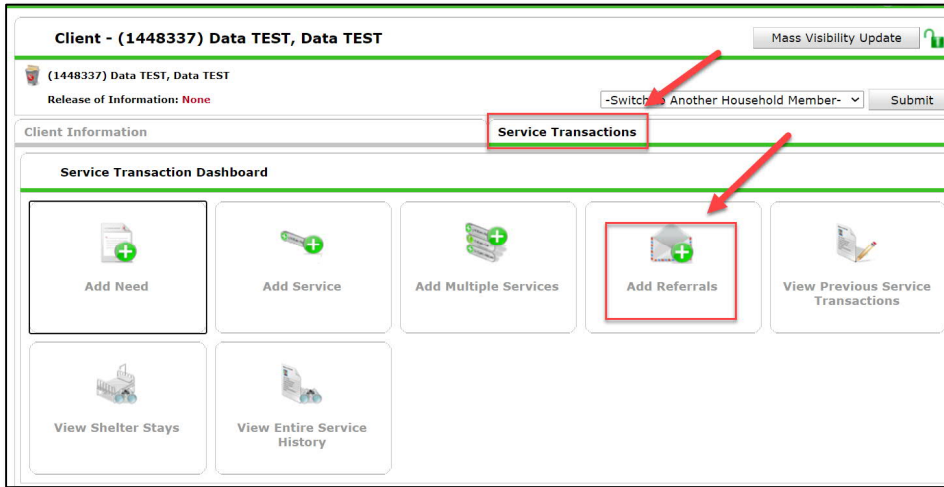


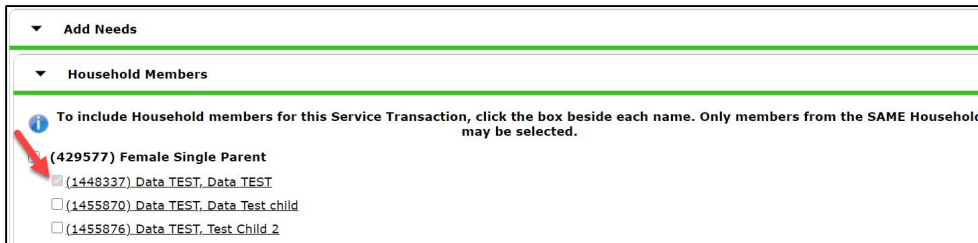
Process for Managing Direct Referrals

The process outlined below should be used when transferring clients directly from one project to another.

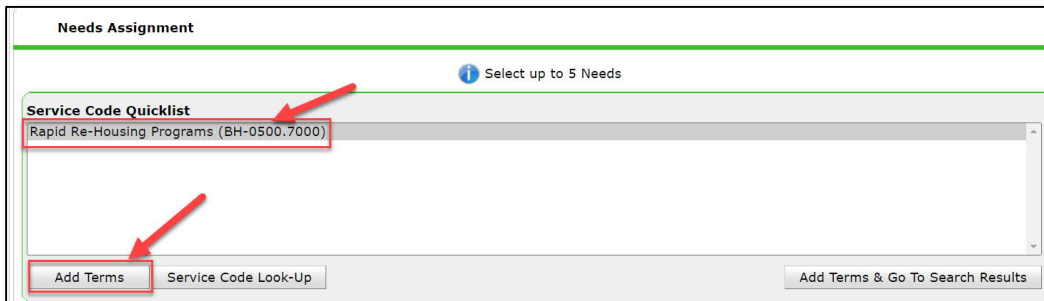
1. EDA into the project that is making the referral (i.e. current RRH or PSH bin)
2. Search for client record
3. Click on Service Transactions >> Add Referrals



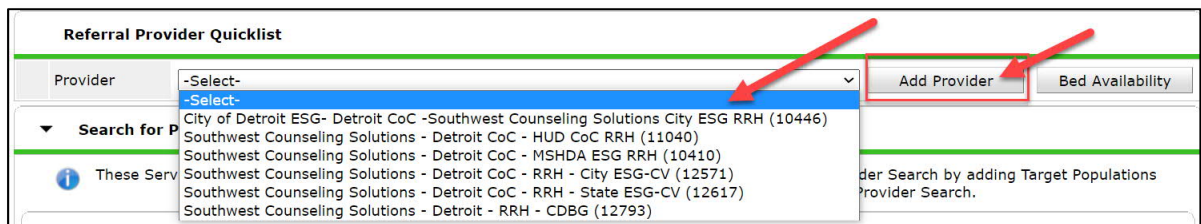
4. Check box next to Head of Household (HoH), if not already selected



5. Select the appropriate code from Service Code Quicklist and click Add Terms
 - a. RRH = Rapid Re-Housing Programs (BH-0500.7000)
 - b. PSH = Supportive Housing Placement/Referral (BH-8500)



6. Select the RRH or PSH project where the client is being "referred" and click Add Provider



7. Scroll down to Refer to Providers > Referral Data
8. Adjust Needs Referral Date
 - a. When transferring between projects > Referral Date = Date client is exited from initial project.

Refer to Providers

Referral Data

Needs Referral Date * 04 / 19 / 2021

Referral Ranking -Select-

VI-SPDAT Score Please Select a VI-SPDAT Score Search Clear

Projected Follow Up Date

Follow Up User Southwest Counseling Solutions - Detroit CoC - RRH HP Referrals (10932) -Select- Search My Provider Clear

[Check to notify ServicePoint Providers by Email.](#)

9. Scroll down to Referrals > Referred-To Provider
10. Check the box for Rapid Re-Housing Programs or Supportive Housing Placement/Referrals

Referrals		Send Summary
Referred-To Provider	Rapid Re-Housing Programs	Referred Clients
Southwest Counseling Solutions - Detroit CoC - HUD CoC RRH (11040)	<input checked="" type="checkbox"/>	(1448337) Data TEST, Data TEST

11. Scroll down to Need Data
12. Adjust Date of Need (should equal the referral date as entered above)
13. Click Save ALL

Need Data

Date of Need * 04 / 19 / 2021

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Rapid Re-Housing Programs (BH-0500.7000)		Identified -Select- -Select-	

Remove All Needs

Save Needs ONLY **Save ALL** Clear ALL Cancel

--- END WORKFLOW ---