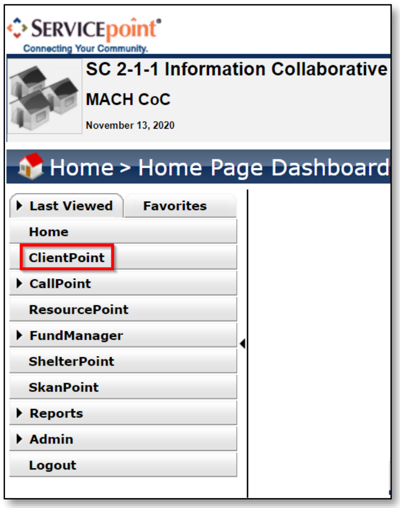
HMIS - How to Add a Referral

1. Log into **HMIS**. The **Home Page Dashboard** displays.

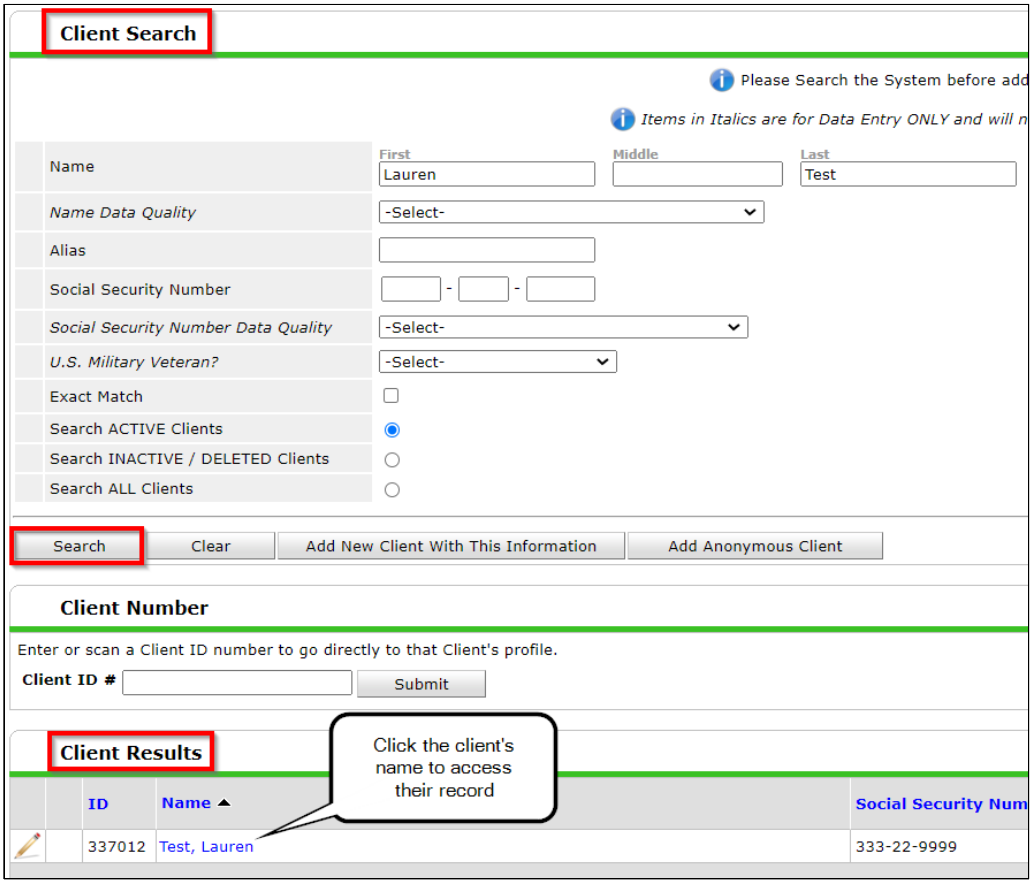
2. Click on the **ClientPoint** module.



3. Search for the client through entering data in the fields under the **Client Search** or **Client Number** tabs.

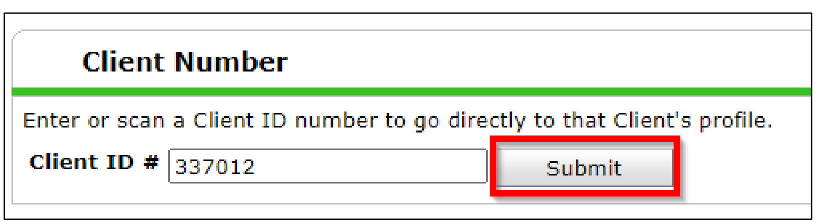
   3a. If you use the **Client Search** tab:

   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.

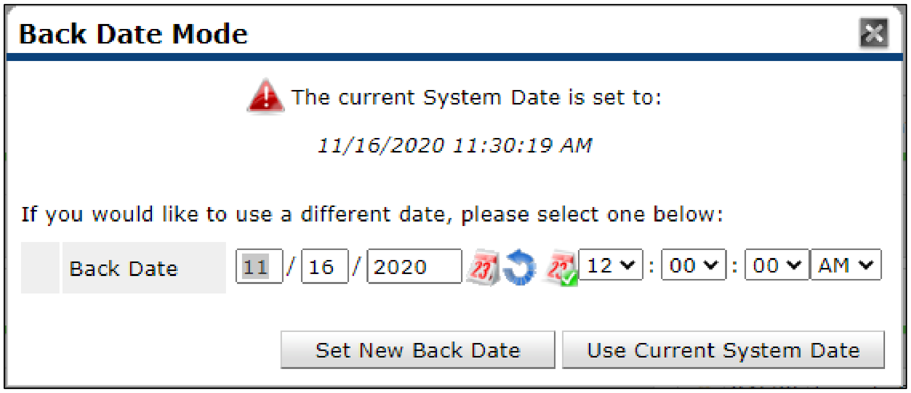


3b. If you enter data under the **Client Number** tab:

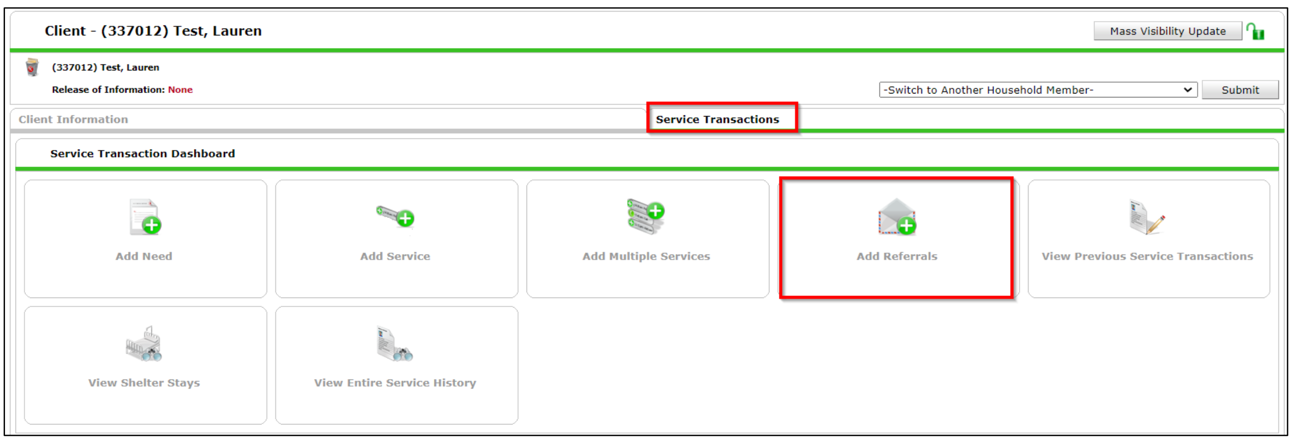
1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.



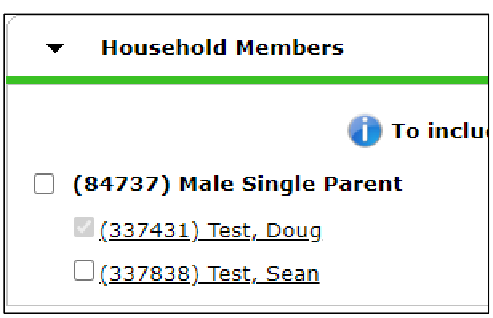
4. When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.



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

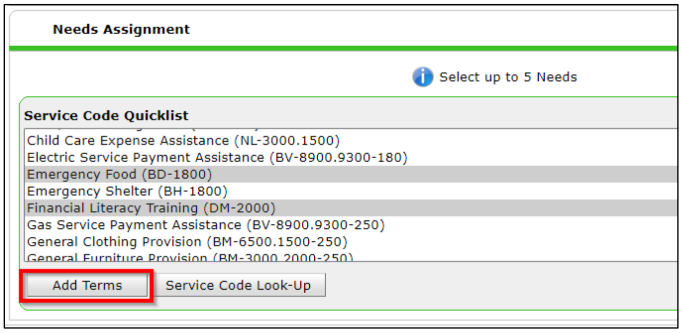


6. If the client is a member of a member of a household, you will see the Household ID with the members listed below. The head of household automatically has a gray checkmark beside their name. When appropriate, place a checkmark next to the household member(s) who received the referral(s).



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.



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

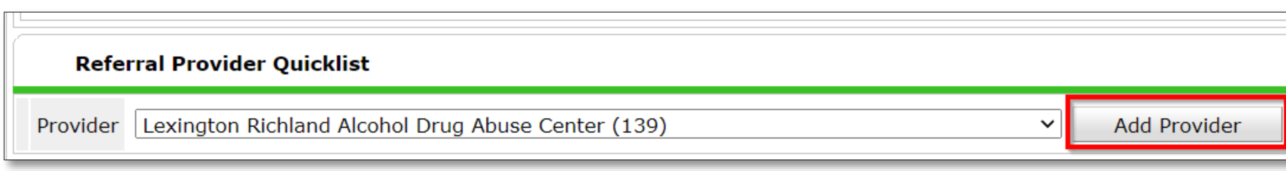
9. You may add the referral agency via the **Referral Provider Quicklist** section or the **Refine Provider Search Criteria** section.

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.

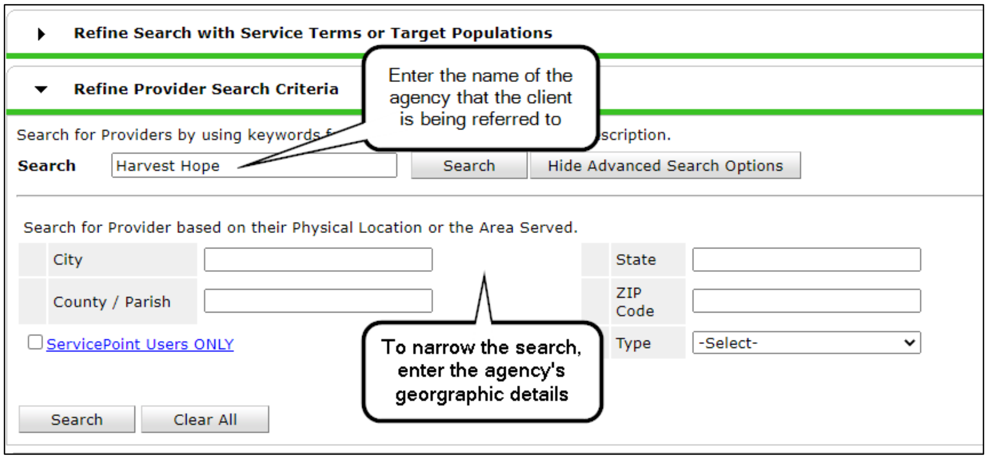
    10b. Click the **Add Provider** button.



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.

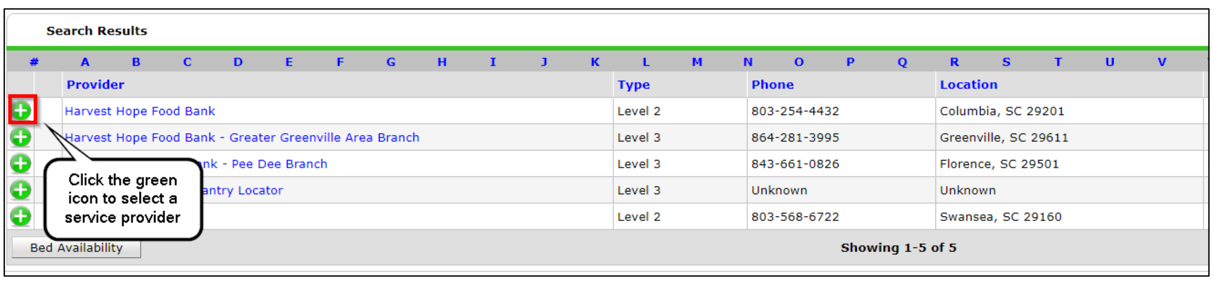
    TIP: You may also enter geographic data in the address fields to narrow results.



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

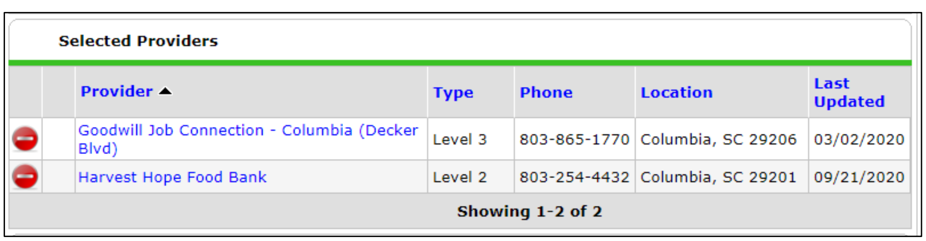
11c. Scroll to the **Search Results** grid and view the options.

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.

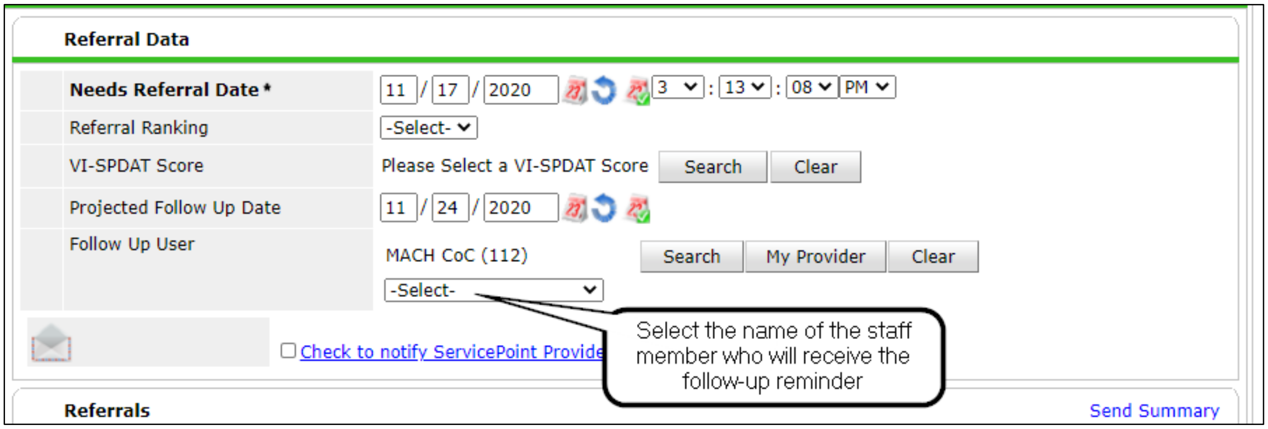


12. The provider's name displays in the **Selected Providers** grid.

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



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.



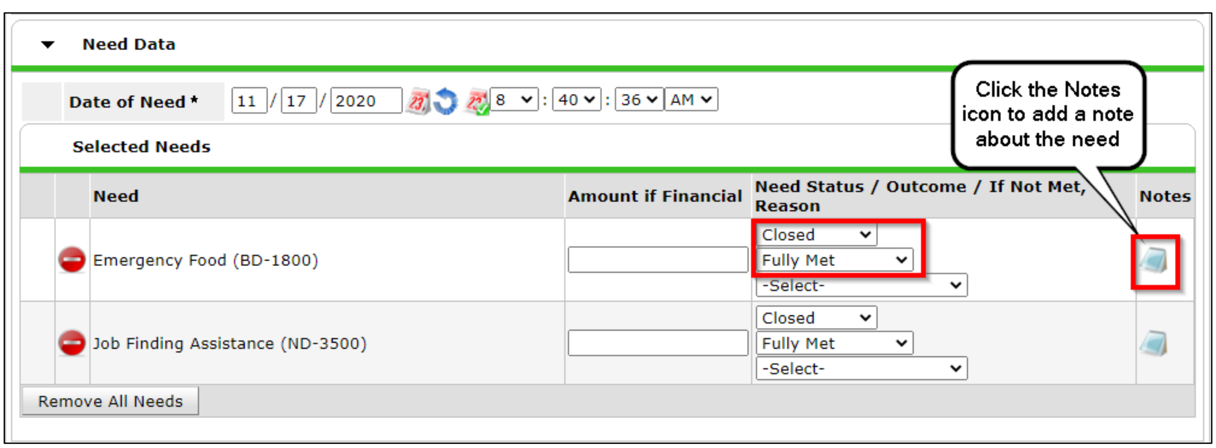
14. If you would like HMIS to send the case manager a reminder to follow-up with the client, follow steps 14a – 14b:

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.

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



a. Ensure that the **Date of Need** is correct.

b. The **Selected Needs** tab displays the previously selected need(s). Remove needs if needed.

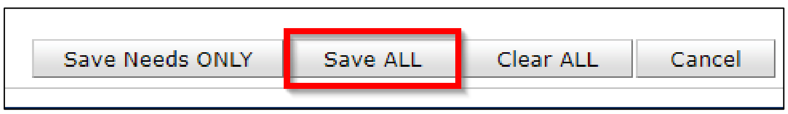
c. In the **Amount if Financial** section, enter the monetary amount that the client needs.

d. In the **Need Status** drop-down, select the appropriate option.

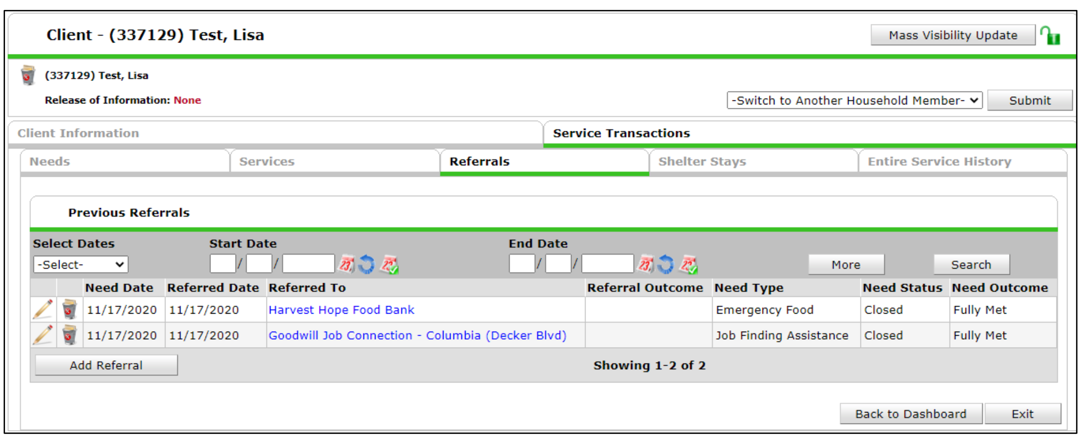
e. In the **Outcome** drop-down, select the appropriate option.

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.