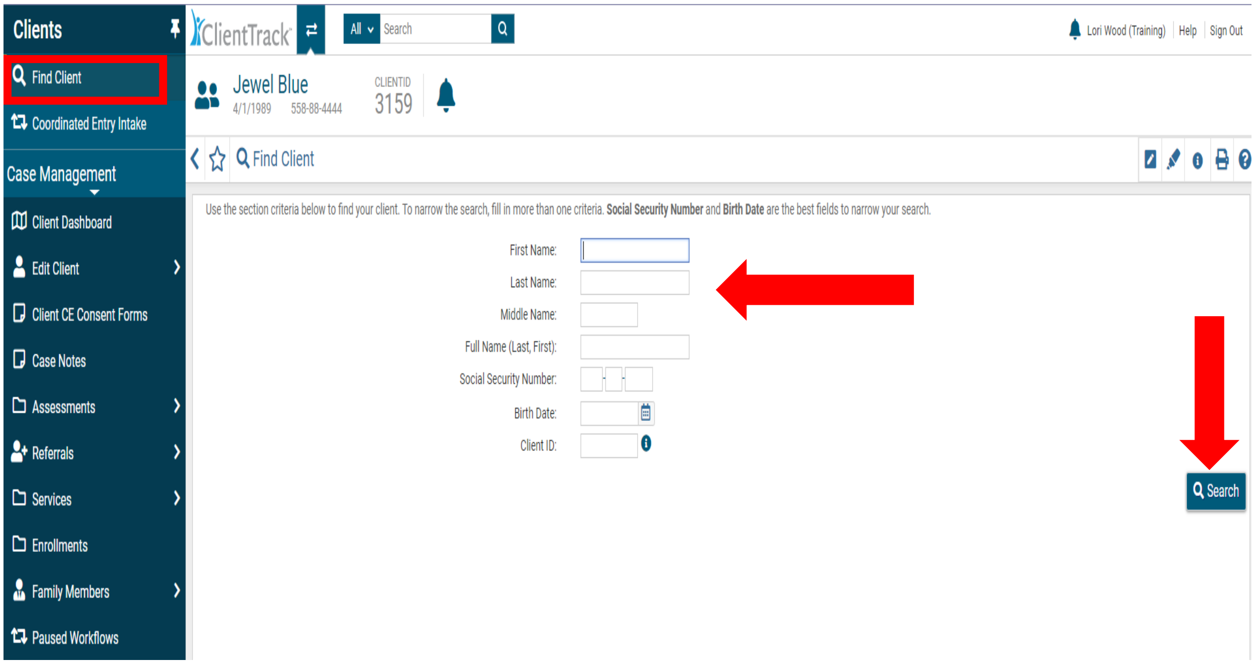
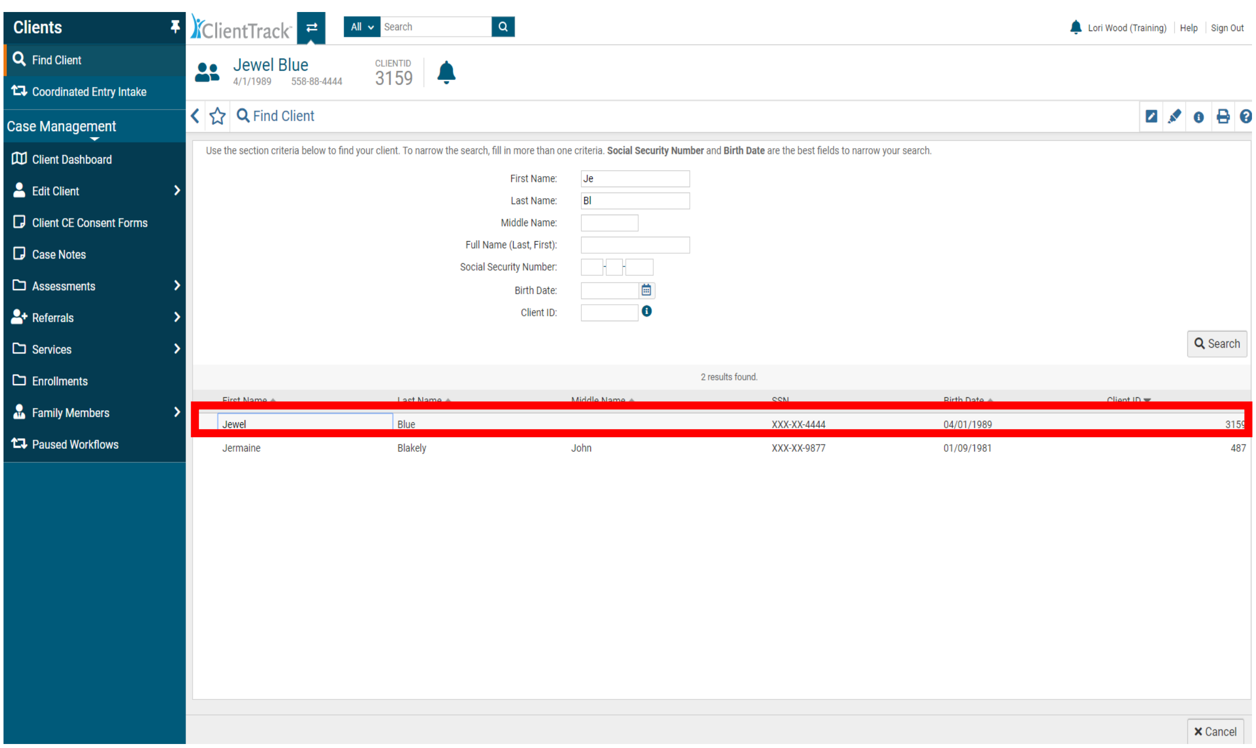
How to Guide for Entering Coordinated Entry Client Referrals

December 2019

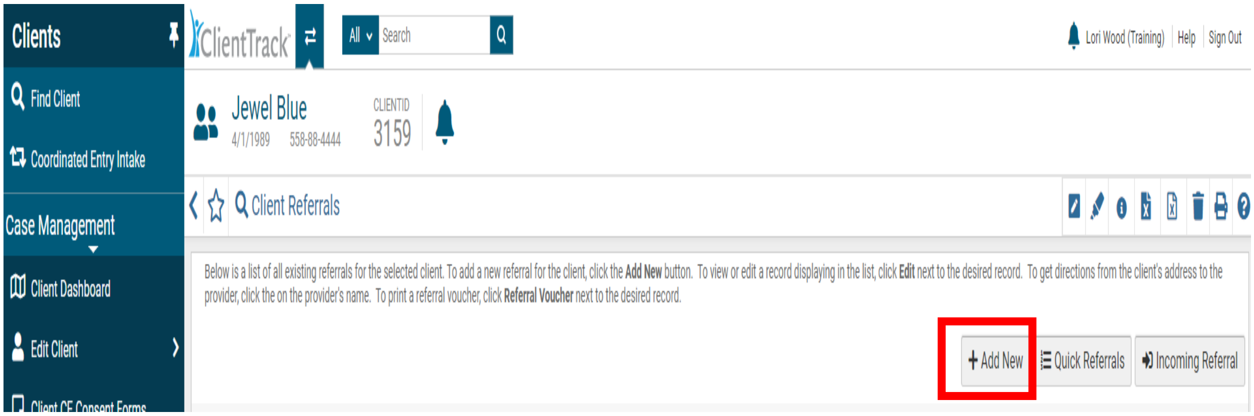
1. Log in to HMIS using the **"2020 Coordinated Entry"** workgroup and choose your **"Coordinated Entry Region #"** as the organization.
2. From the **"Client's** workspace, click on **"Find Client"** located in the left-hand menu.
3. Search for the Client using one of the following: **Name, SSN, DOB, or Client ID#**
4. Click the **"Search"** button located on the right-hand side of the screen.



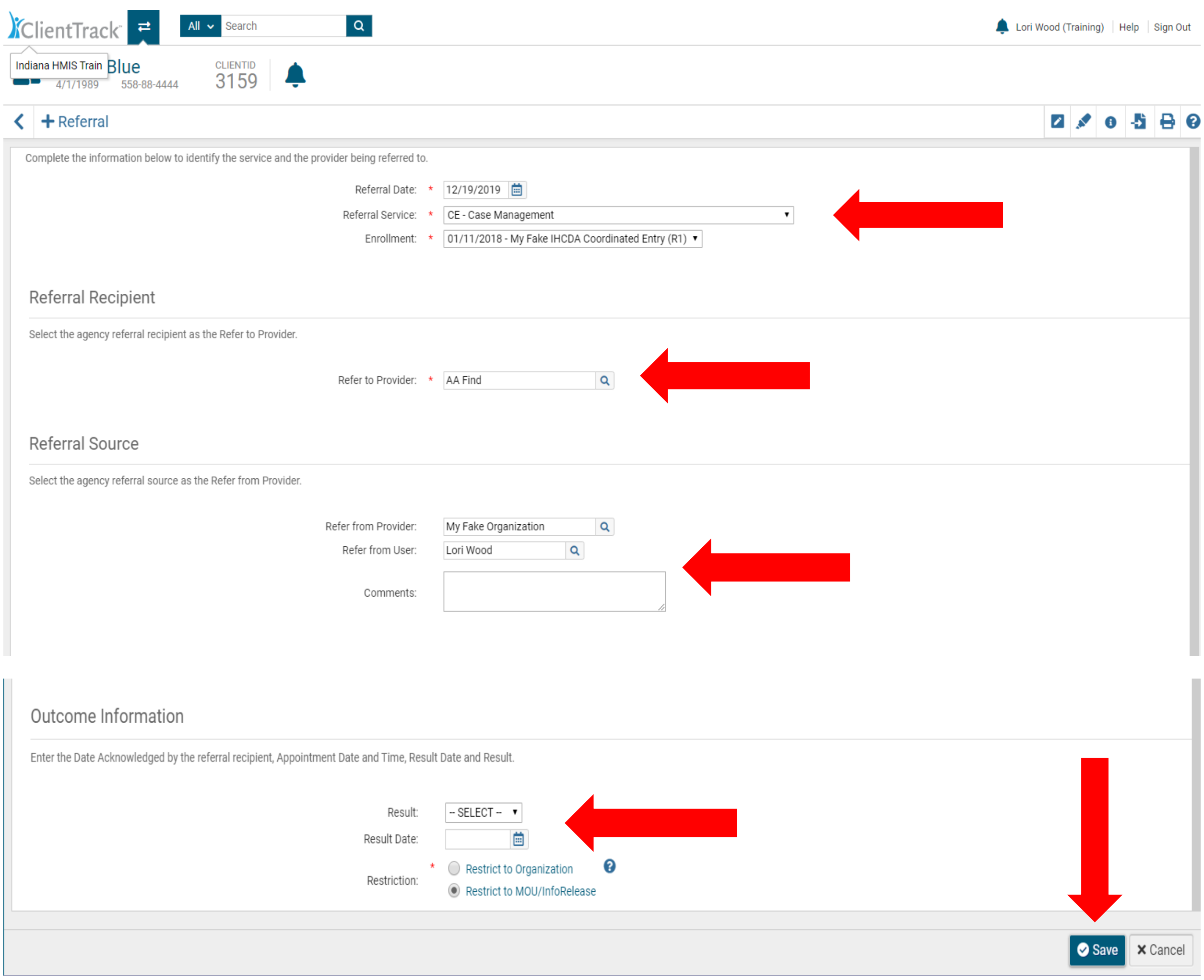
5. A list of names will appear that match your search criteria. Double click on the correct Client.



6. This brings us to the **"Client Dashboard"**. From this screen, move your cursor to the menu on the left side of the screen and click on **"Case Management"** then click on **"Referrals"**.
7. On the next screen, click on **"Add New"**.



8. You are now on the Referral screen. Click on the **"Referral Service"** drop down box arrow then click on the appropriate CE Referral for your Client. **All CE Referrals begin with "CE".**



9. Click on the **"Enrollment"** drop down box arrow then click on **"Coordinated Entry".**
10. For **"Refer to Provider"** click on the magnifying glass which will bring up the Providers in your area who have been entered and tied to the Referral you have selected. Click on the appropriate Provider.
11. In the small **"Comments"** box you can add a brief note about the Referral if you so choose. The **"Comments"** box is not a required field and can be left blank.
12. Click on the drop-down box arrow for the **"Result"** field and choose the appropriate response. The three response choices are: **"Attained", "Not Attained" and "Unknown"**.
13. Last, enter the date in the **"Result Date"** field.
14. Click **"Save"** in the bottom right corner of the screen.
15. The Referral has now been recorded in the Client's record.

PLEASE NOTE: ***Only Referrals with the prefix of "CE-"are to be used for Coordinated Entry Client Referrals.***

Please check with the HMIS System Administrator at your organization to make sure the Providers have been added for your area and linked to the appropriate CE-Referrals in the **"2020 Coordinated Entry Workgroup"**. There is a separate process for **"Adding and Linking Providers"** that must be completed before your organization can begin entering Referrals for Coordinated Entry. See **"Quick Access Guide Adding Providers and Linking to Coordinated Entry Services/Referrals"** for instructions.

Please contact the HMIS Help Desk at: HMISHelpDesk@ihcda.in.gov with questions.