Coordinated Entry Referrals SP 5.14

Overview

Requests for Coordinated Entry referrals are received through a HMIS Help Desk ticket, https://nilhmis.cayzu.com. Requests should include:

a. Project Name
b. Number of vacancies
c. Maximum number of bedrooms (or household size)
d. Any additional restrictions such as household type (Adult Only vs Adult Child), Veteran Status, Youth Only, etc.

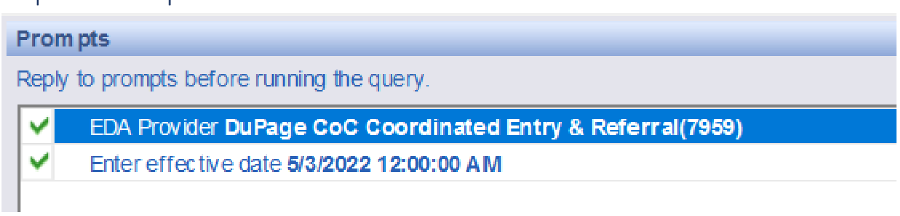
Prior to selecting referrals or completing data entry in HMIS

- Review the Coordinated Entry Policy's prioritization and referral criteria.
- Consider downloading a copy of the Coordinated Entry Workflow Document for reference.
- **Enter Data As** must be used to view and record data for the DuPage CoC Coordinated Entry project.

Running the Report

Pull the *Coordinated Entry Prioritization and By Name List* report through the advanced reporting tool. The report is in the Public Folder → 04 HMIS Admin Share → Julie's Reports →Coordinated Entry and Prioritization.

Report Prompts:



- ✓ EDA Provider: DuPage CoC Coordinated Entry & Referral(7959)
- ✓ Enter effective date: (enter current date)

Export the report by selecting "Save to my computer as…" and choosing Excel.

Managing the List in Excel

There are a few steps that will help ensure a proper referral is identified.

1. XLookup – we use the XLookup formula in Excel to pull data over from another sheet within the same workbook. Specifically, we want to combine the active referral to the client Id in the Prioritization List.
    a. Create a new column at the end of your table on the Prioritization List sheet.
2. Clear contents in the first data row (not header) of the new column, by selecting "Clear All" from Home on the Excel Ribbon, under the Editing section.

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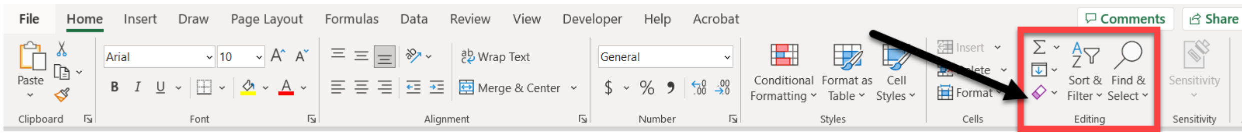

a. In the 1st row of data, select the cell to type in the xlooup formula. =XLOOKUP(Look up Value,Lookup Array,Return Array,If Not Found)

b. Look up Value = the cell holding the client Id Number on the Prioritization List for the data row you are in.

c. Lookup Array = where do you want the formula to look for this client Id in another table/sheet. In this case we are looking for the client Id in the “Active Referrals No priority” sheet. Select the Column holding the Client Uid.

d. Return Array = what do you want the formula to return if the client Id is located. In this case we want the formula to return the “Provider Assigned” from the “Active Referrals No priority” sheet. Select the entire column.

e. If Not Found = what do we want the formula to do if the client Id is not in the list. In this case I use the “” to return a blank.

f. The formula will look like this –

=XLOOKUP(B2,'Active Referrals No priority'!B:B,'Active Referrals No priority'!A:A,"")

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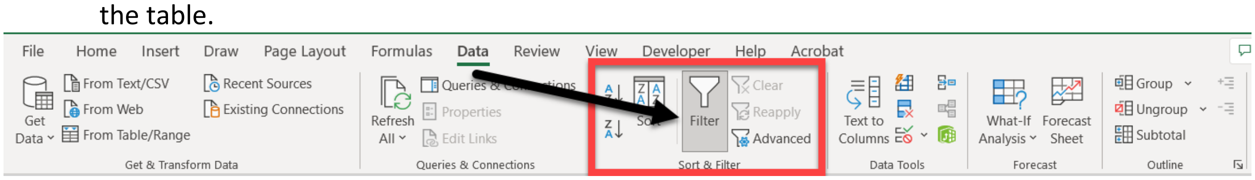
g. Grab the handle of the cell with the formula you just created and drag the formula down to the last row of the report.

3. Add a table filter
    a. Select the A1 cell and either drag to the last cell in the table or use the shortcut Ctrl+Shift+End to highlight the table.
    b. From “Data” on the Excel Ribbon, select Filter under “Sort & Filter” to apply the filter to the table.



4. If the policy requires a different sort for the project requesting referrals, then select the table and Select Sort. Enter each data element included in the prioritization and the required order for the sort.
    a. Apply filters as applicable to limit results to only those that would be considered for this vacancy.
    b. Clients without active ROIs should not be referred, unless the agency requesting referrals is also the agency actively working with the client. Otherwise, contact the User/User Provider to request an update and continue to move through the list as needed.

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Recording the Referrals

1. Working from the top of the list, look-up clients in the order they appear in HMIS.
2. Log into HMIS using Enter Data As (EDA) to the Coordinated Entry (CE) project
3. Check the latest CE Assessment responses. You can access this on the assessment tab. Look for -
    a. Last referral return and reason for return. Policy states that if the return was within 30-days move to the next client.
    b. CM Recommendation,
    c. CH details, and the
    d. Latest Coordinated Entry Case Note under case plans
    e. And any additional information that could impact a referral being made
4. From the Entry/Exit tab and on the active Coordinated Entry enrollment, create an Interim Update Review Type to record a referral. Enter the referral into the following sub-assessments -
    a. Housing Referral Tracking
    b. Coordinated Entry Event
5. Once the appropriate number of referrals have been selected for the specified vacancies, send the requestor the client Id's for the new and existing referrals for the specified project in the order of priority.