



GUIDE: CREATING REFERRALS IN SERVICEPOINT™

Version 1.0

Guide for Recording a Referral Outcome in ServicePoint™

Service Provider Type: PH-PSH, PH-RRH, PH-HP

Household Type: All Household Types

SUMMARY:

This guide is designed to assist End Users with recording a Project Referral in ServicePoint for the purposes of the NHC CAAS coordinated entry process.

INSTRUCTIONS:

Step 1: Log into **ServicePoint**, <https://sp.lsndc.org>. Make sure you are using Enter Data As (EDA) for the appropriate provider name, which will likely be *Northlake CAAS [IND]* or *Northlake CAAS [FAM]*.

Step 2: From the *Dashboard Homepage*, click on the **ClientPoint** menu item. Type in the **Client ID #** of the client who is to be referred for services and click on the **Submit** button.

Search INACTIVE / DELETED Clients
Search ALL Clients

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to the Client's profile.

Client ID # 8346060 Submit

Legal Notices

FIGURE 1

Step 3: On the *Summary* tab, navigate to the **Outstanding Outgoing Referrals** module.

Social Security 222-23-5222 Secondary Race White (HUD)
U.S. Military Veteran? No (HUD)

Release of Information

| Provider | Permission | Start Date | End Date |
|---|------------|------------|------------|
| Northlake CAAS [IND] - Northlake Homeless Coalition | Yes | 10/24/2016 | 10/24/2019 |
| Northlake Homeless Coalition | Yes | 10/24/2016 | 10/24/2019 |
| Northlake CAAS [IND] - Northlake Homeless Coalition | Yes | 05/01/2015 | 05/01/2017 |
| Region IX: Northlake Homeless Coalition | Yes | 01/21/2013 | 01/21/2016 |

Add ROI Showing 1-4 of 4

Households

| ID | Type | Head of Household | Relationship |
|--------|-------------------|-------------------|---------------|
| 127758 | Two Parent Family | | |
| | *Bear, Yogi | Yes | Self |
| | Bear, BooBoo | No | Adopted Child |
| | Bear, Cindy | No | Wife |

Search Existing Households Start New Household

Entry/Exits

| Program | Type | Entry Date | Exit Date |
|--|------|------------|-----------|
| Northlake CAAS [BRIDGE] - Northlake Homeless Coalition | HUD | 10/11/2016 | |
| Region IX: Northlake Homeless Coalition | HUD | 07/21/2015 | |

Add Entry / Exit Showing 1-2 of 2

Services

| Start Date | End Date | Provider |
|-------------|----------|----------|
| No matches. | | |

Add Service Add Multiple Services

Outstanding Incoming Referrals

| Referral Date | Referring Provider | Need Type |
|---------------|--|---------------------------------------|
| 04/05/2017 | Northlake CAAS [BRIDGE] - Northlake Homeless Coalition | Homeless Permanent Supportive Housing |

Add Referral Showing 1-1 of 1

Outstanding Outgoing Referrals

| Referral Date | Referred To Provider | Need Type |
|---------------|----------------------|-----------|
| No matches. | | |

Add Referral

FIGURE 2

Step 4: Verify that only one client name has a check mark next to it; this is the client who is the primary referral. Under the **Service Code Quicklist** option, scroll through the list, and select the appropriate service type term. In most cases, the appropriate response is *Homeless Permanent Supportive Housing (BH-8400.3000)*, *Transitional Housing/Shelter ((BH-8600)*, or *Rent Payment Assistance (BH-3800.7000)*. Click the **Add Terms** button [Figure 3].

The screenshot shows the 'Service Transactions' form with two main sections: 'Household Members' and 'Needs Assignment'. In the 'Household Members' section, under '(127758) Two Parent Family', three members are listed: '(8346060) Bear, Yogi' (checked), '(8357019) Bear, BooBoo', and '(8357018) Bear, Cindy'. A red arrow points to the checked box for 'Bear, Yogi'. In the 'Needs Assignment' section, the 'Service Code Quicklist' is displayed with 'Rent Payment Assistance (BH-3800.7000)' selected. A red arrow points to this selected item. Other buttons visible include 'Add Terms', 'Service Code Look-Up', and 'Add Terms & Go To Search Results'.

FIGURE 3

Under the **Referral Provider Quicklist** option, select the appropriate provider name for the project who is receiving the client referral. Click the Add Provider button [Figure 4].


The screenshot shows the 'Referral Provider Quicklist' section of the form. A dropdown menu is open, displaying a list of providers. The provider 'Northlake CoC RRH Project - Northlake Homeless Coalition (31424)' is highlighted. A red arrow points to this provider. Other providers listed include 'ESG for St. Tammany-HP (St. Tammany Parish Community Action Agency) (14602)', 'ESG for St. Tammany-RRH (St. Tammany Parish Community Action Agency) (31166)', and 'Volunteers of America, GNO - 6040 (14680)'. Buttons for 'Add Provider' and 'Bed Availability' are visible to the right of the dropdown. The 'Add Terms & Go To Search Results' button is also present at the top right of the section.

FIGURE 4

Step 5: Under the **Refer to Providers** option, select the appropriate responses for the referral [Figure 5].

A. The *Needs Referral Date* will auto-populate to the current date. This will need to be set to the **date** that the CAAS Committee identified the client for referral.

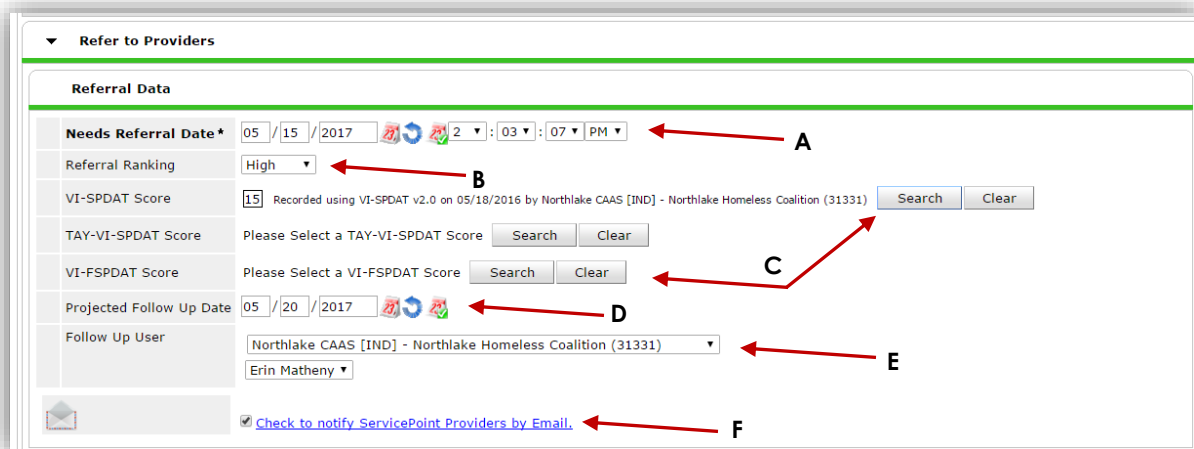
B. Select the **High** response from the pull-down menu next to *Referral Ranking*, unless otherwise instructed.

C. Click the **Search** button next to the *VI-SPDAT Score* or *VI-FSPDAT Score*, depending upon the type of assessment administered. A pop-up window that details the assessment score will appear, if an assessment was administered. Click the  to add the assessment score to the referral.

D. Set the *Projected Follow-up Date* to a date that is **5 business days after** the *Needs Referral Date*.

E. Select the appropriate **provider name** from the pull-down menu for *Follow Up User*, which will likely be Northlake CAAS [IND] or Northlake CAAS [FAM], AND the **staff person** assigned to monitor the referrals records.

F. Click the **check box** next to *Check to Notify ServicePoint Providers by Email*.

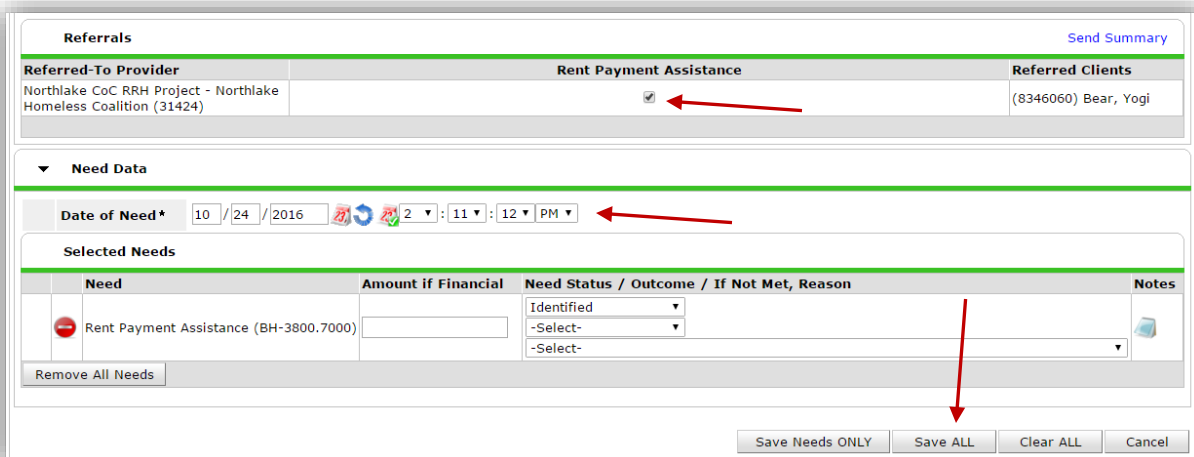


The screenshot shows the 'Refer to Providers' form with the following fields and annotations:

- A:** Needs Referral Date (05/15/2017)
- B:** Referral Ranking (High)
- C:** VI-SPDAT Score (15) and VI-FSPDAT Score (Please Select a VI-FSPDAT Score)
- D:** Projected Follow Up Date (05/20/2017)
- E:** Follow Up User (Northlake CAAS [IND] - Northlake Homeless Coalition (31331) and Erin Matheny)
- F:** Check to notify ServicePoint Providers by Email (checked)

FIGURE 5

Under the **Referrals** option, check the box beneath the selected Service Code Quicklist type. Under the **Need Data** option, set the Date of Need. This date should correspond with the Entry Date for the CAAS project. Click the Save ALL button [Figure 6].



The screenshot shows the 'Referrals' and 'Need Data' forms with the following fields and annotations:

- Referrals:** Referred-To Provider (Northlake CoC RRH Project - Northlake Homeless Coalition (31424)), Rent Payment Assistance (checked), Referred Clients ((8346060) Bear, Yogi)
- Need Data:** Date of Need (10/24/2016)
- Selected Needs:** Rent Payment Assistance (BH-3800.7000) with a 'Remove All Needs' button
- Buttons:** Save Needs ONLY, Save ALL, Clear ALL, Cancel

FIGURE 6

Step 6: A menu of *Previous Referrals* will appear; click the **Back to Dashboard** button to return to the *Dashboard Homepage* or the **Exit** button to access *ClientPoint* [Figure 7].

The screenshot shows the ClientPoint interface for a client named (8346060) Bear, Yogi. The 'Referrals' tab is active, displaying a table of previous referrals. The table has the following data:

| Need Date | Referred Date | Referred To | Referral Outcome | Need Type | Need Status | Need Outcome |
|------------|---------------|--|------------------|-------------------------|-------------|--------------|
| 10/24/2016 | 05/15/2017 | Northlake CoC RRH Project - Northlake Homeless Coalition | | Rent Payment Assistance | Identified | |

Below the table, there is an 'Add Referral' button and a status indicator 'Showing 1-1 of 1'. At the bottom right, there are two buttons: 'Back to Dashboard' and 'Exit'. Two red arrows point from the 'Need Status' and 'Need Outcome' columns of the table to these buttons.

FIGURE 7