

Quick Guide: Posting Units and Processing Referrals in HMIS

Posting Units:

- 1. Log in to HMIS
- 2. From the "home" page, navigate to Referrals on the top right.
 - a. If this option does not exist for you, contact your agency HMIS lead.
- 3. Select "Availability." This will show a list of all programs available to your agency.

REFERRALS					
Pending	Community Queue	Completed	Denied	Sent	Availability

- 4. Select your program, and ensure it is toggled to "Limited Availability."
 - a. If a program is selected, all currently posted units will display. Any units that are linked to a pending referral will show under "Reserved Openings."

PSH Building (standard intake)	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Available Openings			
06/25/2021			Z 🖬
Special Population: Family : No			
Special Population: Single Adult : No			
Special Population: Veteran : No			
Special Population: YA : No			
Does this project have eligibility criteria : No regarding gender of HoH?			
Eligibility Criteria: Co-Occurring : No Disorder			
Eligibility Criteria: Mental Health : No			
Eligibility Criteria: CD/SUD : No			
Eligibility Criteria: Medicaid : No			
Eligibility Criteria: LTSS : No			
4 more fields			
There are no reserved openings			

 \oplus ADD SINGLE OPENING \bigoplus ADD MULTIPLE OPENINGS

- 5. Scroll down to see the options "Add Single Opening" or "Add Multiple Openings."
 - a. Batching unit postings through the "Add Multiple Openings" option is only recommended in the case of tenant-based resources that are virtually the same- such as RRH. Project based resources, even if there are multiple units available in the same project, should always be posted individually and differentiated with a unit number or other identifier.



6. Select the appropriate option and the Unit Posting Form will open.

ADD AN OPENING		\otimes
Date		Â
Additional Notes		- 1
Unit Description (IMPORTANT please enter unit number in "Additional Notes" above)		
Date Unit/Resource is Available	//25	- 1
Min Household Size		- 1
Max Household Size		- 1
Min HoH Age		- 1
Max HoH Age		- 1
Unit Size (SRO, 1bd, 2bd, etc.)		- 1
Floor of Unit		- 1
Staire or Flevator (if	SAVE CHANGES CANCEL	•

- 7. Fill out the Unit Posting Form with as much detail as possible. Please note:
 - a. The first Date field should **always** be the date the unit is posted.
 - b. Additional Notes/Unit Description should include, at minimum:
 - i. Unit number if applicable
 - ii. Homelessness Requirement: Literally Homelessness vs Chronic Homelessness
 - iii. Disability requirement
 - iv. Income limitations
 - v. Voucher/subsidy type
 - vi. Supportive services offered at project
 - c. The population toggles must be accurately toggled or the unit will not show on the correct CE dashboard.
 - d. All requirements included in unit posting should be related to funder-driven eligibility.
- 8. Save changes.



Enrolling Referrals:

- 1. Log in to HMIS
- 2. From the "home" page, navigate to Referrals on the top right.
- 3. Select "Availability"

REFERRALS					
Pending	Community Queue	Completed	Denied	Sent	Availability

- 4. Pending referrals will be listed under "Reserved Openings" below any current openings posted in the program.
- 5. Click on the client's name who you'd like to enroll. This will take you to their profile.
- 6. Navigate to the Programs tab from the profile. Scroll to the correct program.

Training Profile								
PROFILE	HISTORY	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS
PROGRAM	HISTORY							

- 7. Select the drop-down button on the right-hand side. Scroll down to "Enroll."
- 8. Complete the enrollment form.
- 9. Save and close.

Denying Referrals:

- 1. Log in to HMIS
- 2. From the "home" page, navigate to Referrals on the top right.
- 3. The "Pending" tab will list all pending referrals for your agency with the program they are pending for. Find the client you'd like to deny. Hover over the edit box to the left of the name of the client and click.
- 4. Status will indicate "Pending."



REFERRAL: EDIT

Client	Test Outreach	
Referred Program	System Advocate - Outreach	
Referred to Agency	King County	
Referring Agency	King County	
Referred Date	06/16/2022 10:51 AM	
Days Pending	130 day(s)	
In Process	52 day(s)	
Qualified	No	
Referred by Staff	Janelle Rothfolk	
Case Manager	Janelle Rothfolk	~
Last Activity	06/16/2022 CHECK-IN	
Status	Pending	\sim
Private		
	SAVE CHANGES CANCEL	

- 5. To deny a referral, select Denied.
 - a. Indicate accurate denial information, including detailed reasoning for the denial. The denial reason and notes should be concise and transparent.
 - b. Only denial reasons marked [ALL] should be used. Denial reasons marked [BOS] (which stands for Balance of State) are not for use in our community.
- 6. Refer back to the queue, except in cases of denials for Mobility Requests or External Fills.
- 7. Note- "Expired" should never be used as a referral resolution in HMIS

External Fills:

Please refer to CE External Fills Policy.

Please note: It is the agency's responsibility to process referrals in HMIS in a timely manner. While a household has a pending referral, they are prevented from appearing on the Priority Pool.