# Housing Match Team Referral Training

This document covers the steps needed to complete a coordinated assessment referral in ServicePoint. Every referral is required to be recorded in two locations. A housing match team will first record a referral under the "Service Transactions" tab. Next, the housing match team will record the referral under the "Coordinated Entry Event" sub-assessment. All referrals should be sent on the **Head of Household's** profile only.

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# Recording Coordinated Assessment Referrals

This document covers the steps needed to complete a coordinated assessment referral in ServicePoint. Every referral is required to be recorded in two locations. A housing match team will first record a referral under the "Service Transactions" tab. Next, the housing match team will record the referral under the "Coordinated Entry Event" sub-assessment. All referrals should be sent on the **Head of Household's** profile only.

## Recording Referrals - "Service Transactions" Tab

These steps should be completed for the **head of household** only.

1) Log in to ServicePoint.

2) Select the appropriate "Enter Data As" mode, as necessary. For the Housing Match Team, this will be the top-level SACE/FHH provider.

3) Navigate to the **head of household's** profile.

4) Select "Service Transactions" tab.

5) Select "Add Referrals".
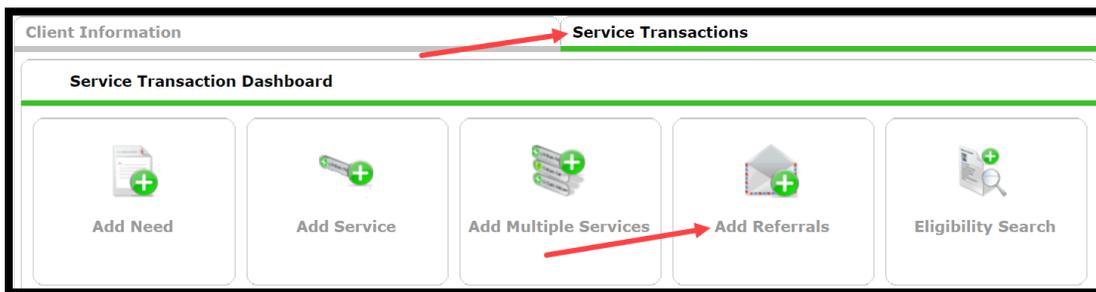


6) Under "Service Code Quicklist" select the appropriate service code. Once selected, click "Add Terms".

7) Select the appropriate agency or provider from the "Provider" dropdown.
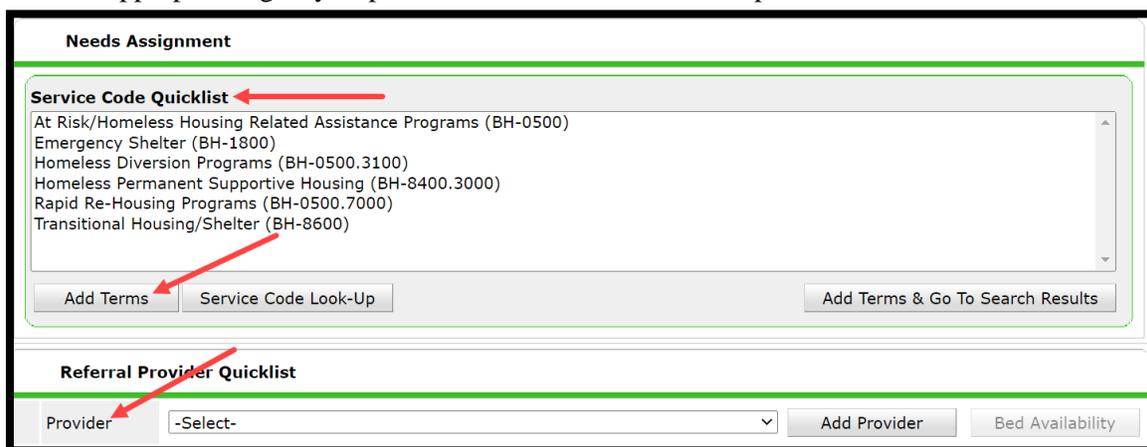


8) Once you add the provider scroll down to the "Referral Data" section.

9) Click "Search" next to VI-SPDAT Score section. A pop-up will appear.
   a. Please note, not all coordinated assessment systems will complete this step.

10) Attach the appropriate VI-SPDAT, VI-FSPDAT, or TAY-VI-SPDAT by selecting the green plus symbol.
   a.   Please note, not all coordinated assessment systems will complete this step.



11) Ensure the appropriate referral box is checked.

12) Under the "Selected Needs" section complete the following fields:
   a.   Needs Status: Identified
   b.   Outcome: Service Pending

13) Click "Save ALL"



## Recording Referrals – "Coordinated Entry Event" Sub-Assessment
This sub-assessment should be completed for the **head of household** only. Users should remain in the same top-level SACE/FFH provider as the previous section.

1)   Navigate to the client's "Summary" tab.

2) At the bottom of the "Summary tab", there will be an assessment available with the "Coordinated Entry Event" sub-assessment. The exact layout may vary between different coordinated entry systems. Please note you will most likely see another event already in place, which was added upon the client's entry point enrollment.

3) Click on the "Add" button. A pop-up will appear on the screen. **Do not** modify currently existing records.



| | | Start Date* | Date of Event* | Event* | Referral Result | Date of Result |
|---|---|---|---|---|---|---|
| 🖉 | 🗑 | 09/27/2020 | 09/27/2020 | Referral to scheduled Coordinated Entry Housing Needs Assessment | | |
| Add | | | | Showing 1-1 of 1 | | |

4) Complete the following fields, as applicable, on the pop-up.
   a. **Start Date**: This date will default to the date of the assessment. Do not change this field.
   b. **End Date**: Leave this field blank.
   c. **Date of Event**: Enter the same date as the "Start Date"
   d. **Event**: For this workflow, you will **ONLY** select one "Referral Event". Do not select an "Access Event".

   *If 'Event' answer was 'Referral to post-placement/follow-up case management, please answer the following question:*

   e. **Referral to post-placement/follow-up case management result - Enrolled in Aftercare project**: Select the appropriate response.

   *If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:*

   f. **Location of Crisis Housing or Permanent Housing Referral**: Click on the "Lookup" button. A pop-up will appear. In selecting the appropriate agency from the list, consider the following items:
      ▪ Search for "HMIS" to narrow the provider selection to only HMIS providers.
      ▪ Select only the top-level agency for this sub-assessment. This may be a different provider than selected on the "Service Transactions" tab, which is expected.
   g. **Referral Result**: Do not complete. This will be completed by housing providers.
   h. **Date of Result**: Do not complete. This will be completed by housing providers.

**Coordinated Entry Event**

| | |
|---|---|
| Start Date * | 09 / 25 / 2020 |
| End Date | / / ← **Do Not Use** |
| Date of Event * | 09 / 25 / 2020 G |
| Event * | Referral to Emergency Shelter bed opening G |

If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service result', please answer the following question:

| Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative | -Select- ← **Do Not Use** |
|---|---|

If 'Event' answer was 'Referral to post-placement/follow-up case management result', please answer the following question:

| Referral to post-placement/follow-up case management result - Enrolled in Aftercare project | -Select- ← **Use As Applicable** |
|---|---|

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

| Location of Crisis Housing or Permanent Housing Referral | (1052) UMOM UMOM New    Lookup    Clear   G |
|---|---|

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

| Referral Result | -Select- ← **Do Not Use** |
|---|---|

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

| Date of Result | / / |
|---|---|

| Print Recordset | Save | Save and Add Another | Cancel |
|---|---|---|---|

5) Once all applicable fields have been completed, click "Save".



**Coordinated Entry Event**

| | |
|---|---|
| Start Date * | 09 / 25 / 2020 |
| End Date | / / G |
| Date of Event * | 09 / 25 / 2020 G |
| Event * | Referral to Emergency Shelter bed opening G |

If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service result', please answer the following question:

| Referral Result | -Select- G |
|---|---|

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

| Date of Result | / / G |
|---|---|

| Print Recordset | Save | Save and Add Another | Cancel |
|---|---|---|---|

6) If properly completed, you will see a new sub-assessment record, as pictured below.

**Coordinated Entry Event: Complete and choose an ACCESS event only**

🔍 **Coordinated Entry Event**

| | | Start Date * | Date of Event | Event * | Referral Result | Date of Result |
|---|---|---|---|---|---|---|
| ✏️ | 🗑️ | 09/20/2020 | 09/20/2020 | Problem Solving/Diversion/Rapid Resolution intervention or service | | |
| **Add** | | | | **Showing 1-1 of 1** | | |