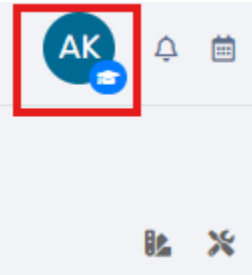
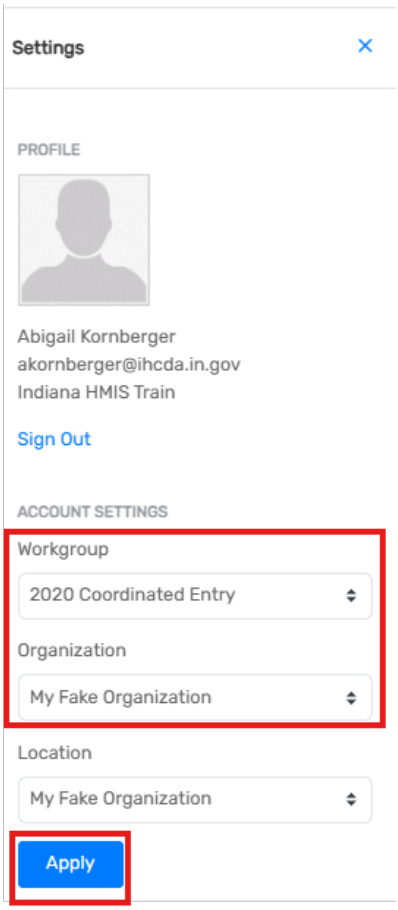
HOW TO GUIDE: RECORDING A CE EVENT REFFERAL AND RESULT

Log into HMIS with your username and password. In the upper right corner of the screen, click on your initials.



Next, click the **"Workgroup"** drop-down and select **"2020 Coordinated Entry"** then click the **"Organization"** drop-down and select **"Coordinated Entry Region #"** ***(Your CE Region # as the Organization)*** **NOTE: Since this tool is being created in the HMIS training environment the Organization selected is "My Fake Organization".**



Select **"Apply"**

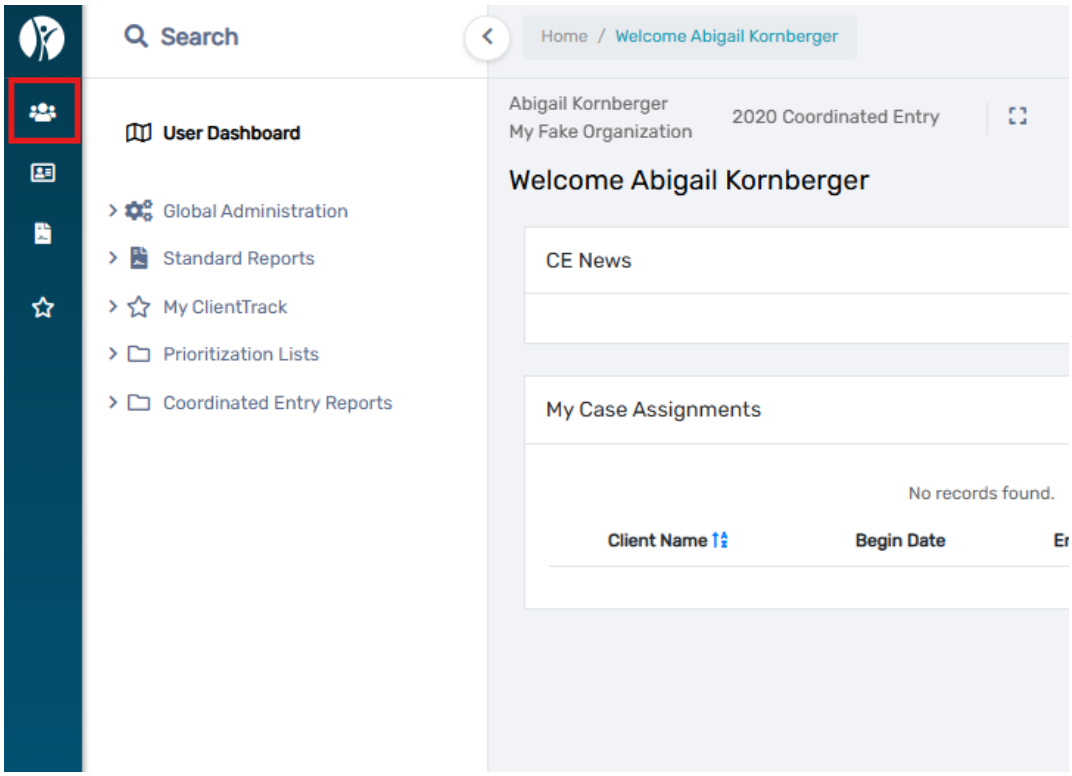
You are now logged into the 2020 Coordinated Entry Workgroup and your Coordinated Entry Region # Organization in HMIS.

HOW TO GUIDE: RECORDING A CE EVENT REFFERAL AND RESULT

You must be logged into the correct Workgroup and Organization to access Coordinated Entry in HMIS. If the Workgroup OR Organization are incorrect you will be unable to complete CE data entry in the system.

METHOD 1 – Recording a CE Event from a Client's Dashboard

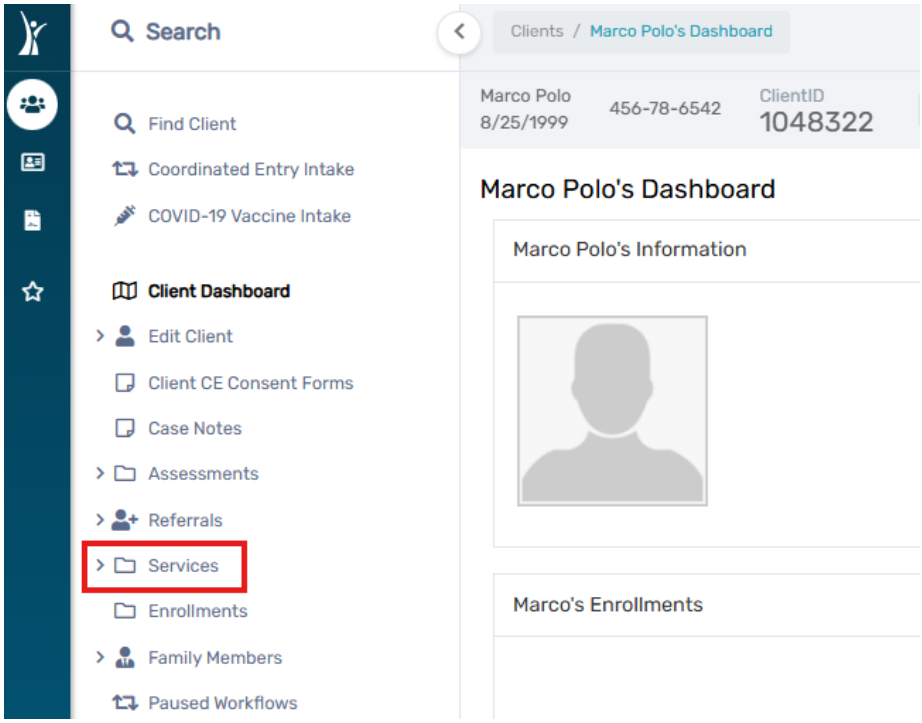
Navigate to the **"Clients"** tab in the upper left corner.



You will then search for the client that you are looking to record a CE Event for using the "Find Client" search function. If you have questions about searching for a client, please reference the HMIS User Manual and other HMIS resources HERE.

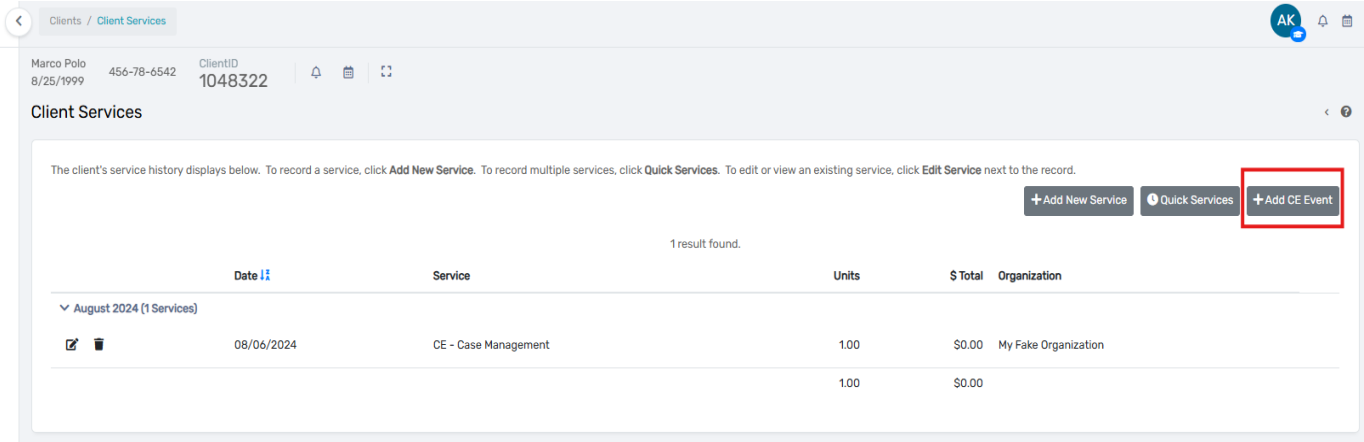
HOW TO GUIDE: RECORDING A CE EVENT REFFERAL AND RESULT

Once you have navigated to the dashboard of the client that you would like to record a CE Event for, Select the **"Services"** tab



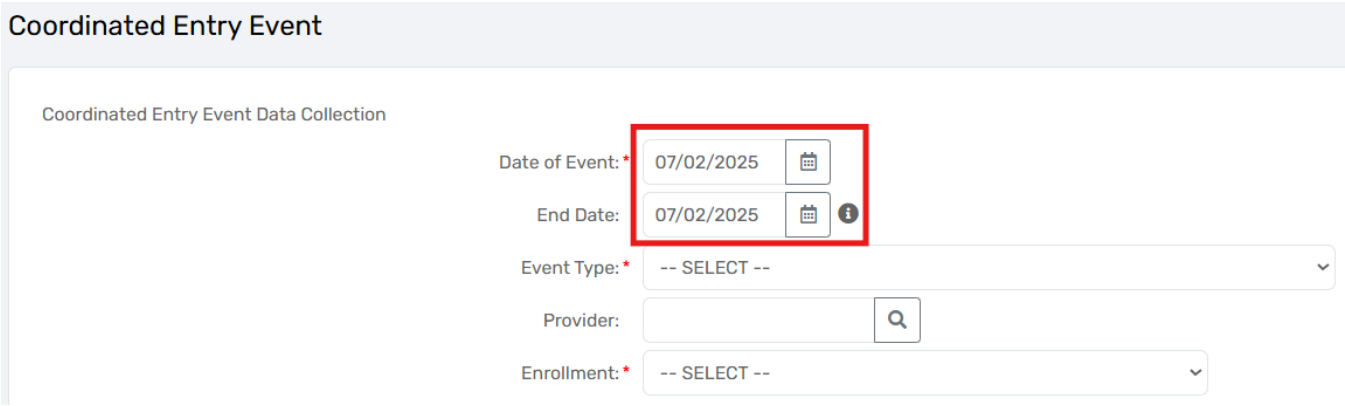
Client Services Screen

Select **"Add CE Event"**

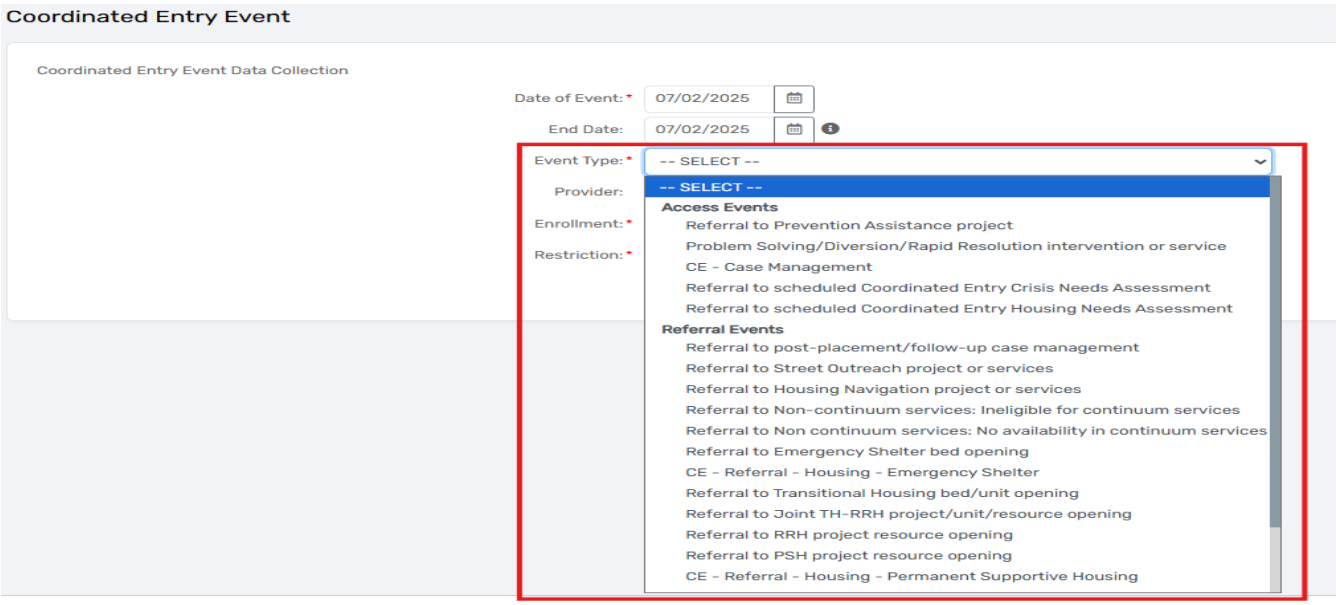


Coordinated Entry Event Screen

Add the **"Date of Event"** response. The system will always default to the current date. The **"End Date"** field is not required.



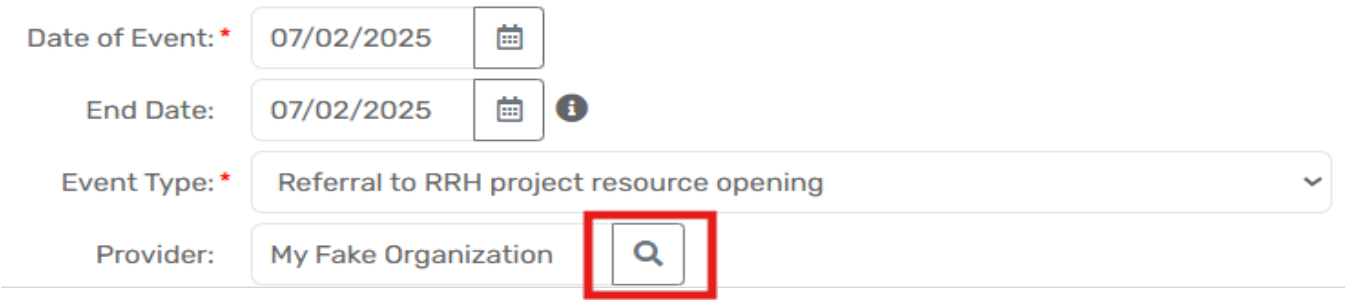
Select the **"Event Type"** drop down and choose from the list of event types.



"…. Resource Opening" referral event options (RRH, PSH, TH, TH/RRH, etc.,) will prompt an additional **"Location of Crisis Housing or Permanent Housing Referral [Project name/ HMIS ID]"** question. In this example, we will be selecting a **"Referral to RRH project resource opening"** event to represent this.

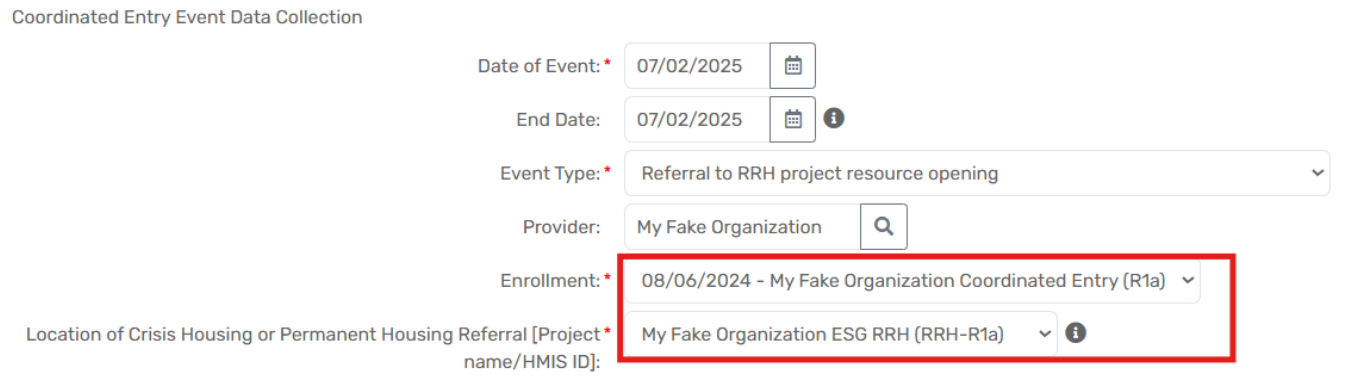
HOW TO GUIDE: RECORDING A CE EVENT REFFERAL AND RESULT

Verify that the **"Provider"** response field is your Coordinated Entry Region #. If the field has not auto populated with your Coordinated Entry Region #, you can search for your region utilizing the magnifying glass next to the field. In this training example, the provider will be **"My Fake Organization".**

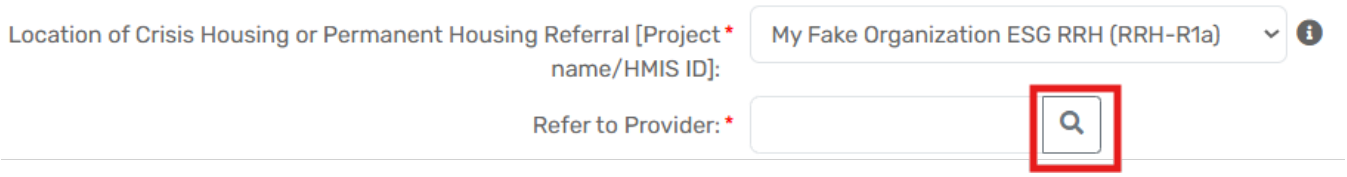


Select the active Coordinated Entry Enrollment of the client in the **"Enrollment"** field.

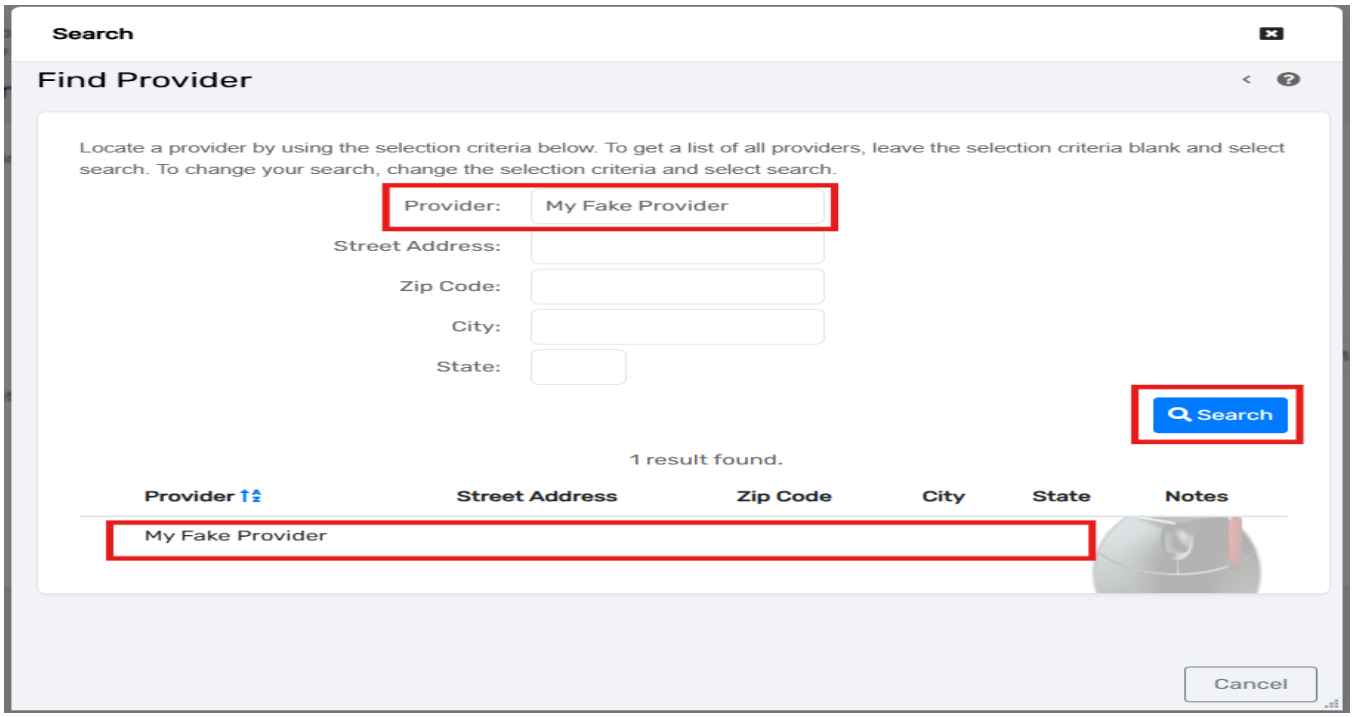
Select the name of the project that the client is being referred to from the **"Location of Crisis Housing or Permanent Housing Referral [Project name/ HMIS ID]"** dropdown.



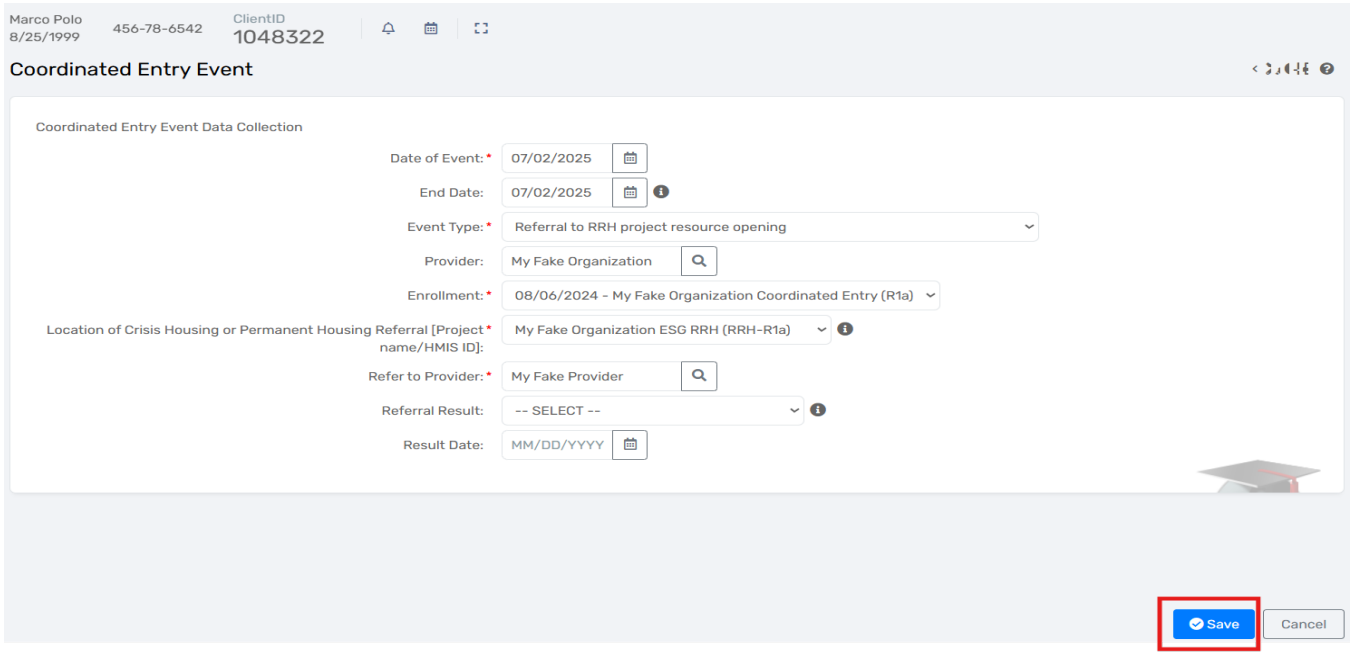
Click on the magnifying glass next to the **"Refer to Provider"** field. This will allow you to search for the Provider that you are referring the client to for assistance. *The Provider name should correspond with the project name selected in the previous step.*



Search for the name of the provider in the **"Provider"** field and select **"Search".** Select the correct provider from the options that appear below.



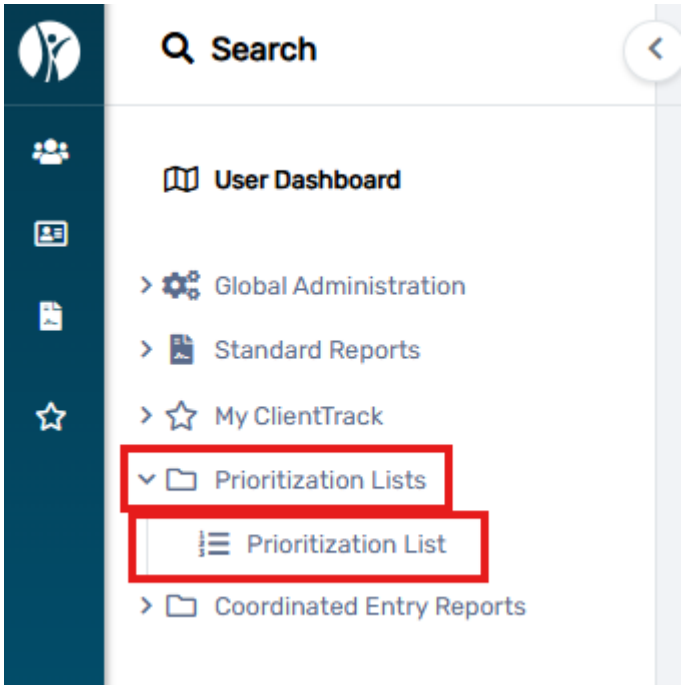
Save the CE Event to the client's record by selecting **"Save"**. The CE Event/Referral is now recorded in the client's record.



METHOD 2 – Recording a CE Event from the Prioritization List

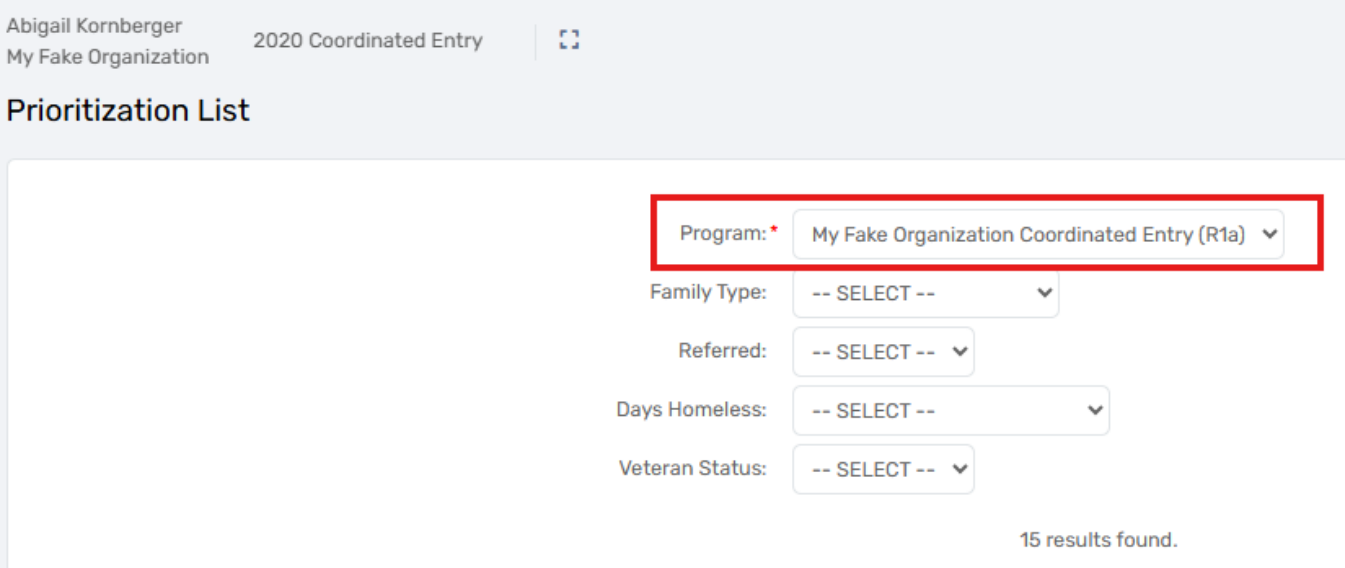
Navigate to the **Home Workspace** by selecting the icon in the top left corner of the screen.

Select the **"Prioritization Lists"** Dropdown and click **"Prioritization List"**.

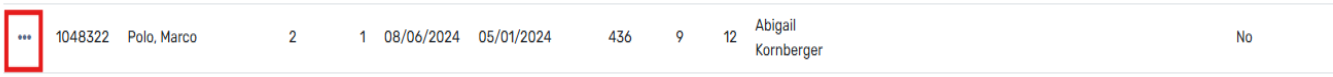


Prioritization List Screen

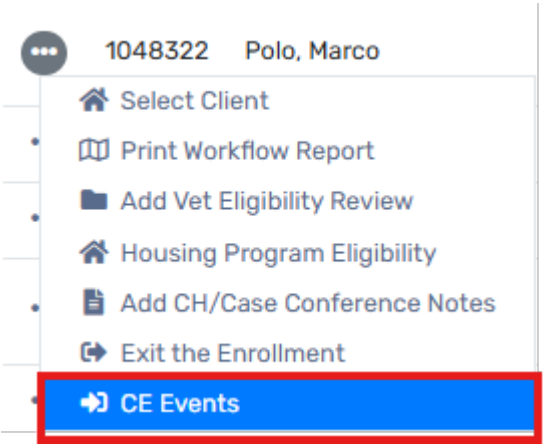
Select the Coordinated Entry Region # from the **"Program"** dropdown field. There is the option to filter by **"Family Type", "Referred", "Days Homeless",** and **"Veteran Status"** below, but these are not required fields.



Once you have located the client on the prioritization list that you would like to record a CE Event for, **click** the three dots next to the client's ID #.

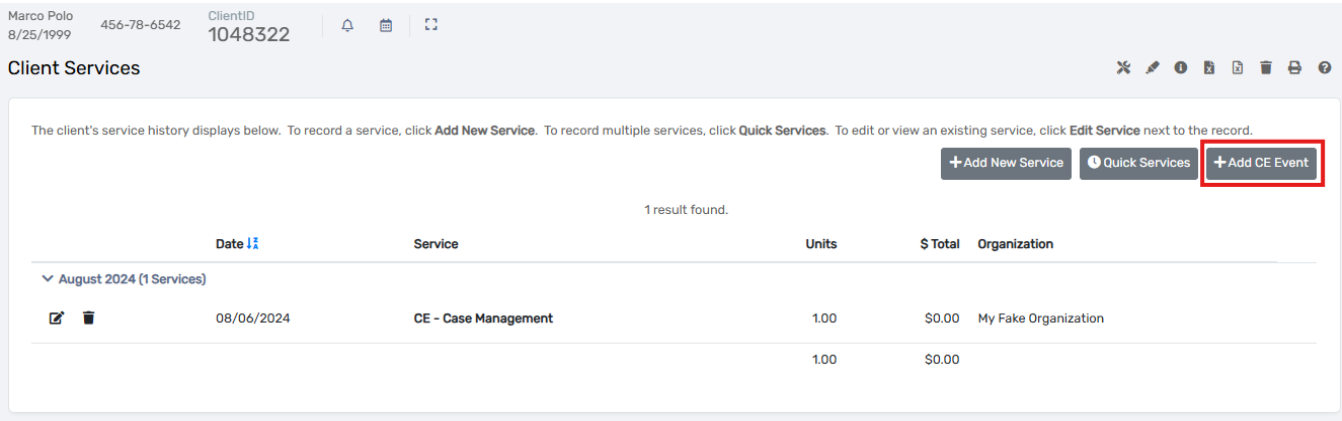


Select the **"CE Events"** option from the dropdown.



Client Services Screen

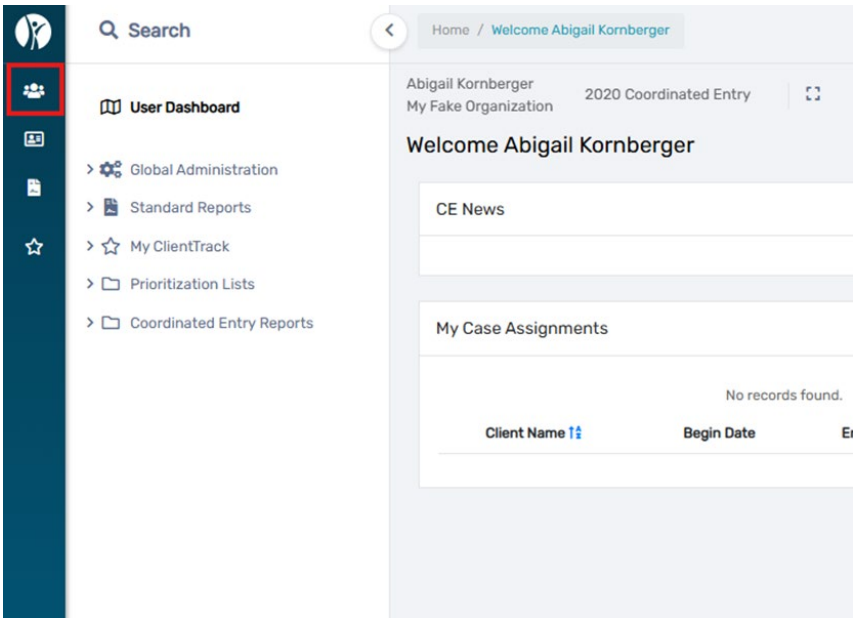
Select "Add CE Event" in the top right corner.



You will then walk through the same steps as described previously on the **Coordinated Entry Event Screen**.

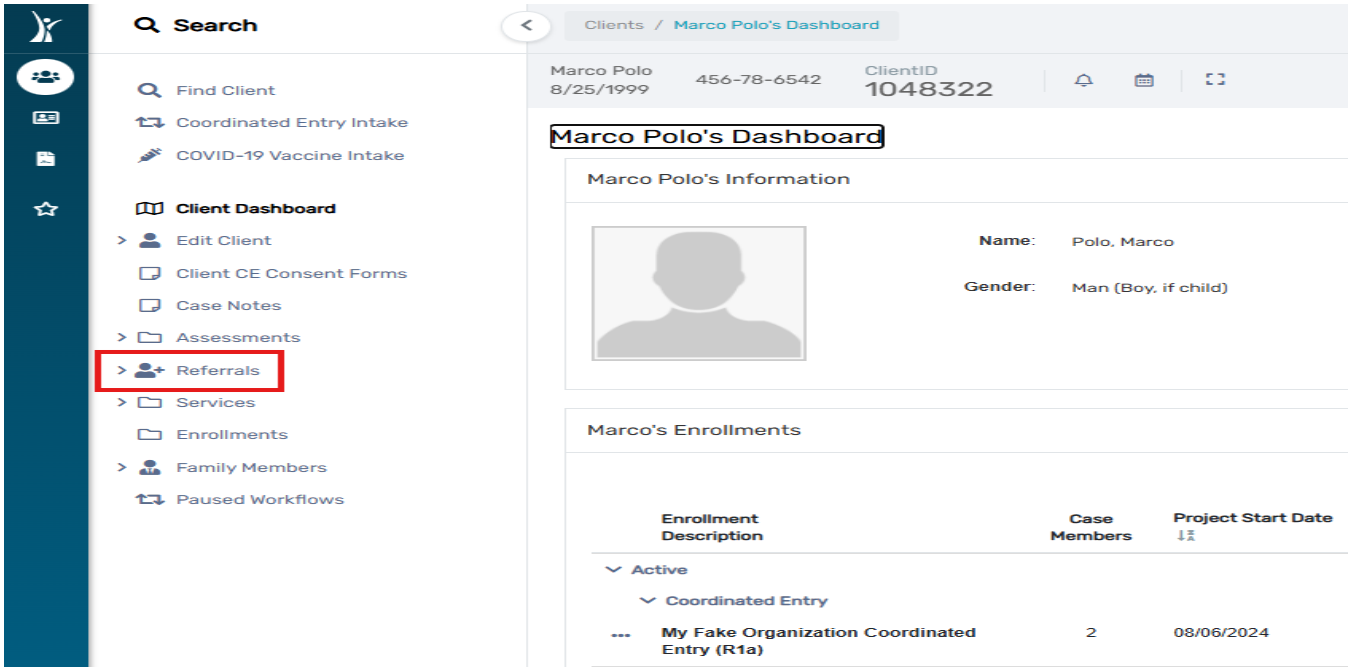
Recording a CE Event Referral Result

Navigate to the **"Clients"** tab in the upper left corner



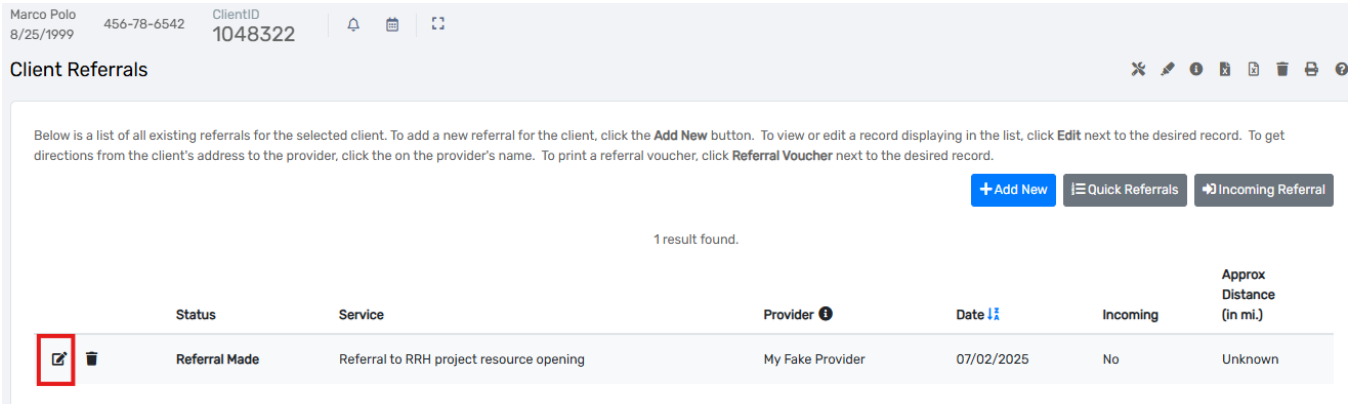
You will then search for the client that you are looking to record a CE Referral Result for using the "Find Client" search function. If you have questions about searching for a client, please reference the HMIS User Manual and other HMIS resources HERE.

Once you have navigated to the dashboard of the client that you would like to record a CE Event Referral Result for, Select the **"Referrals"** tab.



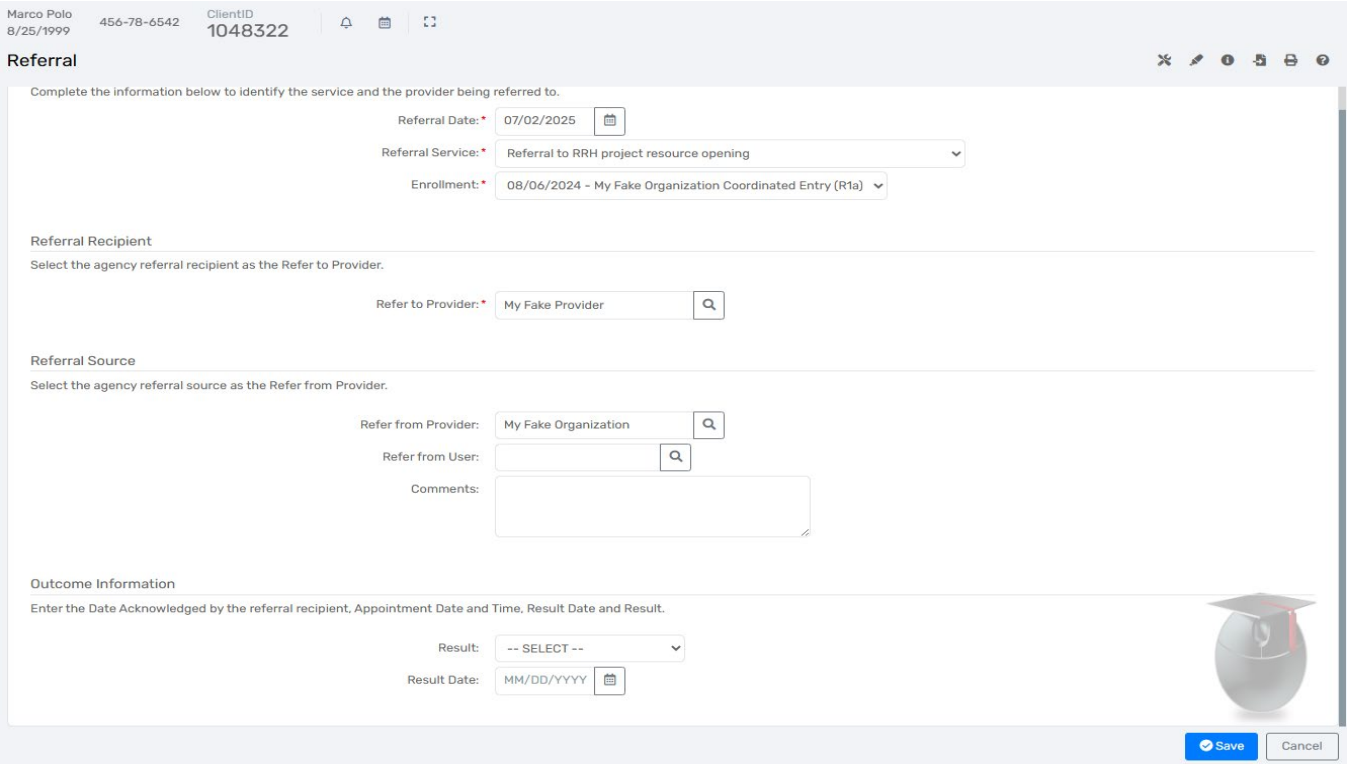
Client Referrals Screen

You will now see the status of the referral, service type, provider, and date of the referral made previously under in the client's profile. To add a CE Event Referral Result, **select** the **edit icon** on the referral you would like to update.



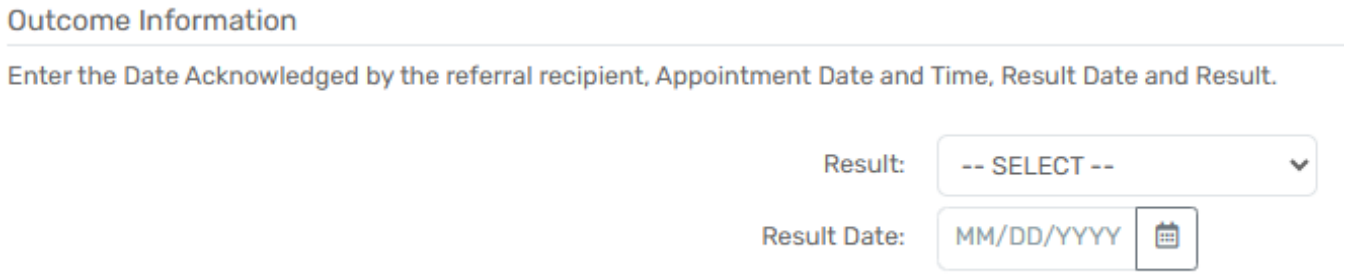
Referral Screen

You will see all of the CE Event data that was added when the event was created including the **"Referral Date"**, **"Referral Service", "Enrollment", "Referral Recipient",** and **"Referral Source".**

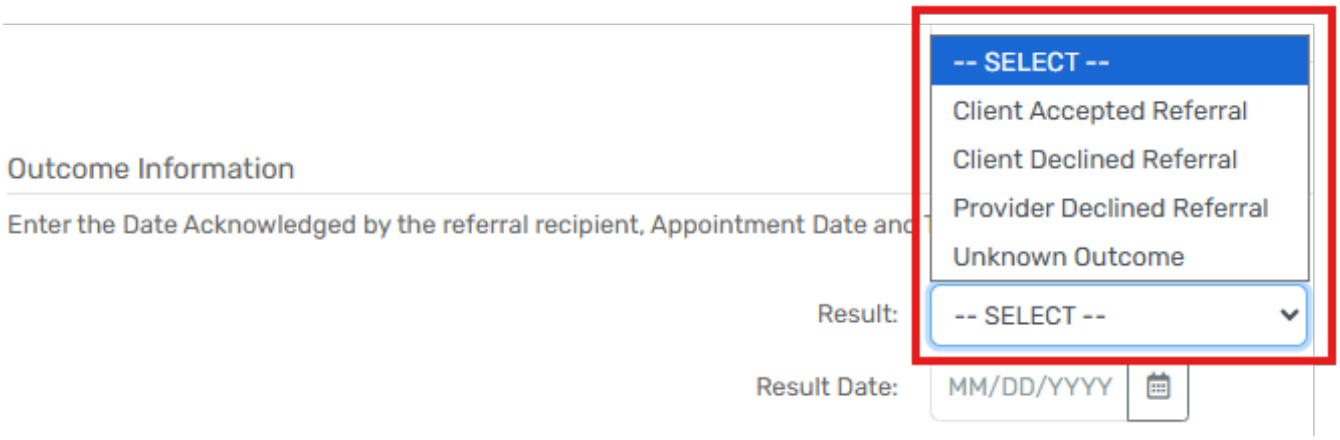


Please verify all of the information previously added to the CE Event before adding the CE Event Referral Result.

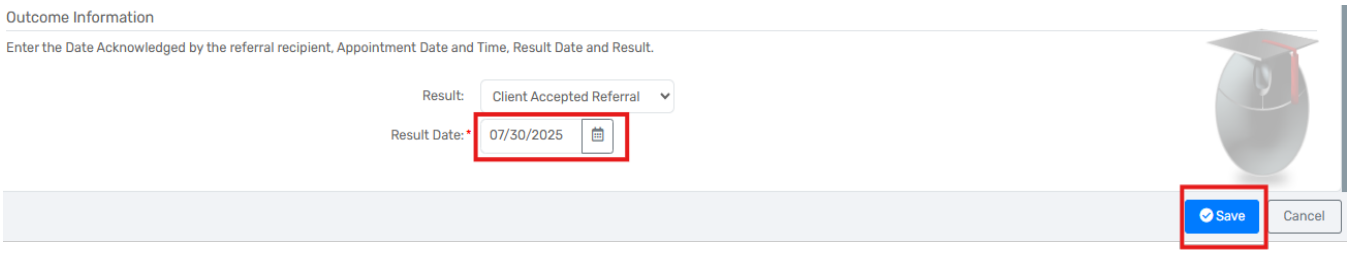
To add the CE Event Result, scroll to the bottom of the **Referral Screen** to the **"Outcome Information"** section.



Select the **"Result"** dropdown and choose from the available outcome options.



Input the date of the result outcome. **Select "Save".**



The CE Event Referral Result has now been successfully recorded. The CE Event Referral and Result will now be included in the CE APR.

Please submit a ticket to the HMISHelpDesk@ihcda.in.gov if you need further assistance.