NORTHLAKE
HMIS DATA PROJECT

GUIDE: CREATING REFERRALS IN SERVICEPOINT™

Version 1.0

MAY 2017

<u>Guide for Recording a Referral Outcome in ServicePoint™</u>
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.

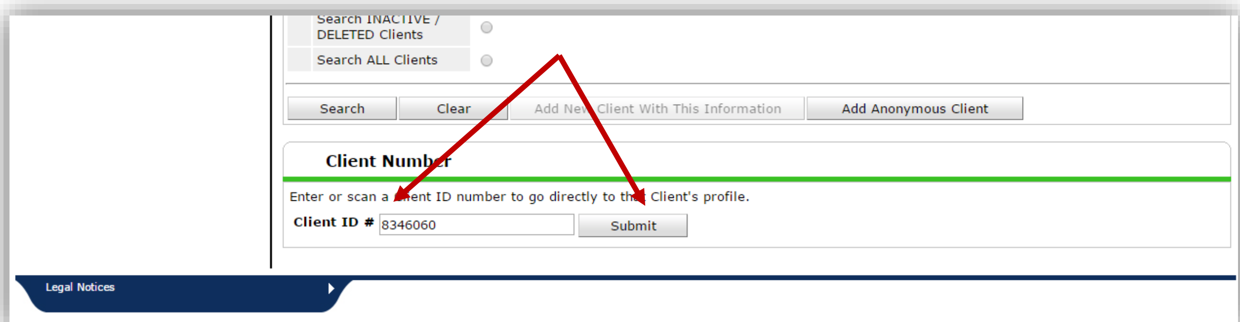

FIGURE 1

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

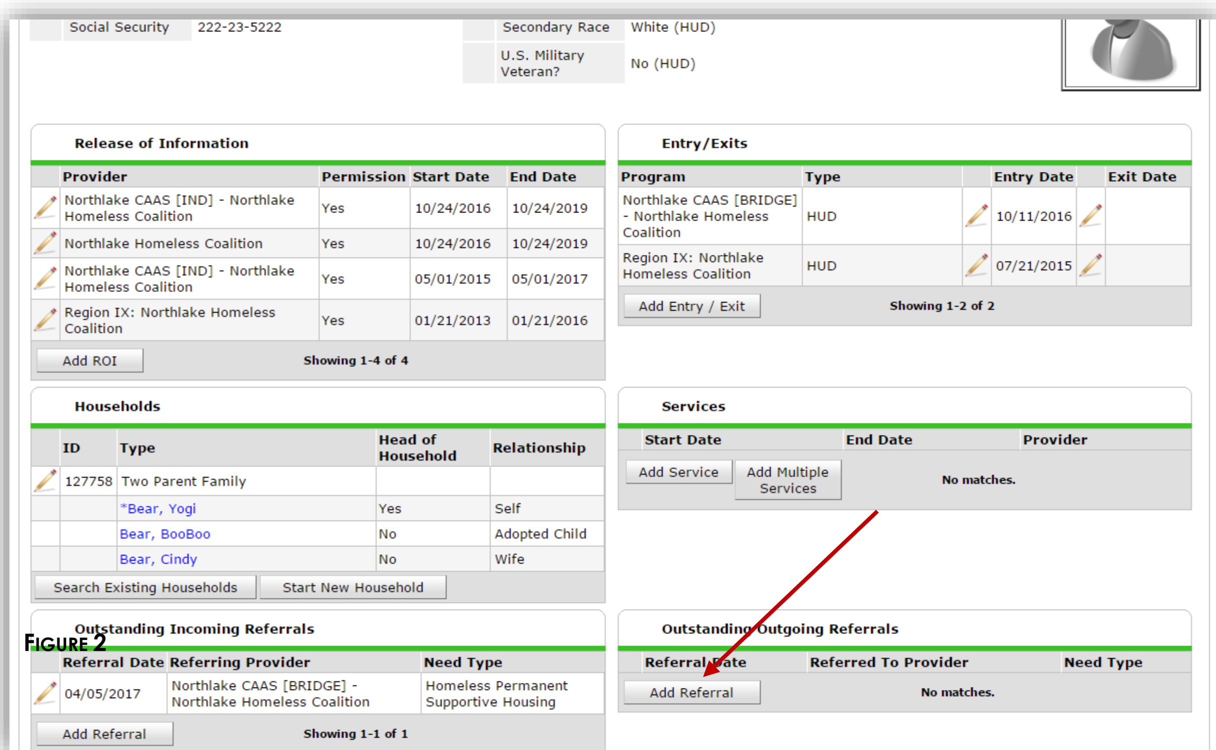

FIGURE 2

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].

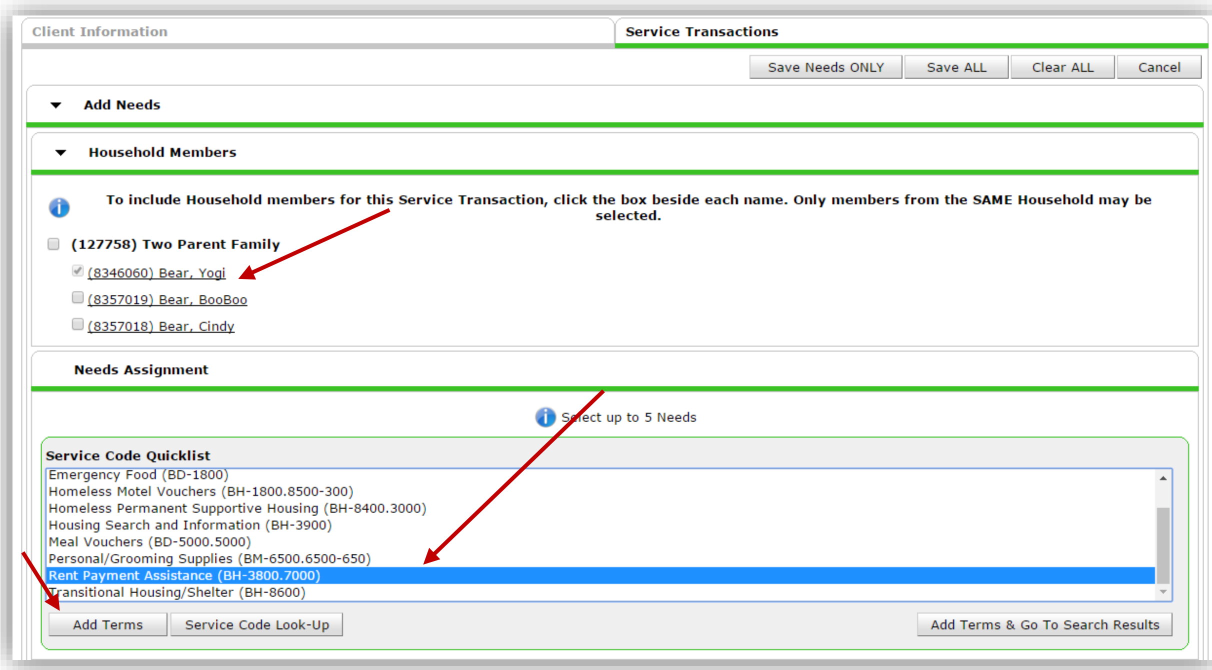

FIGURE 3

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].

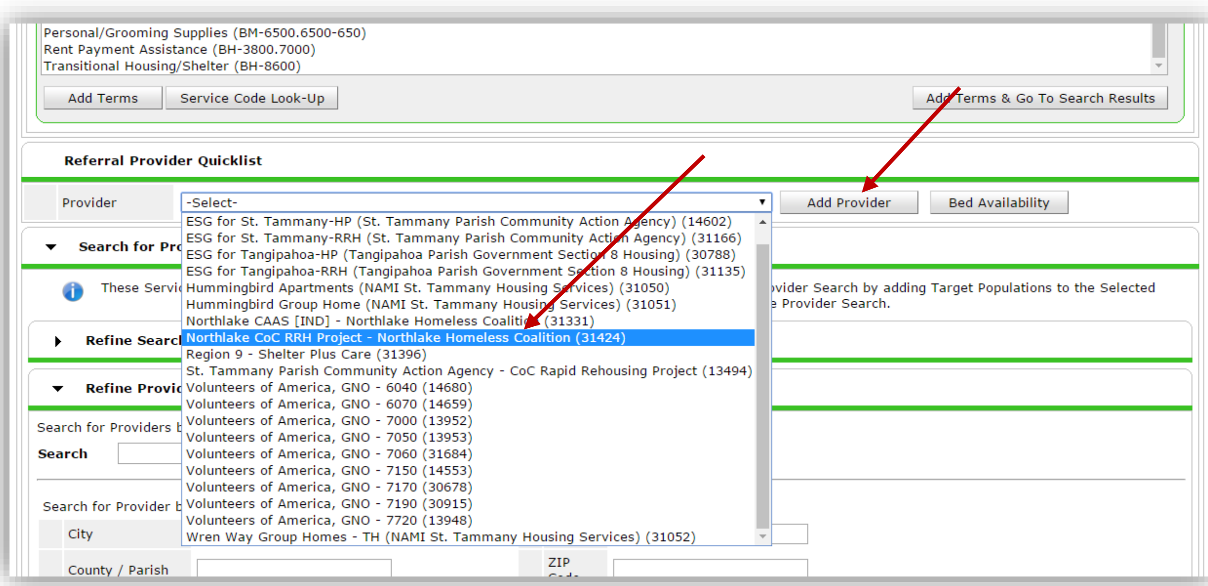

FIGURE 4

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], <u>AND</u> the **staff person** assigned to monitor the referrals records.

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

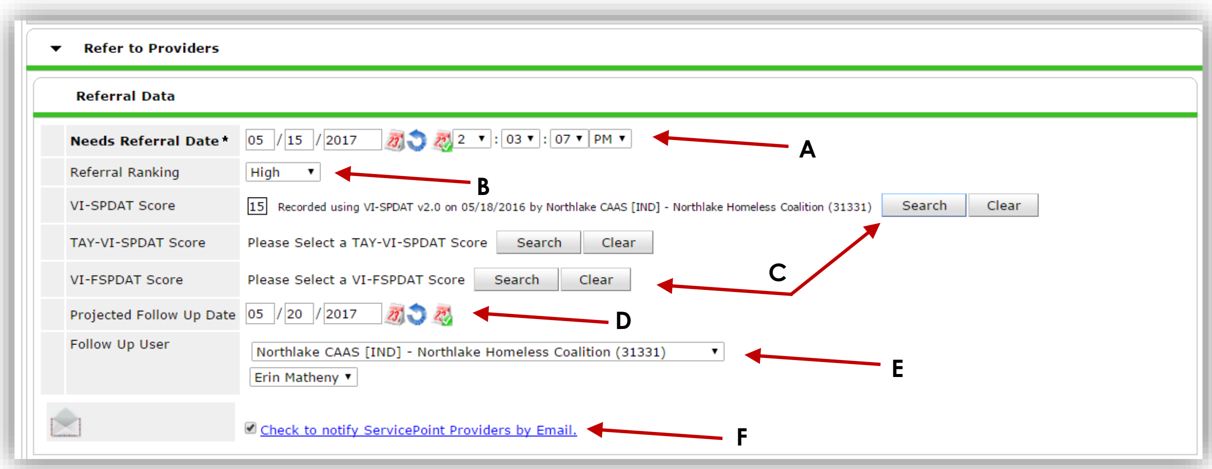

Figure 5

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].

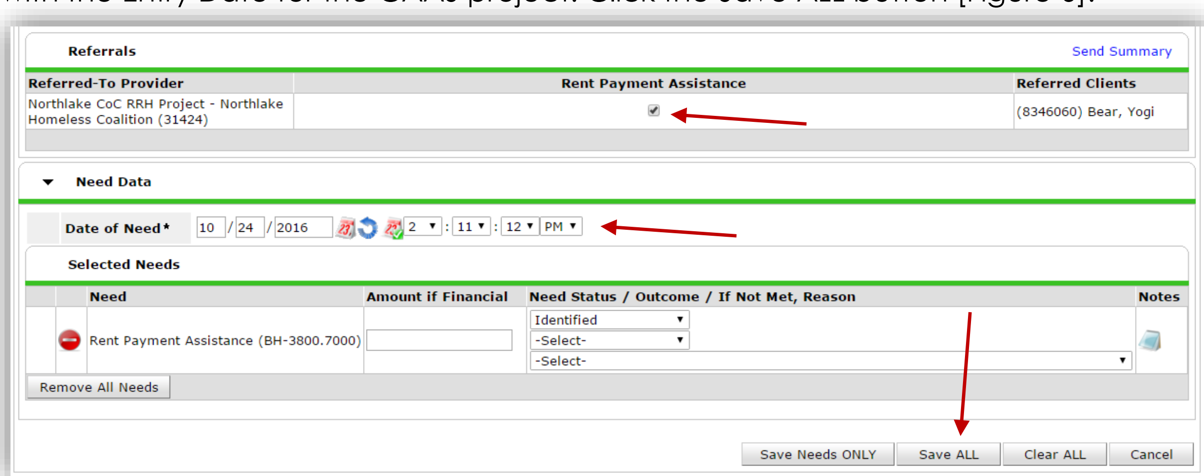

Figure 6

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].

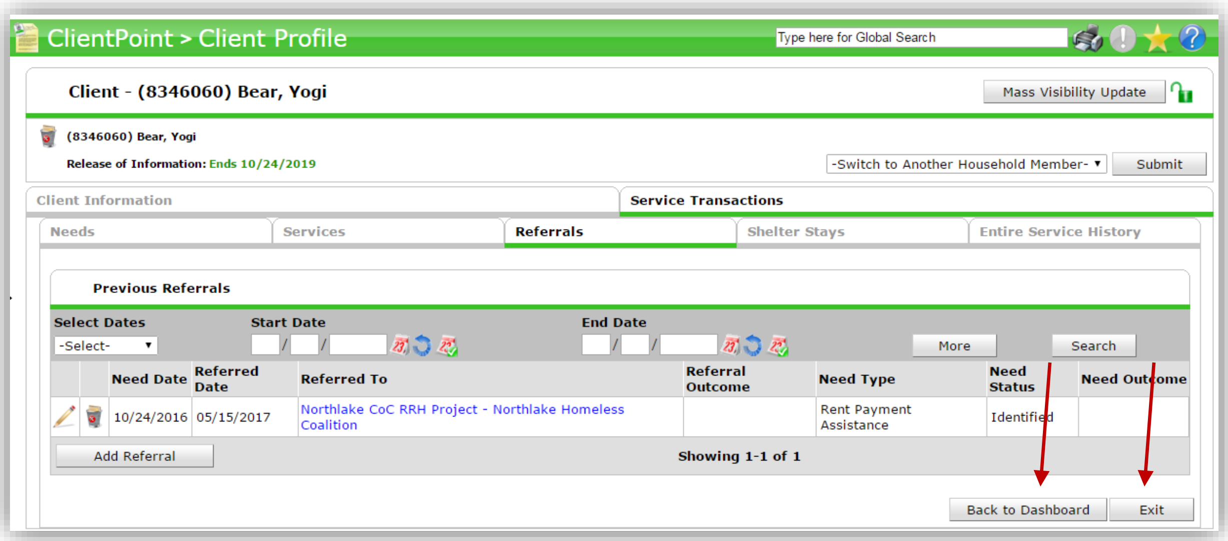

FIGURE 7