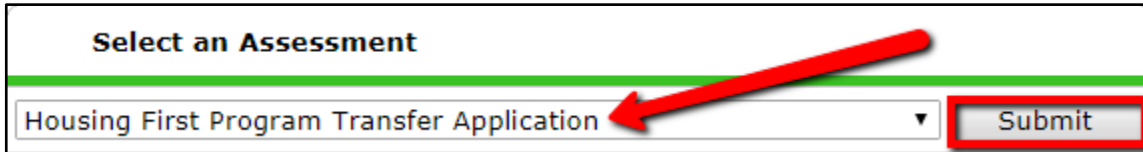


Program Transfers - HMIS Steps

STEPS - Refer your client to the "Program Transfer- CAA" program;

1. Open the client profile (while in Housing First program, no EDA required for anything else).
2. Upload a valid, signed and witnessed CAA ROI document.
3. Answer the questions in the "Housing First Program Transfer Application" assessment.



Select an Assessment

Housing First Program Transfer Application ▼ **Submit**

4. Create a service referral to "Program Transfer - CAA" program identifying "housing/shelter" as the term. The exact steps and how-to can be found at the end of this document.

**** To ensure your referral is accepted, please make sure you have completed each step listed above and answered all the applicable questions in the "Housing First Program Transfer Application" assessment ****

Program Transfer – Client Information

Who will my clients' information be shared with?

Your client's First Name, Last Name, Demographics as well as information entered into the "Housing First Program Transfer Application" assessment will be provided in a triage list for all of Placement Committee members to see.

If your client is triaged to a program which uses ServicePoint, this information will then be shared with them.

Who has access to Program Transfer - CAA in HMIS?

CHF's System Planners and HMIS Team.

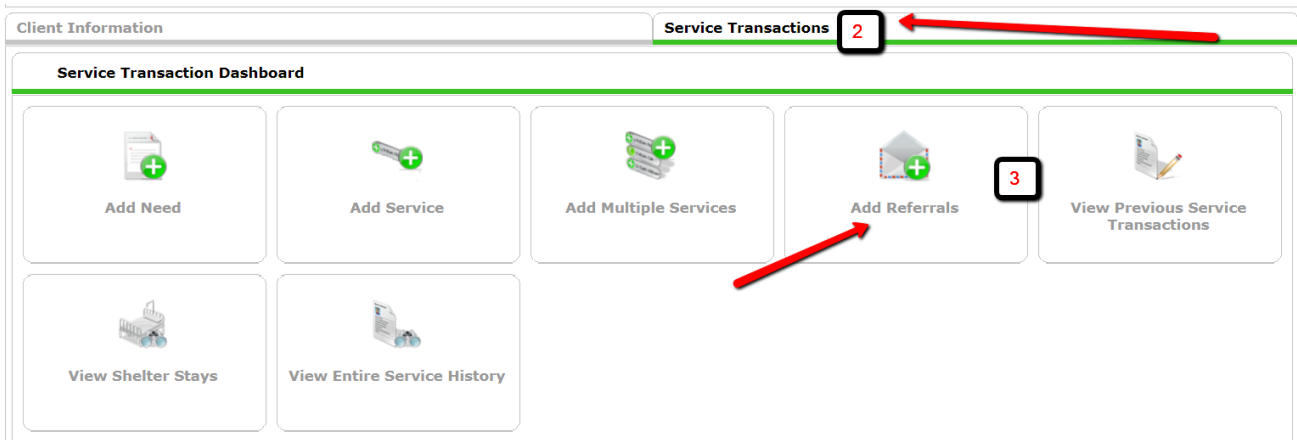
Why are we using the CAA ROI?

As transfer clients are discussed and triaged through the Coordinated Access and Assessment process, and therefore CAA participating partners may be privy to the information entered about a client in need of a transfer, the CAA ROI is the best document to explain and request consent for this collaborative process.

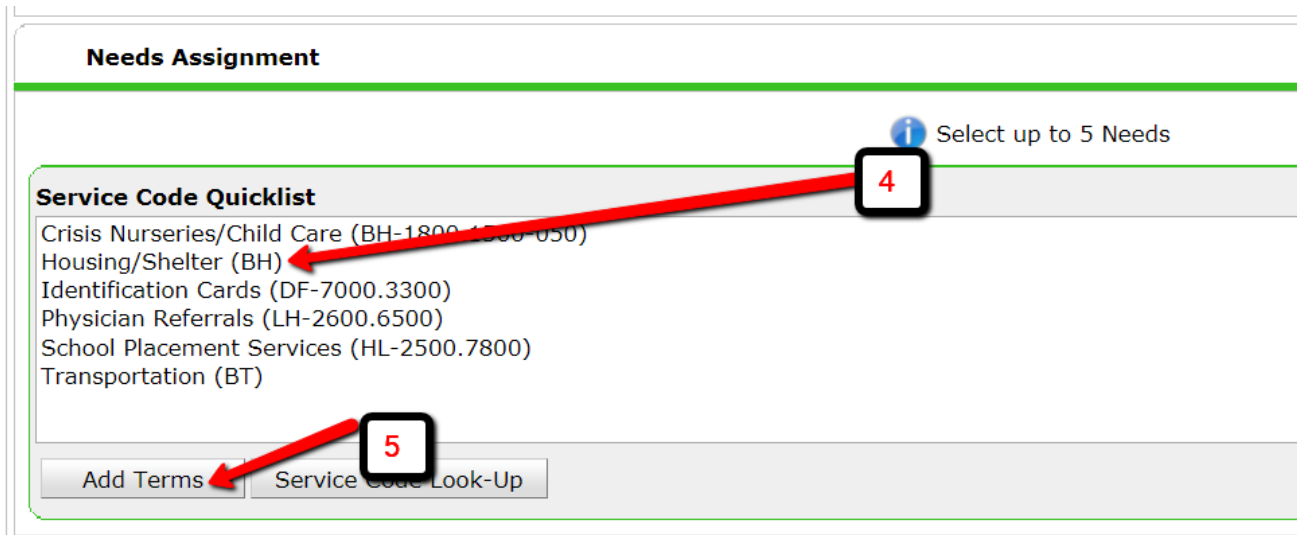
Program Transfer Referral

How to create a referral

1. Open the client profile
2. Click on the Service Transactions tab
3. Click Add Referrals



4. Choose Service Code Housing/Shelter
5. Click Add Terms



6. In the Search Results, click on the letter P.

Search Results

A B C D E F G H **6** I J K L M N O **P** Q R S T U V W X Y Z All

#	Provider	Type	Phone	Location	Distance	Matched Needs
+	Abbeydale - The Alex	Level 3	403-264-2252	CALGARY, AB T2A5X9	N/A	1/1
+	Adaptive Case Management - Aspen	Level 3	403-219-3477	CALGARY, AB T2E 7E4	N/A	1/1
+	Adaptive Case Management - Children's Cottage Society	Level 3	Unknown	Unknown	N/A	1/1
+	Adaptive Case Management - Closer to Home	Level 3	403-543-0550	CALGARY, AB T3E 0B6	N/A	1/1
+	Adaptive Case Management - CUPS	Level 4	Unknown	CALGARY, AB T2R 0B7	N/A	1/1
+	Adaptive Case Management - Discovery House	Level 3	Unknown	CALGARY, AB T2A 7R7	N/A	1/1
+	Adaptive Case Management - Inn From The Cold	Level 3	403-263-8384	CALGARY, AB T2G 0X5	N/A	1/1
+	AHRP - Calgary John Howard Society	Level 4	403-266-4566	CALGARY, AB T2G 0S5	N/A	1/1
+	Alpha Housing - Alpha House	Level 3	403-234-7388	CALGARY, AB T2G 1G4	N/A	1/1
+	Alpha Women's Housing Program - Alpha House	Level 3	403-234-7388	CALGARY, AB T2G 1G4	N/A	1/1

Bed Availability Showing 1-10 of 106 First Previous Next Last

7. Click on the green plus sign next to Program Transfer - CAA.

Search Results

A B C D E **7** F G H I J K L M N O P Q R S T U V W X Y Z All




#	Provider	Type	Phone	Location	Distance	Matched Needs
+	Pathways Team 1 - The Alex (Hospital) - The Alex	Level 3	Unknown	CALGARY, AB T2H 2S6	N/A	1/1
+	Permanent Supportive Housing: Community - Alpha House	Level 3	Unknown	CALGARY, AB T2G 1G4	N/A	1/1
+	Reelude - The Alex	Level 3	403-264-2252	CALGARY, AB T2A5X9	N/A	1/1
+	Program Transfer - CAA	Level 3	Unknown	Unknown	N/A	1/1
+	Project Kathleen - The SHARP Foundation	Level 3	Unknown	CALGARY, AB T2H 0A1	N/A	1/1

Bed Availability Showing 1-5 of 5




8. Select the check box and ensure the Housing/Shelter box is checked (as per the screenshot)

▼ Refer to Providers

Referral Data

Needs Referral Date * 05 / 14 / 2018    11 : 17 : 09 AM

Referral Ranking -Select- ▼

Projected Follow Up Date / /   

Follow Up User Please choose a provider.

-Select- ▼

[Check to notify ServicePoint Providers by Email.](#)

Referrals

Referred-To Provider	Housing/Shelter
Program Transfer - CAA (286)	<input checked="" type="checkbox"/>

9. Scroll down to the bottom of the page and click Save ALL

You should now see the Referral has been made.

- If you selected [Check to notify ServicePoint Providers by Email.](#) (see screenshot above) an automatic notification will be sent to the HMIS team. The referral will be processed and pulled into the Transfer list for the applicable placement committee. Feel free to contact the HMIS team to check on the status of the referral.
- PLEASE NOTE:** If you have a client with an immediate safety concern, and the client does not wish to be identified by First Name and Last Name for triaging through Placement Committee, please contact the HMIS team for instructions pertaining to transfers of anonymous clients.