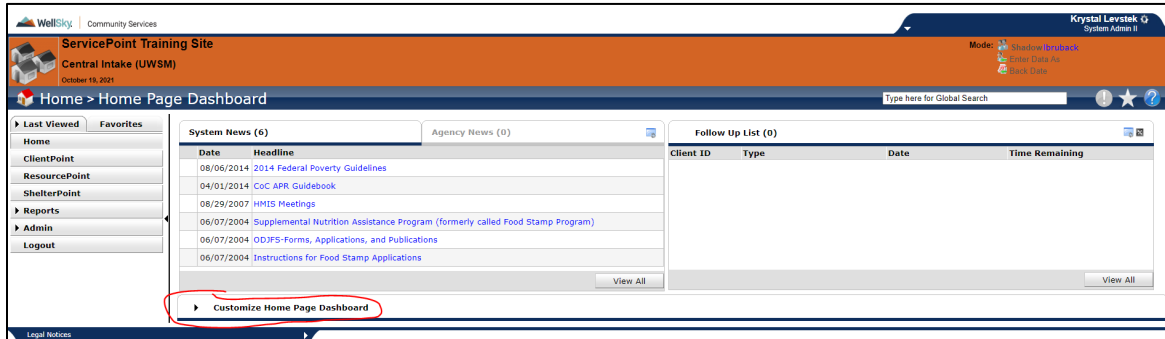


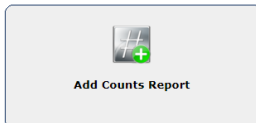
## Finding and Accepting Referrals in Shelter Pointe from Central Intake

Log into ServicePoint and view your Dashboard.

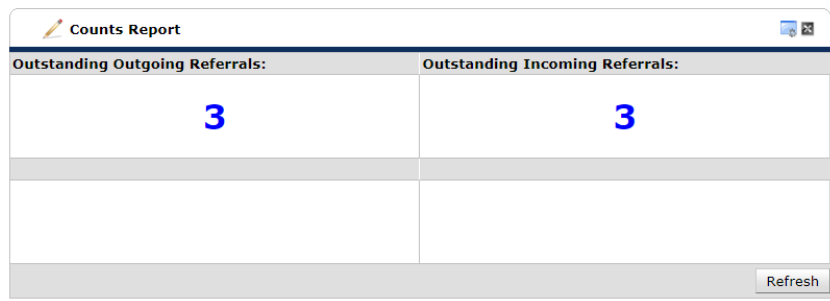
1. Customize your dashboard to show referrals, Using the Customize tab.



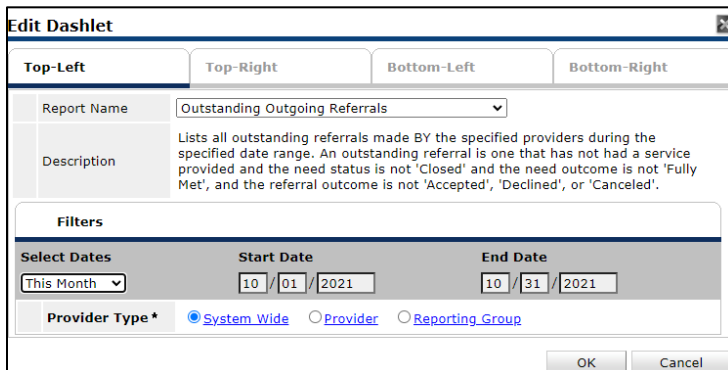
2. Select, *Add Count Reports*



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

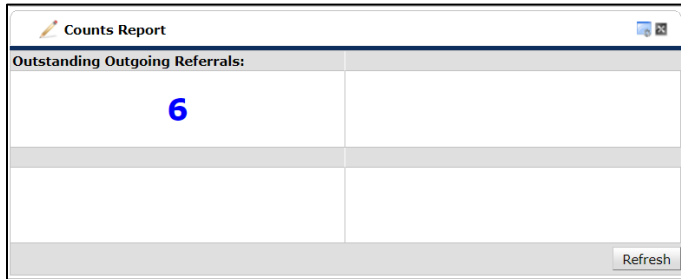


4. You can select to see these referrals by day, week, month, or quarter. Monthly is recommended based on the time (a few weeks), it can take to service a person's need.



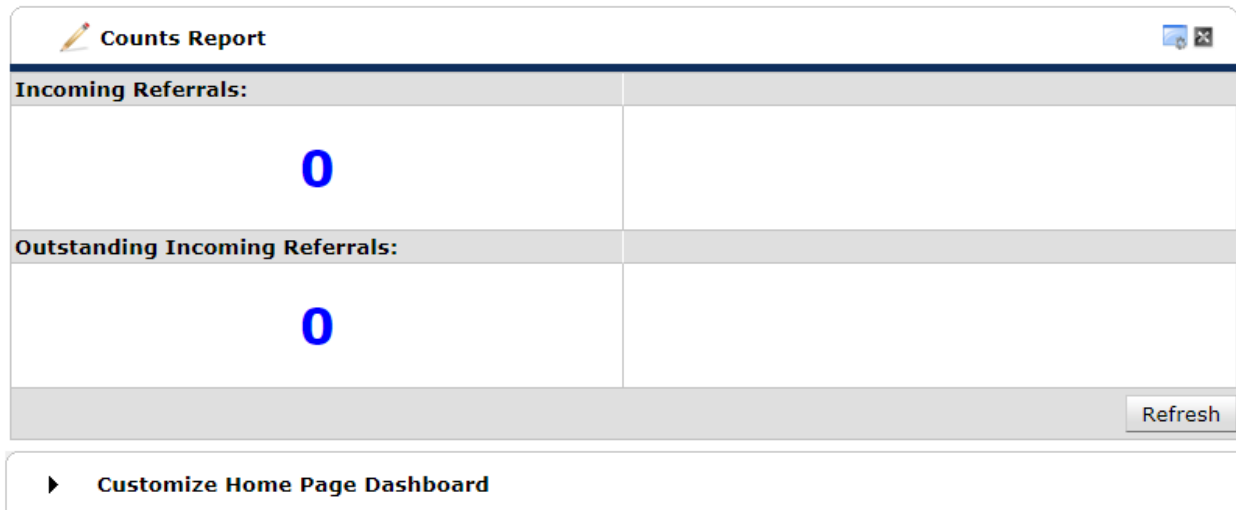
5. You will want to have the *Follow Up List*, and *Count Reports* visible on your Homepage.

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



Counts Report	
<b>Outstanding Outgoing Referrals:</b>	
6	
	Refresh

Partners can also customize their dashboards to keep track of incoming and outstanding referrals on their homepage, along with other stats.



Counts Report	
<b>Incoming Referrals:</b>	
0	
<b>Outstanding Incoming Referrals:</b>	
0	
	Refresh

► **Customize Home Page Dashboard**

**Where ShelterPoint partners can find and Service referrals:**

1. Partners using *ShelterPoint* will select their "Unit list" and submit.
2. They will then select "Check-In Referral" to see their referral list.
3. Click on the bed next to the client's name to serve them.
4. Select all of those in the Household and assign them beds individually.
5. In the same window, Click on the pencil and complete the *Coordinated Entry Event*, by updating the referral information.
6. Be sure to update the need status as "Completed" to close the referral at the bottom of the check in window.

**View Shelter Inventory**

Provider\*

Unit List\*

Type

---

**ShelterPoint Dashboard**

Check Client In

Check In Reservation

Check In Referral

Hold ALL Empty Beds

Print ID Cards

Update Confirmation List

Transmit Today's Check Out List

View All

▼ Outstanding Referrals - ACCESS, Inc. (7) - 4 total

Referral Date ▼	Name	Ranking	Need Type	Referred By	Date of Birth	Gender	Group ID
11/05/2021	(6) Addams, Gomez	Medium	Emergency Shelter	Central Intake (UWSM) (144)	10/31/1958		1
11/05/2021	(5) Addams, Morticia	Medium	Emergency Shelter	Central Intake (UWSM) (144)	10/31/1975		1
11/05/2021	(8) Addams, Pugsly	Medium	Emergency Shelter	Central Intake (UWSM) (144)	10/31/2001		1
11/05/2021	(7) Addams, Wednesday	Medium	Emergency Shelter	Central Intake (UWSM) (144)	10/31/1999		1

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**Coordinated Entry Event**

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
11/10/2021	11/10/2021	Referral to Emergency Shelter bed opening		

Showing 1-1 of 1

**If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:**

Referral Result

**If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:**

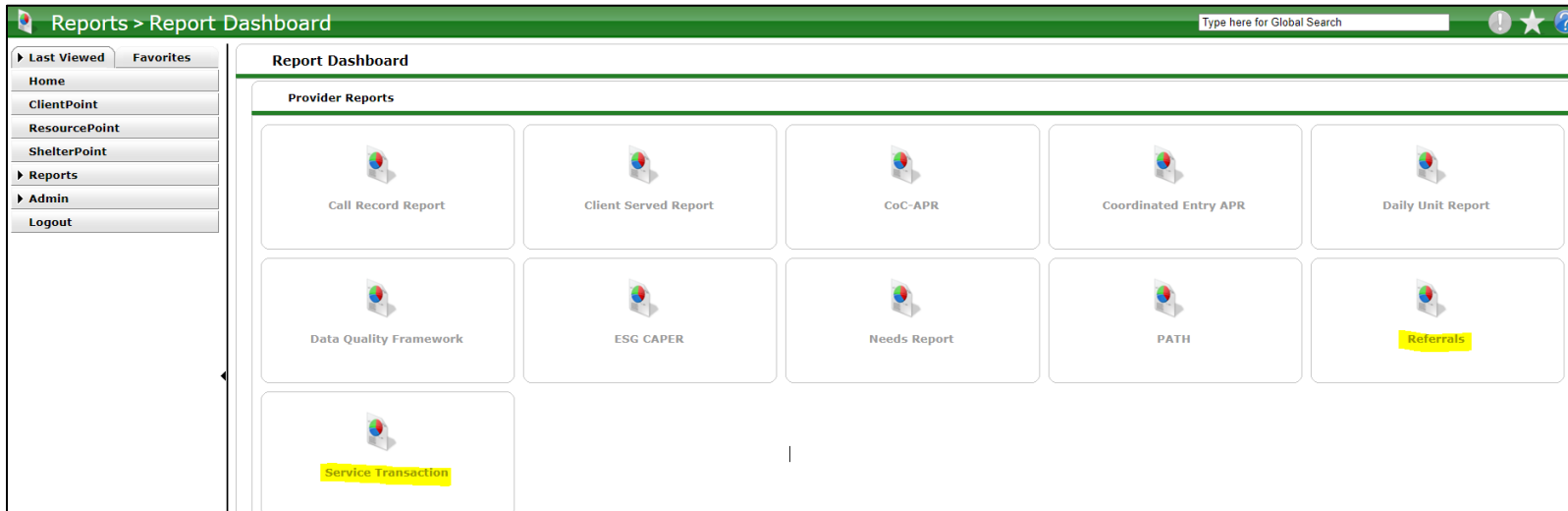
Date of Result / /

**Services**

Number	Service	Need Status
<input type="text" value="1"/>	Emergency Shelter (BH-1800)	<input type="text" value="Completed"/>

## 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*.



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 *	<input type="checkbox"/> Needs Entered by my provider <input type="checkbox"/> Services Provided by my provider (Non-shelter stays) <input type="checkbox"/> Shelter Stays provided by my provider <input checked="" type="checkbox"/> Needs Referred to my provider <input checked="" type="checkbox"/> Referrals Made by my provider
Service Code	Basic Needs (B) <input type="button" value="Choose Service Code"/> <input type="button" value="Clear"/>
Need Date Range	10 / 18 / 2021 <input type="button" value="🔄"/> <input type="button" value="📅"/> 10 / 19 / 2021 <input type="button" value="🔄"/> <input type="button" value="📅"/>
Service Provided Date Range	10 / 18 / 2021 <input type="button" value="🔄"/> <input type="button" value="📅"/> 10 / 19 / 2021 <input type="button" value="🔄"/> <input type="button" value="📅"/>
Need Outcome	-All- ▼
<input type="button" value="Build Report"/> <input type="button" value="Download Results"/>	

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\*

Services\*  Needs  
 Services (Non-shelter stays)  
 Shelter Stays  
 Referrals

Service Code

Need Date Range

Service Provided Date Range

Need Outcome

---

**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)

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- 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:**

**Reports > Referrals**

**Report Options**

Provider\*

This provider AND its subordinates  This provider ONLY

Referral Type\*

Referral Status  Outstanding  Closed  ALL

Referral Outcome

Referral Date Range

Sort Order

- A partner may have multiple Provider options with they have more than one program.
- Select the Referral type *Incoming referrals to provider*.
- You can chose to show open, closed, or all referrals for the date range.
- Enter the Date range.
- Sort order sorts referrals based on your selection. Date is preferred.
- 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	<a href="#">(17) Muppet, Mae</a>	33	Medium	<a href="#">Rapid Re-Housing Programs</a>	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:28:52 AM	<a href="#">(15) Muppet, Elmo</a>	33	Medium	<a href="#">Rapid Re-Housing Programs</a>	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:28:52 AM	<a href="#">(16) Muppet, Louie</a>	33	Medium	<a href="#">Rapid Re-Housing Programs</a>	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	<a href="#">(13) Julio, Coco</a>	36	Medium	<a href="#">Emergency Shelter</a>	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	<a href="#">(12) Julio, Hector</a>	36	Medium	<a href="#">Emergency Shelter</a>	Central Intake (UWSM)	ACCESS, Inc.		
<input type="checkbox"/> 10/19/2021 10:53:20 AM	<a href="#">(14) Rivera, Miguel</a>	36	Medium	<a href="#">Emergency Shelter</a>	Central Intake (UWSM)	ACCESS, Inc.		

Select ALL Clear

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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*.