

*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

Use the **Dashboard** to quickly add needs, services or referrals or to view the client's historical records.



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)

Add Terms Service Code Look-Up

Referral Provider Quicklist

Provider -Select- Add Provider Bed Avail

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

Refine Provider Search Criteria

Search for Providers by

Search

Search for Provider by

Family Priority List (313)

Add Provider

State

ZIP Code

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

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 main window displays a list of providers on the left, 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'. Below this is a 'Selected Providers' section with a dropdown menu for 'Provider' and a 'Family Priority List'. A 'Refer to Providers' section is also visible.

A 'Select VI-SPDAT Score' dialog is open, showing a list of household members: (3) King, Cody (Age: 13) and (2) King, Tiffany (Age: 32). Below this is a table of VI-SPDAT v2.0 scores:

Provider	Start Date	* PRE-SURVEY	A. HISTC HOUSING HOMELE
Coordinated Access (65)	04/30/2018	0	1

A red box highlights the 'Referral Data' section, which includes the following fields:

- Needs Referral Date ***: 04 / 30 / 2018
- Referral Ranking**: High
- VI-SPDAT Score**: Please Select a VI-SPDAT Score (Search, Clear)
- VI-FSPDAT Score**: Please Select a VI-FSPDAT Score (Search, Clear)
- Projected Follow Up Date**: [] / [] / []
- Follow Up User**: Coordinated Access (65) (Search, My Provider, Clear)
- Check to notify ServicePoint Providers by Email.** (checkbox)

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 highlighted "Referrals" report.

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

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 includes 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			
		FCCAUI-Havens of Hope										Level 3	410.272.2229			
		FCCAUI, 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 style="width: 80px;" type="text"/>	Identified ▼ Service Pending ▼ -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. The dashboard is divided into several sections: Favorites, System News (5), Workflow Tools (1), and Follow Up List (9). The Follow Up List table shows client IDs, types (all Referral), dates, and time remaining (all Past).

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