Coordinated Entry Referral Documentation Guidance

To be compliant with the Ohio Balance of State Continuum of Care (BoSCoC) Coordinated Entry (CE) process, all households enrolled in Emergency Shelter (ES), Transitional Housing (TH), Rapid Rehousing (RRH), or Permanent Supportive Housing (PSH) programs in HMIS need a completed referral documented in HMIS. Properly documenting a referral from one program or CE Access Point (CE AP) to another involves multiple steps. This document is intended to provide guidance about how to appropriately document all steps of a referral in HMIS.

The Ohio BoSCoC CE Operational Manual requires documentation of referrals from a Coordinated Entry Access Point (CE AP) to emergency shelter (ES) and/or permanent housing (PH) programs, as well as documentation of referrals from ES to PH programs . This is done in HMIS by referring households to the appropriate community queue and reassigning them to the selected housing program. The receiving provider must then accept the referral and enroll the individual/household. For PH placements, referrals are also supported by a phone call or email to communicate decisions made by the PH Prioritization Workgroup. Documenting these steps in HMIS, along with the accompanying prioritization communication, meets Ohio BoSCoC CE referral documentation requirements.

Documenting Referrals in Clarity

Assessment

All referrals in Clarity (the Ohio BoSCoC HMIS software) are initiated from an assessment. Following are the assessments that would be used to begin documenting a referral:

1. Referral to Shelter Assessment (made from an AP or Street Outreach)
2. Veteran Referral without HARP Tool Assessment (made from an AP, Street Outreach or ES)
3. HARP Tool assessment (made from an AP, Street Outreach or ES)
   a. HARP HH with Children
   b. HARP HH without Children
   c. HARP YYA HH with Children
   d. HARP YYA HH without Children

To initiate a referral from an existing assessment, click eligibility to the right of the assessment under the Assessments menu in the client record.

Community Queue

When an assessment is completed, an option appears to toggle on the appropriate queue:

1. BoSCoC Shelter Queue
2. BoSCoC Permanent and Transitional Housing Queue
3. MCHCoC Shelter Queue
4. MCHCoC Permanent and Transitional Housing Queue

CE Access Point (CE AP) Queue Assignment

APs determine appropriate queue placement by assessing each household's situation and applying guidance based on various scenarios related to emergency shelter availability and client choice.

Scenario 1: The individual/household is currently literally homeless and interested in emergency shelter (ES), but no shelter beds are currently available.
Action: Complete a *HARP Tool assessment* according to guidance. If they will remain in a place not meant for human habitation, the AP should refer to:
- The **Shelter Queue**, and
- The **Permanent and Transitional Housing Queue**.

Scenario 2: The individual/household is currently literally homeless but declines an available shelter bed.
Action: Complete a *HARP Tool assessment* according to guidance. If they will remain in a place not meant for human habitation, the AP should refer to:
- The **Permanent and Transitional Housing Queue** only.

Scenario 3: The individual/household is currently literally homeless and would like to access emergency shelter assistance, but emergency shelter is not available in the community.
Action: Complete a *HARP Tool assessment* according to guidance. If they will remain in a place not meant for human habitation, the AP should refer to:
- The **Permanent and Transitional Housing Queue**.
- The **Shelter Queue** if an emergency shelter is located in a neighboring community or urban area, the AP should coordinate a referral when possible.

Scenario 4: The individual/household is currently literally homeless and the AP confirms that a shelter bed is available, and they are willing to accept the placement.
Action:
- If the emergency shelter (ES) participates in HMIS and conducts HARP assessments, they will be assessed with the HARP Tool at the shelter, if appropriate.
  - Complete the *Referral to Shelter Assessment*
- If the shelter does not participate in HMIS and does not conduct HARP assessments, the AP should complete the *HARP Tool assessment*, if appropriate.

The AP should refer to:
- The **Shelter Queue**.

Provider Reassignment

Shelter Queue to Emergency Shelter

Households on the shelter queue must be reassigned to the appropriate emergency shelter and enrolled in the project. These steps should be completed concurrently, in alignment with the established HMIS workflow and timeline.

Permanent and Transitional Housing Queue to PH Provider

Households on the Permanent and Transitional Housing Queues must be prioritized for assistance by the local Permanent Housing (PH) Prioritization Workgroup before being reassigned to the program in which they will be enrolled.

Following the PH Prioritization Workgroup meeting where program placement has been identified, the household needs to be reassigned from the queue to the appropriate program. To ensure clear communication, a PH Prioritization Workgroup representative should formally communicate the prioritization decision via email or phone call to the agency who will be enrolling the prioritized household.

After the PH Prioritization Workgroup sends the referral email or communication to the PH provider, the PH provider will reassign the household to the appropriate PH program—either Rapid Re-Housing (RRH) or Permanent Supportive Housing (PSH). They will effectively be removed from the community queue once the PH provider staff enroll them into the PH program.

Enrollment

Households should be enrolled in the program to which they were reassigned to complete the referral. In cases where they are enrolled in a program other than where they were assigned, a Referral Connection to the new program should be added to the referral or it will not show as complete.

Referring a Household from Rapid Re-Housing (RRH) to Permanent Supportive Housing (PSH)

Households moving from Rapid Re-Housing (RRH) project to a Permanent Supportive Housing (PSH) project generally do not need to be reassessed using the CoC's common assessment tool. RRH clients also retain their homeless status for the purposes of PSH eligibility, as long as they remain open and actively enrolled in the RRH project (i.e., they are still receiving assistance from the RRH project). However, time spent in an RRH project does not count towards chronicity.

The PH Prioritization Workgroup is responsible for determining when to prioritize the transfer of an active RRH households to a PSH unit. PSH providers and/or RRH providers may not make these decisions on their own. Please note, clients housed with RRH will not appear on the Prioritization Report, so RRH staff must attend the PH Prioritization Workgroup and be prepared with appropriate information to inform the prioritization discussion. If the household is selected for prioritization during the meeting, the decision must be clearly documented in the meeting notes. Following prioritization, they should be referred to PSH in alignment with the workgroup's established policies and procedures and the guidance above.

Technical Assistance Resources

Coordinated Entry
https://cohhio.org/boscoc/coordinated-entry/

HMIS   **HMIS Help Desk**
https://cohhio.org/boscoc/hmis/   hmis@cohhio.org

CoC Help Desk
ohioboscoc@cohhio.org