

*ClientPoint*TM

Coordinated Entry

Workflow for

Coordinated Entry







Provider

Once you have completed the Entry Assessment and the VI-SPDAT or VI-FSPDAT, proceed to the “Services Transactions” Tab

Release of Information: March 4, 2011

Client Information Service Transactions

Service Transaction Dashboard


| | | | |
|---|--|---|---|
|  Add Need |  Add Service |  Add Multiple Services |  Add Referrals |
|  View Previous Service Transactions |  View Entire Service History | <p>Use the Dashboard to quickly add needs, services or referrals or to view the client’s historical records.</p> | |




In ServicePoint, Clients must have **Needs** diagnosed in order for the end user to add services to the record. From there you can add a referral.

Add Referral

Adding a referral will automatically generate the need.








Client - (12973) Salud, Mariano 

 (12973) Salud, Mariano
Release of Information: **None**

-Switch to Another Household Member-

Client Information **Service Transactions**

Service Transaction Dashboard

| | | | | |
|---|--|--|--|---|
|  Add Need |  Add Service |  Add Multiple Services |  Add Referrals |  View Previous Service Transactions |
|  View Shelter Stays |  View Entire Service History | | | |

Adding A Referral

1. Select the Entire Household

2. Select “Housing/Shelter” Need from Service Code Quicklist

3. Add Terms

Household Members

To include Household members for this Service Transaction, click the box beside each name.

(1) Female Single Parent

(2) [King, Tiffany](#)

(3) [King, Cody](#)

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Case/Care Management (PH-1000)
- Food Vouchers (BD-1800.2250)
- Homeless Motel Vouchers (BH-1800.8500-300)
- Housing Search Assistance (BH-3900.3100)
- Housing/Shelter (BH)**
- Local Transit Passes (BT-8500.1000)
- Medical Care Expense Assistance (LH-5100.5000)
- Medical Care Expense Assistance (LH-5100.6500)

Referral Provider Quicklist

Provider:

Search for Providers

These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider by modifying the Service Terms used for the Prov

Refine Search with Service Terms or Target Populations

Adding A Referral

1. Choose either “Family Priority List” or “Single Adult Priority List” in the Referral Provider Quicklist
2. Once selected, “Add Provider”

PRESCRIPTION EXPENSE ASSISTANCE (LIT 0100.0000)

Add Terms Service Code Look-Up

Referral Provider Quicklist

Provider -Select-

Search for Providers

These Service Terms were used as Search Criteria. If necessary, use this area to perform another search by modifying the Service Terms used.

Refine Search with Service Terms or Target Populations

Refine Provider Search Criteria

Search for Providers by

Search

Search for Provider by

State

ZIP Code

Family Priority List (313)

Add Provider

| |
|---|
| -Select- |
| -Select- |
| Anna's House Emergency Shelter (265) |
| Anna's House Permanent Housing II (18) |
| Anna's House Perm I (17) |
| Anna's House PSH IV Chronic (284) |
| Anna's House Transitional Housing (16) |
| Answered Prayers Ministry (276) |
| CoC PSH (S+C) (46) |
| Family Priority List (313) |
| FCCAU, Inc. (22) |
| Harford Community Action Agency RRH (287) |
| Harford County Housing Agency (32) |
| Harford Family House Permanent Supportive Housing (6) |
| Harford Family House Transitional Housing (4) |
| Harmony House (277) |
| Single Adult Priority List (314) |
| UB PSH I Chronic (281) |
| United Way PSH I Chronic (13) |

Adding A Referral

1. Set "Needs Referral Date" to same date as the Service Date.
2. Referral Ranking is optional Search and
3. Select a VI-SPDAT or VI-FSPDAT Score to accompany the referral

The screenshot shows a web application interface for adding a referral. The interface is divided into several sections:

- Provider List:** A list of providers including Affinity Old Post Apartments, Anna's House Emergency Shelter, Anna's House Permanent Housing II, Anna's House Perm I, Anna's House PSH IV Chronic, Anna's House RRH, Anna's House Transitional Housing, Burton Manor, CoC PSH (S+C), and Coordinated Access.
- Selected Providers:** A section showing the selected provider, Family Priority List.
- Household Members:** A section showing household members: (3) King, Cody (Age: 13) and (2) King, Tiffany (Age: 32).
- VI-SPDAT v2.0 Table:** A table with columns: Provider, Start Date, PRE-SURVEY, and A. HISTC HOUSING HOMELE. The table contains one row: Coordinated Access (65), 04/30/2018, 0, 1.
- Referral Data Form:** A form with fields for Needs Referral Date (04 / 30 / 2018), Referral Ranking (High), VI-SPDAT Score (Please Select a VI-SPDAT Score), and VI-FSPDAT Score (Please Select a VI-FSPDAT Score). The 'Needs Referral Date' field is highlighted with a red box.

An arrow points from the 'Needs Referral Date' field in the 'Referral Data' form to the 'Coordinated Access (65)' provider in the 'VI-SPDAT v2.0' table.

Adding A Referral

1. Put a under Housing/Shelter for each family member in Referred to Provider
2. Date of Need should reflect Date of Service
3. Need Status will remain Identified/Status Pending
4. There is an optional note section that can be used
5. Save All

Follow Up User: Coordinated Access (65)

[Check to notify ServicePoint Providers by Email.](#)

Referrals [Send Summary](#)

| Referred-To Provider | Housing/Shelter | Referred Clients |
|----------------------------|-------------------------------------|-------------------|
| Family Priority List (313) | <input checked="" type="checkbox"/> | (3) King, Cody |
| | <input checked="" type="checkbox"/> | (2) King, Tiffany |

▼ **Need Data**

Date of Need * 04 / 30 / 2018 12 : 00 : 00 PM

Selected Needs

| Need | Amount if Financial | Need Status / Outcome / If Not Met, Reason | Notes |
|--|----------------------|--|----------------------------------|
| <input type="button" value="🗑️"/> Housing/Shelter (BH) | <input type="text"/> | Identified <input type="button" value="▼"/> Service Pending <input type="button" value="▼"/> -Select- <input type="button" value="▼"/> | <input type="button" value="📝"/> |

Adding A Referral

A referral has now been created for this Need/Service

Client - (2) King, Tiffany

(2) King, Tiffany

Release of Information: Ends 04/30/2019

[-Switch to Another Household](#)

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Ser

All Service Transactions

Select Dates










Start Date

End Date

-Select-

/ /

/ /

| | Transaction Type | Date | Provider | Type | Need Status / Outcome |
|---|------------------|------------|-------------------------------------|----------------------|------------------------------|
|    | Need | 04/30/2018 | Coordinated Access | Housing/Shelter | Identified / Service Pending |
|   | Referral | 04/30/2018 | Family Priority List | Housing/Shelter | |
|   | Service | 04/30/2018 | Coordinated Access | Housing/Shelter | |
|    | Need | 03/26/2018 | United Way Family Stability Program | Case/Care Management | Closed / Fully Met |
|   | Service | 03/26/2018 | United Way Family Stability Program | Case/Care Management | |

Showing 1-2 of 2

Working with the Priority List

You can now pull a Referrals report that will list all households on the Priority List

The screenshot displays a web dashboard interface. At the top, there is a green header bar labeled "Dashboard". Below this is a section titled "Report Dashboard". The dashboard is organized into two main categories: "Audit Reports" and "Provider Reports".

Audit Reports includes three report options:

- Audit Report
- User Information
- User Login

Provider Reports includes seven report options:

- Annual Homeless Assessment Report (AHAR)
- Call Record Report
- Client Served Report
- Entry/Exit Report
- ESG CAPER (HDS V5)
- Needs Report
- Service Transaction

The "Referrals" report option is highlighted with a green border and a white background, indicating it is the selected report. An arrow from the text on the left points to this "Referrals" report icon.

Working with the Priority List

1. Choose Provider (Family or Single Adult Priority List)
2. Set Referral Type to “incoming referrals to provider”
3. Set Status and Outcomes to “all”
4. Choose date range and Build Report

IS
Type here for Global Search
4

Report Options

Use Previous Parameters

| | | | | | | |
|------------------------|--|--------|----------------|-------|--|--|
| Provider * | Family Priority List (313) | Search | My Provider | Clear | | |
| | <input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY | | | | | |
| Referral Type * | Incoming referrals to provider | | | | | |
| Referral Status | <input type="radio"/> Outstanding <input type="radio"/> Closed <input checked="" type="radio"/> ALL | | | | | |
| Referral Outcome | -All- | | | | | |
| Referral Date Range | 04 / 01 / 2018 | | 06 / 01 / 2018 | | | |
| Sort Order | Please Select a Sort Order | | Select | Clear | | |

Export Report
Build Report
Clear

Report Results

| | Referral Date ▼ | Name | Group ID | Ranking | VI-SPDAT | VI-FSPDAT | Need Type | Referred By | Referred To | Referral Outcome | Need Notes |
|--------------------------|------------------------|-------------------------|----------|---------|----------|-----------|-----------------|--------------------|----------------------|------------------|------------|
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (7) Reynolds, John | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (8) Reynolds, Christine | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (6) Reynolds, Amanda | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 04/30/2018 12:00:00 PM | (2) King, Tiffany | 33 | High | | 6 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 04/30/2018 12:00:00 PM | (3) King, Cody | 33 | High | | 6 | Housing/Shelter | Coordinated Access | Family Priority List | | |

Select ALL
Clear
Showing 1-5 of 5

Update Referral Outcome

Working with the Priority List

1. A list of all persons referred along with their VI-SPDAT or VI-FSPDAT scores will appear along with the referral date.
2. Select name by putting a checkmark in the box and “Update Referral Outcome”
3. Set Referral Outcome to “Accepted on Waitlist” and Save Referral Information
4. The Referral Outcome Column should now say “Accepted on Waitlist”

The screenshot displays a web application interface for managing referrals. At the top, there are filters for 'Referral Type' (Incoming referrals to provider), 'Referral Status' (Outstanding), 'Referral Outcome' (-All-), 'Referral Date Range' (04 / 01 / 20), and 'Sort Order' (Please Select a). Below these filters are buttons for 'Export Report' and 'Build Report'. The main section is titled 'Report Results' and contains a table with the following columns: Referral Date, Name, Group ID, Ranking, VI-SPDAT, VI-FSPDAT, Need Type, Referred By, Referred To, and Referral Outcome. A single row is visible, representing a referral for Margaret Booker, with a checkmark in the selection column. Below the table are buttons for 'Select ALL' and 'Clear', and a status indicator 'Showing 1-1 of 1'. At the bottom, there is a button labeled 'Update Referral Outcome'. A modal dialog box titled 'Update Referral Outcome' is overlaid on the table, showing a message: 'The selected (1) Referral will receive the outcome selected below.' The dialog has a dropdown menu for 'Referral Outcome' set to 'Accepted on Wait List' and buttons for 'Save Referral Information' and 'Exit'.

| Referral Date | Name | Group ID | Ranking | VI-SPDAT | VI-FSPDAT | Need Type | Referred By | Referred To | Referral Outcome |
|----------------------|----------------------|----------|---------|----------|-----------|-----------------|--------------------|----------------------------|-----------------------|
| 5/28/2018 12:00:00 M | (5) Booker, Margaret | | High | 5 | | Housing/Shelter | Coordinated Access | Single Adult Priority List | Accepted on Wait List |

Working with the Priority List

1. When a vacancy occurs you can choose the client to be referred from the Priority List by clicking on their name.
2. Choose the entire household to send as the referral.

IS
Type here for Global Search
4

Report Options

Use Previous Parameters

| | | | | | |
|------------------------|---|---------------------------------------|--|--------------------------------------|--|
| Provider * | Family Priority List (313) | <input type="button" value="Search"/> | <input type="button" value="My Provider"/> | <input type="button" value="Clear"/> | |
| | <input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY | | | | |
| Referral Type * | Incoming referrals to provider ▾ | | | | |
| Referral Status | <input type="radio"/> Outstanding <input type="radio"/> Closed <input checked="" type="radio"/> ALL | | | | |
| Referral Outcome | -All- ▾ | | | | |
| Referral Date Range | 04 / 01 / 2018 | | 06 / 01 / 2018 | | |
| Sort Order | Please Select a Sort Order | | <input type="button" value="Select"/> <input type="button" value="Clear"/> | | |

Report Results

| | Referral Date ▾ | Name | Group ID | Ranking | VI-SPDAT | VI-FSPDAT | Need Type | Referred By | Referred To | Referral Outcome | Need Notes |
|--------------------------|------------------------|---|----------|---------|----------|-----------|---------------------------------|--------------------|----------------------|------------------|------------|
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (7) Reynolds, John | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (8) Reynolds, Christine | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 05/07/2018 12:00:00 PM | (6) Reynolds, Amanda | 14 | High | | 7 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 04/30/2018 12:00:00 PM | (2) King, Tiffany | 33 | High | | 6 | Housing/Shelter | Coordinated Access | Family Priority List | | |
| <input type="checkbox"/> | 04/30/2018 12:00:00 PM | (3) King, Cody | 33 | High | | 6 | Housing/Shelter | Coordinated Access | Family Priority List | | |


Showing 1-5 of 5

Referring From Priority List for a Vacancy

From the client's record, go to the Service Transactions tab and select "Add Referrals"







Profile Type here for Global Search

Client - (2) King, Tiffany

 (2) King, Tiffany
Release of Information: **None** -Switch to Another H

Client Information Service Transactions

Service Transaction Dashboard

| | | | |
|---|--|--|--|
|  Add Need |  Add Service |  Add Multiple Services |  Add Referrals |
|  |  | | |

Referring From Priority List for a Vacancy

1. Repeat the “Adding a Referral” Process only this time when selecting a provider, choose the project(s) with the vacancy.

2. You may choose multiple providers to refer to.

| Search Results | | | | | | | | | | | | | | | | |
|----------------|----------|--|---|---|---|---|---|---|---|---|---|---------|--------------|---|---|---|
| # | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
| | Provider | | | | | | | | | | | Type | Phone | | | |
| | | ESG Homecoming Project, Inc. RRH | | | | | | | | | | Level 3 | 410.399.2904 | | | |
| | | Family Priority List | | | | | | | | | | Level 3 | 443-456-3629 | | | |
| | | FCCAU-Havens of Hope | | | | | | | | | | Level 3 | 410.272.2229 | | | |
| | | FCCAU, Inc. | | | | | | | | | | Level 2 | 410.272.2229 | | | |
| | | The Graw | | | | | | | | | | Level 2 | 410-939-2736 | | | |
| | | Harford Community Action Agency | | | | | | | | | | Level 2 | 443-456-3629 | | | |
| | | Harford County Housing Agency | | | | | | | | | | Level 2 | 410-638-3045 | | | |
| | | Harford County Housing Agency-RRH | | | | | | | | | | Level 2 | 410-638-3045 | | | |
| | | Harford Family House | | | | | | | | | | Level 2 | 410-273-6700 | | | |
| | | Harford Family House - Emergency Shelter | | | | | | | | | | Level 3 | 410-273-6700 | | | |

Bed Availability Showing 1








| Selected Providers | | | | | | |
|--------------------|------------|---|--|------|---------|-------|
| | Provider ▲ | | | Type | Phone | |
| | | Anna's House Emergency Shelter | | | Level 3 | 410-8 |
| | | Harford Community Action Agency RRH | | | Level 3 | 443-4 |
| | | Harford Family House Transitional Housing | | | Level 3 | 410-2 |

Show

Referring From Priority List for a Vacancy

1. Set Needs Referral Date to date you are making the referral
2. Select VI-SPDAT/VI-FSPDAT score to accompany referral
3. Set Follow Up date for **a week out (7 days)**
4. Set Follow up User (either Family or Single Adult Priority List)
5. Check to Notify the Provider by Email

servicepoint.com/harfordcounty_training/com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=2

| Referral Data | |
|---|--|
| Needs Referral Date * | 05 / 22 / 2018    12 : 00 : 00 PM |
| Referral Ranking | High |
| VI-SPDAT Score | Please Select a VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/> |
| VI-FSPDAT Score | 6 Recorded using VI-FSPDAT v2.0 on 04/30/2018 by Coordinated Access (65) <input type="button" value="Search"/> <input type="button" value="Clear"/> |
| Projected Follow Up Date | 05 / 29 / 2018    |
| Follow Up User | Family Priority List (313) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> Candace Coates |
|  | <input checked="" type="checkbox"/> Check to notify ServicePoint Providers by Email. |

Referrals

Referring From Priority List for a Vacancy

1. Place check marks in the Housing/Shelter boxes
2. Set Date of Need the same as Needs Referral Date
3. Set Needs Status to “Identified” and “Service Pending”
4. You may add a note if needed with special instructions for the provider
5. Save All

[Check to notify ServicePoint Providers by Email.](#)

Referrals
[Send Summary](#)

| Referred-To Provider | Housing/Shelter | Referred Clients |
|---|-------------------------------------|-------------------|
| Anna's House Emergency Shelter (265) | <input checked="" type="checkbox"/> | (3) King, Cody |
| | <input checked="" type="checkbox"/> | (2) King, Tiffany |
| Harford Family House Transitional Housing (4) | <input checked="" type="checkbox"/> | (3) King, Cody |
| | <input checked="" type="checkbox"/> | (2) King, Tiffany |
| Harford Community Action Agency RRH (287) | <input checked="" type="checkbox"/> | (3) King, Cody |
| | <input checked="" type="checkbox"/> | (2) King, Tiffany |

▼ Need Data

Date of Need * / / : : AM

Selected Needs

| | Need | Amount if Financial | Need Status / Outcome / If Not Met, Reason | Notes |
|--|----------------------|----------------------|--|-------|
| | Housing/Shelter (BH) | <input type="text"/> | <input type="text" value="Identified"/> <input type="text" value="Service Pending"/> <input type="text" value="-Select-"/> | |

Working with the Follow Up List as Family or Single Adult Priority List

1. You will see your Follow Up List on your Home Page Dashboard with the date you set for follow-up. This list will notify you who has an outstanding referral to a provider.
2. Select **Referral** for the client you want to work with.

The screenshot displays the ePoint Training Site Home Page Dashboard. The top navigation bar includes the site name, user information (Shadow ccoates), and system mode options (Enter Data As, Back Date). A search bar is located on the right side of the dashboard. The main content area is divided into three sections: System News (5), Workflow Tools (1), and Follow Up List (9). The Follow Up List table shows client IDs, types (Referral), dates, and time remaining.

| Client ID | Type | Date | Time Remaining |
|-----------|----------|------------|----------------|
| 2 | Referral | 05/14/2018 | Past |
| 3 | Referral | 05/14/2018 | Past |
| 6 | Referral | 05/21/2018 | Past |
| 7 | Referral | 05/21/2018 | Past |
| 8 | Referral | 05/21/2018 | Past |
| 2 | Referral | 05/23/2018 | Past |
| 2 | Referral | 05/23/2018 | Past |

Working with the Follow Up List as Family or Single Adult Priority List

A follow-up will remain on your dashboard until you complete the follow-up information and outcome.

You will need to run a Referral Report to check status of referrals made to the provider.

Working with the Follow Up List as Family or Single Adult Priority List

You will run an “Outgoing Referrals from Provider” Report to see status of the referral to provider.

Report Options

| | | | | | |
|------------------------|--|----------------|-------------|-------|--|
| Provider * | Single Adult Priority List (314) | Search | My Provider | Clear | |
| | <input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY | | | | |
| Referral Type * | Outgoing referrals from provider ▼ | | | | |
| Referral Status | <input type="radio"/> Outstanding <input type="radio"/> Closed <input checked="" type="radio"/> ALL | | | | |
| Referral Outcome | -All- ▼ | | | | |
| Referral Date Range | 06 / 01 / 2018 | 06 / 08 / 2018 | | | |
| Sort Order | Please Select a Sort Order | Select | Clear | | |

Export Report
Build Report
Clear

Report Results

| Referral Date ▼ | Name | Group ID | Ranking | VI-SPDAT | VI-FSPDAT | Need Type | Referred By | Referred To | Referral Outcome | Need Notes |
|-----------------------|---------------------|----------|---------|----------|-----------|-----------------|----------------------------|-------------|------------------|------------|
| 06/08/2018 8:00:00 AM | (12) Smith, Heather | | High | 9 | | Housing/Shelter | Single Adult Priority List | FCCAU, Inc. | Declined | |

Select ALL
Clear
Showing 1-1 of 1

Update Referral Outcome