



HMIS Referral of a Client from an Access Point to a Shelter

This process is for clients that are entering shelter after meeting with an Access Point (AP). The AP will create a client record/household, add a birthdate, maybe add a VI-SPDAT, and create the referral to shelter. If your agency is both the AP and also the shelter you will then switch your EDA to the shelter, accept the referral, and enter the client into the shelter project. If your agency is not the AP, but is only the shelter, you will start at the **Accept Referral** step.

AP - Add VI-SPDAT

*In most cases, the AP will not be entering a VI-SPDAT into the AP project prior to referring to shelter. However, if the client has been unsheltered, it's possible the AP will have VI-SPDAT information that can be entered into the client record.

Use Enter Data As to switch to the access point (AP) project.

Search for and create (or open) the Client record from ClientPoint. Create a household if necessary.

The Client Summary Tab should provide the Coordinated Entry Assessment by default.

If the birthdate info is blank, fill it in and then click Save at the bottom.

Click Add in the appropriate VI-SPDAT section to input the results of whichever VI-SPDAT was done with the client or head of household.

AP - Create Referral

Click the Add Referral button at the bottom of the Summary

In the Service Code Quicklist, pick the Need: *Emergency Shelter BH 1800*

Click Add Term

In the Search Results, select the shelter provider (find the provider and click the green plus sign)

Set the Referral Date (if you need to change it)

Set the Ranking to Single or Household

Click the Search button for the appropriate VI-SPDAT type you had entered in the previous steps

Click the green plus sign next to the VI-SPDAT score to add it to the referral

Set the Need Date to match the referral date (if you changed it)

Click Save All

If your agency is also the shelter provider, you will follow the next section as well. If your agency is not the shelter provider you are finished.

Accept Referral

Use Enter Data As to switch to the shelter project, if your shelter is also the AP

Click the Incoming Referrals number on your Counts Dashboard, click the ClientID number in the list
or open the client via ClientPoint

Go to the Outstanding Incoming Referral box on the Summary and click the Referral pencil.

Set the Referral Outcome to 'Accepted'

Set Need Status to 'Closed'

Set Need Outcome to 'Fully Met'

Save & Exit

ROI, Project Entry

From here it's the same old workflow: Add ROI for shelter, Add Entry/Exit to shelter.