

QRG - Entering PATH Referrals

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WHO THIS GUIDE IS FOR 1

WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

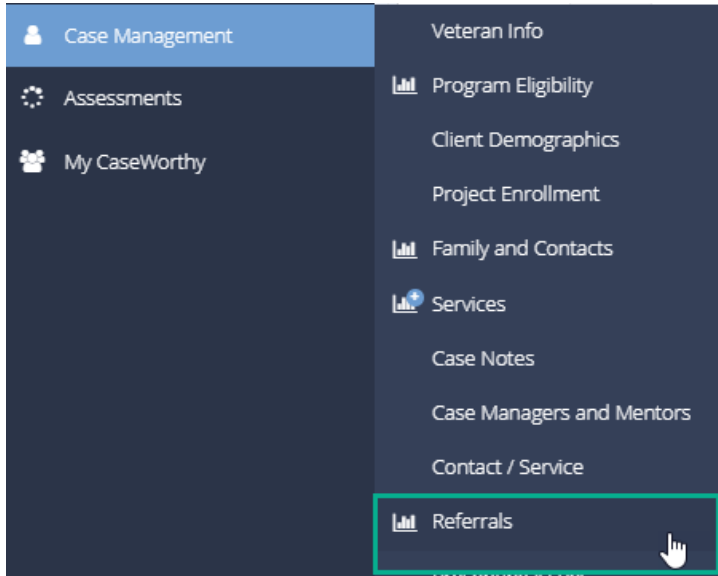
WHO THIS GUIDE IS FOR – This guide is for staff entering PATH referrals in HMIS. A referral is active and direct PATH staff support on behalf of or in conjunction with a PATH-enrolled individual to connect to an appropriate agency, organization, or service. Referrals are not services, if the PATH provider does not actually deliver the PATH-funded service it should be entered as a referral not a service. PATH referrals should be entered in HMIS each time a referral is provided. The referral date must be between the project entry and exit dates.

- Each PATH referral should identify the outcome as “Attained”, “Not Attained”, or “Unknown” as of project Exit
 - ▶ “Attained” means the client was connected and received the service (if the referral is for housing, it is not attained until the housing placement starts).
 - ▶ “Not attained” means the client was referred to, but may not have ever been connected with, the service or did not actually receive the service.
 - ▶ “Unknown” means the status of the client’s connection or receipt of service is unknown to the provider entering the data.

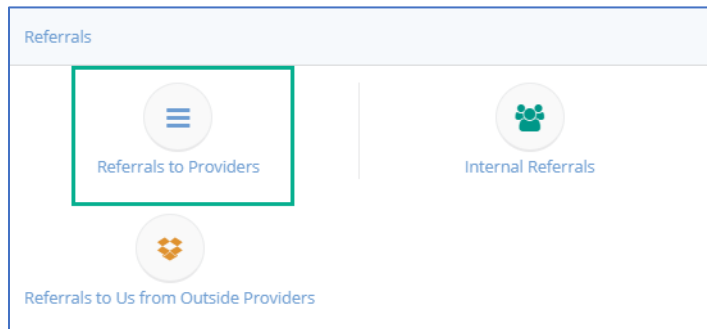
Source: <https://files.hudexchange.info/resources/documents/PATH-Program-HMIS-Manual.pdf>

STEPS

Case Management > Referrals



Referrals to Providers



Add New (upper right-hand corner)

External Client Referrals							+ Add New	Multi Referral	
Total Rows: 0									
Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User		

Fill out blank and SAVE

Add New

Enter Provider Referral

Enrollment

Refer To *

Refer to Person

Referral Date * 05/23/2019 1 : 53 PM

Service

Referral Status and Outcome (if known)

Referral Status

Referral Outcome

Referral Voucher Information

Provider Voucher to Client

Case Note and Restriction Information

Case Note

Restriction

To email the provider this referral, select the email option below.

Email Provider

Map Referral to Client's Presenting Issues