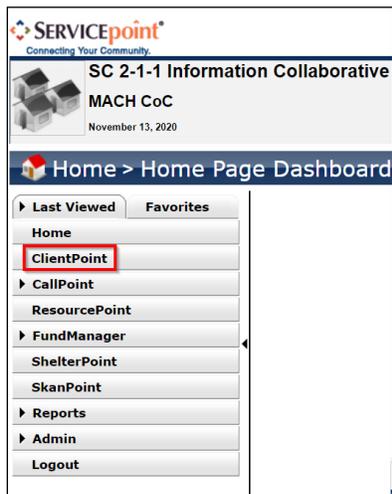


HMIS - How to Add a Referral

1. Log into **HMIS**. The **Home Page Dashboard** displays.
2. Click on the **ClientPoint** module.



3. Search for the client through entering data in the fields under the **Client Search** or **Client Number** tabs.
 - 3a. If you use the **Client Search** tab:
 1. Enter the client's data (primarily use the SSN and full name fields).
 2. Click the **Search** button.
 3. Locate the client's data in the **Client Results** grid.
 4. Click the client's name to access their record. The **Back Date Mode** pop-up displays.



Client Search

Please Search the System before add
Items in Italics are for Data Entry ONLY and will n

Name	First	Middle	Last
	Lauren		Test
Name Data Quality	-Select-		
Alias			
Social Security Number			
Social Security Number Data Quality	-Select-		
U.S. Military Veteran?	-Select-		
Exact Match	<input type="checkbox"/>		
Search ACTIVE Clients	<input checked="" type="radio"/>		
Search INACTIVE / DELETED Clients	<input type="radio"/>		
Search ALL Clients	<input type="radio"/>		

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

Client Results

ID	Name ▲	Social Security Num
337012	Test, Lauren	333-22-9999

Click the client's name to access their record

3b. If you enter data under the **Client Number** tab:

1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # **Submit**



- When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.

Back Date Mode

The current System Date is set to:
11/16/2020 11:30:19 AM

If you would like to use a different date, please select one below:

Back Date 11 / 16 / 2020 12 : 00 : 00 AM

Set New Back Date Use Current System Date

- Click on the **Service Transactions** tab, then click on the **Add Referrals** button.

Client - (337012) Test, Lauren

(337012) Test, Lauren
Release of Information: None

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

- If the client is a member of a member of a household, you will see the Household ID with the members listed below. The head of household automatically has a gray checkmark beside their name. When appropriate, place a checkmark next to the household member(s) who received the referral(s).

Household Members

To inclu

(84737) Male Single Parent

(337431) Test, Doug

(337838) Test, Sean



7. Scroll to the **Service Code Quicklist** section and place a checkmark next to the needs that client received referrals for.

TIP: Up to 5 needs may be selected at one time. To select multiple needs, press the **Ctrl** key on your keyboard while clicking the need using your mouse.

The screenshot shows a web interface titled "Needs Assignment". At the top, there is a green bar with the text "Select up to 5 Needs" and an information icon. Below this is a section titled "Service Code Quicklist" containing a list of service codes and descriptions: Child Care Expense Assistance (NL-3000.1500), Electric Service Payment Assistance (BV-8900.9300-180), Emergency Food (BD-1800), Emergency Shelter (BH-1800), Financial Literacy Training (DM-2000), Gas Service Payment Assistance (BV-8900.9300-250), General Clothing Provision (BM-6500.1500-250), and General Furniture Provision (BM-3000.2000-250). At the bottom of the list, there are two buttons: "Add Terms" (highlighted with a red box) and "Service Code Look-Up".

8. Once all of the needs are selected, click the **Add Terms** button.

9. You may add the referral agency via the **Referral Provider Quicklist** section or the **Refine Provider Search Criteria** section.

10. To add the referral agency via the **Referral Provider Quicklist** section, follow steps 9a - 9b:

10a. Click the **Provider** dropdown and select the provider.

NOTE: If the agency you wish to select is not listed, please contact the HMIS System Administrator.

10b. Click the **Add Provider** button.

The screenshot shows a web interface titled "Referral Provider Quicklist". It features a dropdown menu labeled "Provider" with the text "Lexington Richland Alcohol Drug Abuse Center (139)" and a downward arrow. To the right of the dropdown is a button labeled "Add Provider", which is highlighted with a red box.

11. To add the referral agency via the Refine Provider Search Criteria section, follow steps 11a - 11d.

11a. Scroll to the **Refine Provider Search Criteria** tab and enter the name of the organization that you referred the client to.

TIP: You may also enter geographic data in the address fields to narrow results.



► Refine Search with Service Terms or Target Populations

▼ Refine Provider Search Criteria

Search for Providers by using keywords for description.

Search Search Hide Advanced Search Options

Search for Provider based on their Physical Location or the Area Served.

City State

County / Parish ZIP Code

ServicePoint Users ONLY

Type

Search Clear All

Enter the name of the agency that the client is being referred to

To narrow the search, enter the agency's geographic details

11b. Click the **Search** button.

11c. Scroll to the **Search Results** grid and view the options.

11d. To select a provider, click the **green circle icon**. You may select multiple providers.

NOTE: If 'No matches' displays, re-check the information entered in the search fields.

Search Results																						
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
	Provider											Type	Phone	Location								
	Harvest Hope Food Bank											Level 2	803-254-4432	Columbia, SC 29201								
	Harvest Hope Food Bank - Greater Greenville Area Branch											Level 3	864-281-3995	Greenville, SC 29611								
	Harvest Hope Food Bank - Pee Dee Branch											Level 3	843-661-0826	Florence, SC 29501								
	Harvest Hope Food Bank - Entry Locator											Level 3	Unknown	Unknown								
												Level 2	803-568-6722	Swansea, SC 29160								
Bed Availability												Showing 1-5 of 5										

Click the green icon to select a service provider

12. The provider's name displays in the **Selected Providers** grid.

NOTE: To remove a provider, click the red circle icon.

Selected Providers					
	Provider ▲	Type	Phone	Location	Last Updated
	Goodwill Job Connection - Columbia (Decker Blvd)	Level 3	803-865-1770	Columbia, SC 29206	03/02/2020
	Harvest Hope Food Bank	Level 2	803-254-4432	Columbia, SC 29201	09/21/2020
Showing 1-2 of 2					

13. Scroll to the **Referral Data** tab. In the **Needs Referral Date** field, enter the date of the referral. If desired, enter an approximate time.



Referral Data

Needs Referral Date * 11 / 17 / 2020 3 : 13 : 08 PM

Referral Ranking -Select-

VI-SPDAT Score Please Select a VI-SPDAT Score Search Clear

Projected Follow Up Date 11 / 24 / 2020

Follow Up User MACH CoC (112) Search My Provider Clear

Check to notify ServicePoint Provider

Select the name of the staff member who will receive the follow-up reminder

Referrals [Send Summary](#)

14. If you would like HMIS to send the case manager a reminder to follow-up with the client, follow steps 14a – 14b:

14a. In the **Projected Follow Up Date** field, enter the date that the follow-up reminder should sent.

14b. In the **Follow Up User** drop-down, select the name of the staff member who should receive the reminder.

NOTE: The reminder will display on the HMIS user's Home screen.

15. Scroll to the **Referrals** tab. Notice that section lists the agencies, services, and referred clients.

NOTE: If you select multiple providers and/or needs, match the providers with the needs that they provide.

Referrals [Send Summary](#)

Referred-To Provider	Emergency Food	Job Finding Assistance	Referred Clients
Harvest Hope Food Bank (161)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(337129) Test, Lisa
Goodwill Job Connection - Columbia (Decker Blvd) (15683)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(337129) Test, Lisa

16. Scroll to the **Need Data** section.

Need Data

Date of Need * 11 / 17 / 2020 8 : 40 : 36 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Emergency Food (BD-1800)		Closed Fully Met -Select-	<input type="text"/>
Job Finding Assistance (ND-3500)		Closed Fully Met -Select-	<input type="text"/>

Remove All Needs

Click the Notes icon to add a note about the need

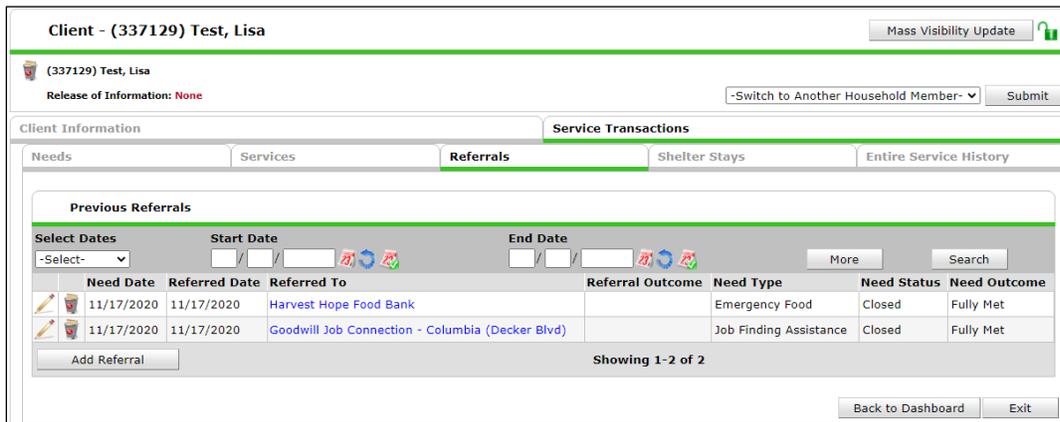


- a. Ensure that the **Date of Need** is correct.
- b. The **Selected Needs** tab displays the previously selected need(s). Remove needs if needed.
- c. In the **Amount if Financial** section, enter the monetary amount that the client needs.
- d. In the **Need Status** drop-down, select the appropriate option.
- e. In the **Outcome** drop-down, select the appropriate option.
- f. Click the **Notes** icon to enter a note pertaining to the need, if necessary.
NOTE: The notes placed here do not also display on the **Client Profile** tab.

17. Click the **Save ALL** button.



18. The screen automatically displays the **Referrals** tab where a list of all of the referrals for the client are listed.



19. Click the **Needs** tab. Observe the need that was added during the referral adding process.

