



### SAHomelink Referral Procedure

- 1) Agency will submit [SAHomelink Project Availability Notification Form](#) via Google Forms to request a referral.
- 2) Once submitted, the Referral System Coordinator (RSC) is sent an automated email notification that the [Program Availability Notification \(Responses\)](#) workbook that a new SAHomelink Availability Notification form has been received. (Program Availability Notification tab)
- 3) RSC will [fulfill the referral](#) request within 48 business hours of SAHomelink Project Availability Notification Form receipt via the [SAHomelink Prioritized Program Referral Google](#) Forms.
- 4) Once a referral is sent, the agency has 31 days to accept (enroll client in project) or decline (see below) the referral.
  - Upon referral receipt, it is recommended that a discussion (case conference) is arranged between the previous and receiving case managers to discuss.
  - A referral may be declined<sup>1</sup> if:
    - The participant could not be located or contacted using two different means. There is no minimum time threshold between attempts, but agencies are required to document in a case note the means they employed to locate the participant.
    - The participant refused the program. In the case that the person referred rejects the program, the referral may be closed. The client will remain in SAHomelink but will not be referred to the same program again. Client refusal must be documented.
    - The participant does not meet program eligibility. If the client misrepresented information needed to fulfill the grant specifications, the referral could be closed. An example would be if somebody reported that they were a veteran during their housing assessment but could not provide proof of their veteran status.
    - The participant is no longer experiencing homelessness (in Category 1 or 4).
  - Accepted referrals must be enrolled in the program within 30 days of receipt.
    - Once enrolled in the program, SAHomelink enrollment must be closed.
- 5) Within 30 days of referral's acceptance or rejection, RSC will submit Stakeholder Surveys, via survey monkey<sup>2</sup>, to [the client](#) and [the provider](#) input regarding the SAHomelink Referral process.

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<sup>1</sup>. All referral rejections are reviewed monthly by CoC staff. The CoC will provide written notice to agency staff if they fall below the 100% acceptance rate. The CoC may request a housing provider to submit an action plan or documentation if their referral acceptance rate falls below 75%.

<sup>2</sup> Survey Monkey will automatically send reminders to recipients of unanswered surveys after seven days.



## **SAHomelink Referral Procedure**

### **Internal Job Aids**

#### **A. Making the Referral**

- Utilizing the Priority Pool, The RSC will identify households will select highest prioritized households who meet requesting agency's specifications.
- Once client referral is identified, the RSC will add the new client to the requesting agency's claim summary<sup>3</sup>.
- Repeat for each referral.
- The RSC will submit the referral to requesting agency via the SAHomelink Prioritized Program Referral Google Forms.

#### **B. SAHomelink Prioritized Program Referral Google Job Aid**



**SAHomelink  
Prioritized Program**

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<sup>3</sup> Claims -HMIS -> "Client Intake" -> "SA Homelink," -> "Claim Client – All."-> enter the clients HMIS ID -> choose the program from dropdown -> save