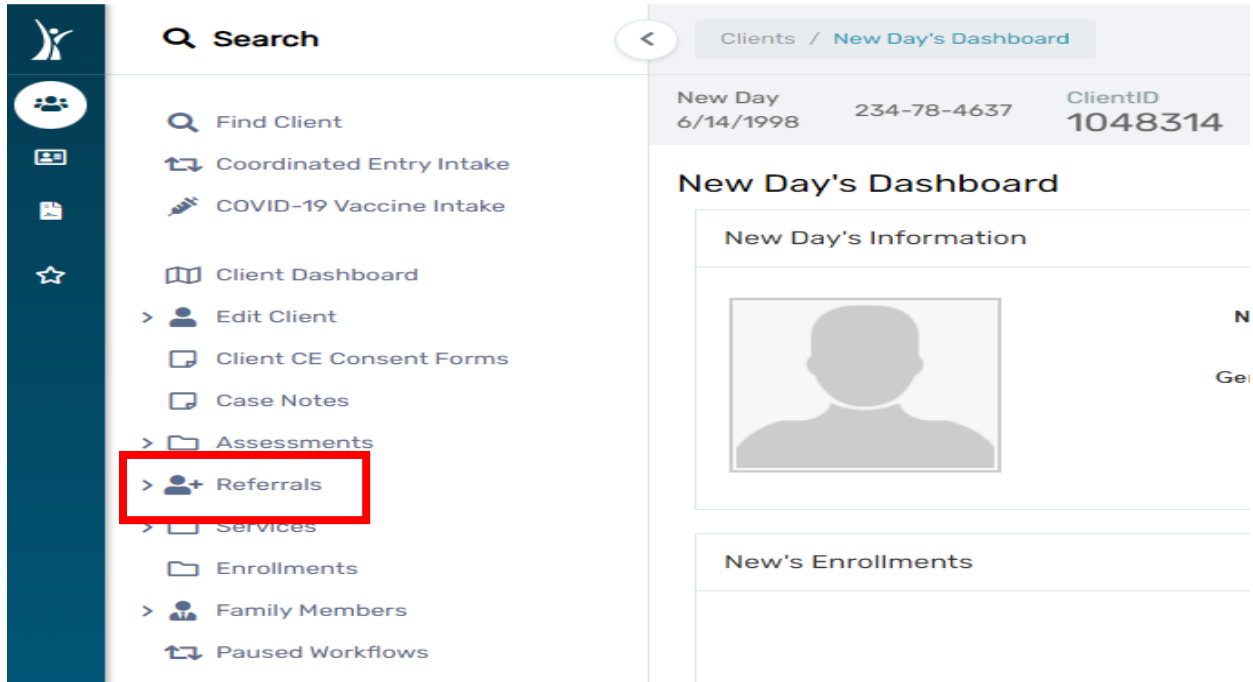


HOW TO GUIDE

ENTERING A COORDINATED ENTRY REFERRAL FOR A LIMITED HOUSING PREFERENCE VOUCHER (HOUSING CHOICE VOUCHER)

A Coordinated Entry Referral for the Limited Housing Preference Voucher (Housing Choice Voucher) will be entered into a client's HMIS file using the following steps:

- From the client's dashboard screen:
 - Select **"Referrals"** located in the menu on the left side of the screen.



The screenshot shows the client dashboard for a client named New Day. The left sidebar contains a search bar and a menu with various options. The 'Referrals' option is highlighted with a red box. The main content area displays the client's information and a section for 'New Day's Information' with a placeholder for a profile picture.

Search

- Find Client
- Coordinated Entry Intake
- COVID-19 Vaccine Intake
- Client Dashboard
- Edit Client
- Client CE Consent Forms
- Case Notes
- Assessments
- Referrals**
- Services
- Enrollments
- Family Members
- Paused Workflows

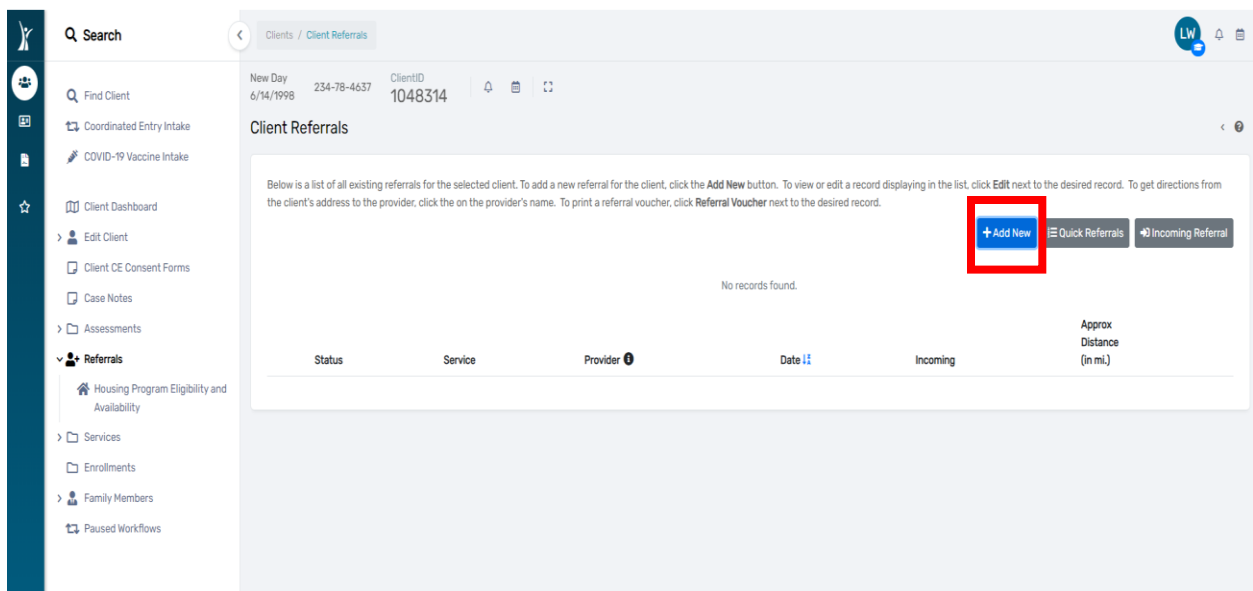
Client Information: New Day, 6/14/1998, 234-78-4637, ClientID 1048314

New Day's Information

New Day's Information

Placeholder for profile picture

- Next, select **"Add New."**



The screenshot shows the 'Client Referrals' screen for the same client. The 'Add New' button is highlighted with a red box. The page displays a message about existing referrals and a table with columns for Status, Service, Provider, Date, Incoming, and Approx. Distance (in mi.).

Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New** button. To view or edit a record displaying in the list, click **Edit** next to the desired record. To get directions from the client's address to the provider, click on the provider's name. To print a referral voucher, click **Referral Voucher** next to the desired record.

+ Add New Quick Referrals Incoming Referral

No records found.

Status	Service	Provider	Date	Incoming	Approx. Distance (in mi.)
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HOW TO GUIDE

ENTERING A COORDINATED ENTRY REFERRAL FOR A LIMITED HOUSING PREFERENCE VOUCHER (HOUSING CHOICE VOUCHER)

- Enter the **“Referral Date”** (the date defaults to the current date)
- Select **“CE Referral – Housing Choice Voucher”** from the **“Referral Service”** dropdown list.

Referral

Complete the information below to identify the service and provider.

Referral Date: * 02/06/2024

Referral Service: * -- SELECT --

Enrollment: * -- SELECT --

Referral Recipient

Select the agency referral recipient as the Refer to Provider:

Refer to Provider: *

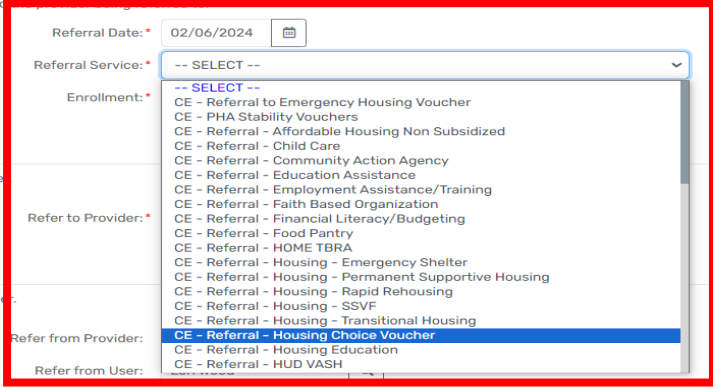
Referral Source

Select the agency referral source as the Refer from Provider:

Refer from Provider:

Refer from User:

Comments:



- Select the **“Enrollment”** (Coordinated Entry) from the **“Enrollment”** dropdown list.

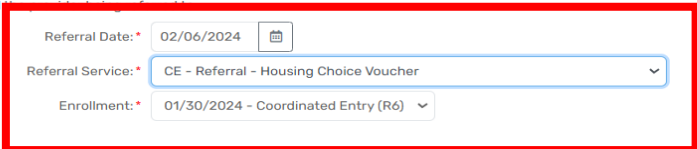
Referral

Complete the information below to identify the service and provider.

Referral Date: * 02/06/2024

Referral Service: * CE - Referral - Housing Choice Voucher

Enrollment: * 01/30/2024 - Coordinated Entry (R6)




Select the correct agency from the **“Refer to Provider”** field. (IHCDA)

Referral Recipient

Select the agency referral recipient as the Refer to Provider:

Refer to Provider: * IHCDA

Referral Source



Search

Find Provider

Locate a provider by using the selection criteria below. To get a list of all providers, leave the selection criteria blank and click Search.

Provider: IHCDA

Street Address:

Zip Code:

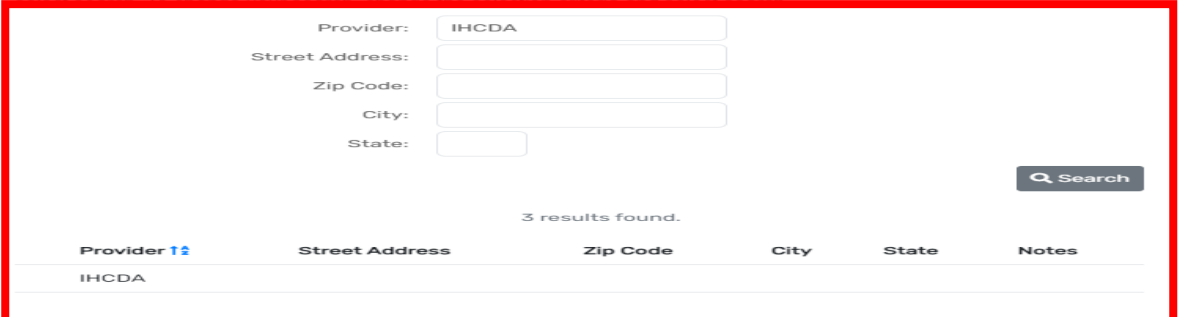
City:

State:

Search

3 results found.

Provider	Street Address	Zip Code	City	State	Notes
IHCDA					



HOW TO GUIDE

ENTERING A COORDINATED ENTRY REFERRAL FOR A LIMITED HOUSING PREFERENCE VOUCHER (HOUSING CHOICE VOUCHER)

The **“Refer from Provider”** field will prefill with your Coordinated Entry Region #

The **“Refer from User”** field will prefill with your Username.

The screenshot shows two sections of a form. The first section, 'Referral Recipient', has a label 'Select the agency referral recipient as the Refer to Provider.' and a search field for 'Refer to Provider:' containing 'IHCDA'. The second section, 'Referral Source', has a label 'Select the agency referral source as the Refer from Provider.' and two search fields: 'Refer from Provider:' containing 'Coordinated Entry Region 6' and 'Refer from User:' containing 'Lari Wood'. A 'Comments:' text area is located below these fields. A red box highlights the 'Refer from Provider:' and 'Refer from User:' fields.

- Select the appropriate response from the “Result” dropdown list and enter the “Result Date.”
- Next, select “Save” in the bottom right corner of the screen.

The screenshot shows the 'Outcome Information' section with the label 'Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.' A dropdown menu for 'Result:' is open, showing options: '-- SELECT --', '-- SELECT --', 'Client Accepted Referral', 'Client Declined Referral', 'Provider Declined Referral', and 'Unknown Outcome'. A red box highlights the dropdown menu. At the bottom right of the form are 'Save' and 'Cancel' buttons.

The **“CE Referral – Housing Choice Voucher”** is now added to the client’s HMIS record. You can edit the **“Result”** and **“Result Date”** field if needed later, by clicking on the **“Edit”** icon (pencil) on the **“Referral”** screen and updating the **“Referral Result”** and **“Result Date”** fields.

Please email the HMISHelpDesk@ihcda.IN.gov if you require additional assistance.