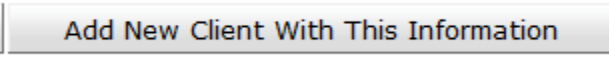


CES in HMIS – a Quick How To

For HMIS Users referring TO the Coordinated Entry System:

1. START with searching for the client in ClientPoint.
2. If the Client is **NOT** in HMIS, then please add them by doing the following:
 - a. If after searching for Client in ClientPoint there are no records, add client by clicking “Add New Client With This Information”:



- b. Click on the “Client Profile” tab and add the demographic information of client by clicking on the pencil next to “Client Record” and “Client Demographics”:



- c. Once the demographic information is entered, jump to Step 4.
3. 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.
4. 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 (agency).**

>>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”

5. SELECT the “Assessments” tab:



Select the assessment: “Central Oregon Coordinated Entry Eligibility MATCH Form”. Click “Submit” to see the questions.

Select an Assessment

VI-SPDAT 2.0

Submit

-Select-

- Central Oregon CE Assessment
- Central Oregon Coordinated Entry Eligibility MATCH Form
- Coordinated Entry Contacts
- Housing Outcomes
- TAY-VI-SPDAT 1.0
- VI-FSPDAT 2.0
- VI-SPDAT 2.0

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

VI-SPDAT v2.0

Start Date*

10/18/2017

Add

Showing 1-1 of 1

Once completed, return to the Select an Assessment dropdown. SELECT the appropriate VI-SPDAT (VI-SPDAT=Individuals; VI-SPDAT= Families; TAY-SPDAT= Youth). CLICK “Submit” >>Click “Add”.



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



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

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

ONLY the Head of Household needs to be checked for the referral:

The screenshot shows the 'Household Members' section with the following information:

- (429569) Male Single Parent
 - (1) Test, Just A
 - (58100) Test, Just A, Jr

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

The screenshot shows the 'Service Code Quicklist' with 'Housing Search Assistance (BH-3900.3100)' selected. A yellow arrow points to the 'Add Terms' button.

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

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

Under Referral Data, answer the following questions.

▼ **Refer to Providers**

Referral Data

✓ **Needs Referral Date*** 10 / 18 / 2017 8 : 12 : 56 PM

Referral Ranking -Select-

✓ **VI-SPDAT Score** Please Select a VI-SPDAT Score Search Clear

✓ **TAY-VI-SPDAT Score** Please Select a TAY-VI-SPDAT Score Search Clear

✓ **VI-FSPDAT Score** Please Select a VI-FSPDAT Score Search Clear

Projected Follow Up Date [] / [] / []

Follow Up User NeighborImpact (3591) Search My Provider Clear

-Select-

[Check to notify ServicePoint Providers by Email.](#)

SELECT "Save All" at the bottom of the page.

To check ensure that a referral has been made:

1. Click on the "Service Transactions" tab, then click on the "Referrals" tab:

Client Information | **Service Transactions**

Needs | Services | **Referrals** | Shelter Stays | Entire Service History

2. You should see all referrals made for this client on this tab. Your referral will have "Central Oregon Coordinated Entry" as the Referred to provider.

Previous Referrals

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
11/13/2017	11/13/2017	Central Oregon Coordinated Entry		Housing Search Assistance	Identified	