



GUIDE: RECORDING REFERRAL OUTCOMES & RUNNING THE REFERRALS REPORT IN SERVICEPOINT™

Version 1.1

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 an “Outcome” to a referral generated through ServicePoint for the purposes of the NHC CAAS coordinated entry process. Outcomes define whether referrals made through CAAS are “Accepted” or “Declined”. The Referral Outcome response populates the Referral Report in ServicePoint.

INSTRUCTIONS:

Step 1: Log into **ServicePoint**, <https://sp.isndc.org>. If needed, set the *Enter Data As (EDA)* to the appropriate provider name (i.e. the project for which you are receiving an electronic referral).

Step 2: From the *Dashboard Homepage*, click on the **ClientPoint** menu item. Type in the **Client ID #** provided by NHC staff and click on the **Submit** button.

ClientPoint > Client Search

Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name: First, Middle, Last, Suffix

Name Data Quality: -Select-

Alias: [Text Field]

Social Security Number: [Text Field]

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search ACTIVE Clients:

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 Incoming Referrals** module. Click on the **Edit Pencil** icon to open the *Referral Data* section of the *Service Transactions* tab.

Name: Bear, Yogi
Date of Birth: 02/02/1982 (Age 35)
Social Security: 222-23-5222
Gender: Male
Primary Race: Black or African American (HUD)
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

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	

Households

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

Outstanding Incoming Referrals

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

Outstanding Outgoing Referrals

Referral Date	Referred To Provider	Need Type
No matches.		

FIGURE 2

Step 4: Click the **Referral Outcome** response dropdown menu, and click on **Accepted** [Figure 3] or **Declined** [Figure 4]. Do not select the responses of **Accepted on Wait List** or **Canceled**; these responses may only be recorded by NHC CAAS staff.

Referral Data Send Summary

Referred-To Provider: Region IX: Northlake Homeless Coalition (24712)

Needs Referral Date*: 04 / 05 / 2017

Referral Ranking: High

Referral Outcome: **Accepted**

Follow Up Information

Projected Follow Up Date: [] / [] / []

Follow Up User: Northlake Homeless Coalition (13482)
Erin Matheny

Follow Up Made: -Select-

Completed Follow Up Date: [] / [] / []

FIGURE 3

If the Referral Outcome response is **Declined**, the follow-up question, **If Canceled or Declined, Reason** will appear. Click on the response that best describes why the referral has been declined.

The screenshot shows the 'Referral Data' form with the following fields:

- Referred-To Provider: Region IX: Northlake Homeless Coalition (14712)
- Needs Referral Date*: 04 / 05 / 2017
- Referral Ranking: High
- Referral Outcome: Declined
- If Canceled or Declined, Reason: -Select- (dropdown menu is open)
- Follow Up Information:
 - Projected Follow Up Date: 04 / 11 / 2017
 - Follow Up User: Northlake Ho (13482) Erin Matheny
 - Follow Up Made: -Select-
 - Completed Follow Up Date: [] / [] / []
- Need Status and Outcome:
 - Need Status*: Identified
 - Outcome of Need: -Select-

The dropdown menu for 'If Canceled or Declined, Reason' is open, showing the following options:

- Select-
- Select-
- All Services Full
- Availability
- Client Did Not Show
- Client Not Eligible
- Client Refused Service
- Client Rescheduled Appointment
- Conflict of interest
- Did Not Connect With Resource Given
- Did not meet eligibility or statutory requirements
- Financial
- Geographic or other isolation of victim/survivor
- Inadequate language capacity (including sign language)
- Need not documented
- No Resource Available
- Program reached capacity
- Program rules not acceptable for victim/survivor
- Referred to Another Provider
- Service Does Not Exist
- Service Not Accessible

FIGURE 4

Step 5: Click the **Save & Exit** button to close the window [Figure 5]. 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 6].

The screenshot shows the 'Service Information' section with a 'Provide Service' button and a message: 'A Service has not yet been provided for this Referral.' At the bottom right, there are three buttons: 'Save', 'Save & Exit', and 'Exit'. A red arrow points to the 'Save & Exit' button.

FIGURE 5

The screenshot shows the 'Service Transactions' section with a table of transactions. The table has the following columns: Transaction Type, Date, Provider, Type, Need Status / Outcome, and Need Goal.

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	01/01/2017	Northlake CAAS [BRIDGE] - Northlake Homeless Coalition	Homeless Permanent Supportive Housing	Identified	
Referral	04/05/2017	Region IX: Northlake Homeless Coalition	Homeless Permanent Supportive Housing		

At the bottom right, there are two buttons: 'Back to Dashboard' and 'Exit'. Red arrows point to these buttons from the 'Need Status / Outcome' and 'Need Goal' columns of the second row.

FIGURE 6

Guide for Running the Referrals Report 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 running the ServicePoint Referrals report for a provider. This a useful tool for verifying that a Referral Outcome was accurately recorded.

INSTRUCTIONS:

Step 1: Log into **ServicePoint**, <https://sp.isndc.org>

Step 2: From the *Home Page Dashboard*, click on **REPORTS** in the left menu, and click on the tile labeled Referrals.

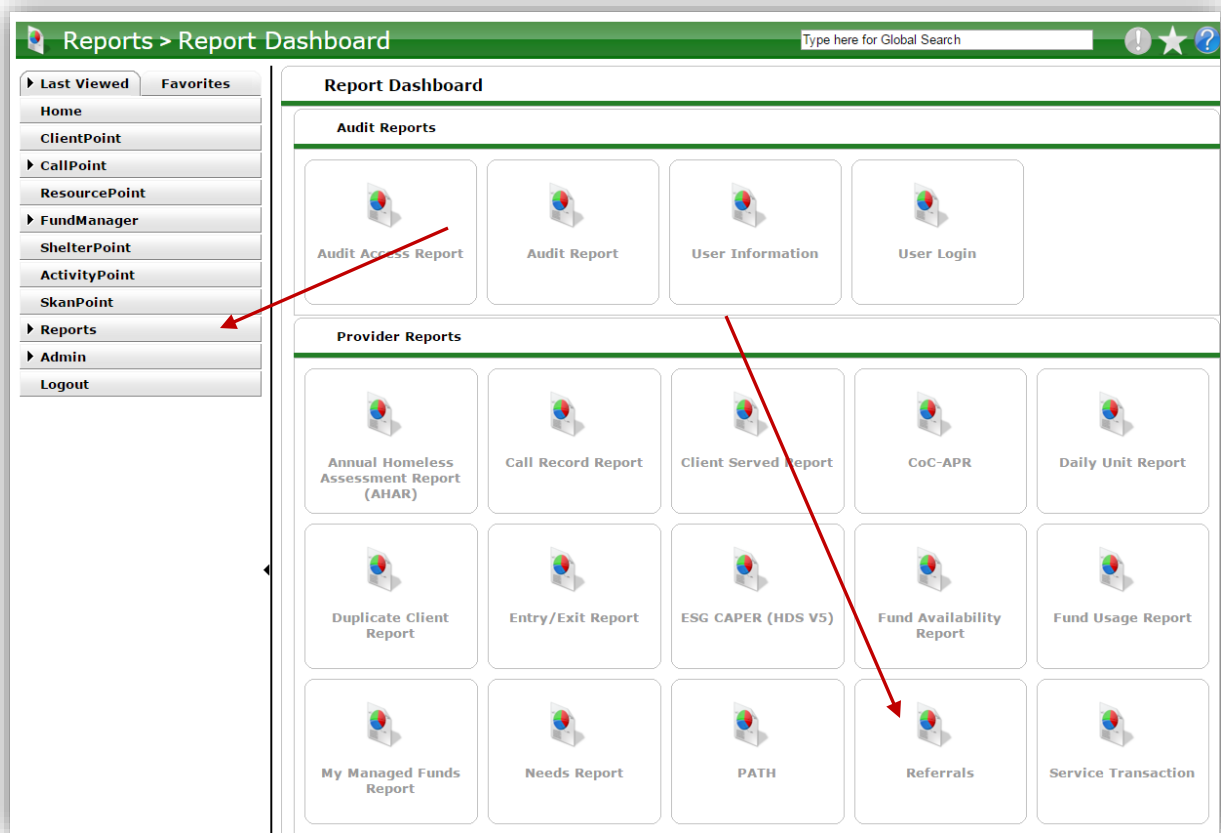



FIGURE 7

Step 3: Select the appropriate *Report Options* [Figure 8].

- A. The *Provider* will auto-populate to the Service Provider under which you are accessing ServicePoint. To change this, click the **Search** button and click the  button next to the preferred *Provider*.
- B. Click the radio button next to **This Provider Only**.
- C. Select the **Incoming Referrals to provider** response from the pull-down menu next to *Referral Type*.
- D. For the *Referral Status*, select the radio button next to **ALL**.
- E. Select the **-ALL-** response from the pull-down menu next to *Referral Outcome*.
- F. Set the *Referral Date Range* to a period of time that will include the referral you are verifying.
- G. Click the **Build Report** button to run the report.

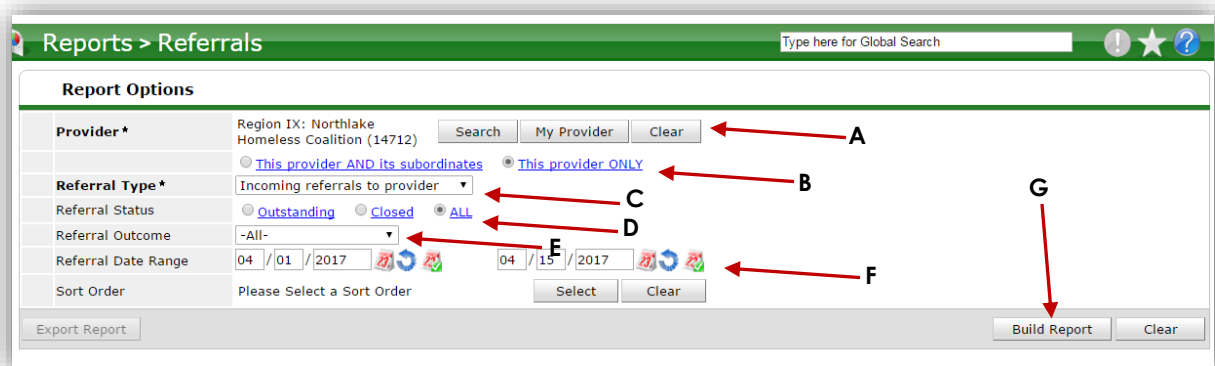


FIGURE 8

Step 4: Review the **Referral** report for accuracy.

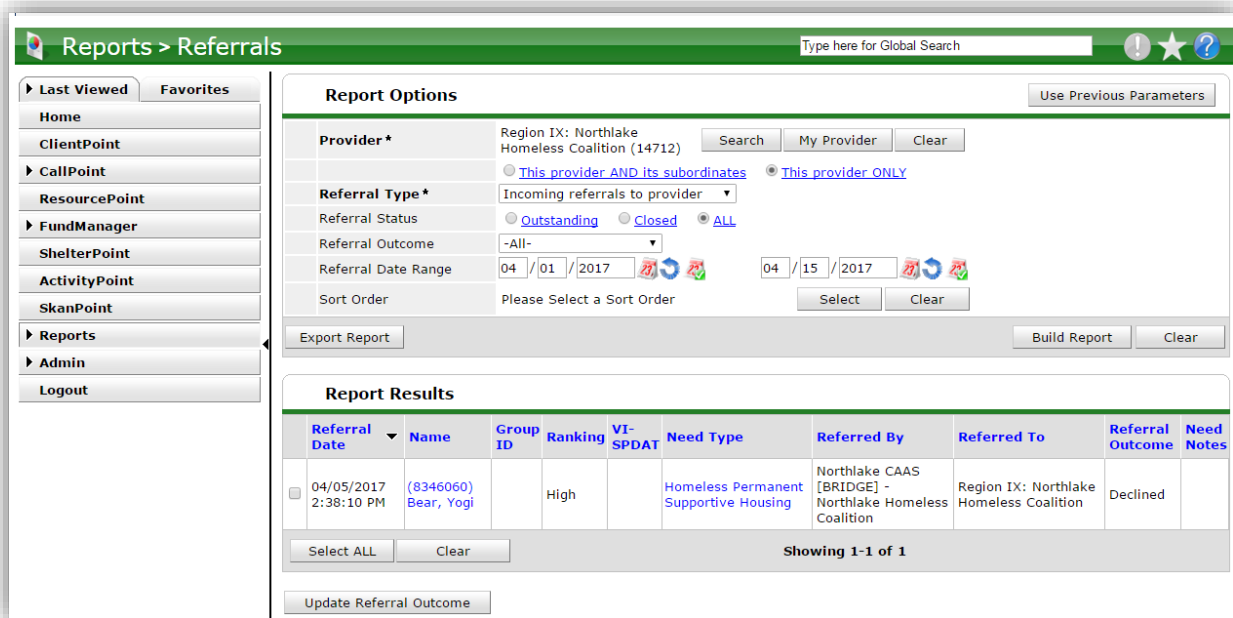


FIGURE 9