



USER BULLETIN: Cancelling a Referral 3-Sept-13

This User Bulletin will explain how to cancel a referral.

Step 1: Checking your Outstanding Referrals Report

If you created a referral by accident, you need to delete the referral

To access the referral, you will need to log into ServicePoint. Then go to the “Reports” tab as indicated by the red arrow in Figure 1-1.

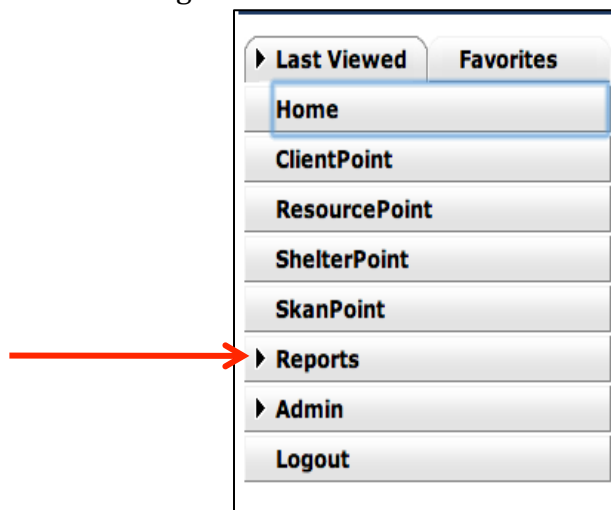


Figure 1-1

On the “Provider Reports” page, you will see a button that says “Outstanding Referrals,” as shown in Figure 1-2. You will need to click this button.

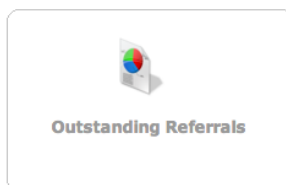


Figure 1-2

You will then be taken to the “Report Options” page. Please select the appropriate report options. For “Referral Type,” please select “Referrals my provider has made.”

You can select a specific date range by inputting the date, or if you would like to view all referrals, leave the date boxes blank.

When you have finished filling out this form, please click “Build Report.”

Figure 1-3

You will then see the following Outstanding Referrals page. For this example, you will be cancelling the first referral, the one made for Lisa McTest as indicated by the red arrow in Figure 1-4. Please click on the name of the client whose referral you would like to cancel.

Outstanding Referrals					
Name	Group ID	Referral Date	Need Type	Referred By	Referred To
(30104) McTest, Lisa	1842110	08/28/2013	Orienteering	University of Tennessee at Knoxville	Test Provider
(24092) McTest, Testy	1842110	08/28/2013	Orienteering	University of Tennessee at Knoxville	Test Provider

Figure 1-4

You will then be taken to the “Client Profile” Page. Please click “Service Transactions” tab, as indicated by the red arrow in Figure 1-5.

Client - (30104) McTest, Lisa

(30104) McTest, Lisa
Release of Information: Ends 07/01/2015

-Switch to Another Household Member- Submit

Client Information | **Service Transactions**

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

Client Record Issue ID Card

Name	McTest, Lisa
Alias	
Social Security	
SSN Data Quality	Don't Know or Don't Have SSN (HUD)
Age	55

No Photo Attached

Change Clear

Figure 1-5

From the following screen, please click “View Previous Service Transactions” as indicated by the red arrow in Figure 1-6.

Client Information | **Service Transactions**

Service Transaction Dashboard

Add Need | Add Service | Add Multiple Services | Add Referrals | **View Previous Service Transactions**

View Shelter Stays | View Entire Service History

Figure 1-6

From this screen, please click the “Referrals” tab as indicated by the red arrow in Figure 1-7.

The screenshot shows a web interface with two main tabs: 'Client Information' and 'Service Transactions'. Under 'Service Transactions', there are five sub-tabs: 'Needs', 'Services', 'Referrals', 'Shelter Stays', and 'Entire Service History'. A red arrow points to the 'Referrals' sub-tab.

Figure 1-7

This screen will show us all “Previous Referrals” for a client. You want to delete the referral at the top, so you will click the trash can next to this referral as indicated by the red arrow in Figure 1-8.

The screenshot shows the 'Previous Referrals' screen. It features a table with columns: 'Need Date', 'Referred Date', 'Referred To', 'Need Type', 'Need Status', and 'Need Outcome'. The top row of the table has a trash can icon next to it, which is highlighted by a red arrow. Below the table is an 'Add Referral' button and a 'Showing 1-2 of 2' indicator. At the bottom right, there are 'Back to Dashboard' and 'Exit' buttons.

	Need Date	Referred Date	Referred To	Need Type	Need Status	Need Outcome
	08/28/2013	08/28/2013	Test Provider	Orienteering	Identified	
	08/14/2013	08/14/2013	Test Provider	Orienteering	Identified	

Figure 1-8

You will then get the following pop-up as shown in Figure 1-9. Select “Delete.”

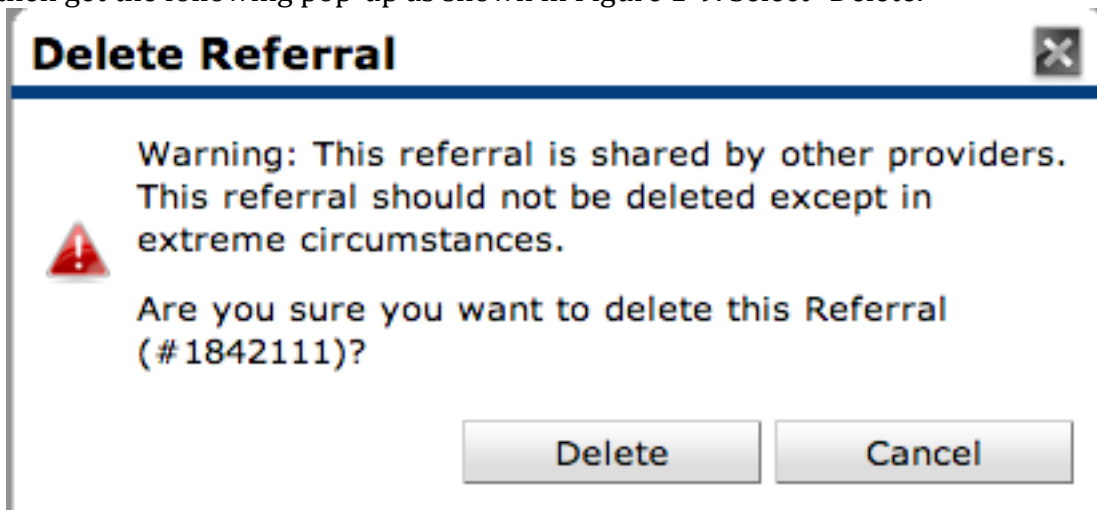


Figure 1-9

Congratulations! You are now finished cancelling a referral!