



HOUSING
ALLIANCE
DELAWARE

DELAWARE COMMUNITY MANAGEMENT INFORMATION SYSTEM

Referrals Report

Housing Alliance Delaware
CMIS Lead Agency

LAST UPDATED: July 2022

For any inquiries, contact cmis.support@housingalliancede.org.

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INTRODUCTION

The **Referrals** report is a canned report available in the DE-CMIS system. The Referrals report provides a list of all clients who were referred to or from one program to another, as well as the outcomes for those referrals. For agencies that receive referrals from Centralized Intake, this report is a helpful tool to track that all referrals have been responded to.

ACCESS

Canned reports like the Referrals report are available to all CMIS users. This means that the report is always accessible in CMIS and can be run and re-run to review data in real-time.

RECOMMENDATION

Housing Alliance Delaware recommends that the Referrals Report is run and reviewed by providers on a **weekly basis** to ensure that all referrals are responded to. For providers operating residential programs (ES, TH, TH-RRH, or PSH), it is recommended to run this report more frequently.

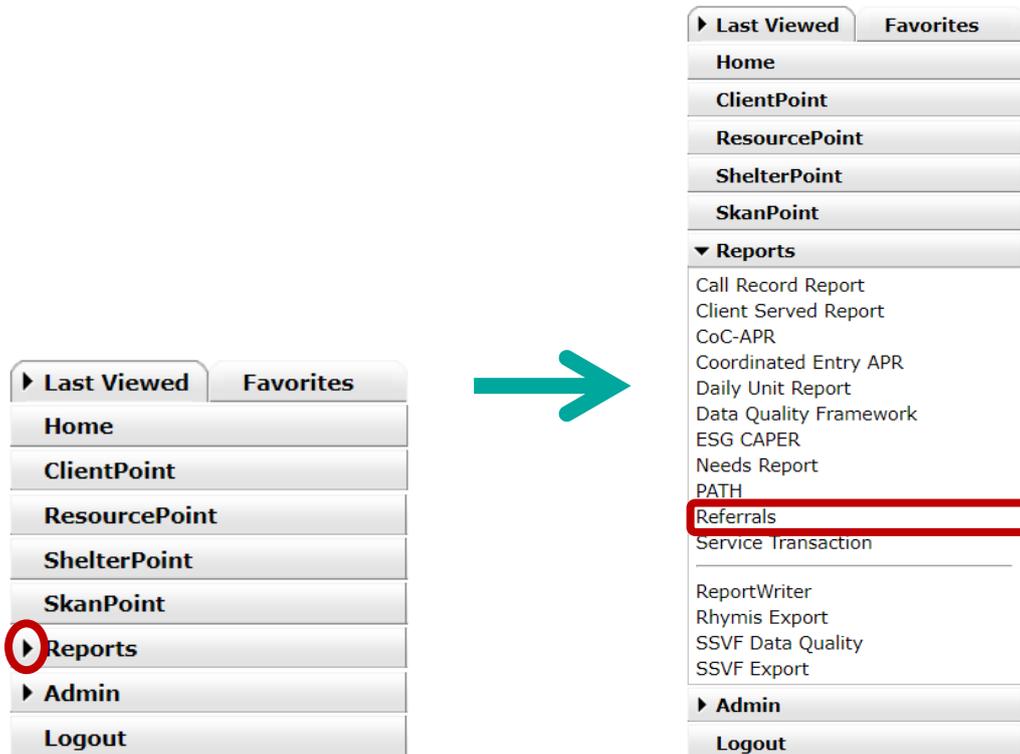
TECHNICAL ASSISTANCE

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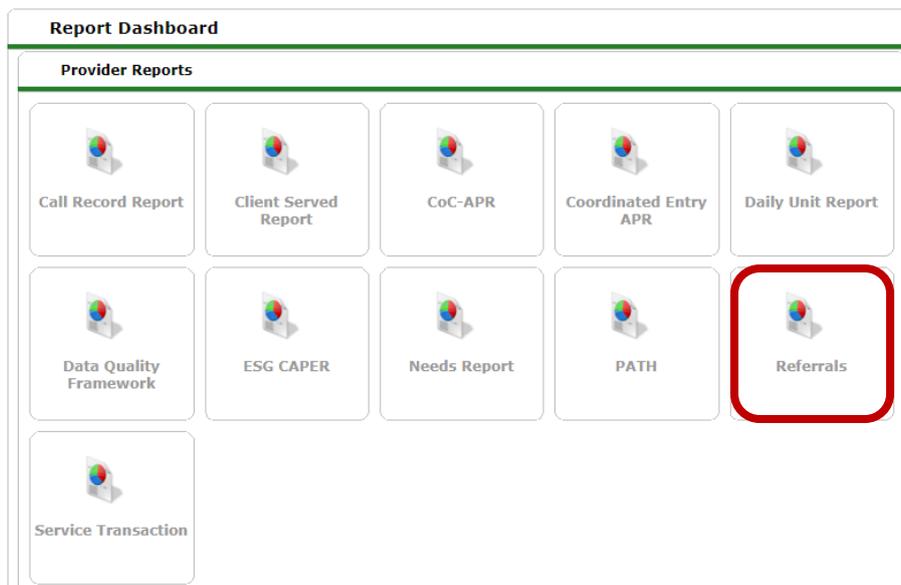
LOCATING THE REFERRALS REPORT

To locate the Referrals, go to the **Reports** section of CMIS. There are two ways to access this:

1. Click the arrow on the sidebar of CMIS to expand the Reports menu. **Referrals** will be available in the list of report options.



2. Click the **Reports** button to open the Report Dashboard. Referrals can be located under the **Provider Reports** section.



RUNNING THE REFERRALS REPORT

The **Report Options** contains customizable fields to run reports based on the data that will be pulled. These fields can be edited between each report run.

Report Options

Provider* YWCA (119) Search My Provider Clear

This provider AND its subordinates This provider ONLY

Referral Type* -Select-

Referral Status Outstanding Closed ALL

Referral Outcome -All-

Referral Date Range / / / /

Sort Order Please Select a Sort Order Select Clear

Export Report Build Report Clear

FIELD	DESCRIPTION
Provider	Use the drop-down or Search to identify the provider you will run the project for. <ul style="list-style-type: none"> Using the parent provider project and selecting "This provider AND its subordinates" will pull all referrals sent to an agency. Using the parent provider project and selecting "This provider ONLY" will pull all referrals sent for Rapid Rehousing and/or Diversion. Specific ES, TH, TH-RRH, or PSH projects must be run through separate reports.
Referral Type	<ul style="list-style-type: none"> Select "Incoming referrals to provider" unless you are Centralized Intake staff.
Referral Status	Select if you are only looking for 1) outstanding, 2) closed, or 3) all referrals.
Referral Outcome	This option will only appear if you select "Closed" or "ALL" for the previous field. Select if you want your results to be filtered by a specific Referral Outcome: "Accepted", "Canceled", or "Declined".
Referral Date Range	Select a start and end date to filter results.
Sort Order	Select if you would like results to be sorted by client name, Group ID, or referral date.

Once all fields have correctly been entered, click the **"Build Report"** button.

READING THE REFERRALS REPORT

The report results will appear immediately, depending on the fields selected.

EXAMPLE OF RESULTS:

The screenshot shows the 'Report Options' section at the top, including filters for Provider (YWCA), Referral Status (Outstanding, Closed, ALL), Referral Outcome (-All-), and Referral Date Range (09/01/2022 to 09/21/2022). Below this is the 'Report Results' table. Three callouts are present: 'Export Report' (a button), 'TYPE OF REFERRAL' (pointing to the 'Need Type' column), and 'PROJECT CLIENT(S) REFERRED TO Parent Provider = Diversion or RRH' (pointing to the 'Referred To' column). Another callout 'OUTCOME OF REFERRAL Blanks = referral still Outstanding' points to the 'Referral Outcome' column. At the bottom, there is an 'Update Referral Outcome' button.

Referral Date	Name	Group ID	Ranking	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
09/21/2022 3:13:59 PM	(3) Rogers, Steve			Homeless Diversion Programs	Centralized Intake of Delaware	YWCA	Canceled	
09/17/2022 1:12:36 PM	(1) Parker, Peter	17		Emergency Shelter	Centralized Intake of Delaware	YWCA - HLMC I ES	Accepted	
09/17/2022 1:12:36 PM	(18) Parker, May	17		Emergency Shelter	Centralized Intake of Delaware	YWCA - HLMC I ES	Accepted	
09/03/2022 3:10:46 PM	(15) Smith, Willow	13		Rapid Re-Housing Programs	Centralized Intake of Delaware	YWCA		
09/03/2022 3:10:46 PM	(14) Smith, Will	13		Rapid Re-Housing Programs	Centralized Intake of Delaware	YWCA		
09/03/2022 3:10:46 PM	(16) Smith, Jaden	13		Rapid Re-Housing Programs	Centralized Intake of Delaware	YWCA		
09/03/2022 3:10:46 PM	(17) Pinkett-Smith, Jada	13		Rapid Re-Housing Programs	Centralized Intake of Delaware	YWCA		

ADDITIONAL FEATURES AVAILABLE:

Referrals for all project types provided by Centralized Intake (ES, TH, RRH, TH-RRH, PSH, and Diversion) will be visible in this table.

- **Export Report** – downloads the report results as an Excel file.
- **Update Referral Outcome** – *available for Agency Administrators only* – feature that allows you check/select client(s) and update their Referral Outcome. Referrals can be updated to Accepted, Declined, or Canceled, and should accurately reflect the outcome.
 - ES, TH, PSH programs using ShelterPoint – Referral Outcome cannot be updated to “Accepted” through this feature. Instead, check the client(s) into your Bed List.