll to the bottom of the screen.)

Referral Provider Quicklist

Provider: Homeless Services Network-Permanent Supportive Housing Match:CES (812) Add Provider

- 7) For Youth Referrals only, select additional referral data
 - a) Under Referral Ranking, select either Youth Individual or Youth Family

Referral Data

Needs Referral Date * 11 / 24 / 2021 9 : 02 : 20 AM

Referral Ranking: Youth Family

VI-SPDAT Score: Please Select a VI-SPDAT Score Search Clear

VI-FSPDAT Score: Please Select a VI-FSPDAT Score Search Clear

Projected Follow Up Date: / /

Follow Up User: Homeless Services Network-Rapid Rehousing Match:CES (811) Search My Provider Clear

-Select-

- 8) Scroll to bottom of screen to see a summary of the referral data. Ensure the blue box is checked for the referral.



Referrals		Send Summary
Referred-To Provider	Homeless Permanent Supportive Housing	Referred Clients
Homeless Services Network-Permanent Supportive Housing Match:CES (812)	<input checked="" type="checkbox"/>	(90057) ZZ-Doe, ZZ-John

9) **ADD REFERRAL NOTE (if needed)**

- a) Scroll down to *Need Data* box and click the notepad.
- b) Include any relevant information about the referral that you would want CES to know.

Selected Needs				
Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason		Notes
Homeless Permanent Supportive Housing (BH-8400.3000)	<input type="text"/>	Identified <input type="text"/>	<input type="text"/>	
		-Select- <input type="text"/>	-Select- <input type="text"/>	
Remove All Needs				

RECORDKEEPING REVIEW

Once a referral is submitted in HMIS, CES staff complete a recordkeeping review of the profile, which is an audit to ensure the profile reflects all items needed by the funder and HUD. CES will decline or accept the referral.

- » If declined: CES declines the referral in HMIS and emails Navigator to explain reason for decline. Navigators are encouraged to submit a new referral if the issue can be resolved.
- » If accepted: CES accepts the referral in HMIS and the participant is placed on the Approved Registry awaiting a referral to a PSH, RRH, or ROPAL program.