GCCEH New Referral Retention Checklist

Documentation Process:
Sufficient documentation of client contact during the active referral process shall Include all of the following:

- Date & Time spoken/communicated with client
- Form of communication (phone, email, in person, third party, etc.)
- Goal timeline for completing item/topic discussed (i.e. in person meeting)
- Primary program staff responsible for completion of task
- Be accessible to all Placement Team members

Client ID ____________________
Client Name: _________________
Date Referral Received: ________
# of Contact Attempts: _________

** Note: All CoC-funded programs with and without active client referrals MUST attend Placement Team.

1) Learn all existing contact info
   - ❏ Check HMIS
   - ❏ Check Smartsheets
   - ❏ Check agency internal database
   - ❏ Placement Team: Case conference/ask if team knows how to reach client

2) Begin outreach to client
   Send out written request (including phone message/ message board) to:
   - ❏ all day centers,
   - ❏ shelters,
   - ❏ hospital social services

   In order to be on lookout for client and request that they ask the client to reach out to CM

3) Call/Text/Email all available contacts for client
   - ❏ Directly for Client
   - ❏ Client's Family
   - ❏ Client's Caseworker(s)

4) If client is found, but says no to services, or has self-resolved document the following:
   - ❏ What is client's current living situation?
   - ❏ Why is client saying no to services?
   - ❏ Can any changes be made that would interest client in services if they are currently still literally homeless?
   - ❏ Attempted to ask these questions and client (or other contacts) declined to answer.
   - ❏ Submit the above in writing to GKCCEH CES staff