Coordinated Entry Training Series: Referrals
Ohio Balance of State Continuum of Care
February 28, 2020

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Referrals
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Webinar Information
All participants lines are muted.
Use the questions feature in the GoToWebinar control panel to submit questions.
This webinar will be posted to COHHIO's website.
This webinar is being recorded.

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Agenda

- Purpose and Focus of Coordinated Entry Training Series
- Fundamentals of Referrals
- Referral Policies & Procedures
- HMIS

Purpose and Focus of CE Training Series

- Series of webinars focused on reviewing each of the CE components in detail
- No new requirements to share
- Each webinar is intended to provide a comprehensive review of current requirements and guidance related to each of the CE components:
  - Includes new clarifying guidance provided in the new Ohio BoSoCoC Coordinated Entry Operational Manual
- Additional webinars may be added if needed

Purpose and Focus of CE Training Series Details

- **Access**
  - Jan. 8, 2020 at 10am
  - Materials available at: [https://cohhio.org/boscoc/coordinated-entry/](https://cohhio.org/boscoc/coordinated-entry/)

- **Assessment**
  - Jan. 24, 2020 at 10am
  - Register at: [https://attendee.gotowebinar.com/registereventtalk?322476244](https://attendee.gotowebinar.com/registereventtalk?322476244)

- **Prioritization**
  - Feb. 12, 2020 at 10am
  - Register at: [https://attendee.gotowebinar.com/registereventtalk?2987743686130337188](https://attendee.gotowebinar.com/registereventtalk?2987743686130337188)

- **Referrals**
  - Feb. 28, 2020 at 10am
  - Register at: [https://attendee.gotowebinar.com/registereventtalk?41611413118523084364](https://attendee.gotowebinar.com/registereventtalk?41611413118523084364)

- Details also on COHHIO calendar at: [http://cohhio.org/member-services/calendar/](http://cohhio.org/member-services/calendar/)
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Key Elements of Coordinated Entry

- Access
- Assessment
- Prioritization
- Referrals

Fundamentals of Referrals in a CE System

- The CE process and participating providers must continually strive to identify and lower barriers to project entry
- The CE system’s referral process applies to all projects, and to ESG and CoC-funded projects in particular
  - Some exceptions, which will be covered later
- CoC must establish and document a uniform referral process for all participating projects, including a protocol for handling rejections of referrals

What is a Referral?

- Ohio BoSCoC uses referrals to connect clients experiencing homelessness to shelter and the permanent housing resources they are eligible for
- Referrals are made via direct communication between providers and via HMIS
- Referrals are documented in HMIS AFTER prioritization decisions have been made
- Creating and accepting referrals in HMIS is primarily done to document that a homeless household appropriately moved through the CE system
Why Referrals?

- A referral is required in HMIS to document Coordinated Entry (CE) movement for every client entering any project
- Exceptions for clients entering the following projects:
  - Unsheltered Outreach provider
  - PATH Street Outreach projects
  - Diversion project
  - Homelessness Prevention projects
  - Non-HMIS participating projects.

Referrals in the Ohio BoSCoC CE System

- Ohio BoSCoC CE process documents referrals in HMIS primarily to document movement through the CE system and process, for the following reasons:
  - There are insufficient permanent housing resources to assist all who need it
  - Decisions about who gets assisted with permanent housing are made in Prioritization Workgroups, not via review of a list of referrals
  - Only documenting referrals for those prioritized for assistance puts less data entry pressure on shelter providers in particular

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Referrals from Access Points to Crisis Response System

- After screening for possible diversion, APs refer to local crisis response providers (eg. shelter) if needed
- Referral process involves:
  - Contact local shelter/crisis response provider to determine availability of beds
  - If beds are available and household in crisis wants the referral, document referral in HMIS
  - If no shelter/crisis response provider beds available, APs do NOT make a referral in HMIS
Referrals from Crisis Response Providers to Permanent Housing

• Decision-making Guidance
  1. Is the household struggling to identify their own housing plan?
  2. Is the household willing to accept assistance if resources are available?
  3. Is the household eligible for RRH, TH, PSH?
  4. Is the household’s severity need, determined in part by the VI-SPDAT, such that assistance is likely needed?

• Referral Protocol
  • Shelter/crisis response provider confirms if a referral to RRH, TH, PSH is needed for homeless households
  • Prioritization Workgroup meets and makes prioritization decisions
    • Shelter/crisis response providers should participate
  • Shelter/crisis response provider documents referrals to RRH, TH, or PSH for those households prioritized for assistance
  • Receiving agency accepts referrals in HMIS

Accepting or Declining Referrals

• Homeless households may accept or decline referrals for housing assistance
  • At least one alternative is provided when the first referral is declined, if possible
  • Ohio BoSCoC providers do not decline to provide assistance because of perceived housing barriers or service needs that are too great
  • Rejections and reasons for rejection are documented in the Prioritization Workgroup meeting notes and communicated to relevant providers, as needed

Referrals from Crisis Response Providers to Permanent Housing

• Decision-making Guidance
  • If provider can answer ‘yes’ to all questions, then a referral may be needed
    • Referral/assistance decisions are made in Prioritization Workgroup meetings
    • But considering the decision-making guidance may help a crisis response provider determine if they might need to advocate on behalf of their client in the meeting
Declining Referrals

- If a household refuses a particular type of assistance of unit, they continue to be considered for assistance until they are no longer homeless

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Coordinated Entry Flowchart

Coordinated Entry Referral

(through an HMIS participating shelter)
Coordinated Entry Referral
(from a Non-HMIS participating shelter)

Coordinated Entry Referral
(from an unsheltered location)

HMIS Workflows: Access Point

- Unsheltered – OUTREACH Workflow
- Coordinated Entry Workflow
- Referral Guidance
- Add or Close Referral