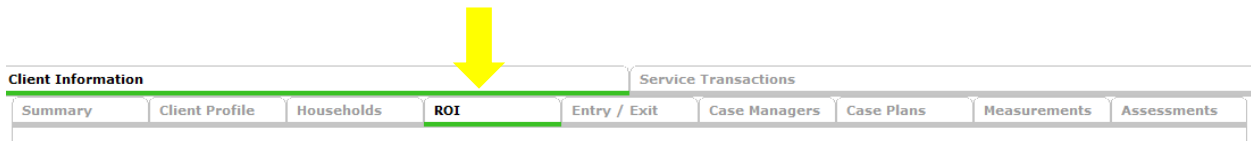


CES in HMIS – a Quick How To

For HMIS Users referring TO the Coordinated Entry System:

1. START with searching for the client in ClientPoint. If the Client is not in HMIS, then take the appropriate steps of adding a new record. If the Client is in HMIS, click on their name to pull up their Client Record.
 - a. Data Quality Bonus Points: You’ve taken a few brief moments to review information on the Client Profile page and confirmed this information is complete and up-to-date.
2. Under the Client Information tab, SELECT the ROI tab:



CLICK “Add Release of Information”. Select all Household members covered by the ROI. Select your provider, which is your **AGENCY** (not specific program).

>>Release Granted>>Start Date (date the ROI was completed/signed, should be same date as assessment)>>End Date (one year after ROI was signed)>>Documentation (select appropriate option)>>Witness (select appropriate answer)

CLICK “Save Release of Information”

3. SELECT the “Assessments” tab:



SELECT the appropriate VI-SPDAT (VI-SPDAT=Individuals; VI-FSPDT= Families; TAY-SPDAT= Youth)

CLICK “Submit” >>Click “Add”.

Return to the Assessment drop-down and complete the second assessment: “Central Oregon Coordinated Entry Eligibility MATCH Form”:

The screenshot shows a 'Select an Assessment' dropdown menu. The selected option is 'Central Oregon Coordinated Entry Eligibility MATCH Form'. Below the dropdown is a table with the following data:

VI-SPDAT 2.0	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
10/18/2017	0	1	0
	0	2	3

The table also includes a 'Start Date*' column with the value '10/18/2017' and an 'Add' button at the bottom left. The status 'Showing 1-1 of 1' is displayed at the bottom right.



**Have you completed the correct SPDAT and the MATCH assessment?
If so, proceed to making the referral...**



4. Under the Service Transaction tab, SELECT the “Add Referrals” button:

The screenshot shows the 'Service Transactions' tab selected. The 'Service Transaction Dashboard' contains several buttons: 'Add Need', 'Add Service', 'Add Multiple Services', 'Add Referrals', 'View Shelter Stays', and 'View Entire Service History'. A yellow arrow points to the 'Add Referrals' button.

CHECK the household members tied to the referral:

The 'Household Members' section includes an information icon and a note: "To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected." Below this are three entries: "(429569) Male Single Parent" (unchecked), "(1) Test, Just A" (checked), and "(58100) Test, Just A, Jr" (unchecked).

SELECT the correct Service Code: “Housing Search Assistance”, then CLICK “Add Terms”

The 'Service Code Quicklist' shows 'Housing Search Assistance (BH-3900.3100)' selected. A yellow arrow points to the 'Add Terms' button. Other buttons include 'Service Code Look-Up' and 'Add Terms & Go To Search Results'.

From the Referral Provider Quick List, CHOOSE the “Central Oregon Coordinated Entry Provider” from the drop down Menu:

The 'Referral Provider Quicklist' shows a dropdown menu with 'Central Oregon Coordinated Entry (5214)' selected. Buttons for 'Add Provider' and 'Bed Availability' are also visible.

Under Referral Data, answer the following questions. **Then SELECT “Save All” at the bottom of the page.**

The 'Refer to Providers' section contains the 'Referral Data' form. Fields include: 'Needs Referral Date*' (10/18/2017), 'Referral Ranking' (-Select-), 'VI-SPDAT Score' (Please Select a VI-SPDAT Score), 'TAY-VI-SPDAT Score' (Please Select a TAY-VI-SPDAT Score), 'VI-FSPDAT Score' (Please Select a VI-FSPDAT Score), 'Projected Follow Up Date' (empty), and 'Follow Up User' (NeighborImpact (3591)). A red circle with a slash is drawn over the 'Follow Up User' field. At the bottom, there is a checkbox for 'Check to notify ServicePoint Providers by Email' and a 'Save All' button.