Prioritization List – Service Inquiry Feature

The Service Inquiry feature can assist Providers in finding potential matches on the Prioritization List by sending an electronic inquiry request through HMIS to the person's placing Assessment Center and assigned Case Manager to facilitate improved communication, along with having a record of the action taking place and its associated status/outcome.

The Service Inquiry feature is available for all general clients that are on the active Prioritization List and can be used to record when a Provider wants to further communicate with the client/household about a service match through HMIS.   To begin the inquiry process, select the **Service Inquiry** option as shown below, which resides in the bottom section of the Prioritization List record (accessed by using the Review Prioritization List Record option from the main screen).

Please note that currently this option is not available for Domestic Violence / Anonymous client records due to privacy/security concerns and the standard manual communication process should still be used.

The inquiry option loads a new window in which to record the inquiry information, which includes the Entry Date, Inquiry From Provider, the Inquiry Service and optional notes.

Upon hitting Save, the system will send the inquiry request to the person's placing Assessment Center and assigned Case Manager.   The process will also load a window that will contain a predefined email in which to communicate the inquiry as well.

Inquiry Email (Example) – the initial email template is listed below, and by default will send the email to the assigned Case Manager and the general Provider email, the email will also be CC'ed to the Primary and Secondary Contact for the Provider if setup in HMIS.

Service Inquiry
Inquiry Date: 7/18/2018

Placing Provider: HMIS Service Agency
Case Manager: Bob Johnson

Client: Johnson, John (82916)
Service: Permanent Supportive Housing

A service inquiry has been sent to you as the placing Provider for the following client/household on the Prioritization List for the above listed service.   Please contact the client and the inquiry Provider listed below for details on the potential service match.

Inquiry Provider: DCED Administrative Organization
Inquiry User: Jan Johnson

Notes:

Please note that all information with the body of the email can be added to or edited and any of the email address in the TO: or CC: fields can be added to or edited as well.

Once the inquiry is created and email is sent, the information the record is also placed into Prioritization List Record's Coordinated Intake Notes under a new category called Service Inquiry and can be reviewed later with the other notes.   All service inquiries as with other intake notes are visible and accessible by the entire community, although only the sending and receiving Providers will be able to edit them.

| Entry Date ▽	Type ▲	Client Name ▲	Household ▲	Subject ▲	Organization ▲	Entered By ▲
07/20/2018	Service Inquiry	Johnson, John	Johnson, John Household	Permanent Supportive Housing	DCED Administrative Organization	Brian Miller
07/20/2018	Community List	Johnson, John	Johnson, John Household	Update Information	DCED Administrative Organization	Brian Miller

Each Inquiry can be viewed like any other Intake Note and includes information about the Inquiry such as the Providers and their contact information (for Inquiry To: and Inquiry From: standpoints), as well as the Service and any notes included with the request.

Receiving Inquiries:

While all Service Inquiries will be accessible and broadcast within the Coordinated Intake Notes, for those Providers that specifically have received or sent a Service Inquiry there is an additional feature built-in to help manage/track those inquiry requests.

The Western Prioritization List Menu has been slightly updated and now includes a Service Inquiries option to provide a quick entry point to view and answer Service Inquiries that have been sent to you as well as allow those that sent the inquiry to track their progress.
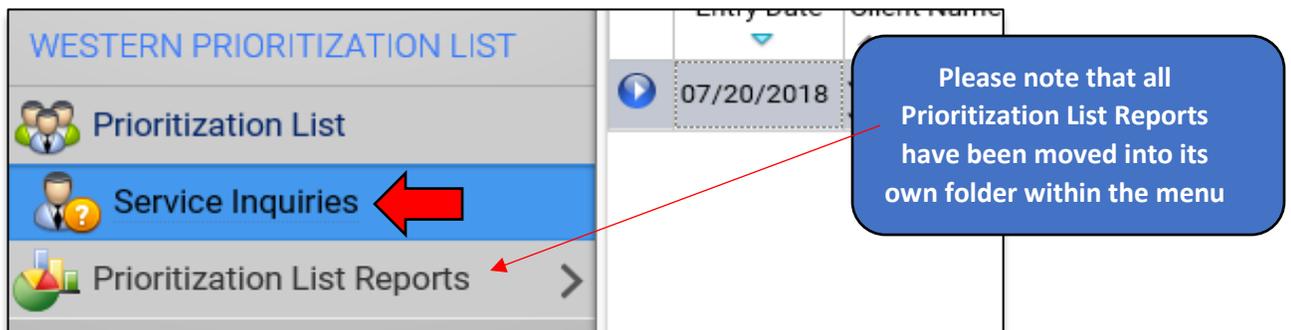
Within the Service Inquiries screen, which is loaded by selecting that menu option, you can sort/filter your inquiries by sent/received and by status to locate those that need attention. Or to locate historical inquiries for informational purposes.

Each Service Inquiry has a Status that is set to "Pending" when initially sent and will remain in this Status until the receiving Provider answers or acknowledges the inquiry request. The Provider should acknowledge the request once they have receiving it and have begun working on assisting/facilitating the inquiring Provider to get into contact with the person on the list the Assessment Center/Case Manager is overseeing.

Using the Edit/Review Inquiry menu option, the Service Inquiry will load and allow for the Status to be changed, as well as for new notes to be added and/or a follow-up email to be sent. To change the status, which is located near the bottom of the page, toggle it from Pending to Acknowledged and hit Save.

By checking the 'Send Follow-up Email' option, upon saving the record the system will load an email window that will contain defaulted information about the request and can be added to/edited as needed to communicate between the two sending and receiving inquiry parties.

To assist with notifications when new Service Inquiries have been sent to your Provider in HMIS, the system will provide a visual alert at the top of the Provider tab/workspace, next to your Provider Name, when loaded that will display if there are any pending inquiries.
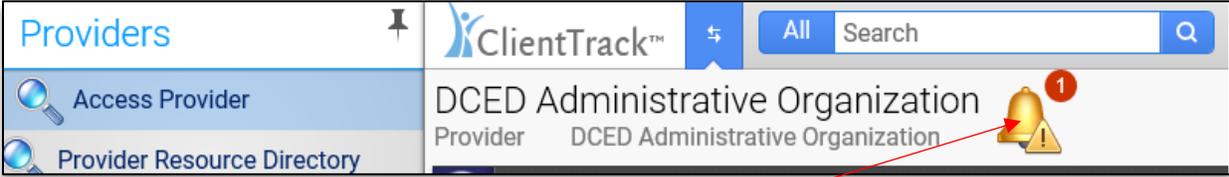
If your Provider has any pending inquiries, this alert icon will be illuminated and will show the current number of pending inquiries. As the pending inquires as answered and their statuses are turned to acknowledged these alerts will be removed. Once no pending inquiries are within your queue, the alert icon will be become grayed out.