**all Chicago**
making homelessness history

Chicago Coordinated Entry System (CES)
Homeless Management Information System (HMIS) Housing Provider Workflow

Step 1: Create a **Counts Report** to monitor **incoming referrals** to your project. Counts Reports are an easy way to manage the flow of referrals to your project. In addition, they provide a quick means of accessing the client record directly.
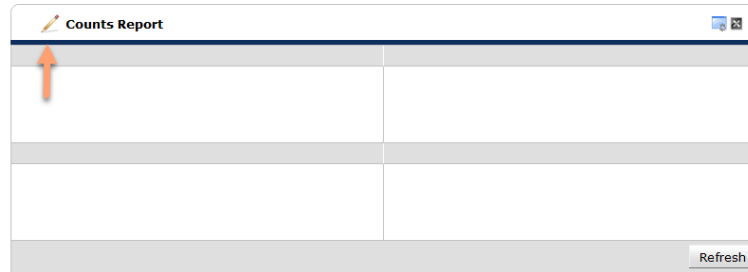
A. From the **HMIS Home Page**, click the ▶ icon next to **Customize Home Page Dashboard**.
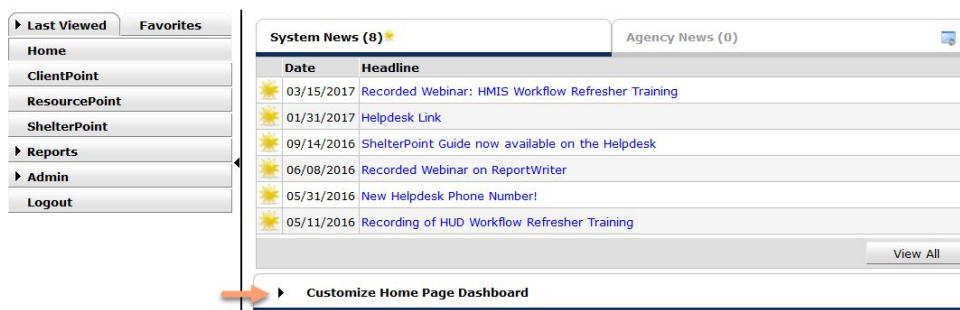
B. Click **Add Counts Report**.
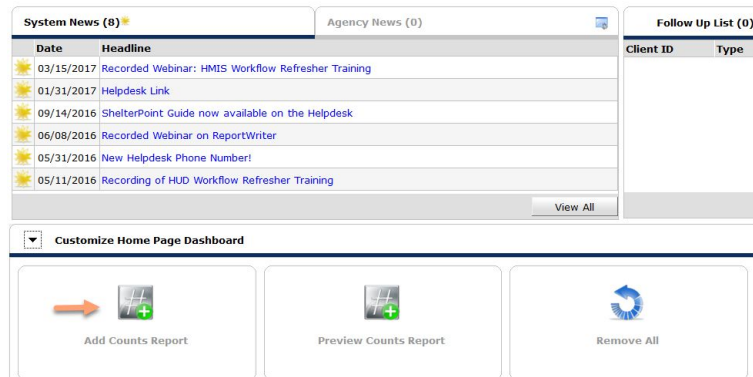
**C.** Click the ✏ icon in the Counts Report Dashlet to bring up the settings.

D. Set the **Report Name** to **Outstanding Incoming Referrals**, set the **Dates** to **All Dates**, set the **Provider Type** to **Provider**, and set the **Provider** as the specific project that will be receiving referrals (i.e. All Chicago - PSH Project), then click **OK**.

*Note: Please **do not** select the parent provider. For example, select **All Chicago - Transitional Housing Project** instead of **All Chicago**.*

E. You can display **4 different Counts Reports**. If you are receiving referrals for multiple projects, repeat **C** and **D**, while making sure to **change the position** of your report so as not to overwrite your previous reports.
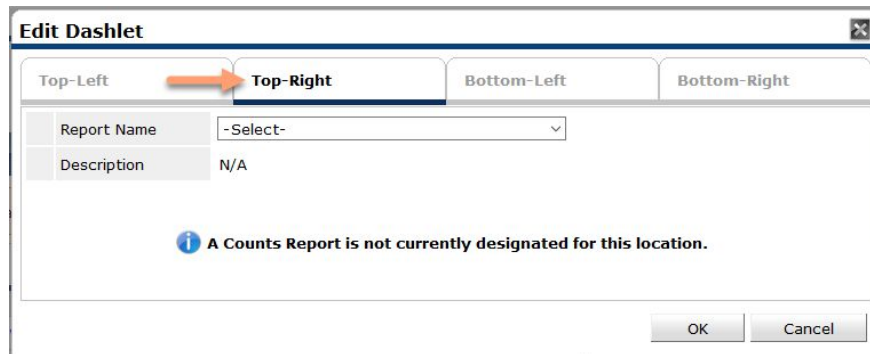

F. Once completed, you will see the number of referrals your project has received. You can click the number to display the list of Client IDs corresponding to the individuals referred to your project, and click the Client ID to view the individual's Client Profile.
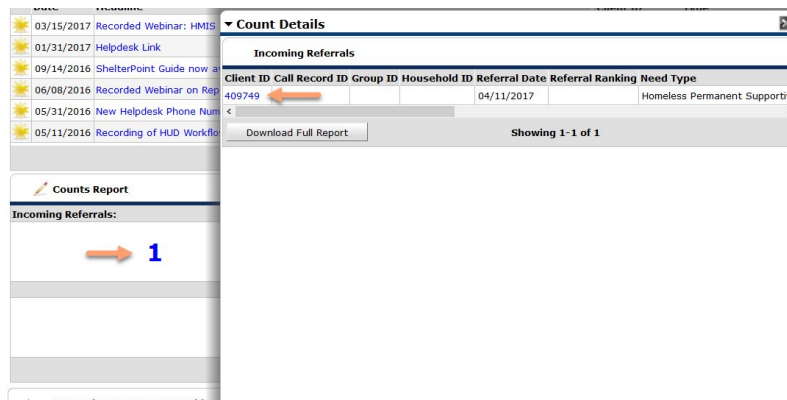
Step 2: View the **Assessment** data to gain **contact information** to begin to attempt to contact the client to complete an intake**.** View and download any **documentation** you need, which has been uploaded by a Skilled Assessor.

A. When a referral is made to your project, the Matching Team will allow you to view the client's Assessment data gathered in the Chicago CoC Standardized Housing Assessment. On the **Client Summary Tab**, click on the ✏ icon next to the client's entry into the **Chicago Coordinated Entry System (CES) Skilled Assessor Project**, and then click **Save & Continue**.
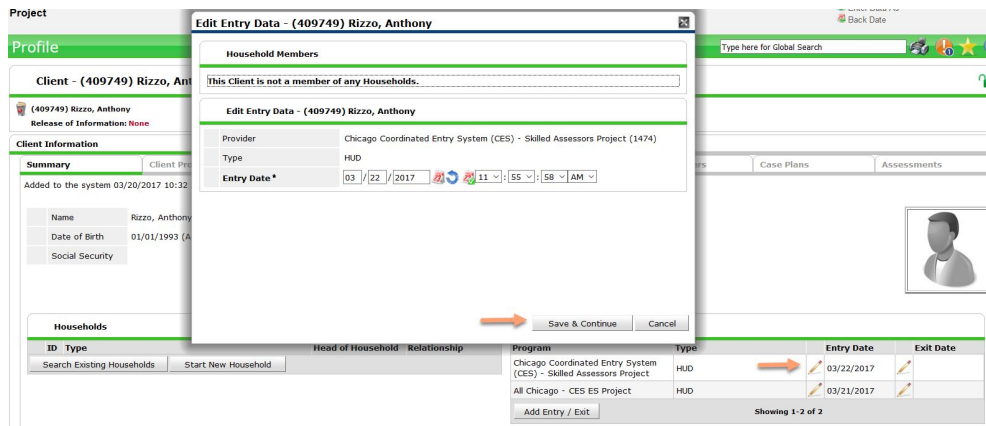
B. Scroll down to view the client's assessment, but please **do not** change any data. View the client's contact information, and follow the **contact protocol** to get in touch with the client.
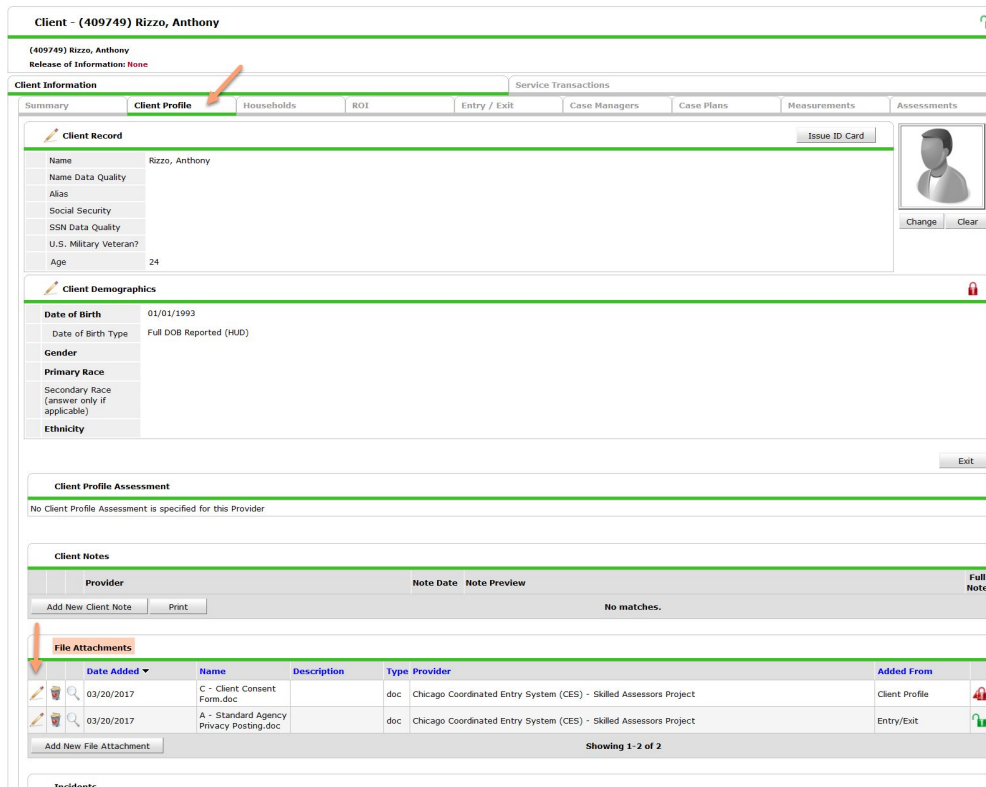
C. To view **documentation** that Skilled Assessors have uploaded, returning to the **Summary Tab**, click the **Client Profile Tab**, scrolling down to **File Attachments**, and click the ✎ icon next to the documentation you wish to download.


D. Click **Download** to download the file to your computer.

Step 3: Update the **Need Status** within **two business days** of referral, and keep the client's **Need Status** updated throughout the housing process.

Need Statuses are the primary communication mechanism to track progress through Coordinated Entry. Need Statuses have two purposes: they help both people experiencing homelessness access housing and help projects keep their units filled. **Providers are expected to keep need statuses updated throughout the housing process.** This includes any activity that occurs after enrollment—if, after enrolling a client, something occurs that prevents the project from housing them, please update the referral need status to the relevant need status so the client can be rematched and/or exited from coordinated entry. Updates to Need Status need to occur within **2 business days.**

30 second demo: https://youtu.be/YS6O6_7tmX8
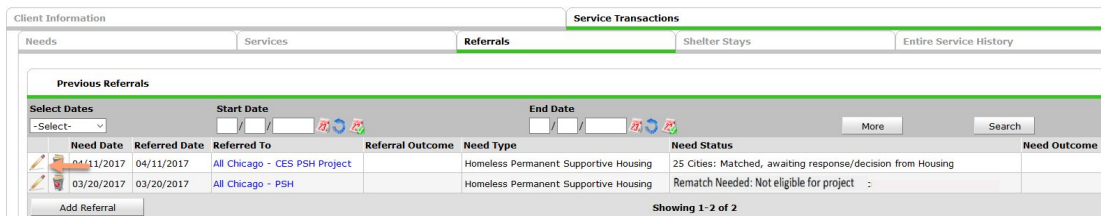
A. From the **Summary Tab**, click the **Service Transactions Tab**.
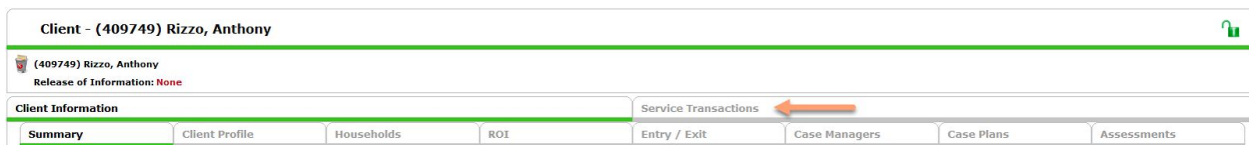
B. Click **View Entire Service History**.
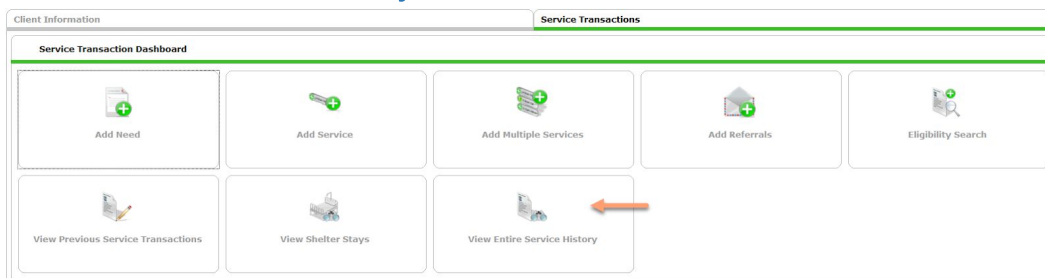
C. Click the **Referrals Tab**, and then click the ✏️ icon next to the referral to your project

D. Click the ✏ icon next **Need Information**.

E. Frequently update the **Notes** section to keep the CES team updated about important developments during the housing process. Choose the appropriate **Need Status** from the drop-down list and click **Save & Exit**.

F. See the **Glossary:ReferralNeedStatus** for more detailed information about the appropriate use of **Need Statuses**.

Step 5: All project types will request a transfer by creating a **CES Transfer Request** to indicate that the individual or family appears to need a different level of support.

A. From the **Summary Tab**, click the **Entry/Exit Tab**. Then click on the 🖹 icon under the **Interim** heading associated with your project's entry.

B. Click on **Add Interim Review**.

C. Select **CES Transfer Request** from the drop-down menu and click **Save & Continue**.

D. Ensure that the **Chicago Coordinated Entry System (CES) Transfer Request Form** is chosen from the Assessment menu.

E. Complete the form ensuring that your request follows the **Program Transfer Policies.** You can find **Program Transfer Policies** by clicking here.

Project Requesting Transfer Details:

Project Team Member - Name:	G
Project Team Member - Email address:	G
Project Team Member - Phone number:	G

Client Information:

Please indicate the recommended project type for the client (i.e. Rapid Re-housing or Permanent Supportive Housing). Please select one option that would best meet the client's needs.	-Select- ∨ G
Please provide details for the transfer request:	G
Date the client's current project involvement will conclude if the client is not currently in a permanent housing program:	__ / __ / ____ G
For completion by CES Matching Team - Request Approval:	-Select- ∨ G
Date of acceptance or denial:	__ / __ / ____ G

F. Click Save & Exit and await a decision regarding the transfer from the CES Matching Team.