

Referrals: Connecting to Enrollments

The 'Enrollment' field is being added to the referral process in HMIS. You will see this field starting Friday, June 19, 2020. This is a required field for HMIS users in CE Workgroups.

Who does this impact? Assessors at Entry Points

When does the field come into play? When recording referrals in the CE Workflow, 'Add New Referrals' page, and 'Quick Referrals' page

Why is this important? A referral for a client can be traced back to their CE enrollment. This is important for understanding whether the CE process is working effectively in connecting households to housing and services. When pulling reports, we can determine whether their housing program enrollment was a result of CE.

Step 1: Record Referrals

Assessors record referrals in three ways.

1. In the CE Workflow
2. 'Add New Referral' page
3. 'Quick Referrals' page



[Add New Referral](#) [Quick Referrals](#)

Step 2: Select the Client's Enrollment

In the 'Enrollment' field, select the client's Coordinated Entry enrollment.

'Add New Referral' Page:

A screenshot of the 'Add New Referral' form. The form fields include: Referral Date (06/04/2020), Status (Referral Made), Service (Option not in the list), Refer To Provider, Provider Contact, Contact Phone Number, Enrollment (highlighted with a red arrow and showing '-- SELECT --'), and Comments.

'Quick Referrals' Page:

A screenshot of the 'Quick Referrals' page. The form fields include: Referral Date (06/04/2020), Referring Provider Name (Texas Homeless Network), Referring Location (Texas Homeless Network), Referring User (Marissa Ortega), and Referral Screen (Preferred Providers). Below the form, there is a table with columns for Referral Status, Service, Provider Name, and Enrollment. The 'Enrollment' column is highlighted with a red arrow and shows '-- SELECT --'. A red arrow also points to the 'Enrollment' field in the form above.

If you have questions regarding this process, please email CE@THN.org. Visit THN's website for general information about Coordinated Entry.