# COORDINATED ENTRY SYSTEM (CES) POLICY AND PROCEDURES
## CES-PP-18-04: REFERRAL POLICY AND PROCEDURES
## APPROVED May 30, 2018

**_PURPOSE_**:  To establish and detail the process of referrals to supportive housing within MACCH's Coordinated Entry System (CES).

**_POLICY_**:  Threshold CoC will centralize all referrals to supportive housing resources for agencies participating within the CES. All projects participating within the system are required to only accept referrals through the CES.  Projects will report all openings directly to Threshold CoC, who will identify the referral for the project opening based on project eligibility and the current Priority Pool within the By-Name List (BNL).  Each project is responsible for ensuring openings are reported in a timely and accurate manner. Threshold CoC will provide all Rapid Rehousing (RRH) referrals within one (1) business day of the reported opening.  Permanent Supportive Housing (PSH) referrals will be identified weekly during the Homeless Review Team's (HRT) case conferencing meeting.  Projects are responsible for responding to the referral in a timely manner, as outlined in the Contact Attempts Procedures.

Housing referrals for households that are residing in Domestic Violence programs will be based on anonymous data exported from the DV HMIS system and integrated into the priority pool. All referrals of DV survivors will be made by referring the housing provider to the DV agency who is currently housing or involved with the household. This process will maintain anonymity and security of the household and allow the household the opportunity to decline placement without the disclosure of identifying information.
(Final implementation guidance is still being developed with DV providers and the CES)

### _PROCEDURES:  REFERRAL PROCESS_

### A. Daily Priority Pool Posting
1. Per the CES Prioritization Policy and Procedures, all referrals for RRH and PSH resources will be identified through the Priority Pool of the BNL.
2. Threshold CoC will post the RRH Priority Pool each business day by 4:00pm. This posting will occur in a shared folder with Threshold CoC CES agencies and will be housed on MACCH's server. This list will include individuals within the HMIS system, as well as individuals being served through victim service providers.
   a. Public posting will ensure transparency of prioritization and inform housing navigators and outreach workers who is likely to receive a housing referral within the next 60 days.
   b. Threshold CoC will comply with all security measures, in compliance with Homeless Management Information System (HMIS) data security and privacy requirements, when sharing the Priority Pool with agency partners.
      i. Providers with access to the Priority Pool are prohibited from sharing with any entity outside of their project.  Failure to comply will result in loss of access to the HMIS system,

until such time that HMIS data security training is again completed. This process will be administered through ICA.

ii. Per the Assessment Policy and Procedures, households must consent to having their

information shared within the CES. Depending on the level of information release chosen by the household, (Yes, full release, Yes, in part or No, declining release) the information available for prioritization and referral may vary by household.

**B. Reporting Project Openings**
1. Programs must notify Threshold CoC of all openings via completion of the CES Openings Google Form.
2. Each agency is responsible for ensuring their openings are reported in a timely and accurate manner, (no more than 48 hours after the opening becomes available). Projects are encouraged to report upcoming openings once identified to streamline the process for project intake and ensure high program utilization.
3. Steps to reporting an opening are as follows:
   a. Open the web link for the [CES Openings Google Form](#)
   b. Complete and submit the CES Openings Google Form
   c. Reporting "New" vs. "Existing" Openings-

      i. "New" openings are being reported to CES for the first time following vacancy

      ii. "Existing" openings are those in which prior referrals have been sent, but the referred

         household was not successfully housed. The opening is considered "existing" until someone is housed in the open unit. This assists in data tracking and analysis of project openings
   d. An email confirming receipt of the reporting opening will be received by the sending agency
   e. A referral for the project opening will be sent in HMIS within one (1) business day. Referrals for clients who are currently engaged with the DV system will occur outside HMIS system.

**C. Referrals**
1. Upon submitting the CES Openings Google Form, the following will occur:
   a. If the opening is for RRH, Threshold CoC will provide a referral for the project via HMIS within one (1) business day of receiving the openings report to include an email confirmation.
   b. If the opening is for PSH, the Homeless Review Team (HRT) will case conference referrals made to the group during every weekly meeting.
      i. HRT will review all reported PSH openings and identify referrals based upon Prioritization Policy and unique client needs
      ii. Referrals for current openings will be made during the HRT meeting
      iii. The prioritization list established during HRT will be used to fill PSH vacancies that occur during the week between meetings.
      iv. Threshold CoC will provide a referral for the opening within 1 business day of the HRT meeting
   c. Upon receipt in HMIS, projects must follow up on referrals in accordance with the CES Contact Attempts Procedures.
   d. The referral within HMIS should be closed once the client has:
      i. Successfully entered the housing program or;
      ii. The program has determined that the client is not eligible for the program or;
      iii. The client has declined the housing programs offer of housing
   e. If a referral is unsuccessful (i.e. not eligible, unable to contact, etc.), the referral must be accurately documented in HMIS.
      i. To receive another referral for this project opening, the agency must resubmit the opening via the CES Openings Google Form, noting the opening is now "existing".

ii. Threshold CoC will send a new referral for the opening within 1 business day
iii. This process continues until the opening is filled.
iv. If a household is found to be ineligible because they do not meet the "chronically homeless" definition, the program should also email the Threshold CoC CES detailing the reasons why the household failed to meet the definition. Threshold CoC staff will then reach out to the housing provider. (ES, housing navigators, outreach etc.) to review the issue and identify needed corrections. Housing providers will be responsible to make needed corrections in HMIS.

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**Additional Resources**:
**Threshold CoC CES Assessment Policy and Procedures**
**Threshold CoC CES Prioritization Policy and Procedures**
**Threshold CoC CES Contact Attempts Procedures**
**Threshold CoC CES Openings Google Form**