Coordinated Entry Workflow - revised Feb 2018

Add or Close Referral - revised Feb 2018

Coordinated Entry HMIS Workflow

for Ohio Balance of State Providers

Task	Steps
1 Login	a. In your web browser go to **https://sp5.servicept.com/odod**
	b. Enter username and password.
	c. Check that you are entering data as the correct provider. If not, click **Enter Data As** and pick the correct provider.
	d. Check System & Agency News (Home Page Dashboard) for important updates.
2 Create Client Profile	a. Click **ClientPoint** in the left sidebar.
	b. Search for the client in the database. If no matches, add in the Name Data Quality, SSN, SSN Data Quality, and Veteran Status, and click **Add Client With This Information**. If there is a match, select the client.
	c. Write Client ID on folder.
3 Household/Single	
A. If Client already exists in HMIS	a. If the client is a single, skip to Step 4. If the client is in a household, check in the list of households in the Households dashlet on the Summary tab to be sure there is a household listed that matches exactly. If there is, skip to Step 4. If not, click Start New Household and skip to Step 3B.
B. If new client is part of a Household	a. Click **Add Client and Add NEW Household**.
	b. Select the appropriate Household Type. To add additional members of the household; stay in the household window, search and add each member, in turn, including their Name Data Quality, SSN and SSN Data Quality, and Veteran Status. Click **Continue** when done.
	c. Select the Head of Household, identify other client Relationships, and make the Joined Household Date to be their Entry Date. Click **Save and Exit.**
C. If new client is an individual	a. Click **Add Client Only**.
4 ROI (Release of Information)	a. Click the **Summary** tab, and find the ROI dashlet.
	b. Click **Add ROI**. Check all household members.
	c. Release Granted = "Yes".
	d. Start Date should be the Entry Date. End Date should be set to a year out from the Entry Date.
	e. Set the Documentation to "Signed Statement from Client". **Save**.
5 Referrals	a. See attached "Step 5: Add or Close Referrals" guide to manage referrals.
6 Enter Client into your program.	a. On the Summary tab, find the Entry/Exit dashlet and click **Add Entry/Exit**.
	b. Check all household members. Select the correct Entry/Exit type for your project (HUD, VA, PATH or RHY). For ES, TH, and SH enter the date the client physically moved into the facility. For PSH, RRH, and HP, enter the date the client was accepted into the program (all paperwork was in, client agreed, everything signed). Click **Save & Continue**.
	c. Fill in the assessment, answering all questions as necessary. Click the next member of the household from Household Members list in the left sidebar. Fill in their assessments in turn, until all household members have their assessments completed and saved.
	d. If the client came to your project with a paper VI-SPDAT that needs to be entered or needs to be assessed immediately, go to Select an Assessment. If the client is a single adult 25 or over, choose **VI-SPDAT 2.0**. If the client is in a household, choose the **VI-FSPDAT 2.0** and only complete while on the head of household. If the client is under 25 (as a single), choose the **TAY VI-SPDAT 2.0**. Click **Add** and answer the subassessment. Click **Save and Exit.**
	e. If the client is a veteran, and you are trained on completing the Homeless Vet Assessment, go to Select an Assessment and complete it. If you are not trained on completing that assessment, be sure the veteran is referred to your local SSVF provider for assistance.
	f. Once all the assessments are complete, click **Save & Exit** which will return to the Summary tab.
The client Entry is completed. The remaining workflow is for changes or updates during enrollment and/or subsequent Exit.	
7 Enter Interim Reviews, Updates, or subsequent VI-SPDATs	a. Click the **Entry / Exit** tab.
	b. Click on the **Interims** button next to the Entry/Exit.
	c. Click **Add Interim Review**. Check all household members. Select Interim Review Type. Click **Save & Continue**. This will make the interim assessment appear.
	d. If you are updating anything in the Update assessment, review the assessment information, making any necessary changes. Click **Save** and then in left sidebar, click the next member of the household and continue until all household members have their assessments completed and saved. If you are entering a VI-SPDAT, from the Head of Household's record, click in the Select an Assessment area and find the appropriate VI-SPDAT. Click **Add** and save the data.
	e. After filling in the last household member's assessment, click **Save & Exit** which will return to the Summary tab.
8 Complete Service Transactions	a. On the Summary Tab, find the Services dashlet.
	b. Click the **Add Multiple Services** button.
	c. Make sure only the Head of Household is checked and complete form, including **Add Funding Source** button (for financial services). Click **Add another** if more services need to be entered. Once all services are entered, click **Save.**
9 Exit Client (after program completion or exit)	a. On the Summary tab, find the Entry/Exit dashlet. Click the appropriate Exit pencil.
	b. Fill in the Exit data and click **Save and Continue**.
	c. Fill in the first household member's Exit Assessment.
	d. Click **Save** if there are more household members, or **Save and Exit** if this was the only or last household member.
	e. If you're exiting a household, go through the household by clicking the client names in the left sidebar, updating each assessment in turn. Click **Save and Exit**.
	f. Once all the data for all the household members are updated through the Exit dialog box, can click **Save and Exit**.
	g. If this client has any Open Outstanding Referrals that need to be closed, follow the instructions in the "Step 5: Add or Close Referrals" guide.

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Step 5: Add or close referrals

This is only Step 5 of the Coordinated Entry workflow. If you are the referring provider and are referring to a non-HMIS provider you may be expected to Add the referral and also close it in HMIS when it has been completed.

Adding a Referral

1. On the Head of Household's Summary tab, in the Outstanding Outgoing Referrals dashlet, click on **Add Referral**. You can also access it from the Service Transactions Tab under the Referrals tab.
2. You do NOT need to select any household members. Be sure you are in the Head of Household's record before continuing.
3. Select any needed services from the Service Code Quick List and click **Add Terms**.
4. If the receiving provider is listed in the Provider Quick List, you can select the provider, click **Add Provider**, and skip to Step 5. If the receiving provider is not listed in the Provider Quick List, you will search for the provider under "Refine Provider Search Criteria".
   a. Enter any geographical information pertaining to where the receiving provider is using the County field or other fields as necessary.
   b. Review the "Search Results" for any providers that offer services needed in the geography specified.
   c. Use to select.
5. Under "Refer to Provider", record the date, choose your household type in Referral Ranking, ranking VI-SPDAT score, Projected Follow-up Date , and Follow-Up User (you or someone from your agency).
6. Make sure that all checkboxes for all the Needs that you Identified and that they are assigned to the correct providers.
7. Click **Save All**.

Closing a Referral

1. Click on the Referral, either in the Follow-Up list, the Counts report, the Referrals report, the Outstanding Incoming Referrals report dashlet, or in the Service Transactions Tab.

2. Select a “Referral Outcome” to indicate if the referral was Accepted, Declined or Cancelled
3. Select a “Follow Up Made” status and enter a “Completed Follow Up Date” to indicate when and how the referral was followed up on.
4. Select a “Need Status”, and “Outcome of Need”
5. Click on **Save & Exit**.

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