

## 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.

ServicePoint Training Site  
Central Intake (UWSM)  
October 19, 2021

Home > Home Page Dashboard

System News (6)

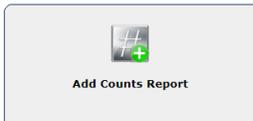
Date	Headline
08/06/2014	2014 Federal Poverty Guidelines
04/01/2014	COC APR Guidebook
08/29/2007	HMIS Meetings
06/07/2004	Supplemental Nutrition Assistance Program (formerly called Food Stamp Program)
06/07/2004	ODJFS-Forms, Applications, and Publications
06/07/2004	Instructions for Food Stamp Applications

Follow Up List (0)

Client ID	Type	Date	Time Remaining
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Customize Home Page Dashboard

2. Select, *Add Count Reports*



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

Counts Report

Outstanding Outgoing Referrals:	Outstanding Incoming Referrals:
3	3

Refresh

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.

Edit Dashlet

Top-Left | Top-Right | Bottom-Left | Bottom-Right

Report Name: Outstanding Outgoing Referrals

Description: Lists all outstanding referrals made BY the specified providers during the specified date range. An outstanding referral is one that has not had a service provided and the need status is not 'Closed' and the need outcome is not 'Fully Met', and the referral outcome is not 'Accepted', 'Declined', or 'Canceled'.

Filters

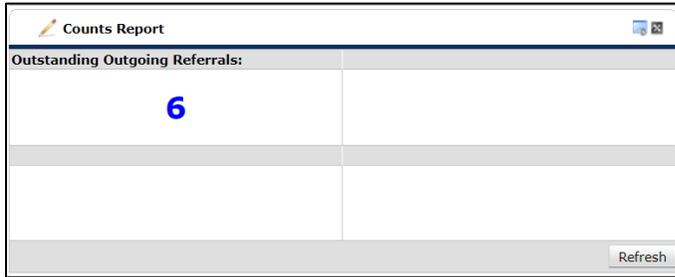
Select Dates: This Month | Start Date: 10/01/2021 | End Date: 10/31/2021

Provider Type\*:  System Wide  Provider  Reporting Group

OK | Cancel

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.

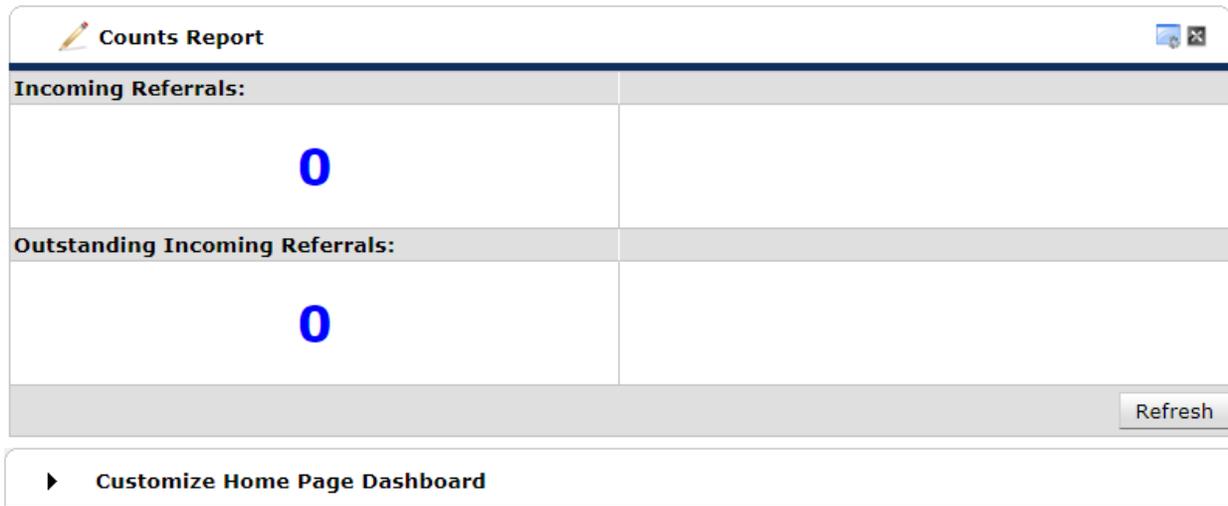


A screenshot of a web application window titled "Counts Report". The window contains a table with the following structure:

Outstanding Outgoing Referrals:	
6	

At the bottom right of the table area, there is a "Refresh" button.

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



A screenshot of a web application window titled "Counts Report". The window contains a table with the following structure:

Incoming Referrals:	
0	
Outstanding Incoming Referrals:	
0	

At the bottom right of the table area, there is a "Refresh" button.

Below the table, there is a link: [▶ 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

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**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		

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**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:**

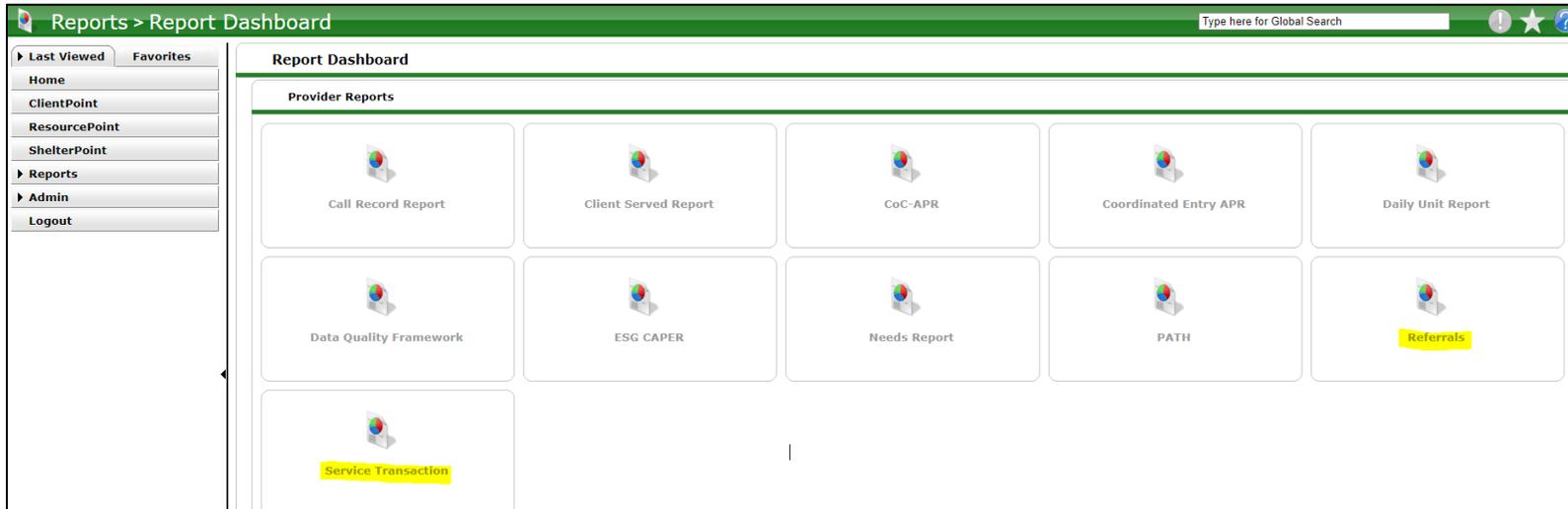
Date of Result / /

**Services**

Number	Service	Need Status
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) <input type="button" value="v"/>
Provider Search Type *	The selected provider ONLY <input type="button" value="v"/>
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="23"/> <input type="button" value="23"/> <input type="button" value="23"/> 10 / 19 / 2021 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>
Service Provided Date Range	10 / 18 / 2021 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/> 10 / 19 / 2021 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>
Need Outcome	-All- <input type="button" value="v"/>
<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

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**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*.