ServicePoint Referral Process

updated: 6/8/2016

All HMIS participating programs are to document client referrals to other HMIS participating programs on ServicePoint.

If working with a household the referral should only be documented on the head of household's record.

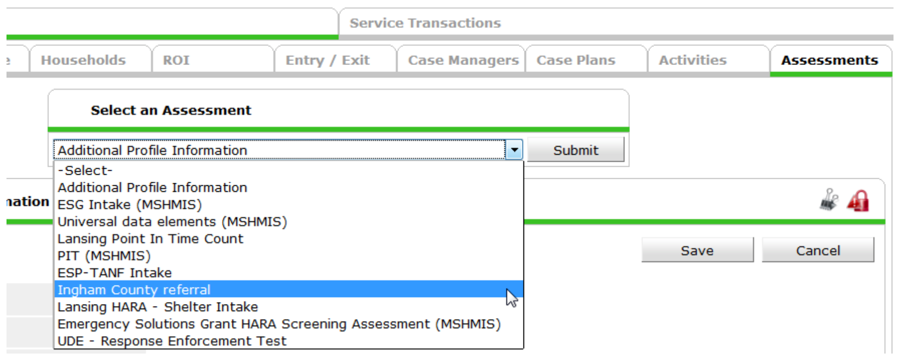
A current Release of Information must be on the client's record for the referral and the Ingham County referral assessment to be viewed by the receiving agency.

Complete 'Ingham County referral' assessment and attach documentation

- On a client record, navigate to the **Assessments** tab. From here expand the drop-down list of available assessments and choose "**Ingham County referral**" from the list and click the **Submit** button.

- Complete the **Contact Information** section and all other questions on the assessment. This is necessary for communicating basic information about the client's situation to the agency receiving the referral.

- Programs using the **VI-SPDAT** should complete this sub-assessment on the referral assessment if it has not been done already. The VI-SPDAT score can then be included in the referral.



- Click the **Save** button after all the questions have been answered.

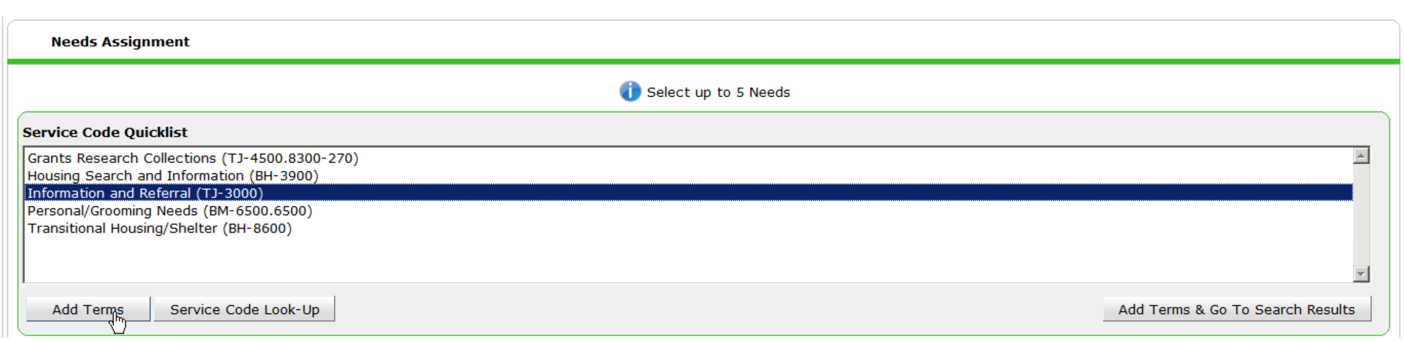
- Navigate back to the **Client Profile** tab to attach supporting documentation necessary for housing referrals. (See the file attachment guidance document on the GLHRN website).

Creating A Referral

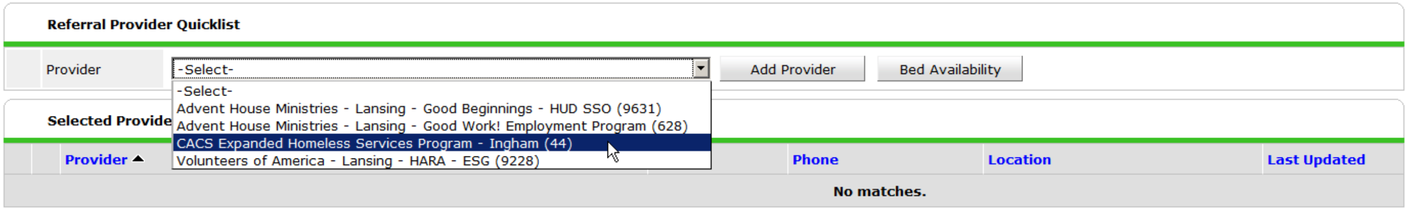
- Navigate to the **Service Transactions** tab and click on the **Add Referrals** button (envelop icon) .

- <u>**DO NOT**</u> check the boxes next to other household members if you are referring a family. The referral should only be made for the head of household.

- In the **Needs Assignment** section, select "**Information and Referral (TJ-3000)**" from the Service Code Quicklist. Once this service is highlighted click on the **Add Terms** button below.

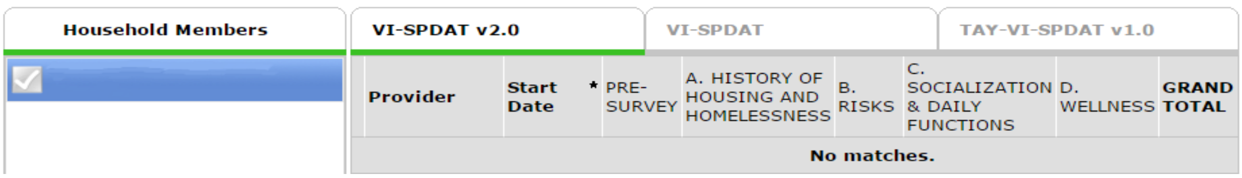


- Directly below, in the **Referral Provider Quicklist**, choose the program the client is being referred to from the dropdown menu and the click the **Add Provider** button. More than one may be selected.



  - The program(s) are now listed below in the **Selected Providers** section.

- Attach the VI-SPDAT score to the referral (see 1 in screen capture below). Click the **Search** button next to "Please Select a VI-SPDAT Score" to bring up the **Select VI-SPDAT Score** pop-up. You will then need to choose between VI-SPDAT v2, VI-SPDAT, or TAY-VI-SPDAT (the TAY SPDAT for youth is not used yet).

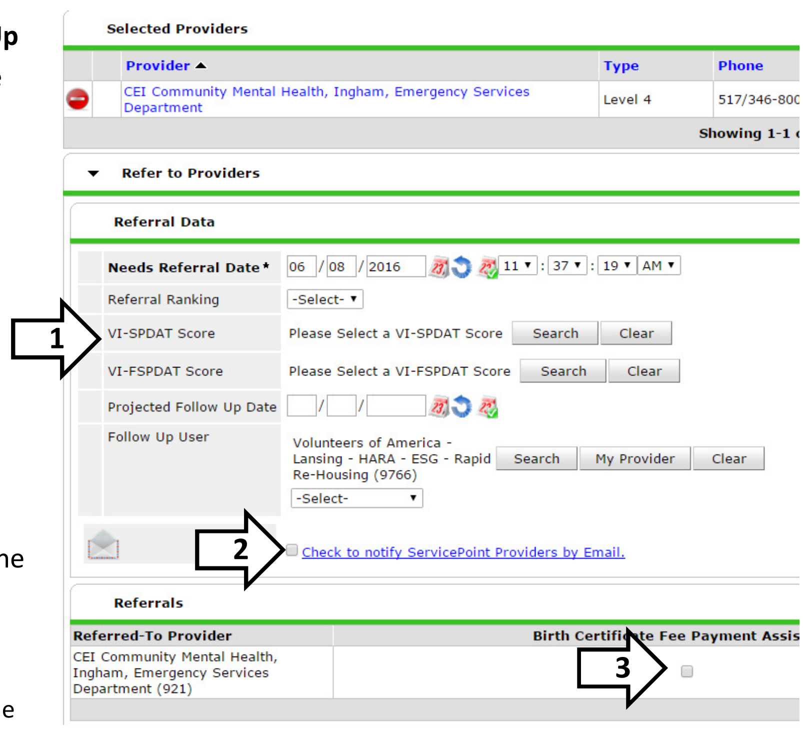


  - VI-SPDATs for singles done after 6/1/16 should be using the VI-SPDAT v2.

- If the client is in a family, click **Search** next to ""Please Select a VI-FSPDAT Score" to find the head of household's family VI-SPDAT score. Click the green plus icon next to the triage score associated with referring program and the date of the assessment.

- <u>**Do not**</u> complete the **Projected Follow Up Date** or **Follow Up User** questions; these fields are for the receiving agency.

  - **DO click where it says "Check to notify ServicePoint Providers by Email."** This will generate a notification that gets sent to the email address associated with the program being referred to (see 2 in screen capture).



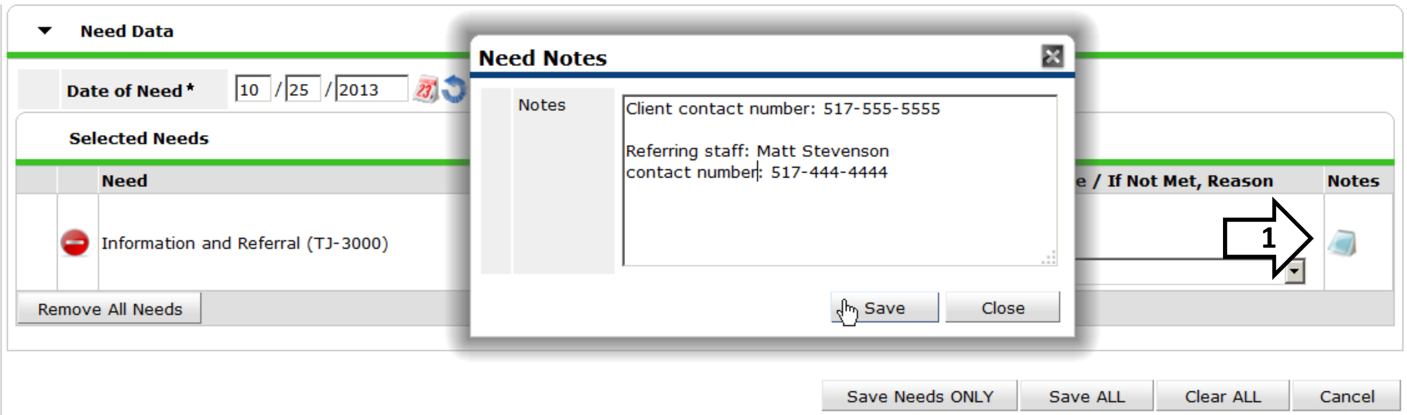
- Click the checkbox directly below the "**Information and Referral**" heading of the **Referrals** section (see 3 in screen capture).

- In the **Need Data** section, clicking on the notepad icon (see 1 in screen capture on the next page) brings up the **Need Notes** pop-up window. (Optional)

  - Additional information regarding the referral can be communicated to the receiving agency here. Click **Save** when finished.

- The **Need Status / Outcome / If Not Met, Reason** questions are to be completed by the agency receiving the referral.

- Click **Save All** to save the referral in ServicePoint and send an email notification to the receiving agency informing them that a new referral has been made to their program.



Receiving A Referral

Once a referral has been issued the receiving provider will be notified via an email generated by ServicePoint if the "**Check this box to notify ServicePoint Providers by Email**" was selected. Otherwise, the receiving agency can use the **Referrals** report or ServicePoint dashboard reports (see next section for instructions on setting up a dashboard report). An ROI for the client must be assigned to the record by the referring agency for the referral to show in the receiving agency's **Referrals** report.

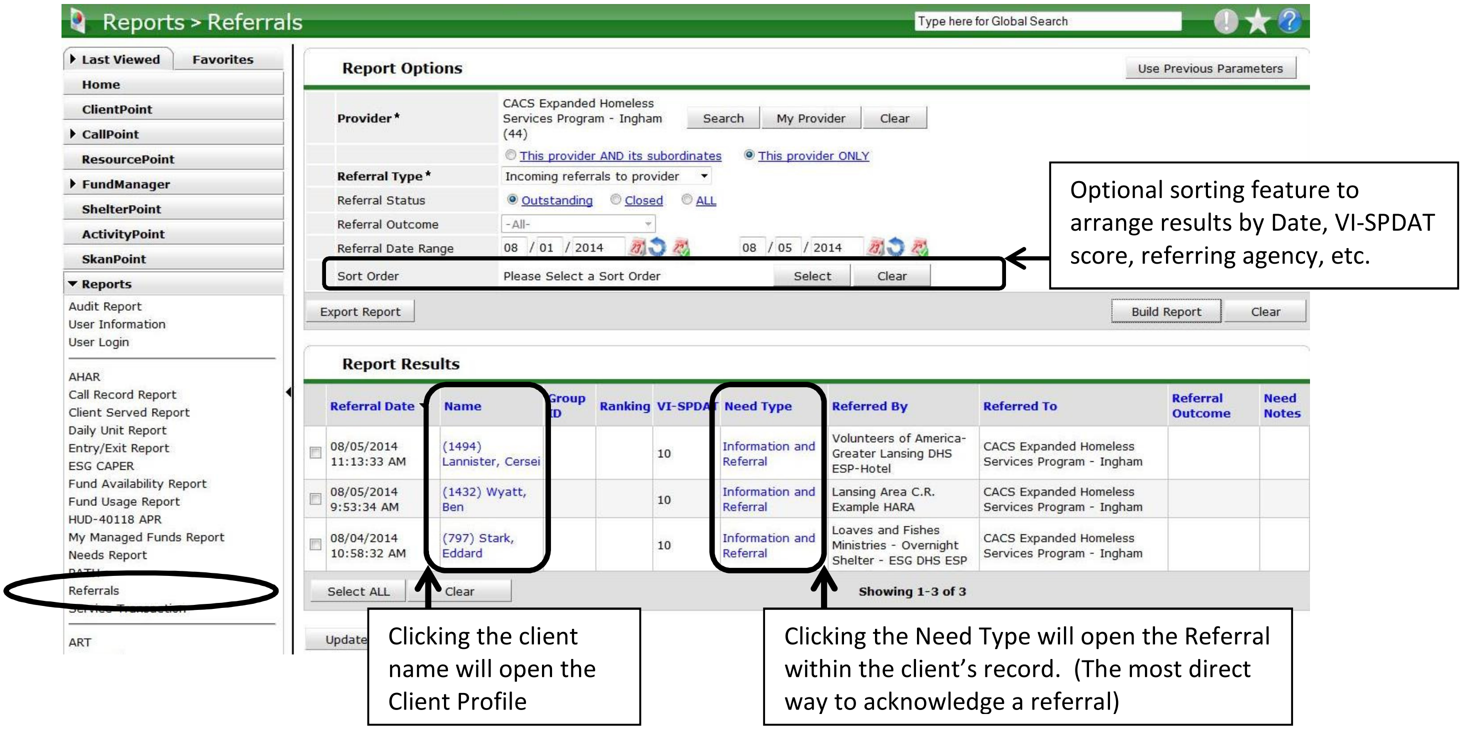
Referrals report

- From the ServicePoint Home screen, click on the **Reports** link on the left-hand side of the screen to display the list of reports. Click the **Referrals** link to bring up the report prompts.

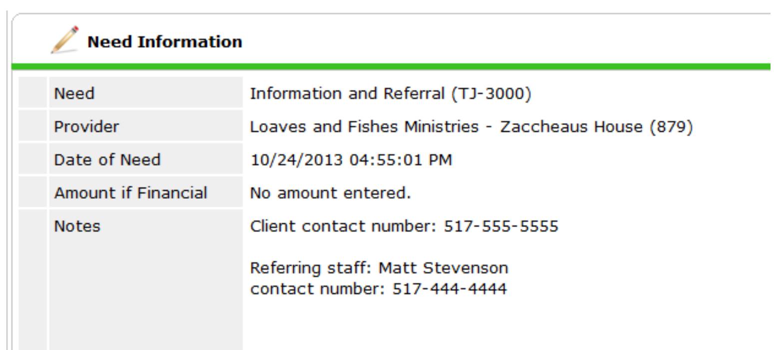
- Select the program that received the referral from the **Provider** list.

- Select "Incoming referrals to provider" from the **Referral Type** pick list and choose a **Referral Status.**

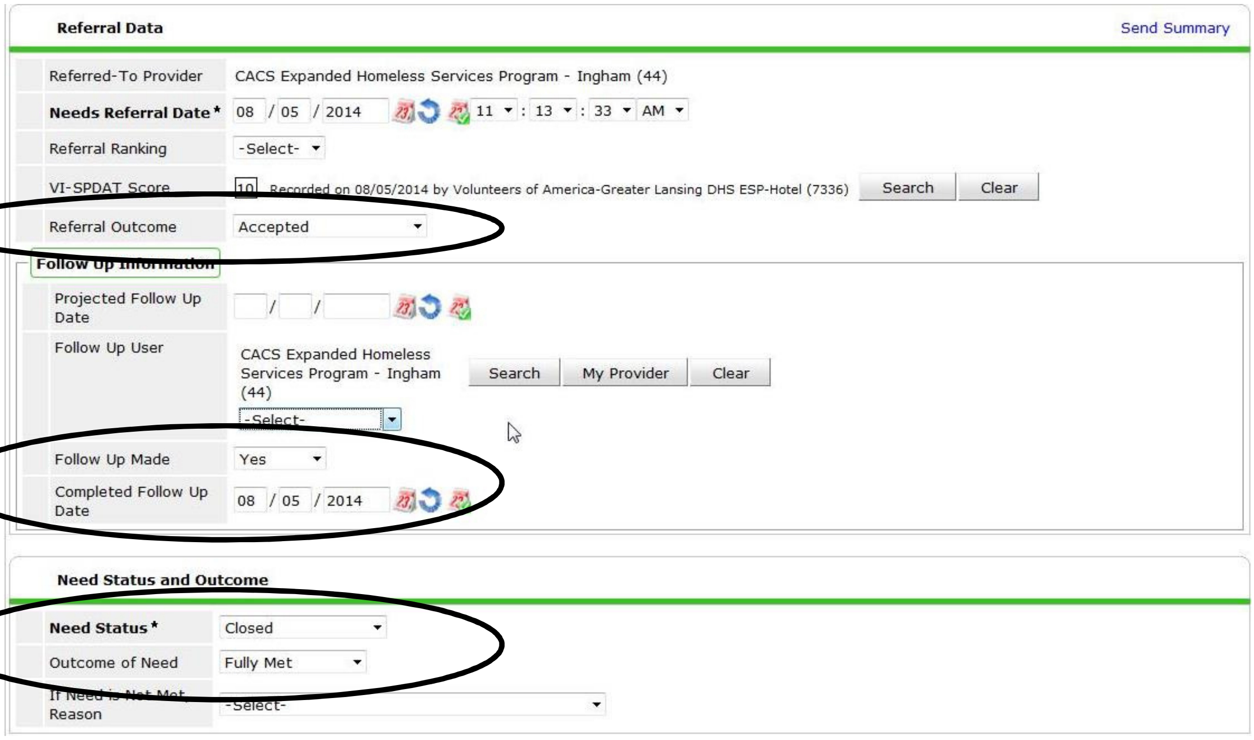
    - **Outstanding** are only referrals that have not been acknowledged (accepted, declined, or cancelled) ***Use this if looking up new referrals***
    - **Closed** are only referrals that have been acknowledged
    - **All** will display every referral regardless of the status



- Enter the date range you want included in the report in the **Referral Date Range** fields.
- Click the **Build Report** button to display the new referrals made to your program.
  - Note: Changing the **Referral Type** selection to "Outgoing referrals from provider" will show you the referrals made by your program to others that have not yet been acknowledged.
- Under the **Need Type**, click on "Information and Referral" to go directly to the client referral information. The top of the screen will show the name of the referring agency, the date of the referral and any notes left by the referring staff person.



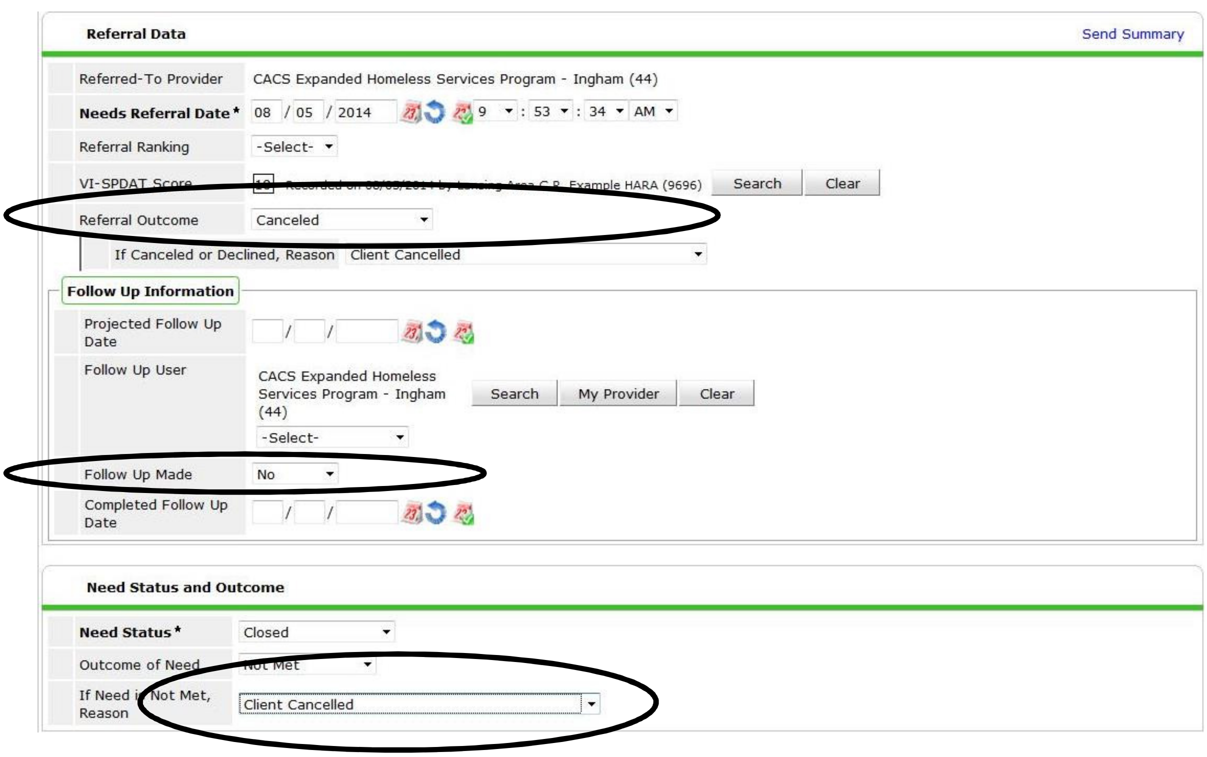
- To acknowledge and "close" the referral, scroll down to the **Referral Data** section and update the following questions depending on the result of the follow up:



○

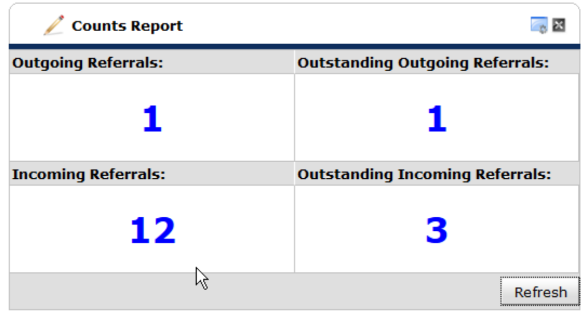
Scenario 1: Follow up attempt was ***successful*** and client is scheduled for an intake

- Referral Outcome = Accepted or Accepted on Wait List
- Follow Up Made = Yes
- Completed Follow Up Date = The date the follow up was made
- Need Status = Closed
- Outcome of Need = Fully Met



- **Scenario 2:** Follow up attempt was ***unsuccessful*** and agency was not able to contact the client
    - Referral Outcome = Canceled or Declined
    - If Canceled or Declined, Reason = Why the referral is being canceled
    - Follow Up Made = Yes or No depending on the circumstances
    - Need Status = Closed
    - Outcome of Need = Not Met
    - If Need is Not Met, Reason = same as the 'If Canceled, Reason' response
- When finished, click the **Save and Exit** button. When this is completed, the client will be removed from your outstanding referrals list and also from the referring agencies outstanding outgoing referrals list.

Referrals Dashboard Report



Dashboard reports appear on the ServicePoint Home screen and allow any user to monitor new referrals coming into your agency and also the status of referrals that your program has made to other agencies.

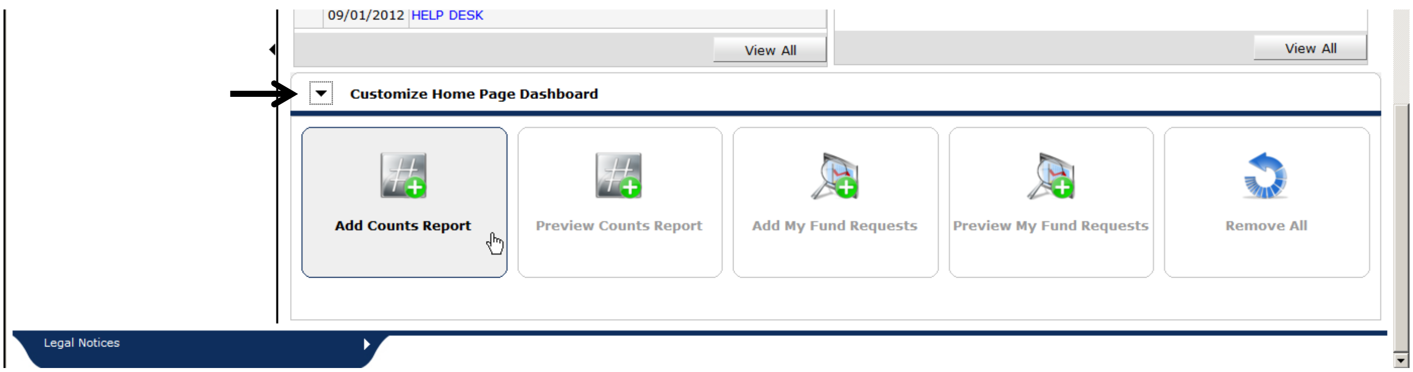
<u>Incoming Referrals</u> – Provides a count and list of all referrals, both open and closed, which have been made **TO** your program(s).

<u>Outstanding Incoming Referrals</u> – Provides a count and list of referrals made **TO** your program(s) that have not yet been acknowledged and closed.

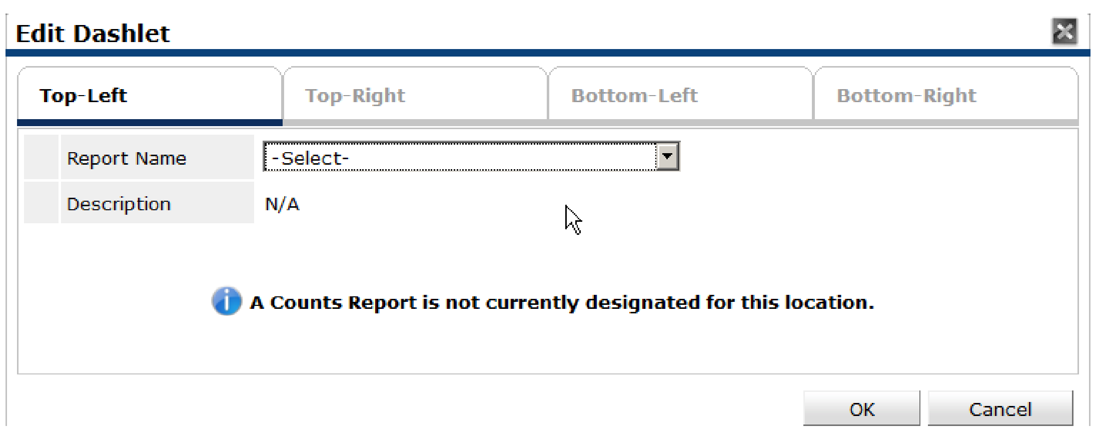
<u>Outgoing Referrals</u> – Provides a count and list of all referrals, both open and closed, which have been made **BY** your program(s) to other agencies.

<u>Clients With Outstanding Referrals</u> – Provides a count and list of clients with referrals that have been made **BY** your program(s) that have not yet been acknowledged by the receiving agency.

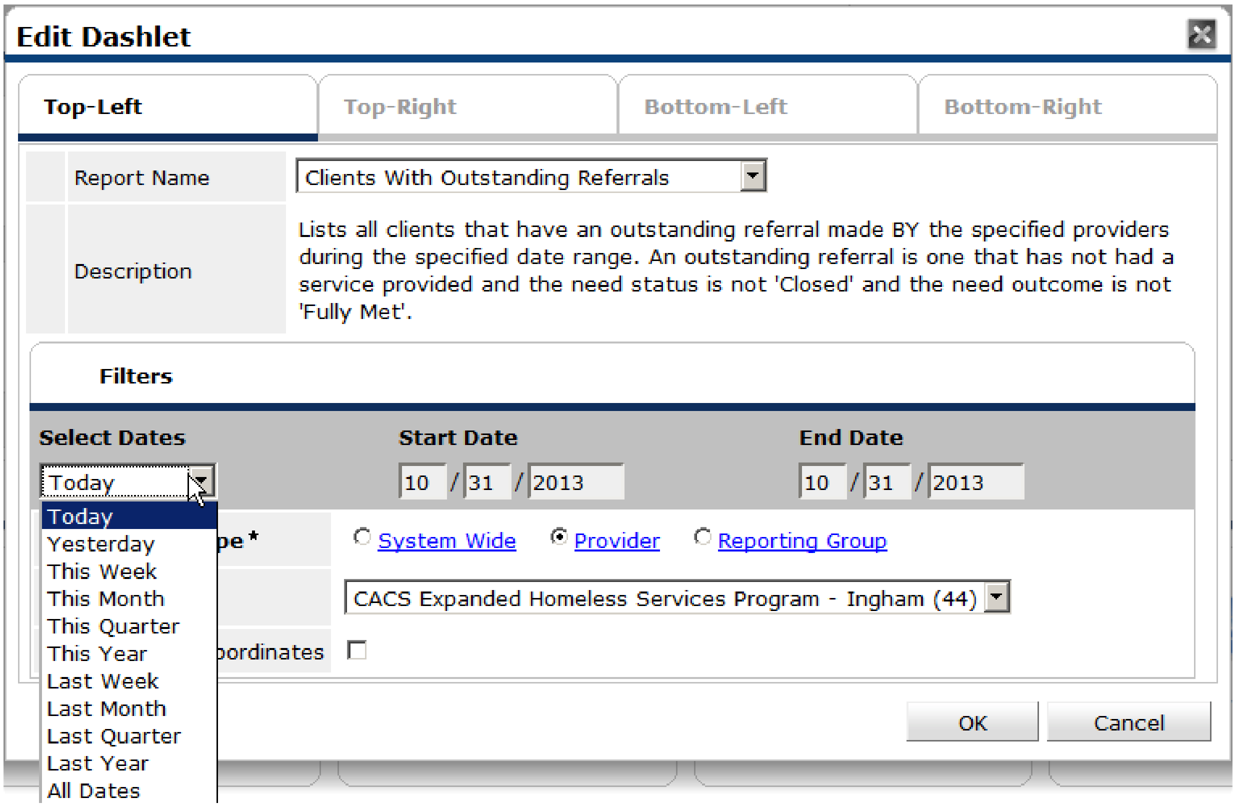
- Start on the ServicePoint Home screen and click the small black triangle near the bottom of the screen where it says **Customize Home Page Dashboard** to expand the list of dashboard options.



- Click on the **Add Counts Report** icon
- The **Count Report** window will now appear on the Home screen. Click on the 'edit pencil' to assign specific reports to the dashboard.
- In the **Edit Dashlet** pop-up window use the **Report Name** drop down list to choose 'Clients With Outstanding Referrals'. This will provide report filter options to appear below.



- Under the **Select Dates** filter you can choose the date range that you want the report to include. The **Start Date** and **End Date** sections will populate based on your selection.
- Next to **Provider Type** select the 'Provider' option. Another drop down list will appear to allow you to select the program that you want to view the referrals report for. Choose your program from the **Provider** drop down list. When finished, click the **OK** button.



- Repeate this process for the remaining 3 quadrants of the dashboard report by clicking on the tab for each location (ex. Top-Right, Bottom-Left). When finished with assigning all reports, a notification will appear at the top of the ServicePoint Home screen, click the **Save** button to save the changes.