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## USER GUIDE: Creating a Referral

### 9-Sept-2021

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This User Bulletin will clarify the steps to complete when creating a referral.

#### **Step 1: Adding a need**

When you first log into ServicePoint, you will be taken to the home screen. Before you can create a referral, you must first find your client. To do so, proceed to the ClientPoint page, as indicated by the red arrow as shown in Figure 1-1.

University of Tennessee at Knoxville  
August 07, 2013  
Mode: Shadow  
Back Date  
ART: Connected

Home > Home Page Dashboard

Type here for Global Search

Last Viewed Favorites

- Home
- ClientPoint**
- ResourcePoint
- ShelterPoint
- SkamPoint
- Reports
- Admin
- Logout

System News (5)

Date	Headline
08/02/2013	Potential Violations of User Agreement
07/09/2013	ServicePoint has been upgraded to 5.8.3
07/03/2013	Upgrade 9:00 AM Tuesday, July 9!
09/26/2012	New User Bulletin: Disability Sub-Assessment
09/20/2012	Helpful documentation available for entering household information

Agency News (0)

Follow Up List (0)

Client ID	Type	Date	Time Remaining
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Add System News View All View All

Customize Home Page Dashboard

Figure 1-1

When you click on this button, it will take you to the following screen. You will want to search by the client's name and social security number (if available) or their Client ID# if you know it.

### Client Search

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Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text" value="testy"/>	<input type="text"/>	<input type="text" value="mctest"/>	<input type="text"/>
Alias	<input type="text"/>			
Social Security Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

### Client Number

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Enter or scan a Client ID number to go directly to that Client's profile.

**Client ID #**

**Figure 1a 2**

If the client is already in the system, open their record by clicking the pencil next to the client's name (as indicated by the red arrow).

If the Client is not found in your search, they'll need to be added. If you are not familiar with adding Clients, please contact KnoxHMISsupport as there are specific guidelines for creating new Client records in the database.

Client Results									
		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		24092	McTest, Testy	***-**-4321	09/27/1961	Deidre's Test Client	Male	Indefinite	3
Showing 1-1 of 1									

**Figure 1-3**

You will then be taken to the Client Profile. You will now make all changes from the “Service Transactions” tab as indicated by the red arrow in Figure 1-4.

**Client - (24092) McTest, Testy**

(24092) McTest, Testy  
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, Testy
Alias	Deidre's Test Client
Social Security	987-65-4321
SSN Data Quality	Full SSN Reported (HUD)
Age	51

Change Clear

KUOX HMIS

Figure 1a 4

Your next step is to click “Add Need,” as indicated by the red arrow in Figure 11 5. **A need must be created before we can add a referral.**

**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 1-5

On the next screen, please select all household members you are referring to another agency. If you would like to refer all members of a household, please select the box next to the Household, as indicated by the red arrow in Figure 1-6. If you are referring only one member of a household or only a few members of an entire household, please ensure that the box next to each name is checked. For the purposes of this demonstration, you will be making a referral for the entire household.

**Client Information** | **Service Transactions**

**Add Need**

▼ **Household Members**

**To include Household members for this Need, click the box beside each name. Only members from the SAME Household may be selected.**

**(10518) Two Parent Family**

(24092) McTest, Testy

(30104) McTest, Lisa

(25131) McTest, Quizz

(32001) Test, Caitlin T

**(12397) Female Single Parent**

(24092) McTest, Testy

**Figure 1-6**

Further down the screen, you will proceed to the “Need Information” section, as shown in Figure 1-7. Please select the appropriate need, and date of need. In this demonstration your need will be “orienteering.” Because you are referring this need to another agency, the “Need Status” will be “Identified.” Click “Save & Continue.”

**Need Information**

**Provider \*** University of Tennessee at Knoxville (1)

**Need \*** -Select-

**Date of Need \*** 08 / 28 / 2013    11 : 21 : 01 AM

Amount if Financial

Notes

**Need Status \*** Identified

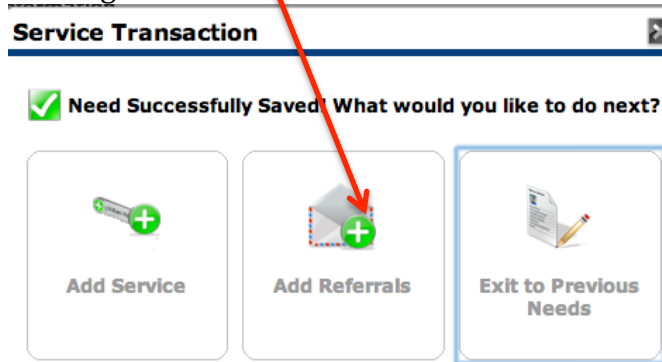
Outcome of Need -Select-

If Need is Not Met, Reason -Select-

**Figure 1-7**

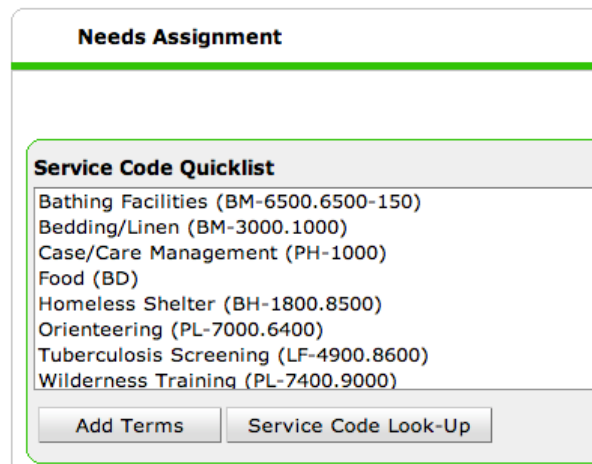
## **Step 2: Adding a Referral**

You will next see a pop-up as shown in Figure 1-8. Please click the “Add Referrals” button as indicated by the red arrow in Figure 1-8.



**Figure 1-8**

On the next screen, please proceed to the “Needs Assignment” section and select the need you are referring the client for from the Service Code Quicklist, as shown in Figure 1-9. Now click “Add Terms”. In this demo, your need is “Orienteering” and your “Add Terms” is also “Orienteering.” **NOTE: Your needs and Add Terms selection should match.**



**Figure 1-9**

## **Step 3: Referring to a specific provider**

### **Part 1:**

If your Referral Provider Quicklist has been set up by KnoxHMIS, you will be able to select an agency to refer to that you know provides the service to meet the need you selected, as indicated by the red arrow in Figure 1-10. In the case that the agency you are referring to is on this list, please select the provider and then click “Add Provider,” as indicated by the red arrow. You can now proceed to Step 4.

If this Quicklist hasn’t been set up and you would like it to be, please contact KnoxHMIS at [hmissupport@utk.edu](mailto:hmissupport@utk.edu) and we will be happy to do so. If your preferred provider is not available, please proceed to part two of this step.

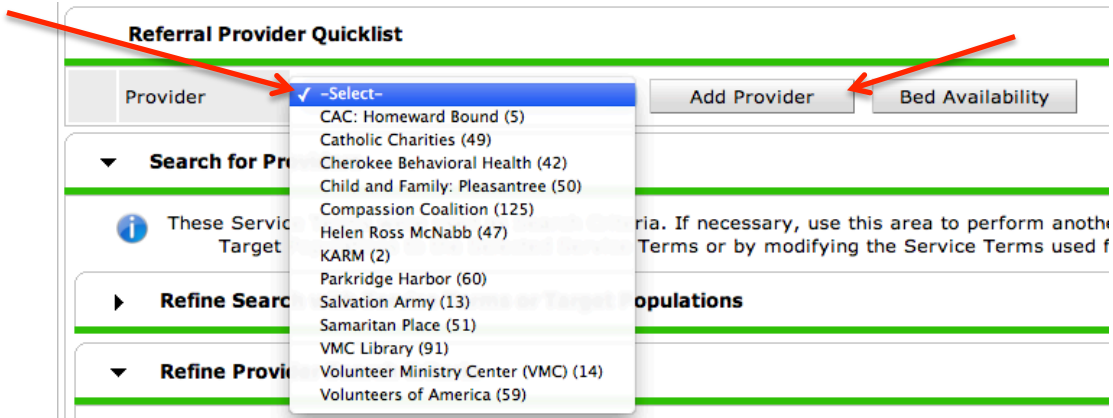


Figure 1-10

**Part 2:**

If you do not have a Referral Provider Quicklist, or your preferred provider is not on this list, you will have to manually search for providers.

When you selected the service you were creating a referral for, ServicePoint automatically created a list of providers that provide this service. These providers can be found under “Search Results,” as shown in Figure 1-11.

Search Results																											
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider												Type	Phone	Location	Distance	Matched Needs										
			Test Provider										Level 1	(865) 976-1746	Knoxville, TN 37996	N/A	1/1										
			University of Tennessee at Knoxville										Level 1	(865) 976-1746	Knoxville, TN 37996	N/A	1/1										

Bed Availability Showing 1-2 of 2

Figure 1-11

You can make a referral to any agency that fills your client’s need. When you have chosen an agency, please click the “+” next the provider as indicated by the red arrow in Figure 1-11.

**Step 4: Finalizing your referral**

If you move down to the “Selected Providers” section as shown in Figure 1-12, you will see the agency you are choosing to refer your client(s) to.

Selected Providers							
	Provider ▲			Type	Phone	Location	Last Updated
		Test Provider		Level 1	(865) 976-1746	Knoxville, TN 37996	03/20/2013

Showing 1-1 of 1

Figure 1-12

Continue to the “Referral Data” and “Referrals” section (as picture in figure 1-13). If you plan to follow-up with the agency via phone, please enter your projected follow up date. You can also select the user from **your** agency that will be making the follow-up (Use the drop-down list) as indicated by the red arrow in Figure 1-13.

**KnoxHMIS encourages you to check the box next to “Check to notify ServicePoint Providers by e-mail” as indicated by the red arrow in Figure 1-12.**

**By checking this option, the agency you refer to will receive an e-mailed referral directing them to ServicePoint for more information.**

**This function is crucial for your agency to monitor the receipt and follow-up of referrals from your agency to another agency.**

In the “Referrals” section, you will notice that the box next to each household member that you are referring for this service has automatically been checked.

The screenshot shows the 'Referral Data' section with the following fields:

- Needs Referral Date \***: 08 / 28 / 2013
- Projected Follow Up Date**: [ ] / [ ] / [ ]
- Follow Up User**: University of Tennessee at Knoxville (1)
- Check to notify ServicePoint Providers by Email.**:

The 'Referrals' section contains a table with the following data:

Referred-To Provider	Orienteering	Referred Clients
Test Provider (79)	<input checked="" type="checkbox"/>	(30104) McTest, Lisa
	<input checked="" type="checkbox"/>	(25131) McTest, Quizz
	<input checked="" type="checkbox"/>	(32001) Test, Caitlin T
	<input checked="" type="checkbox"/>	(24092) McTest, Testy

**Figure 1-13**

When you have completed all steps listed above, please click “Save ALL” located at the bottom of the page.

*Congratulations! You have finished creating a referral!*