## 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

(1448337) Data TEST, Data T	EST					
Release of Information: None			Service Transa	ctions	sehold Member- Y Submi	
Service Transaction Da	ashboard					
Add Need	Add Service	Add Multip	e Services	Add Referrals	View Previous Service Transactions	
View Shelter Stays	View Entire Service					

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

•	Add Needs				
•	Household Members				
0	To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected.				
	(429577) Female Single Parent				
	a (1448337). Data TEST, Data TEST				
	(1455870) Data TEST, Data Test child				
	(1455876) Data TEST, Test Child 2				

- 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)

Needs Assignment	
i Select up to 5 Needs	
Service Code Quicklist Rapid Re-Housing Programs (BH-0500.7000)	
	*
Add Terms Service Code Look-Up	Add Terms & Go To Search Results

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

Referral Provi	der Quicklist				
Provider	-Select-	~	Add Provider	Bed Availability	
<ul> <li>Search for P</li> </ul>	City of Detroit ESG- Detroit CoC -Southwest Counseling Solutions City ESG RRH (10446) Southwest Counseling Solutions - Detroit CoC - HUD CoC RRH (11040)				
1 These Serv	Southwest Counseling Solutions - Detroit CoC - MSHDA ESG RRH (10410) Southwest Counseling Solutions - Detroit CoC - RRH - City ESG-CV (12571) Southwest Counseling Solutions - Detroit CoC - RRH - State ESG-CV (12617) Southwest Counseling Solutions - Detroit - RRH - CDBG (12793)		er Search by adding Ta ovider Search.	Target Populations	

- 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.

Referral Data	
Needs Referral Date *	04 / 19 / 2021 👩 🎝 🧞 2 🗸 : 52 🗸 : 14 🗸 PM 🗸
Referral Ranking	-Select- V
VI-SPDAT Score	Please Select a VI-SPDAT Score Search Clear
Projected Follow Up Date	e 🔄 / 🔄 / 🧾 🧖 🍣
Follow Up User	Southwest Counseling Solutions - Detroit CoC - RRH Search My Provider Clea HP Referrals (10932) -Select-

- 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)		(1448337) Data TEST, Data TEST		
(11040)				

- 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 0 2 2 . 52	✓: 14 ✓ PM ✓			
Selected Needs				
Need	Amount if Financial	Need Status / Outcome / If	f Not Met, Reason	Notes
Rapid Re-Housing Programs (BH-0500.7000)		Identified ~ -Select- ~ -Select-	~	
Remove All Needs	Save	e Needs ONLY Save ALL	Clear ALL 0	Cancel

--- END WORKFLOW ---