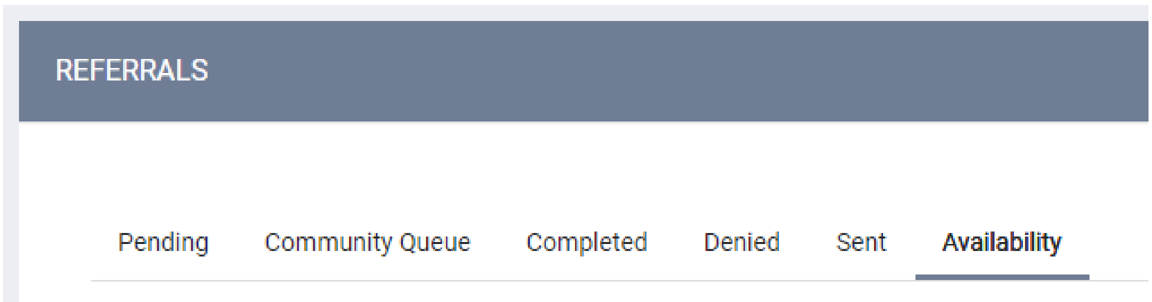
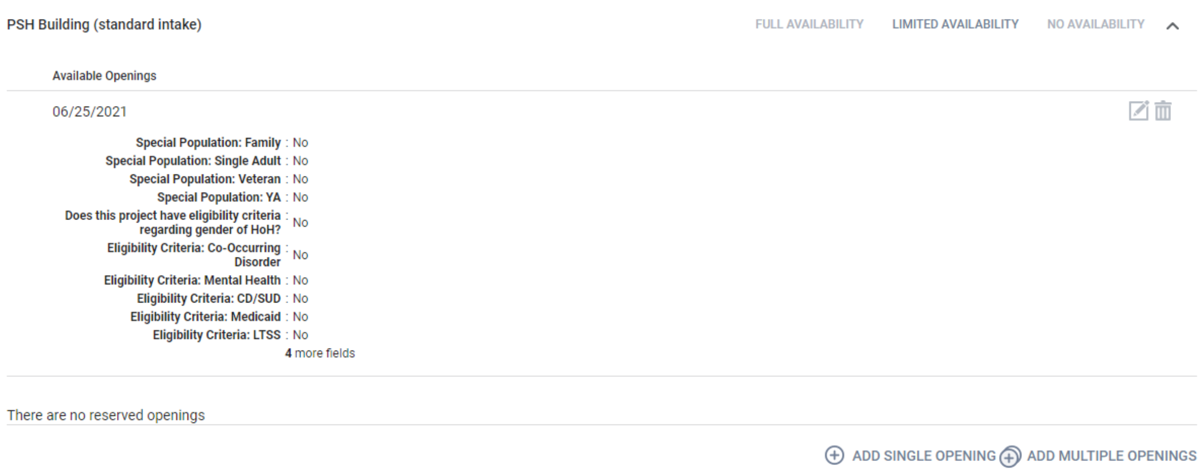
Quick Guide: Posting Units and Processing Referrals in HMIS

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.

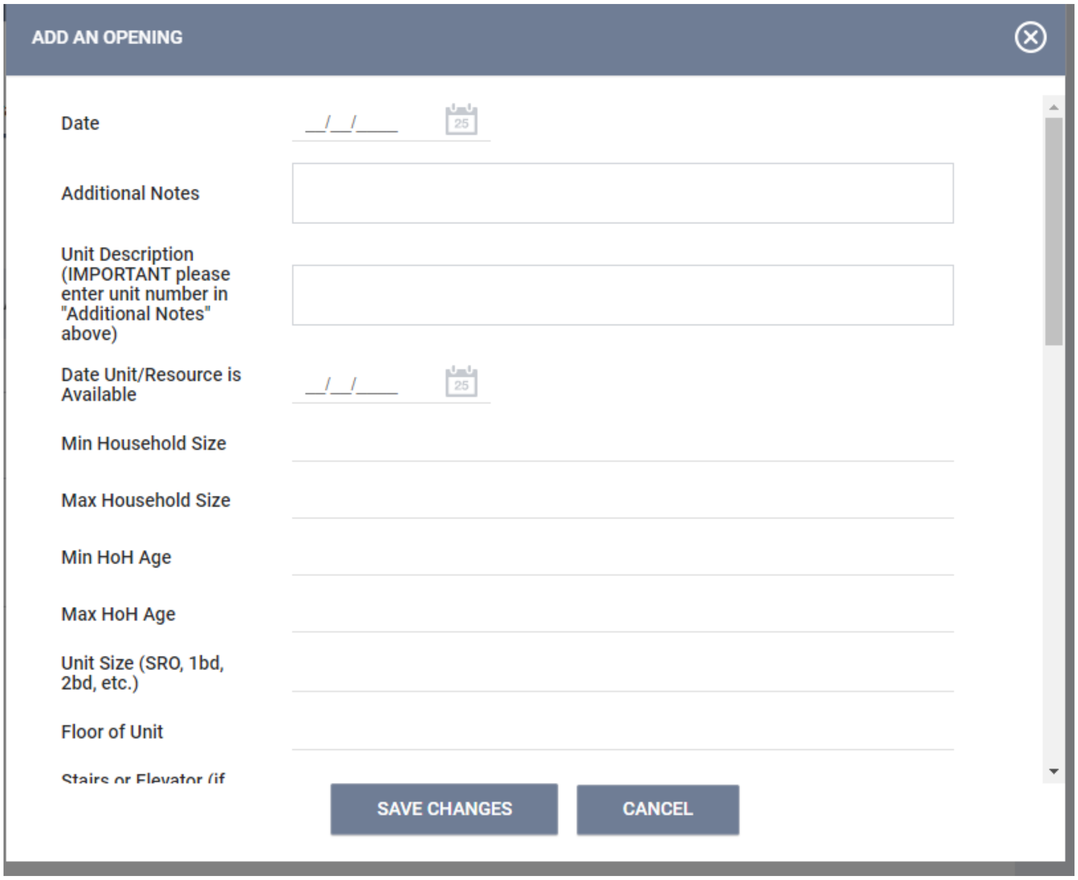


4. Select your program, and ensure it is toggled to “Limited Availability.”
    a. If a program is selected, all currently posted units will display. Any units that are linked to a pending referral will show under “Reserved Openings.”



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.

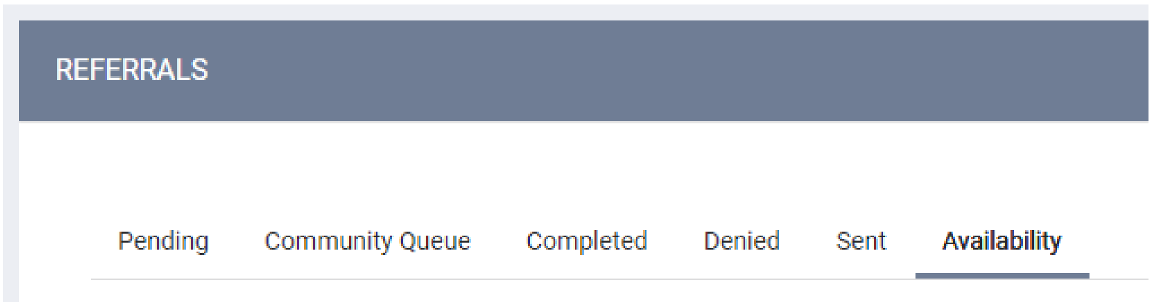
6. Select the appropriate option and the Unit Posting Form will open.



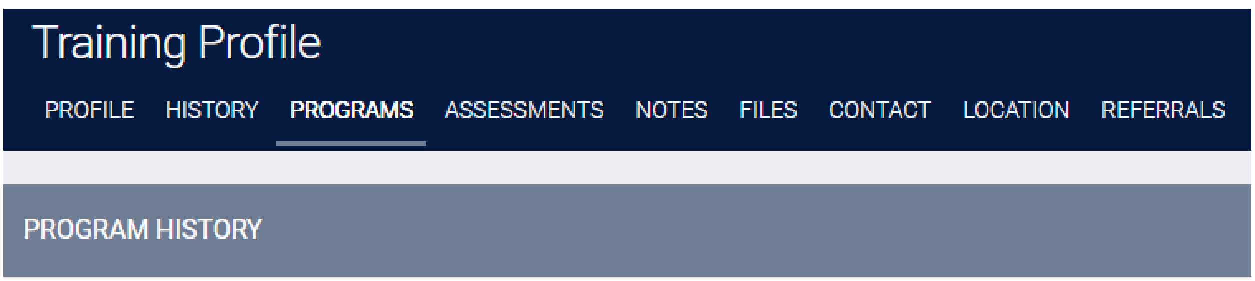
7. Fill out the Unit Posting Form with as much detail as possible. Please note:
    a. The first Date field should **always** be the date the unit is posted.
    b. Additional Notes/Unit Description should include, at minimum:
        i. Unit number if applicable
        ii. Homelessness Requirement: 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”



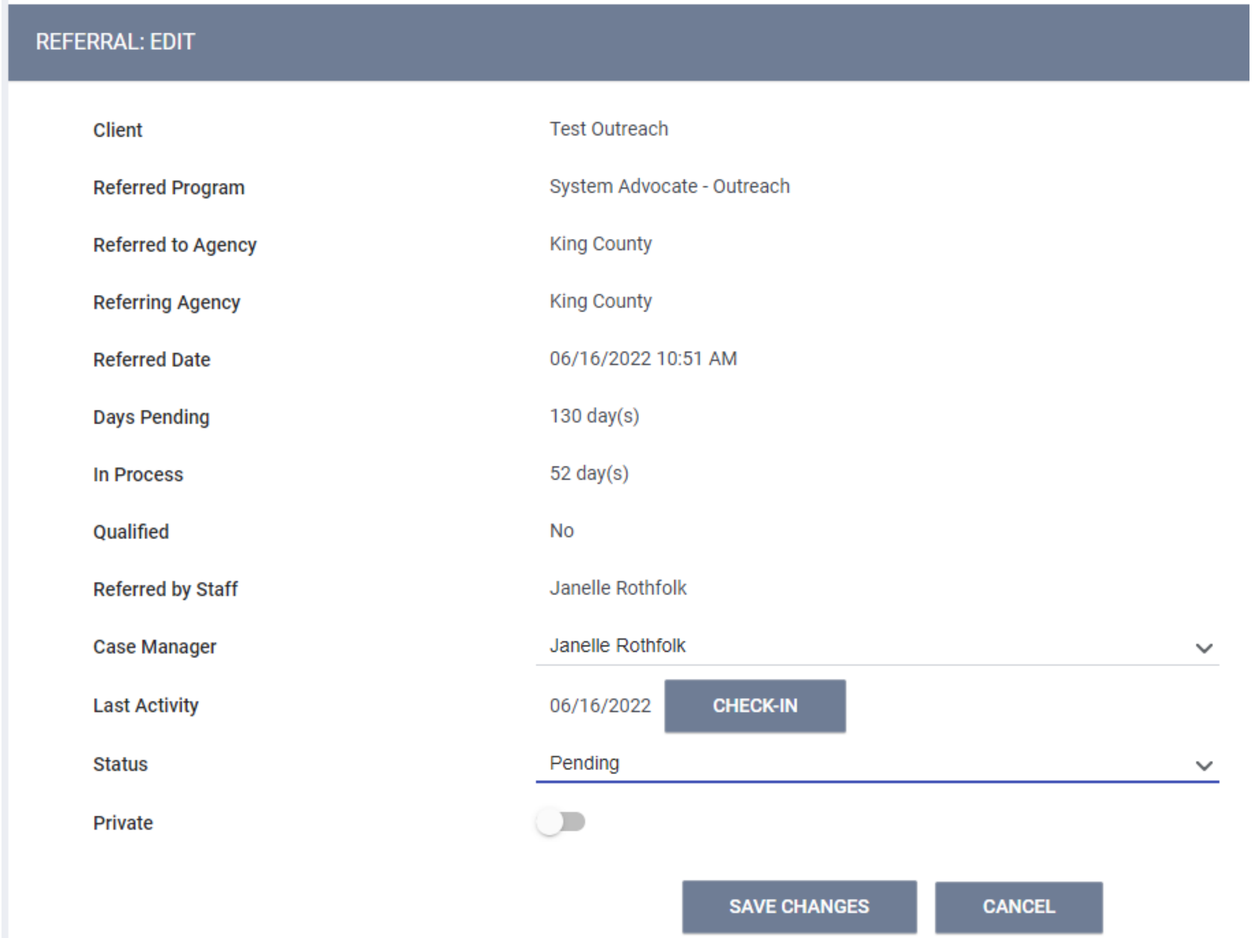
4. Pending referrals will be listed under “Reserved Openings” below any current openings posted in the program.
5. Click on the client’s name who you’d like to enroll. This will take you to their profile.
6. Navigate to the Programs tab from the profile. Scroll to the correct program.



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
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.