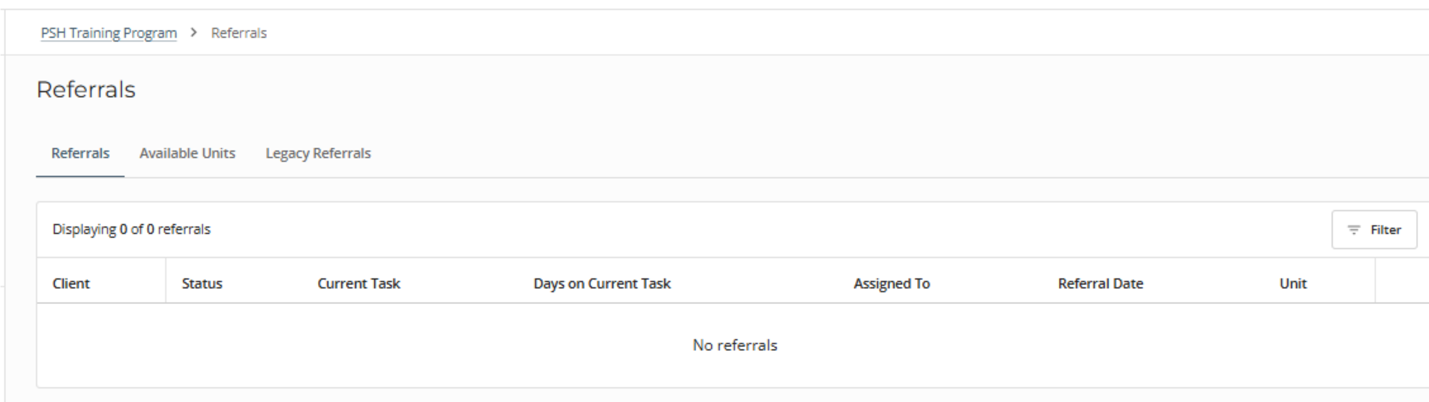
Referrals Screen and Referral Management

This job aid is for projects that receive referrals through coordinated entry and for invite-only projects. It will walk through the system changes implemented in 2025 that added a referral process workflow; staff assignment functionality, and changes to how provider notes and outreaching attempts are tracked.

Referrals screen

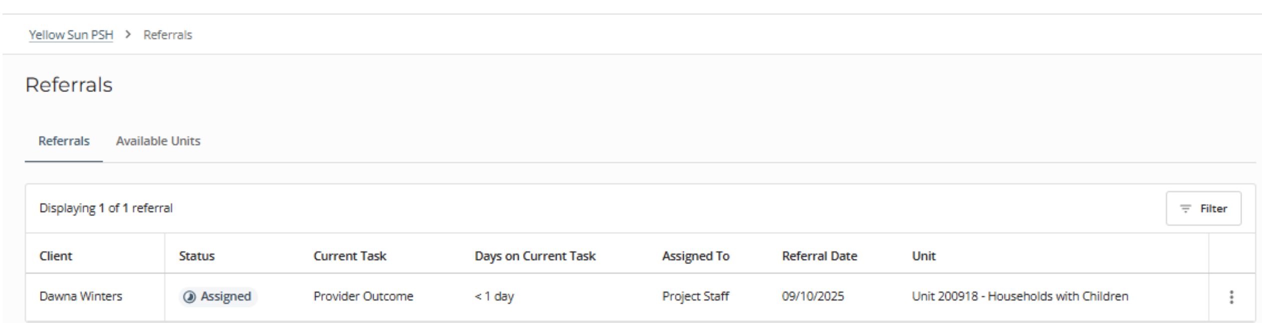
The Referrals screen will display 3 tabs:

- Referrals
- Available Units
- Legacy Referrals

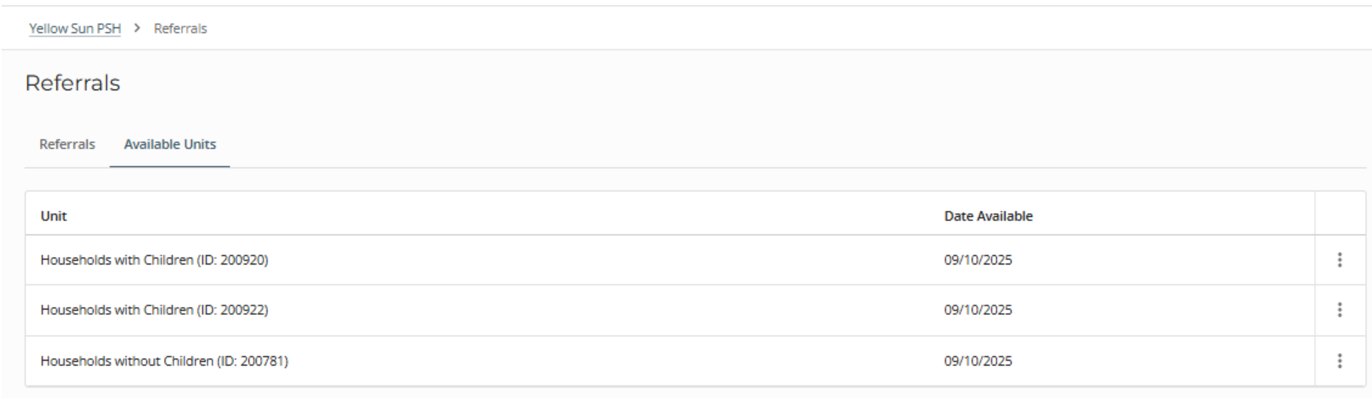


The *Referrals* section displays referrals that have been assigned to the project. Only users associated with the provider organization who have been assigned to the referral will be able to view it.

Please see job aid section on ***Assignment and Access*** *for more details.*



The *Available Units* section displays units that have been marked available that do not yet have a referral associated and working towards assignment to the project by DHS staff.

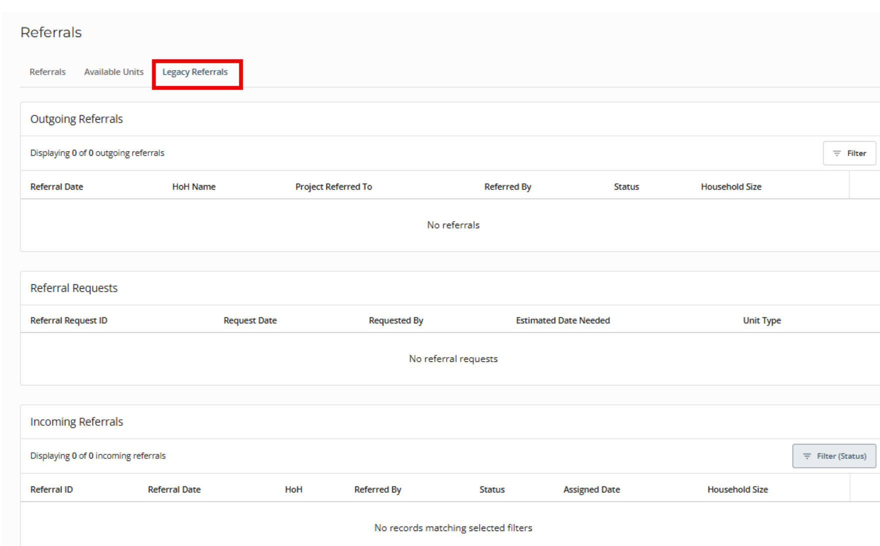


The *Legacy Referrals* section will display as we transition into these system changes.

Legacy referrals will display referrals that were assigned and in progress (accepted-pending or denied-pending) before the system changes implemented on 10/1/25.

Providers should continue accessing and working with referrals displaying on the *Legacy Referrals* section until they are completed.

New referrals, assigned on and after 10/1/25, will display on the *Referrals* section.



Assignment and access

Staff assignment is a new concept being introduced to HMIS.

At the time a referral is assigned to a project that accepts referrals through Coordinated Entry or an Invite-only project, DHS staff will assign provider staff to the referral.

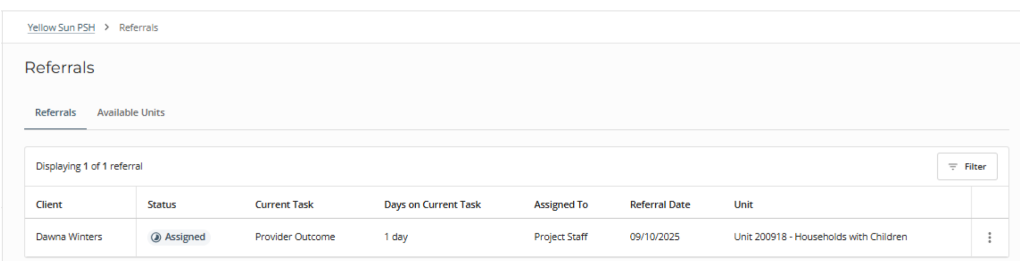
If a staff person is **not assigned** to a referral, they will be **unable** to view the referral.

It is important to keep DHS updated regarding staff changes for this reason.

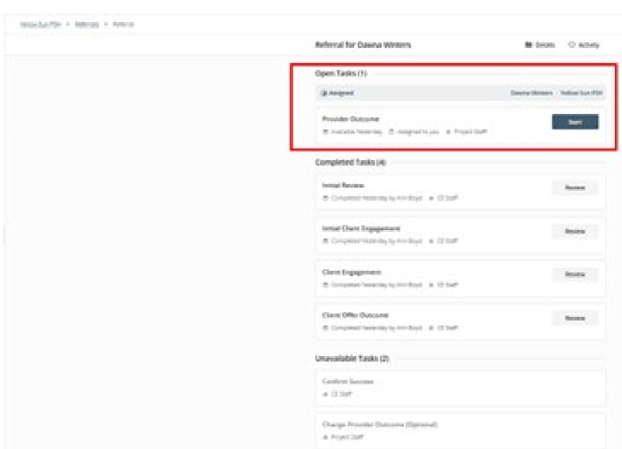
Reach out to DHS as needed with questions or concerns about assigned referrals and view permissions.

Provider Outcome Task activities: outreach and documentation

Tasks are another new concept being introduced to HMIS. Earlier tasks and associated notes in the workflow assigned to DHS (CE) staff able available for assigned providers to view in read-only status.



To view a referral's details and access the **Activity** and **Contacts** sections, select the referral.

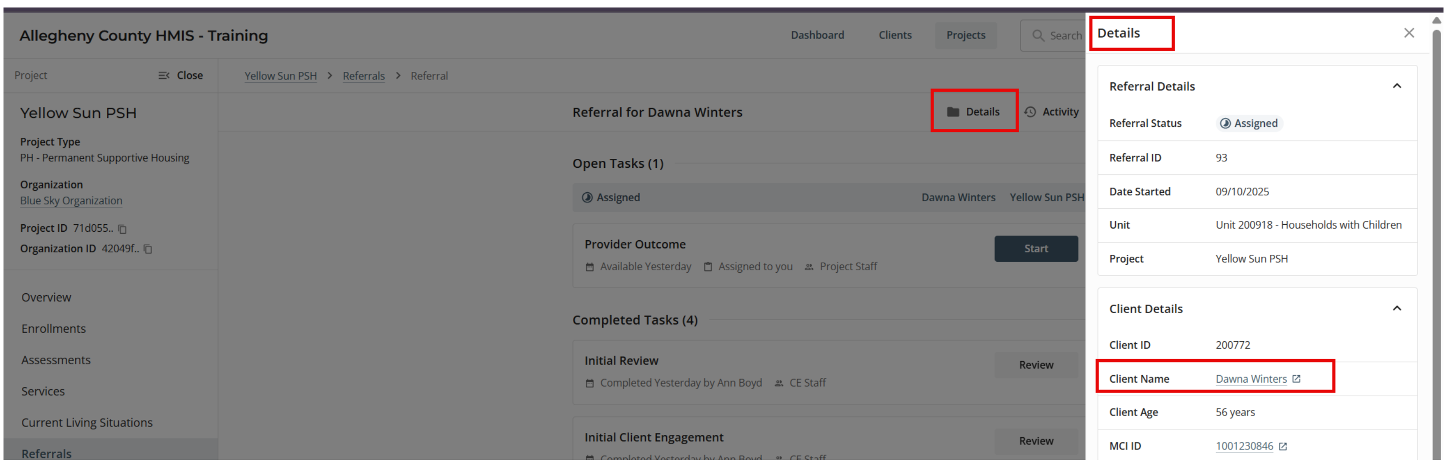


Once a referral is assigned to a project and provider project staff, the referral is in the **Provider Outcome** task.

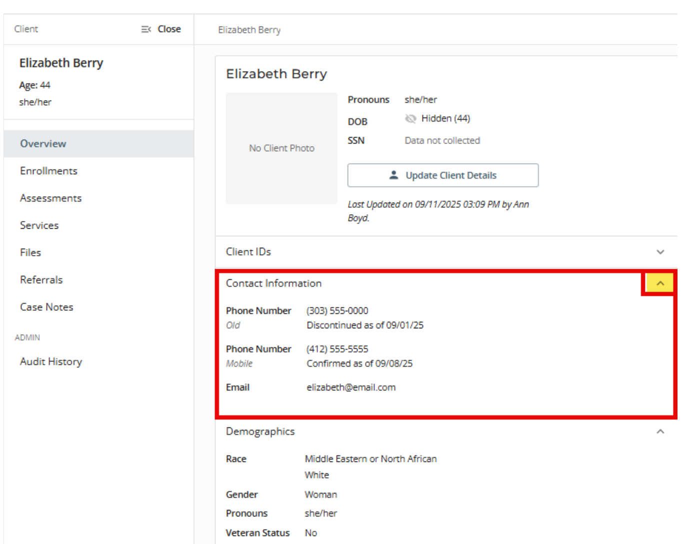
The Provider Outcome task means that the provider should begin outreach attempts, document all contacts/outreach attempts with the date, time, and outcome of each attempt, and schedule the intake with the referral when they agree to work towards enrollment in the project.

Provider Outcome task: Details + Referral Contact Information

Assigned provider staff can access the assigned referral's contact information by selecting the **Details** button at the top left of the referral. In the *Client Details* section of the dropdown, the HOH's name displays as a hyperlink to their HMIS Client record screen.



Select the hyperlinked name to navigate to the Client record. Please note that the Client record will open in a new window or tab.



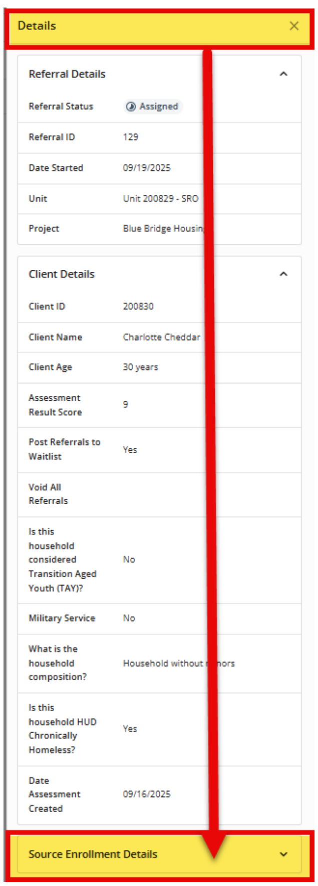
The contact information will be displayed; please note that this section is collapsible and expandable by selecting the chevron symbol at the right. Note the contact information needed and navigate back to the referral details screen.

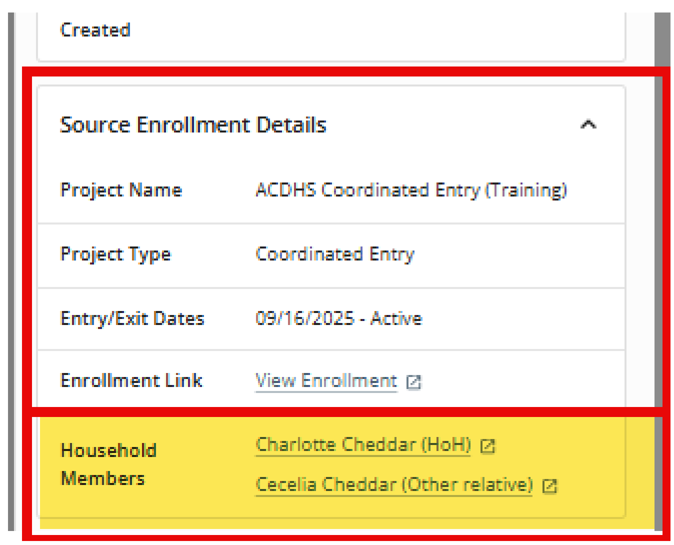
The Details section also displays details regarding the referral to the project and the client details; all information is read-only for provider users.

Provider Outcome task: Viewing Household Details

If the referral is for a household of more than one person, the household composition and household roles will be displayed under the *Source Enrollment Details* section housed within the Details section of the referral.

To view the household information on a referral, select the Details button within the referral.





As the Details section expands on the page, navigate down to the *Source Enrollment Details* section and expand it as needed to view the household member information.

Provider Outcome task: Activity + Contact Documentation/Notes

All outreach attempts and contacts with a referral should be documented in notes.

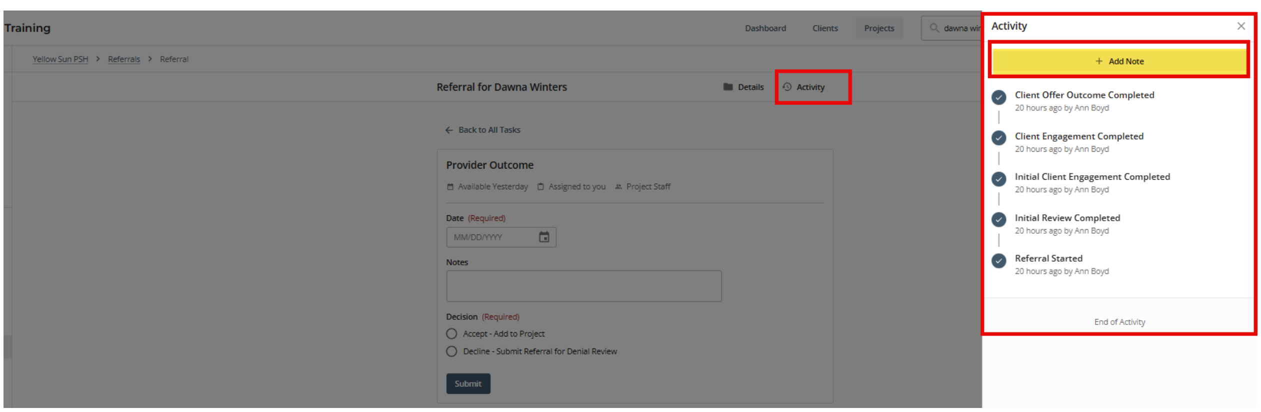
Upon referral assignment, providers must attempt to reach the assigned household to schedule an intake appointment using all contact methods listed for the household.

Each contact method must be attempted at least 3 times. Each contact attempt to each phone number and/or email address must be thoroughly documented with date, time, and outcome in a Note under the Activity button.

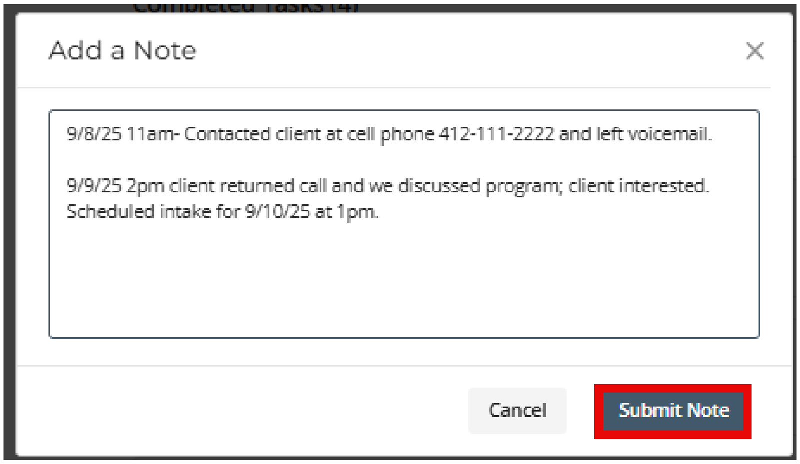
This information is shared with Coordinated Entry so that it can be shared to inform the client of next steps or in the case of a program denial. Like contact attempts, all appointments/intakes set should be documented iby a note as well as in the Notes box associated to a task decision

Notes associated to a referral are accessed by selecting the **Activity** button.

The Activity section will open, and users should select the *Add Note* button at the top to document outreach attempts, contacts, or meetings with the referral.



Enter the note and then select the *Submit Note* button to save the note.



All submitted notes will display under the **Activity** button. Admin users and other users assigned to the referral are able to view Activity notes.

Please note: editing is not available for Notes collected under the Activity button; if clarification or changes are needed, users should submit an additional note.

Provider Outcome Task Decision: Accept- Add to Project

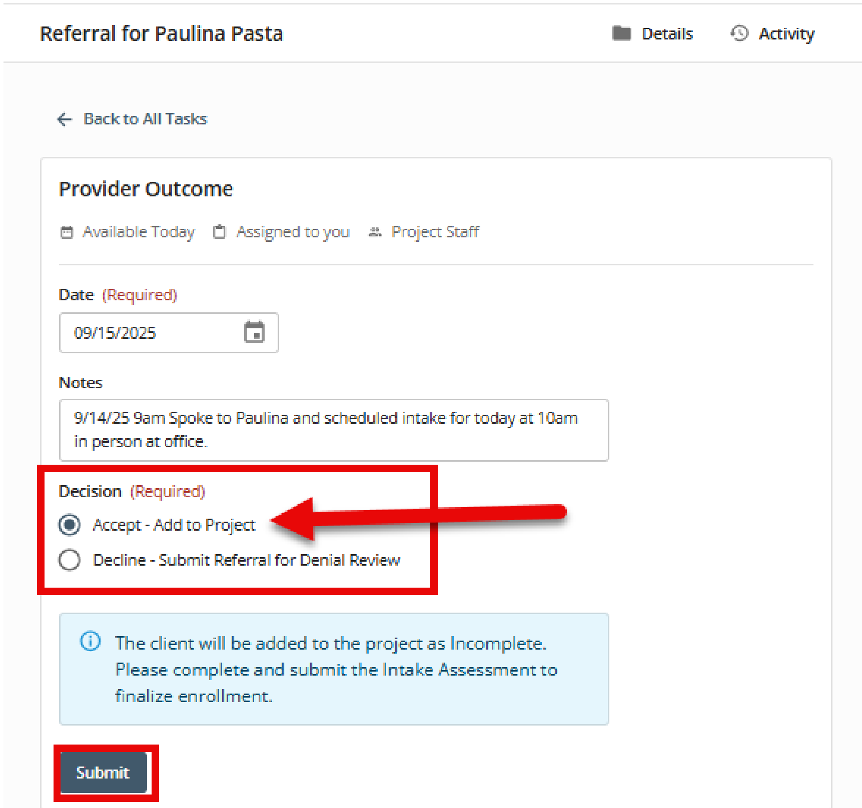
When the referral agrees to work with the project towards enrollment and schedules the intake assessment, the provider should both document that activity in a note and update the Provider Outcome Task's Decision.

The task Decision functions similarly to how the previous referral status worked (changing from *Assigned* to *Accepted-Pending* or *Denied-Pending*). Selecting the Task Decision indicates if the referral will enroll in the project or if the referral is being declined (see the section of job aid on *Provider Outcome Task Decision: Decline- Denial Review*).

Selecting the task Decision as Accept-Add to Project will add the referral as Incomplete to the project's Enrollments screen. The provider can then enter and submit the intake assessment information for the referral to enroll them after the intake is completed.

The date of the task decision as well as notes directly relevant to the task decision should be entered.

To save the task Decision as *Accept-Add to Project*, select the radio button and click *Submit*. A reminder box will indicate that the intake will need to be completed for each household member in order for the household to be considered enrolled.



To complete and submit the intake for enrollment, navigate to the *Enrollments* screen and proceed with completing and submitting the intake assessment/s for all household members (see the *Assessments* job aid).

The referral will remain on the *Referrals* screen after their status has been changed to Accept- Add to Project while their intake is being completed and submitted. The next Task step occurs with DHS to confirm the success of the referral. The accepted and enrolled referral will remain on the provider's Referral screen and Dashboard until DHS completed this step.

After the *Confirm Success* task is completed, the referral will change to *Accepted* status on the Referral screen.

Provider Outcome Task Decision: Decline- Submit Referral for Denial Review

If the provider has contacted the referral and:

- The referral is not interested in working with the project
- The referral is unable to be reached within the allotted time frame
- The referral does not attend a scheduled intake appointment
- The referral cannot produce the required documentation needed to enter the program

Then, the program will document that contact and decision in an activity note and then update the Provider Outcome Task Decision to *Decline- Submit Referral for Denial Review*.

Detailed documentation of all contact attempts, including each phone number or email address the program contacted, along with date, time and outcome of each attempt is required Notes under the Activity button as well as being noted in the *Notes* box associated to the task.

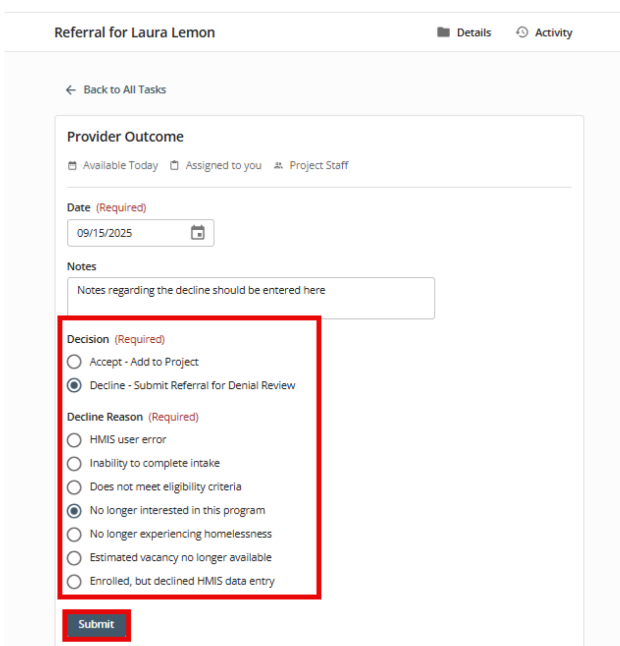
All denial reviews are electronically sent to the Office of Community Services (OCS) Coordinated Entry who have 48 business hours to review the denial and either reach out to the provider for more details or provide a decision to the program.

Until a decision is made by OCS, the denial will reserve a spot in the program.

If there are no other vacant units in the project, then no other units can be made available until the declined referral is reviewed.

To save the task Decision as *Decline- Submit for Denial Review*, open the task on the Referrals screen. The date of the task decision as well as notes directly relevant to the task decision should be entered.

Select the radio button for that decision. Once that decision is chosen, a dependent section will display to prompt the user to select the appropriate Decline Reason for the situation (see *HMIS Denial Reason Guidance One-Pager* for more information). Click the Submit button to submit the declined referral to OCS for review.



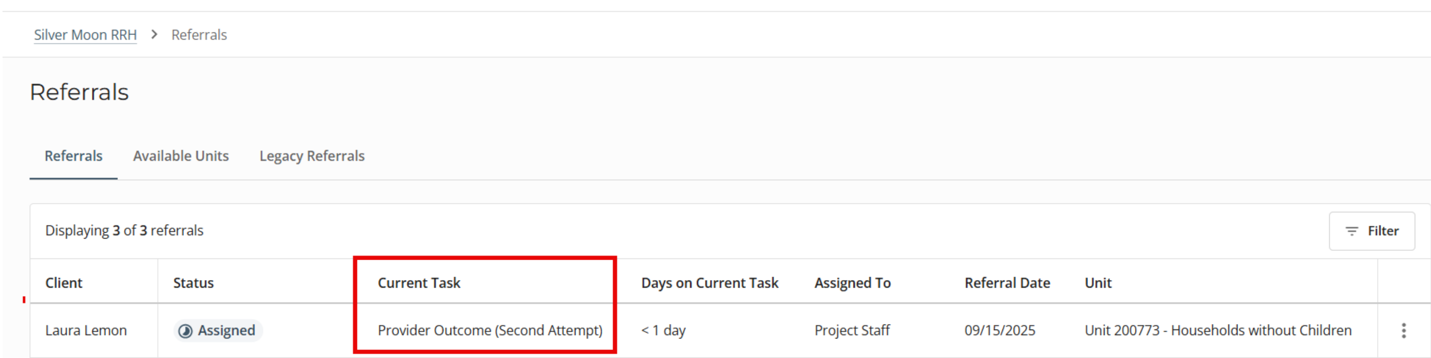
Denial Review Process

Once a referral has been submitted as *Decline - Submit for Denial Review,* the task is on OCS Coordinated Entry to review the decline and either approve it or depending on the circumstances, send it back to the provider to work with.

If the declined referral is approved, the declined referral will no longer be displayed on the provider's *Referrals* screen. The unit the referral was slated for will remain in *Accepting Referrals* status so a new referral can be associated with the vacancy.

If the declined referral is sent back to the provider, OCS will alert them. On the project's *Referrals* screen, the referral's status will display as *Assigned* and the associated task will display as *Provider Outcome (second attempt).*

Once the referral is assigned to the project, the provider should work with the referral to remove barriers to enrollment.



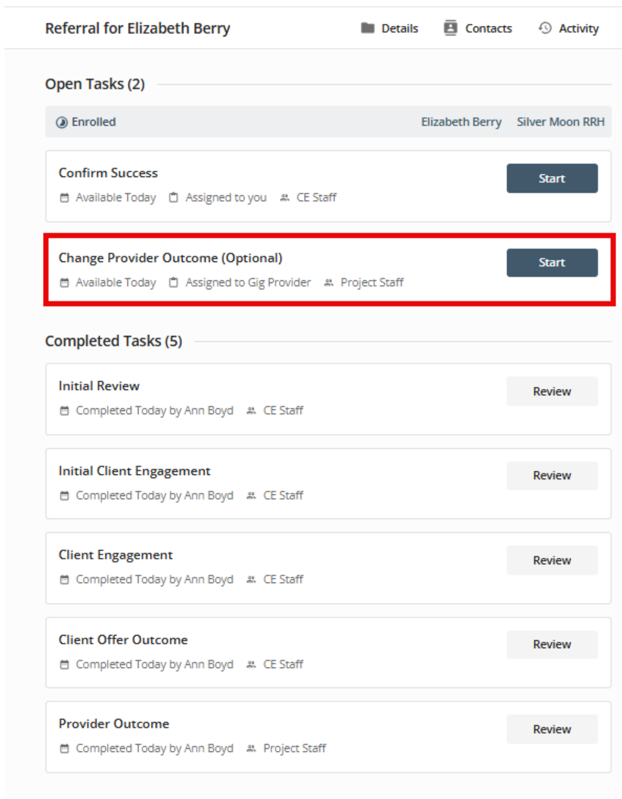
If the referral is able to be enrolled from this second attempt, the provider should update the referral status to *Accept- Add to Project* and enroll the referral (see section of job aid on *Provider Outcome Task Decision: Accept-Add to Project).*

If the referral is unable to be enrolled from this second attempt, the provider should enter updated notes under the Activity button to capture new activity, outreach, and contacts on the second attempt; then the provider should complete the Task by entering a date of the current status decision, relevant notes for the second attempt decision, and selecting the *Decision to be Decline- Submit for Denial Review.*

The Denial Review process is limited to three attempts total per referral to the project.

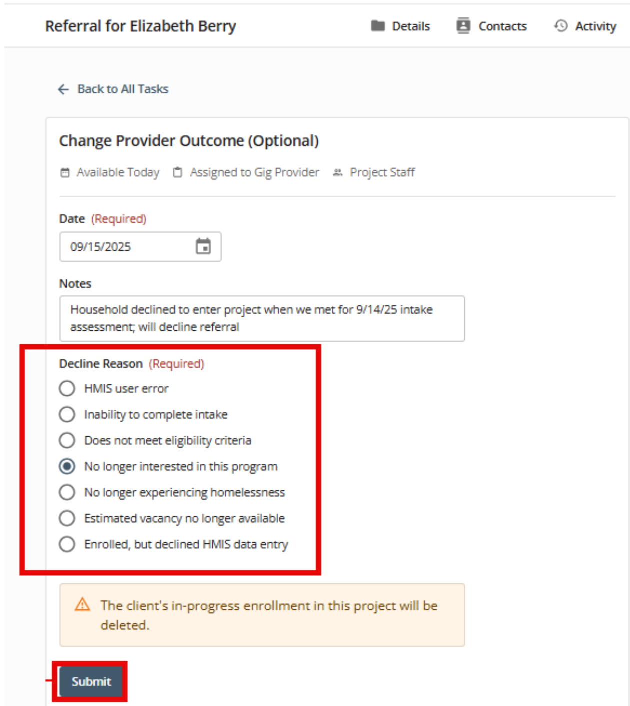
Change Provider Outcome (optional task)

After the provider enrolls a referral; an optional task will display both on their Referrals screen for the accepted referral and on their Dashboard for that referral.



This task, **Change Provider Outcome**, is a task to capture the scenario where a referral is accepted but does not actually enroll in a project. This allows the provider to decline a referral marked as accepted that is not yet enrolled.

In this situation, the provider should select the **Change Provider Outcome Task**. In the task, enter the date, relevant notes to the referral's outcome change, and the decline reason. A warning box will display to let the user know that the incomplete enrollment for the household will be removed when they select the *Submit* button. Select *Submit* to submit the decline.



For more information…

For assistance, please contact the Allegheny County Service Desk at dhs-servicedesk@alleghenycounty.us or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access Service Desk Plus, go to: https://dhs-servicedesk.alleghenycounty.us/