

# ServicePoint Workflow: Receiving a Referral

12/11/17

Once a referral has been issued, **the receiving provider must view and provide, or indicate that they cannot provide, the service.**

There are at least **TWO WAYS** to check **Outstanding Incoming Referrals** in order to update the referral status.

## OPTION #1: Add a Counts Report on your Home Page Dashboard

- 1) Click the pencil icon next to Count Report. Add the Report Name **Outstanding Incoming Referrals** for your provider that is tracking referrals. Selecting “All Dates” will ensure all outstanding referrals are followed-up on and not left outstanding.

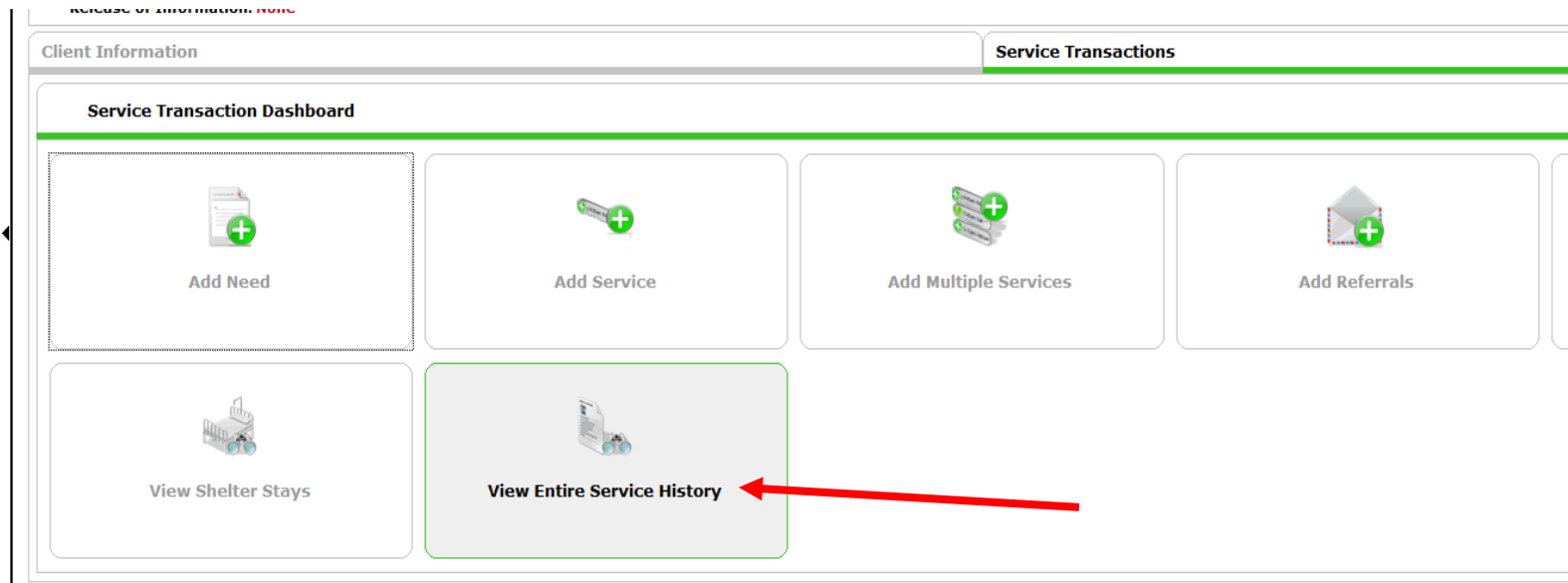
The screenshot shows the 'Home > Home Page Dashboard' interface. On the left is a navigation menu with 'Last Viewed' and 'Favorites' tabs. The main content area features 'System News (3)' and 'Agency News (0)' sections. Below these is a 'Counts Report' widget, which is highlighted with a red arrow pointing to a pencil icon next to its title.

- 2) Result example:









The screenshot shows the 'Counts Report' widget with two columns of data:

Clients With Expiring ROIs:	Outstanding Incoming Referrals:
17	1














- 3) To check Referrals regularly, click on the Number of **Outstanding Incoming Referrals** shown on your homepage dashboard **Counts Report**.
- 4) Click on the Client ID to go to the Client and then pull up the Referral. (From the **Summary Tab**, click the pencil icon next to **Outstanding Incoming Referrals**) OR go to Service Transactions (as shown below) and click on **View Entire Service History**.










- 5) Click on the pencil icon next to the applicable Referral

Client Information		Service Transactions				
Needs	Services	Referrals	Shelter Stays			
<b>All Service Transactions</b>						
Select Dates		Start Date		End Date		
-Select-		<input type="text"/> / <input type="text"/> / <input type="text"/>   		<input type="text"/> / <input type="text"/> / <input type="text"/>   		
	Transaction Type	Date	Provider	Type	Need Status / Outcome	
	Need	12/08/2017	Coordinated Entry	Emergency Shelter	Identified / Not Met	
	Referral	12/08/2017	The Gathering Inn (TGI)	Emergency Shelter		
<b>Showing 1-1 of 1</b>						

- 6) Under **Referral Data**, select the applicable Referral Outcome (Accepted, Accepted on Waitlist, Declined, Canceled) from the drop down list. If Canceled or Declined, select Reason from drop-down menu. Add Follow Up Information if desired for tracking purposes.

Referral Data	
Referred-To Provider	The Gathering Inn (TGI) (24)
Needs Referral Date *	12 / 08 / 2017    11 : 22 : 43 AM
Referral Ranking	-Select- 
Referral Outcome	-Select- 
Follow Up Information	
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	The Gathering Inn (TGI) (24) -Select- 
Follow Up Made	-Select- 
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

- 7) Under **Needs Status and Outcome**, update the Need Status to Closed or In Progress, and Outcome of Need to Fully Met, Not Met, Partially Met or Service Pending. If Need is Not Met, select Reason why from drop down menu.

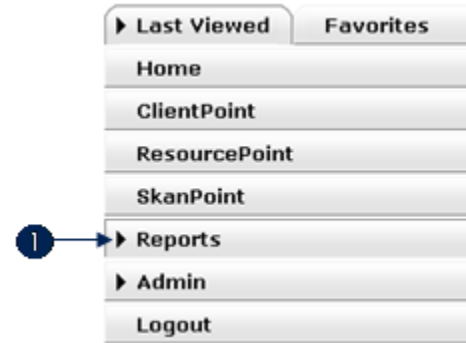
Need Status and Outcome	
Need Status *	Identified  
Outcome of Need	Not Met  
If Need is Not Met, Reason	-Select-  
Service Information	
Provide Service	 A Service has not yet been provided for this Referral.

- 8) BE SURE TO CLICK **SAVE AND EXIT**  
9) Make sure an ROI has been recorded if one was received from your Provider for this client.

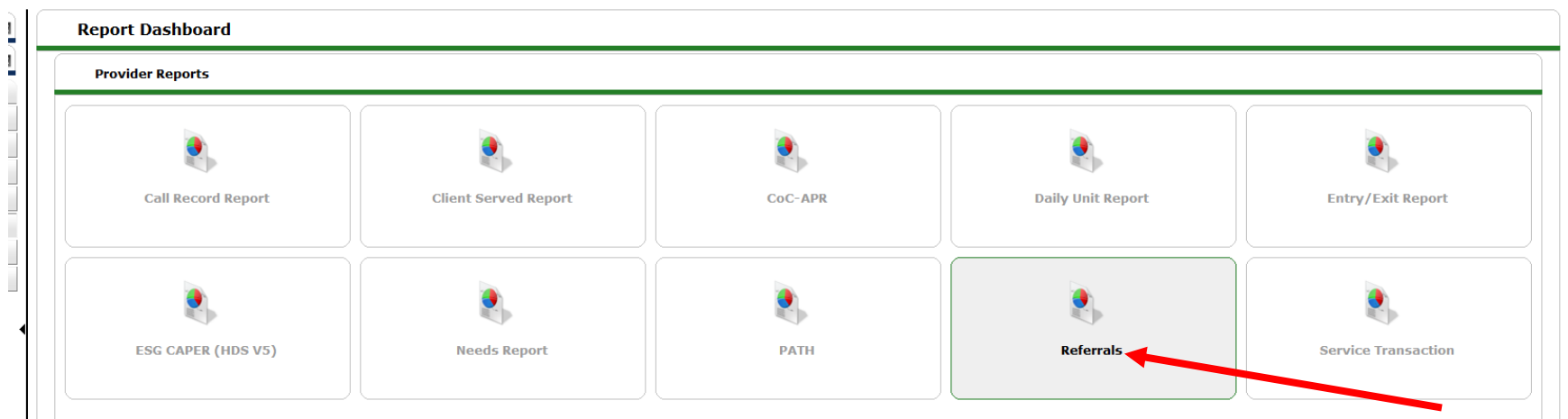
## OPTION #2: Run the Outstanding Referrals Report

Run the **Outstanding Referrals Report** on a periodic basis to see outstanding referrals and update the status. (A Coordinated Entry ROI for the client is needed for the referral to show in the Outstanding Referrals report.)

- 1) For this report it is best to run it in EDA mode for the Provider who is receiving the referrals.  
From the main *ServicePoint* screen, click the **Reports** tab.



- 2) The screen will refresh and display a list of *ServicePoint* Reports. Click the **Referrals icon** under Provider Reports.



- 3) Select the provider that received the referral from the **Provider** pick list. **\*\*Make sure you have the CORRECT Provider\*\***
- 4) Select "Incoming Referrals to this Provider" from the **Referral Type** pick list.
- 5) Click "Outstanding" for **Referral Status**
- 6) Leave Referral Outcome – All -
- 7) Enter a specific **Referral Date Range** during which the referral was sent to the provider. If you want to see ALL outstanding referrals, do not enter a date range (leave dates blank).
- 8) Click Select next to **Sort Order** for sorting preferences. For instance, add Referral Date to Selected Columns (to sort by Referral Date). Click Submit.
- 9) Click **Build Report**. The screen will refresh and display report results. You can export the report by clicking on the **Export Report** icon. It is helpful to export the report if you have more than several referrals because as soon as you go off the report screen to go into a Client Record, you will have to run the report again to see the list of referrals.

### Report Options

<b>Provider *</b>	The Gathering Inn (TGI) (24) <span style="float: right;">▼</span>	
	<input type="radio"/> <a href="#">This provider AND its subordinates</a> <input checked="" type="radio"/> <a href="#">This provider ONLY</a>	
<b>Referral Type *</b>	Incoming referrals to provider <span style="float: right;">▼</span>	
Referral Status	<input checked="" type="radio"/> Outstanding <input type="radio"/> Closed <input type="radio"/> ALL	
Referral Outcome	- All- <span style="float: right;">▼</span>	
Referral Date Range	<input type="text"/> / <input type="text"/> / <input type="text"/> <span style="float: right;"> <input type="text"/> / <input type="text"/> / <input type="text"/> </span>	
Sort Order	Referral Date (Ascending) <span style="float: right;"> <input type="button" value="Select"/> <input type="button" value="Clear"/> </span>	

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### Report Results

Referral Date	Name	Group ID	Ranking	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
12/08/2017 11:22:43 AM	(7960) Test1, Just A			Emergency Shelter	Coordinated Entry	The Gathering Inn (TGI)		

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10) Click the client **Name** to edit the client record. From the **Summary Tab**, click the pencil icon next to **Outstanding Incoming Referrals**.

**Client - (7960) Test1, Just A**


(7960) Test1, Just A  
Release of Information: **None**

**Client Information** | Service Transactions

**Summary** | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

Added to the system 12/08/2017 09:27 AM

Name	Test1, Just A	Gender	Male
Date of Birth	01/01/1990 (Age 27)	Primary Race	
Social Security	000-00-0000	Secondary Race	
		U.S. Military Veteran?	



**Release of Information**

Provider	Permission	Start Date	End Date
No matches.			



Add ROI

**Households**

ID	Type	Head of Household	Relationship
No matches.			

Search Existing Households | Start New Household

**Entry/Exits**

Program	Type	Entry Date	Exit Date
Coordinated Entry	HUD	 12/08/2017	

Add Entry / Exit | Showing 1-1 of 1

**Incidents**


Start Date	End Date	Incident	Incident Code	Provider
No matches.				

Add New Incident

**Shelter Stays**

Start Date	End Date	Provider
No matches.		

**Outstanding Incoming Referrals**

Referral Date	Referring Provider	Need Type
 12/08/2017	Coordinated Entry	Emergency Shelter

Add Referral | Showing 1-1 of 1

- 11) Under **Referral Data**, select the applicable Referral Outcome (Accepted, Accepted on Waitlist, Declined, Canceled) from the drop down list. If Canceled or Declined, select Reason from drop-down menu. Add Follow Up Information if desired for tracking purposes.

Referral Data	
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Follow Up User	The Gathering Inn (TGI) (24) -Select-
Follow Up Made	-Select-
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

- 12) Under **Needs Status and Outcome**, update the Need Status to Closed or In Progress, and Outcome of Need to Fully Met, Not Met, Partially Met or Service Pending. If Need is Not Met, select Reason why from drop down menu. You can also track **service transactions** related to this referral here as well.

Need Status and Outcome	
Need Status *	Identified
Outcome of Need	Not Met
If Need is Not Met, Reason	-Select-
Service Information	
Provide Service	A Service has not yet been provided for this Referral.

- 13) BE SURE TO CLICK SAVE AND EXIT

- 14) Make sure an ROI was recorded by this provider if one was received.