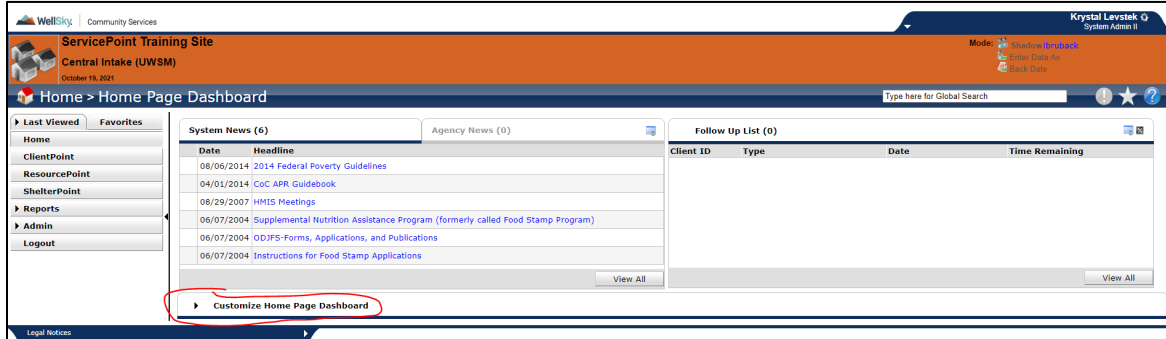


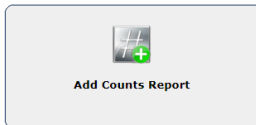
Finding and Accepting Referrals from Central Intake (Non-ShelterPoint Users)

Log into ServicePoint and view your Dashboard.

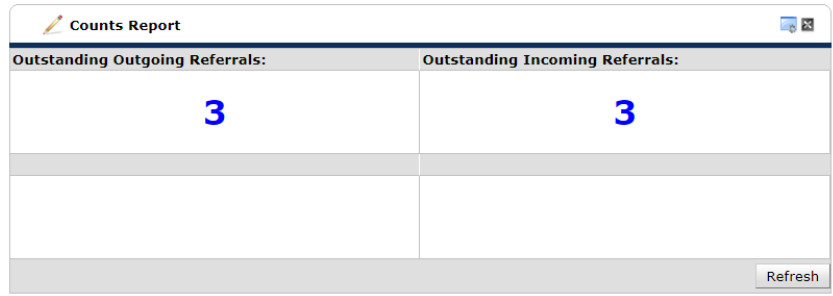
1. You will need to customize your dashboard to show referrals.



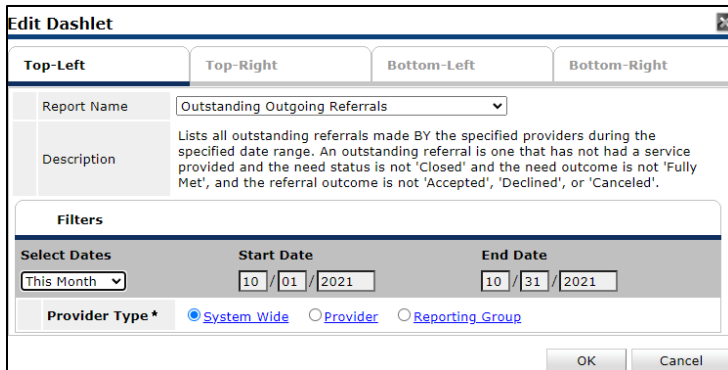
2. Select **Add Count Reports**



3. Add **Incoming Referrals** and **Outstanding Incoming Referrals** for (your program) using the pencil.

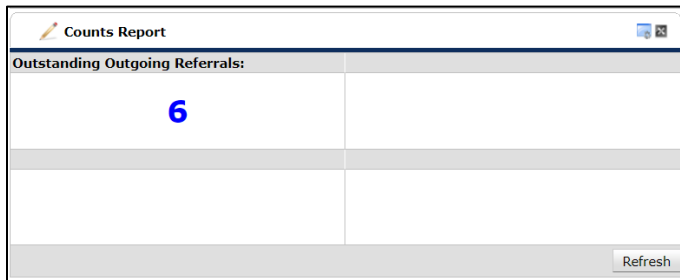


4. You can select to see these referrals by day, week, month, or quarter. Monthly is recommended based on the time (a few weeks), it can take to service a persons need.



5. You will want to have the *Follow Up List*, and *Count Reports* visible on your Homepage.

- Each individual client in a household will appear as an “outstanding referral” until it is addressed.

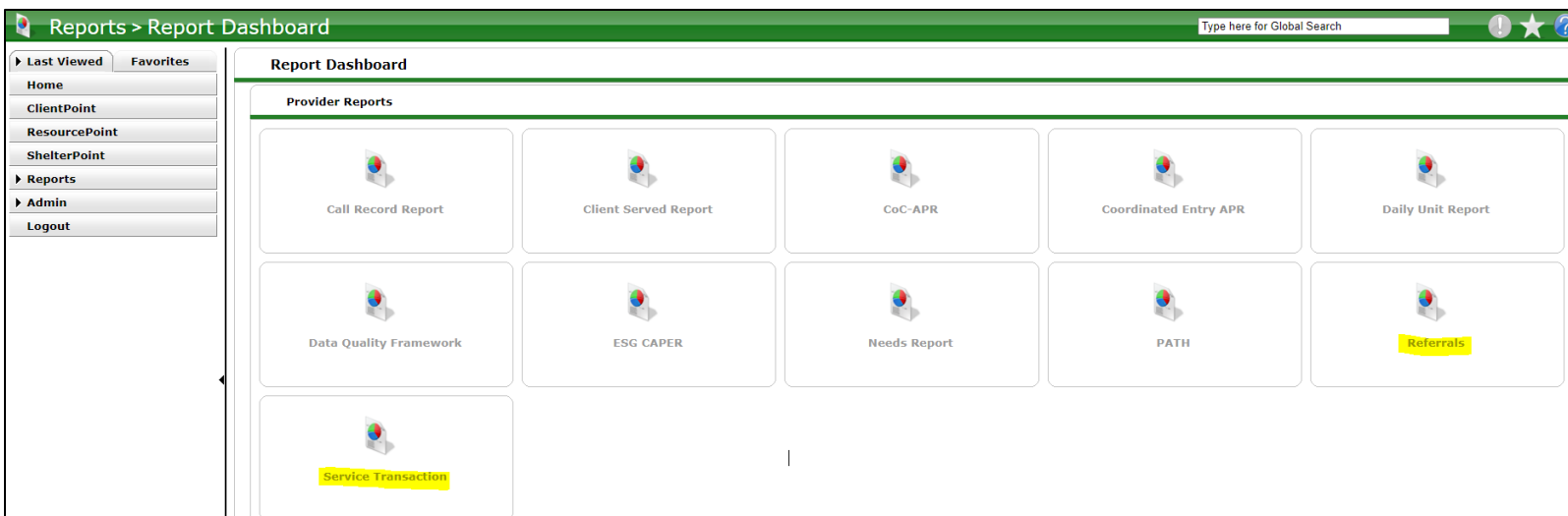


Counts Report	
Outstanding Outgoing Referrals:	
6	
Refresh	

Partners can also Customize their Dashboards to keep track of incoming and outstanding referrals on their homepage by various time frames, and by program.

Where else can Partners find referrals?

In the Reports Tab, there are two main reports that will help you keep track of referrals: *Service Transactions* and *Referrals Report*.



The screenshot shows the 'Reports > Report Dashboard' interface. On the left is a navigation menu with options: Last Viewed, Favorites, Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, and Logout. The main area is titled 'Report Dashboard' and contains a grid of report tiles under the heading 'Provider Reports'. The tiles are: Call Record Report, Client Served Report, CoC-APR, Coordinated Entry APR, Daily Unit Report, Data Quality Framework, ESG CAPER, Needs Report, PATH, and Referrals (highlighted in yellow). A 'Service Transaction' tile is also visible at the bottom left.

To look for unserved needs and referrals you can run separate reports or run a *Service Transactions* report to show both together.

Service Transactions Report Example:

Report Options

Provider * Central Intake (UWSM) (144)

Provider Search Type * The selected provider ONLY

Services *

Needs Entered by my provider

Services Provided by my provider (Non-shelter stays)

Shelter Stays provided by my provider

Needs Referred to my provider

Referrals Made by my provider

Service Code Basic Needs (B)

Need Date Range 10 / 18 / 2021 10 / 19 / 2021

Service Provided Date Range 10 / 18 / 2021 10 / 19 / 2021

Need Outcome -All-

1. A partner may have multiple Provider options with they have more than one program. Select the correct program and check the boxes of what you wish to see.
2. Enter the Need and Service Date range. (They are normally the same range).
3. Mark the Need outcome as "All" to see all needs and referrals.
4. Click *Build Report*

Report Options

Provider Search Type * - System Wide -

Services *

Needs

Services (Non-shelter stays)

Shelter Stays

Referrals

Service Code Housing/Shelter (BH)

Need Date Range 10 / 19 / 2019 10 / 19 / 2021

Service Provided Date Range 10 / 19 / 2019 10 / 19 / 2021

Need Outcome -All-

Service Transaction						
Need Date	Name	Need Type	Created By	Referred To	Service	Service Provider
10/21/2019		Housing/Shelter	Horizon House II (OMCDC)		Housing/Shelter	Horizon House II (OMCDC)
11/20/2019		Housing/Shelter	Avon St. (OMCDC)		Housing/Shelter	Avon St. (OMCDC)
11/26/2019		Housing/Shelter	Avon St. (OMCDC)		Housing/Shelter	Avon St. (OMCDC)
12/02/2019		Housing/Shelter	Horizon House II (OMCDC)		Housing/Shelter	Horizon House II (OMCDC)
12/03/2019		Housing/Shelter	Cuyahoga St. (OMCDC)		Housing/Shelter	Cuyahoga St. (OMCDC)
12/06/2019		Housing/Shelter	Fox II (OMCDC)		Housing/Shelter	Fox II (OMCDC)
12/17/2019		Housing/Shelter	Avon St. (OMCDC)		Housing/Shelter	Avon St. (OMCDC)
02/11/2020		Housing/Shelter	Cuyahoga St. (OMCDC)		Housing/Shelter	Cuyahoga St. (OMCDC)
04/03/2020		Housing/Shelter	Fox II (OMCDC)		Housing/Shelter	Fox II (OMCDC)

Showing 1-9 of 9

5. This report will tell you the client, their need and which program they were referred to. Select a client to open their referral/need.

Referrals Report Example:

The screenshot shows a web interface for generating a Referrals Report. On the left is a navigation menu with options: Last Viewed, Favorites, Home, ClientPoint, ResourcePoint, ShelterPoint, Reports (selected), Admin, and Logout. The main area is titled 'Report Options' and contains the following fields:

- Provider ***: A dropdown menu set to 'Central Intake (UWSM) (144)'. Below it are two radio buttons: 'This provider AND its subordinates' (unselected) and 'This provider ONLY' (selected).
- Referral Type ***: A dropdown menu set to 'Incoming referrals to provider'.
- Referral Status**: Three radio buttons: 'Outstanding' (unselected), 'Closed' (unselected), and 'ALL' (selected).
- Referral Outcome**: A dropdown menu set to '-All-'.
- Referral Date Range**: Two date input fields (MM/DD/YYYY) with 'Refresh' and 'Clear' icons next to each.
- Sort Order**: A text input field with the placeholder 'Please Select a Sort Order' and 'Select' and 'Clear' buttons.

At the bottom of the 'Report Options' section is an 'Export Report' button.

1. A partner may have multiple Provider options with they have more than one program.
2. Select the Referral type *Incoming referrals to provider*.
3. You can chose to show open, closed, or all referrals for the date range.
4. Enter the Need and Service Date range. (They are normally the same range).
5. Sort order sorts referrals based on your selection. Date is preferred.
6. Click, *Build Report*

Report Results								
Referral Date	Name	Group ID	Ranking	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 10/19/2021 10:28:52 AM	(17) Muppet, Mae	33	Medium	Rapid Re-Housing Programs	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:28:52 AM	(15) Muppet, Elmo	33	Medium	Rapid Re-Housing Programs	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:28:52 AM	(16) Muppet, Louie	33	Medium	Rapid Re-Housing Programs	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	(13) Julio, Coco	36	Medium	Emergency Shelter	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	(12) Julio, Hector	36	Medium	Emergency Shelter	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	(14) Rivera, Miguel	36	Medium	Emergency Shelter	Central Intake (UWSM)	ACCESS, Inc.		

Select ALL Clear Showing 1-6 of 6

Update Referral Outcome

The results will list: the date the referral was created, who made the referral, to where and what the outcome is.

Click on the client’s name to update the referral or you can select multiple check boxes and Select, *Update Referral Outcomes*.

Servicing a Referral

Go to the Client Record by clicking on the referral in your Dashboard.

Program	Type	Project Start Date	Exit Date
Central Intake (UWSM)	HUD	10/19/2021	
Central Intake (UWSM)	HUD	10/18/2021	10/18/2021

1. Go to the “Service Transaction” Tab on the client record of the Head of Household of the family.
2. Select “View Service History”

Service Transaction Dashboard

View Entire Service History

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	11/04/2021	Central Intake (UWSM)	Emergency Shelter	Identified	
Need	11/03/2021	Summit County Continuum of Care	Housing/Shelter	Identified / Not Met	

3. To *Service a Referral*, click on the “Key” next to the need.
4. Select all the *Service Type* to fill the *Need* from the dropdown box and click “Save & Continue”.

5. Start the date of Service and enter in any Service notes.

Edit Service

▼ **Household Members**

This Client is not a member of any Households.

Service Provider* Central Intake (UWSM) (144)

Creating User: Krystal Levstek

Start Date* 11/10/2021 3:43:30 PM

End Date 11/10/2021 3:43:30 PM

Service Type* Homelessness Prevention Programs (BH-0500.3140)

Provider Specific Service: -Select-

Service Notes:

6. You can also update any support documentation.

7. Update *Follow up* Information and *Need* Information to *Closed* and *Fully Met*.

8. Save and Exit.

Support Documentation

Date Added	Name	Description	Type
Add Support Documentation			
No matches.			

Follow Up Information

Projected Follow Up Date: 11/11/2021

Follow Up User: Central Intake (UWSM) (144)

Follow Up Made: Yes

Completed Follow Up Date: 11/10/2021

Need Information

Need Status* Closed

Outcome of Need: Fully Met

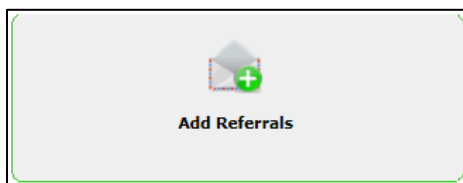
If Need is Not Met, Reason: -Select-

Save Save & Exit Exit

The Need and Service will be completed and recorded.

Adding Referrals without an identified Need

9. Click on *Add Referrals*



10. Select all members of the family that are a part of the referral.

11. Select a Service code that would address the clients need, Click *Add Terms*.

▼ Household Members

i To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected.

(5) Grandparent(s) and Child

(13) Julio, Coco

(12) Julio, Hector

(14) Rivera, Miguel

Needs Assignment

i Select up to 5 Needs

Service Code Quicklist

Case/Care Management (PH-1000)
Emergency Shelter (BH-1800)
Homelessness Prevention Programs (BH-0500.3140)
Homeless Permanent Supportive Housing (BH-8400.3000)
Rapid Re-Housing Programs (BH-0500.7000)
Transitional Housing/Shelter (BH-8600)

Add Terms Service Code Look-Up **Add Terms & Go To Search Results**

Referral Provider Quicklist

Provider: **Add Provider**

Selected Providers

Provider	Type	Phone	Location	Last Updated
ACCESS, Inc.	Level 2	330-535-2999	Akron, OH 44303	07/19/2021

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▼ Refer to Providers

Referral Data

Needs Referral Date* AM

Referral Ranking:

Projected Follow Up Date:

Follow Up User:

Check to notify ServicePoint Providers by Email.

12. Select a Provider. This is a program underneath your partner umbrella.

13. Complete the Referral Data with a *Follow up Date* and *Assign* who will follow up .

14. Make sure all family members are marked to receive the referral. Select **Save All** to send the referral.

Referrals
Send Summary

Referred-To Provider	Emergency Shelter	Referred Clients
ACCESS, Inc. (7)	<input checked="" type="checkbox"/>	(12) Julio, Hector
	<input checked="" type="checkbox"/>	(14) Rivera, Miguel
	<input checked="" type="checkbox"/>	(13) Julio, Coco

Need Data

Date of Need* / / : : AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Emergency Shelter (BH-1800)	<input type="text"/>	Identified -Select- -Select-	

15. The referral will appear under the Referrals tab. All referral history of the client will be found here.

Client Information
Service Transactions

Needs
Services
Referrals
Shelter Stays
Entire Service History

Previous Referrals

Select Dates Start Date / / End Date / /

	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
	10/19/2021	10/19/2021	ACCESS, Inc.		Emergency Shelter	Identified	
	10/18/2021	10/18/2021	Central Intake (UWSM)	Accepted	At Risk/Homeless Housing Related Assistance Programs	Identified	Service Pending

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Each Client will appear as an “Outstanding Referral” until it is addressed with a *Service*.