

# Santa Clara County Community Hotline Workflow for Prevention and Shelter Providers Training

October 13, 2021



# Agenda

- Introductions
- What is the Community Hotline?
- Working with Referrals
  - Accessing a Referral
  - Accepting a Referral
  - Denying a Referral
- Demo
- Q&A



# Introductions





Julee King  
Project Manager  
Professional Services



Lesly Soto Bright  
Deputy Project Administrator  
Community Administration



Melissa Wheeler  
Project Manager  
Professional Services



Trevor Mells  
Senior Project Administrator  
Community Administration



# What is the Community Hotline?



# What is the Community Hotline?

- Countywide hotline for homeless shelter services
- Call center for persons seeking:
  - Access to shelter placement
  - Transportation to a program location
  - Housing Problem Solving services
  - Coordinated Assessment System access
  - Information and referral services

# Working with Referrals



# Working with Referrals

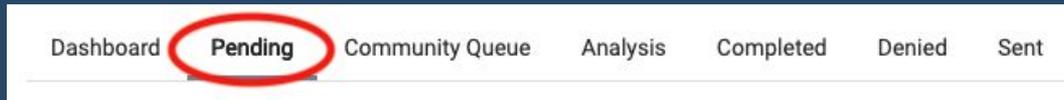
- The Hotline Operator will send referrals in HMIS to homelessness prevention (HP) and emergency housing (EH) providers
- HP & EH providers will do one of the following with referrals:
  - Accept the referral ✓
  - Deny the referral ✗

# Working with Referrals - Accessing a Referral

- Click on the Referrals tab in the top right corner of the screen

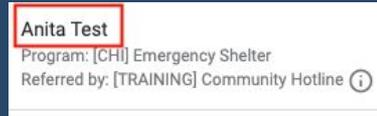


- Click on the Pending tab (if you don't land there by default)

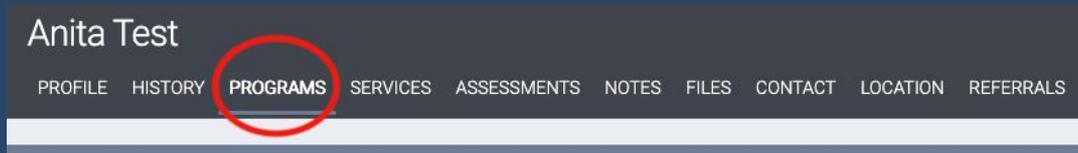


# Working with Referrals - Accepting a Referral

- Locate the client and click their name; make a note of the program they were referred to

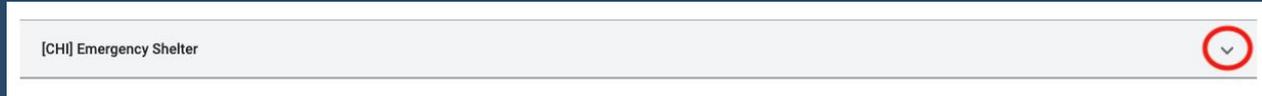


- Click on the global “Programs” tab

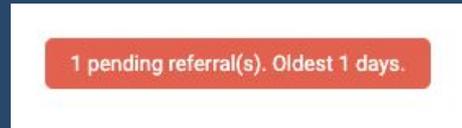
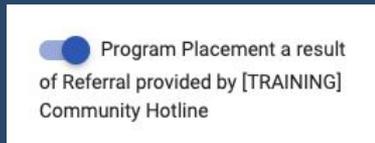


# Working with Referrals - Accepting a Referral

- In the Programs: Available section, click on the down arrow to the right of the program to which the client was referred (and in which they will be enrolled)



- Be sure you see the following, as they are indicators that you are enrolling the client in the program to which they were referred



# Working with Referrals - Accepting a Referral

- Click on “Enroll”

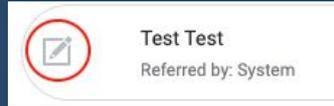


- Complete the enrollment screen and click “Save & Close”



# Working with Referrals - Denying a Referral

- Locate the client and click the “Edit” icon that appears when you mouse over their name



- In the Referral: Edit section, change the Status from “Pending” to “Denied”



# Working with Referrals - Denying a Referral

- 4 additional fields will appear
  - Send to Community Queue
  - Denied By Type
  - Denied Reason
  - Denial Information

**Send to Community Queue**

**Denied By Type**

**Denied Reason**

**Denial Information**

# Working with Referrals - Denying a Referral

- Send to Community Queue: Select “No”
- Denied By Type: Select “Client” if the client declined placement in your program; select “Provider” if you are declining to place the client in your program
- Denied Reason: Select the appropriate response option
- Denial Information: Add any information relevant to the denial
- Click “Save Changes”

SAVE CHANGES



# Working with Referrals - Denying a Referral

- Contact the Hotline Operator to let them know the client's referral has been denied so they can exit the client from the Hotline project



# Demo in HMIS



# Questions

