



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. For detailed instructions on completing specific tasks within HMIS, please refer to your HMIS training documentation.

SUBMITTING REFERRALS IN HMIS

A referral to CES should only be submitted once the Navigator has ensured a client is “Doc Ready.” Navigators get a client 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 [CES.hsnfcl.org](https://ces.hsnfcl.org). Once the Navigator has ensured that the client is Doc Ready, they submit a referral to CES:

- ▶ For Chronically Homeless clients:
 - ▶ CES PSH 812
- ▶ For Homeless Families with minor children or Unaccompanied Youth 18-24:
 - ▶ CES RRH 811

To refer a client to one of the above providers:

- » EDA into your Navigator Provider in HMIS (i.e. Osceola County – Navigator)
- » Locate the client
- » Click on *Service Transactions*
- » Click the *Add Referrals* icon
 - ▶ For households, only the Head of Household should be selected.
- » **ADD NEED** > Under *Service Code Quicklist*, select one of the following:
 - ▶ *Homeless Permanent Supportive Housing* for CES PSH 812 referrals
 - ▶ *Rapid Re-Housing Programs* for CES RRH 811 referrals
- » **ADD PROVIDER** > Under *Referral Provider Quicklist*, select one of the following:
 - ▶ *CES Permanent Supportive Housing Match 812* for PSH referrals
 - ▶ *CES Rapid Rehousing Match 811* for RRH referrals
 - ▶ Hit Add Provider in order to add the selected provider to the referral. (HINT: You won’t see the provider until you scroll to the bottom of the screen. But it’s there.)
- » **ADD VI-SPDAT** > Scroll down to *Referral Data* box
 - ▶ Hit the search button next to the VI-SPDAT score.
 - ▶ Select the green arrow next to the VI-SPDAT you’d like to add (choose the most recent)
- » **ADD REFERRAL NOTE (if needed)** > Scroll down to *Need Data* box and click the notepad.
 - ▶ Include any relevant information about the referral that you would want CES to know.



- ▶ For Youth Referrals only, please include information on the following:
 - ▶ Ranking: Select either Youth Individual or Youth Family
 - ▶ Notes within the referral on program preference: Is there a preference from the client on wanting to participate in RRH or ROPAL shared housing programs?

Scroll to the bottom of the screen. After selecting all the terms above, you should now see a summary of the necessary referral data; the provider you are sending referral to, the need, and client name. Make sure the box under the Referrals section is checked. Hit **SAVE ALL** to submit.

RECORDKEEPING REVIEW

Once a referral has been 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. CES will decline or accept the referral.

- » If declined: CES declines the referral outcome 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 outcome in HMIS and the client is placed on a list of approved clients awaiting placement in a PSH/RRH program.

PROGRAM MATCHING

When a PSH, RRH, or TH provider indicates they have capacity to take approved clients during registry meetings, a prioritized, eligible, CES approved client is matched to that program by CES staff. Matching takes place during registry meetings in order to maintain a transparent process with all providers participating in the process. Once an appropriate program match is determined, CES Match will submit an HMIS referral to the Housing Program.

***Standard practices for Providers receiving referrals from CES:**

CES will only submit a referral to a PSH/RRH provider upon hearing that they have capacity to take on new clients. When a provider indicates that they have capacity for new clients, they are communicating that Case Managers have the capacity to immediately follow up with client to begin working to finalize housing. Upon receiving a referral from CES, providers should accept the referral and schedule the client for immediate intake into the program. *The expectation is that within 3 business days of a referral from CES, the assigned Case Manager has begun making attempts to meet with the client for official program intake.* All internal paperwork or additional documents (such as S+C application or birth certificates for adults) will be completed as a part of the PSH/RRH Provider's intake process with the case manager.