



Homelink Voucher Job Aid and Procedures

Homelink Vouchers

- HABC Emergency Housing Vouchers (EHV)
- Opportunity Home Emergency Housing Vouchers (EHV)
- Opportunity Home Family Referral Program (FRP)
- Opportunity Home Move-on Vouchers
- Opportunity Home Housing (formerly COVID-19) Vouchers

Homelink Voucher Enrollments - Any Skilled Assessors

1. Homelink Voucher Enrollment Completed
 - a. "Housing Needs Assessment" selected in HUD questions for Assessment Level
 - b. The applicable option is selected in HUD questions for Assessment Location
 - c. "Not Placed on Prioritization List" selected in HUD questions for Prioritization Status
2. Assessor completes Enrollment Case Note (Template) documenting enrollment and outcome
 - a. Verify that copied assessments have been updated, if applicable,
 - b. Verify the date Homelessness Episode began is accurate,
 - c. Verify Client consented HMIS ROI, and
 - d. Verify that there is no other open CE Event for a Housing/Prevention/Voucher intervention

Homelink Voucher Referrals – Any Skilled Assessors

1. Create CE Event/Referral in HMIS
 - a. Complete CE Event Program Enrollment = Homelink Voucher CE
 - b. Event
 - i. For EHVS = "Referral to Emergency Housing Voucher (EHV)"
 - ii. For other vouchers = "Referral to Other PH/unit/resource opening"



2. Location of Crisis Housing or Permanent Housing Referral – search for and select voucher project (i.e., CTH OHSA Housing Voucher PH, etc.).
 - a. For “Do you have the event result”, select “No”
3. Complete Referral Case Note Template

Homelink Voucher Processing Referrals – CTH

1. Within 48 hours of Referral, Run Referral Report where Referral Status = “Referred”
2. Verify Enrollment Case note indicates authorized ROI and HUD Assessments were updated.
3. Referrals **will not** be processed for applicants without “Enrollment Case Note” completed.
4. Referring partner will be notified by email and asked to update within five business days or referral will be closed.
5. Referral Status changed to “Acknowledged”.
6. Verify applicable Application Packet is uploaded to Documents section on HMIS.
 - a. For incomplete, missing application packets, referring partner will be notified by email and asked to update within five business days or referral will be closed.
 - b. Referral Status changed to “Acknowledged”.
 1. Screen application for eligibility and completeness.
7. If the client is ineligible:
 - a. Notify referring case manager of ineligibility,
 - b. Close Homelink Voucher Enrollment,
 - c. Resolve CE Event & Referral
 - d. Create case note documenting why client was ineligible
8. If HH appears eligible, application packet is forwarded to Opportunity Homes, Ccing referring case manager.
 - d. Create case note reflecting submission.
 - e. Update Referral Status to “Pending Approval”

Homelink Voucher Referral Outcomes - CTH

CE Outcomes Defined

1. Successful referral: Client Accepted
2. Unsuccessful referral: Client Rejected
3. Unsuccessful referral: Provider Rejected



Referral Outcomes Defined (in HMIS)

1. Referred
2. Accepted/Approved
3. Ineligible
4. Client Turned Down Referral
5. Client Did Not Follow Up

Updating Referral Outcomes in HMIS based on Opportunity Home's updated voucher logs (Bi- weekly)

- Upon receipt of updated log, run CTH Referral report in HMIS
 - a. Sort by status, beginning with "Pending Approval", add the OHSA EID number for any clients without a "Voucher ID"
 - b. Utilizing the Referral report and the Opportunity Home log identify application updates since last log.

Successful Outcomes = Voucher awarded

1. Resolve CE Event
2. Resolve Referral (Change Status and Outcome to Approved and Attained respectfully)
3. Close Homelink Voucher CE Enrollment (if not already closed)
4. Create a case note reflecting referral resolution.
5. Enroll the client in Voucher Project (i.e., CTH OHSA Housing Voucher PH).
 - i. Verify from Homelink Voucher CE Enrollment Case Note that HUD assessments had been updated.
 - ii. Copy Assessments
6. As updated by Opportunity Home's log, update move-in date as provided.
7. As updated by Opportunity Home's log, close project enrollment when HH is indicated to be no longer in program.
8. Document all project updates in case notes.

Unsuccessful Outcome = Ineligible

1. Resolve CE Event
2. Resolve Referral (Ineligible)
3. Close Homelink Voucher CE Enrollment (if not already closed)
4. Create a case note reflecting referral resolution, including the reason that Opportunity Home indicated HH was ineligible.



Updating CTH Voucher Project - CTH (bi-weekly)

1. As updated by Opportunity Home's log, update the move-in date as provided.
2. As updated by Opportunity Home's log, close project enrollment when HH is indicated to be no longer in the program.
3. Document all project updates in case notes.



HMIS Workflow Job Aid: Homelink CE Event/Referral⁶

Section 1: Opening a Referral

1. From the left Navigation Pane, select Case Management, then click Coordinated Entry Event

Client Landing Dashboard

Photo

Demographics (1)

- Client Snapshot *
- Enrollments *
- Employment Placement and Work History
- Services +
- Case Notes +-
- Goals +-
- Referrals +-
- Current Living Situation
- Coordinated Entry Event

2. Review this section to ensure there are no open referrals to prevent referring the client to multiple projects. Once you have confirmed, click **Add New CE Event Referral**. Do NOT select **Add New CE Event Service**.

| Event Date | Project | Coordinated Entry Event | Result required? | Result recorded | Record Type | Enrollment ID | ID |
|------------|-------------|--|------------------|-----------------|-------------|---------------|----------|
| 3/25/2022 | Homelink CE | Referral to scheduled Coordinated Entry Housing Needs Assessment | No | | Service | 556561 | 18694381 |

Results Per Page: 50

3. A new window should appear with a two-step workflow. Click the Enrollment dropdown and select the appropriate enrollment.
 - Housing Project – Select the HH's ES, SO, SH, TH, or Homelink CE Project.

⁶ If you have questions or encounter issues with this feature, please submit a ticket to HMIS.Support@havenforhope.org and an HMIS representative will assist you.

- Homeless Prevention – Select the Homelink Prevention CE Project.
- Voucher – Select the Homelink Voucher CE Project.
- Diversion – Selection the Homelink Diversion CE Project.

The screenshot shows the 'Add New Master Program Referral' form. The 'Referral Type' is 'Program Referral'. The 'Enrollment' dropdown is open, showing 'RMYA RHY Basic Center ES' selected, with a black arrow pointing to it. Other fields include 'Preferred Start Date' set to '--Nothing--', 'Case Note' with a 'Case Note' button, and 'Restriction' set to 'Shared'. An 'Account' dropdown is also visible.

You can also add the Homelink Referral Case Note during this workflow by clicking the Case Note button. You will select the Homelink Referral Case Note template after clicking Case Note, and click 'Save'.

The screenshot shows the 'Edit Case Note' form. The 'Reference Date' is '10/24/2022'. The 'Template' dropdown is open, showing 'Homelink Referral Case Note Ten' selected, with a black arrow pointing to it. The 'Summary' is 'Homelink Referral Case Note Template'. The 'Note Description' field contains 'Project being referred:'. A 'Voice To Text' button is visible above the text area. A rich text editor toolbar is also present.

4. Optional: Enter the Preferred Start Date and click 'Save'.

Referral Type: Program Referral

Enrollment: RMYA RHY Basic Center ES

Preferred Start Date: 11/01/2022

Case Note: Case Note

Restriction: Shared

Save Cancel

5. On the second page of the workflow, click 'Add New'.

Referred Date Referred to Program Event Status Referred To UserID Program Referral ID

Results Per Page: 50

6. Find the program you wish to refer the HH to and click the check mark next to the project name.
- Housing Project – Select your permanent housing project.
 - Homeless Prevention – Select your Homeless Prevention project.
 - Voucher – Select the appropriate SARAH Voucher project.
 - Diversion – Select the Homelink Diversion CE project.
 - Expedited or Emergency Housing Referrals or PSH Bridge – Select Homelink Expedited Referral/PSH Bridge SSO project.
 - SARAH COSA PLACE SSO

Add New

Add New CE Event Program Referral

HMIS Test Project

SAAF CoC PSH

Thrive CoC RRH

7. Select the appropriate Event and select 'No' for 'Do you have the Event result?' if applicable, then click 'Save'.
- Housing Project – Select one of the following options based on your project type:
 - i. Referral to RRH project resource opening
 - ii. Referral to TH bed/unit opening
 - iii. Referral to Joint TH/RRH project/unit resource opening
 - iv. Referral to PSH project resource opening
 - v. Referral to Other PH project/unit/resource opening
 - Homeless Prevention – Select Referral to Prevention Assistance
 - Voucher – Select Referral to Emergency Housing Voucher (EHV)
 - Diversion – Select Problem Solving/Diversion/Rapid Resolution Intervention or Service
 - Expedited or Emergency Housing Referrals or PSH Bridge – Select Referral to Scheduled coordinated Entry Crisis Needs Assessment
 - PLACE – Select Referral to Other PH project/unit/resource opening

✓ HMIS Test Project 10/24/2022 Referred

Case Note Case Note

Event * Referral to RRH project resource opening

Do you have the Event result? * No

Restriction * Shared

8. Click 'Done' to complete the workflow.

Workflow is now complete.

- ✓ Mon, Oct 24, 2022 At 01:05 PM | Gall, Nina | Add New Master Program Referral
- ✓ Mon, Oct 24, 2022 At 03:24 PM | Gall, Nina | Add New Coordinated Entry Event Referrals

3. Change 'Do you have the Event result?' from 'No' to 'Yes' and complete the Referral Result and Data of Result, then click 'Save'.

The screenshot shows the 'Program Referral Add/Edit' form. The 'Do you have the Event result?' field is set to 'Yes'. Other fields include 'Referred Date' (10/24/2022), 'Referred From Program' (RMYA RHY Basic Center ES), 'Referred to Program' (HMIS Test Project), 'Coordinated Entry Event' (Referral to RRH project resource opening), 'Referral Result' (empty), 'Date of result' (empty), and 'Restriction' (Shared). The 'Status' dropdown is set to 'Referred'. Green arrows point to the 'Do you have the Event result?' field, the 'Referral Result' field, and the 'Date of result' field.

If the referral was successful, select 'Successful Referral: Client Accepted' and the status will update to Accepted/Approved.

The screenshot shows the 'Program Referral Add/Edit' form. The 'Referral Result' field is set to 'Successful referral: client accepted'. The 'Status' dropdown is set to 'Accepted/Approved'. Other fields include 'Referred Date' (10/24/2022), 'Referred From Program' (RMYA RHY Basic Center ES), 'Referred to Program' (HMIS Test Project), 'Coordinated Entry Event' (Referral to RRH project resource opening), 'Do you have the Event result?' (Yes), 'Date of result' (11/01/2022), and 'Restriction' (Shared). Green arrows point to the 'Status' dropdown and the 'Referral Result' field.

If the referral was unsuccessful, select either 'Unsuccessful Referral: Client Rejected' or 'Unsuccessful Referral: Provider Rejected', then select the appropriate status from the two options.

The screenshot shows the 'Program Referral Add/Edit' form. The 'Referral Result' field is set to 'Unsuccessful referral: client rejected'. The 'Status' dropdown is set to 'Client Turned Down Referral'. Other fields include 'Referred Date' (10/24/2022), 'Referred From Program' (RMYA RHY Basic Center ES), 'Referred to Program' (HMIS Test Project), 'Coordinated Entry Event' (Referral to RRH project resource opening), 'Do you have the Event result?' (Yes), 'Date of result' (11/01/2022), and 'Restriction' (Shared). Green arrows point to the 'Status' dropdown and the 'Referral Result' field.

4. Confirm that the referral is closed by ensuring that 'Result Recorded' shows 'Yes'.

| Event Date | Project | Coordinated Entry Event | Result required? | Result recorded | Record Type | Enrollment ID | ID |
|------------|--------------------------|--|------------------|-----------------|------------------|---------------|----------|
| 10/24/2022 | RMYA RHY Basic Center ES | Referral to RRH project resource opening | Yes | Yes | Program Referral | 605382 | 3 |
| 3/25/2022 | Homelink CE | Referral to scheduled Coordinated Entry Housing Needs Assessment | No | | Service | 556561 | 18894381 |

Once the referral is closed, the client is ready to be enrolled into the project! Please visit the HMIS Entry Workflow Guide in the HMIS training materials if you have any questions on how to complete this process.