UT SWORPS
Software Development and Systems Engineering
Contact HMIS Support:
hmissupport@utk.edu

USER GUIDE: Creating a Referral
9-Sept-2021

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.

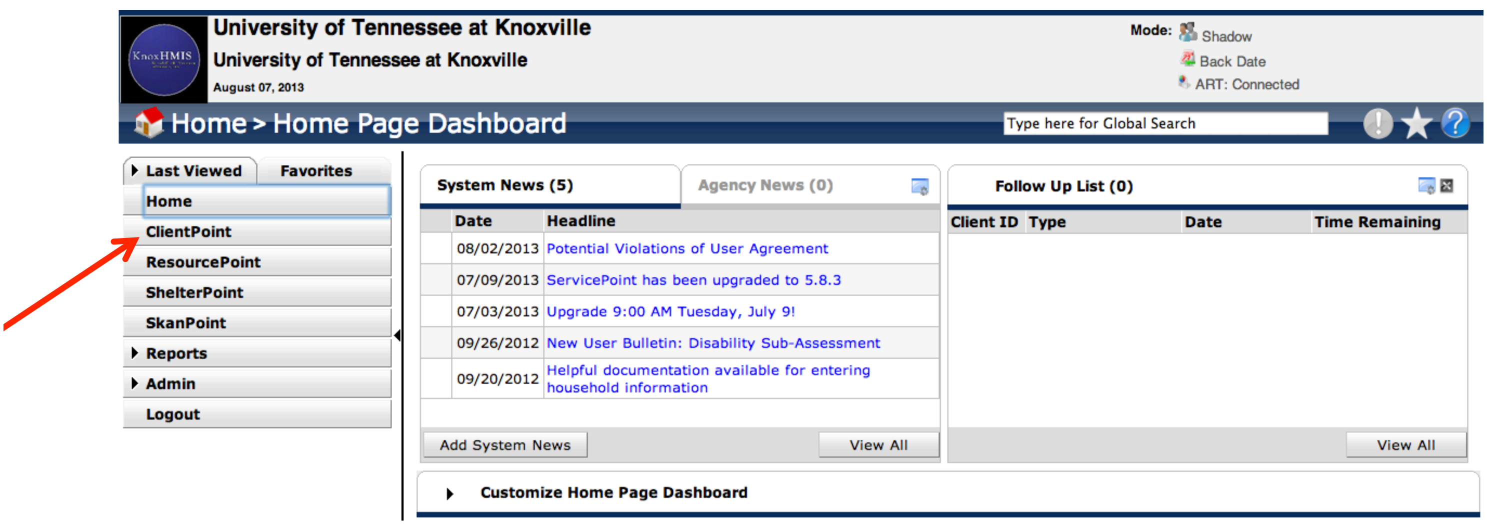

Figure 1-1

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.

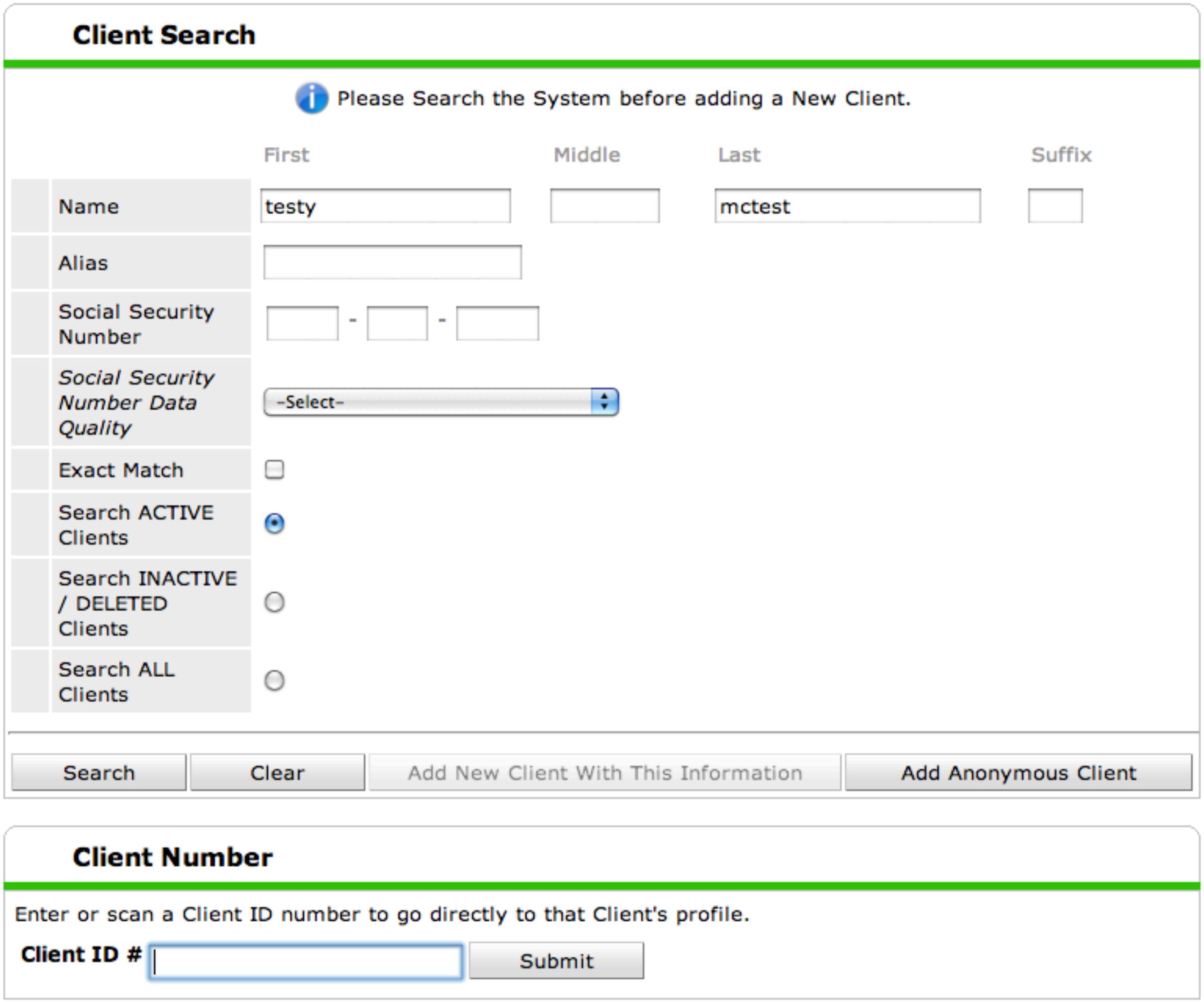

Figure 1a 2

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.

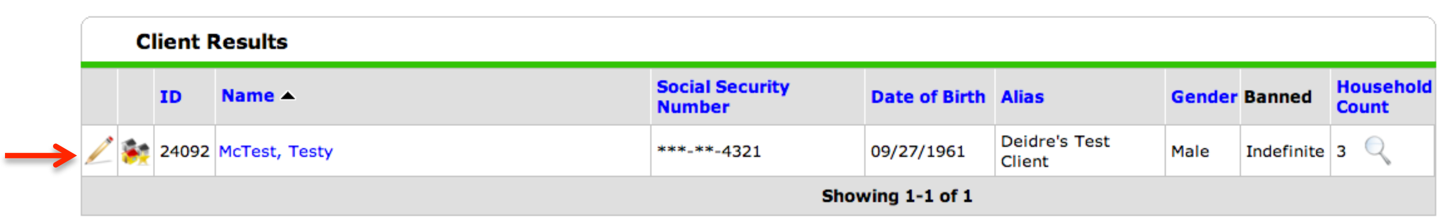

Figure 1-3

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.

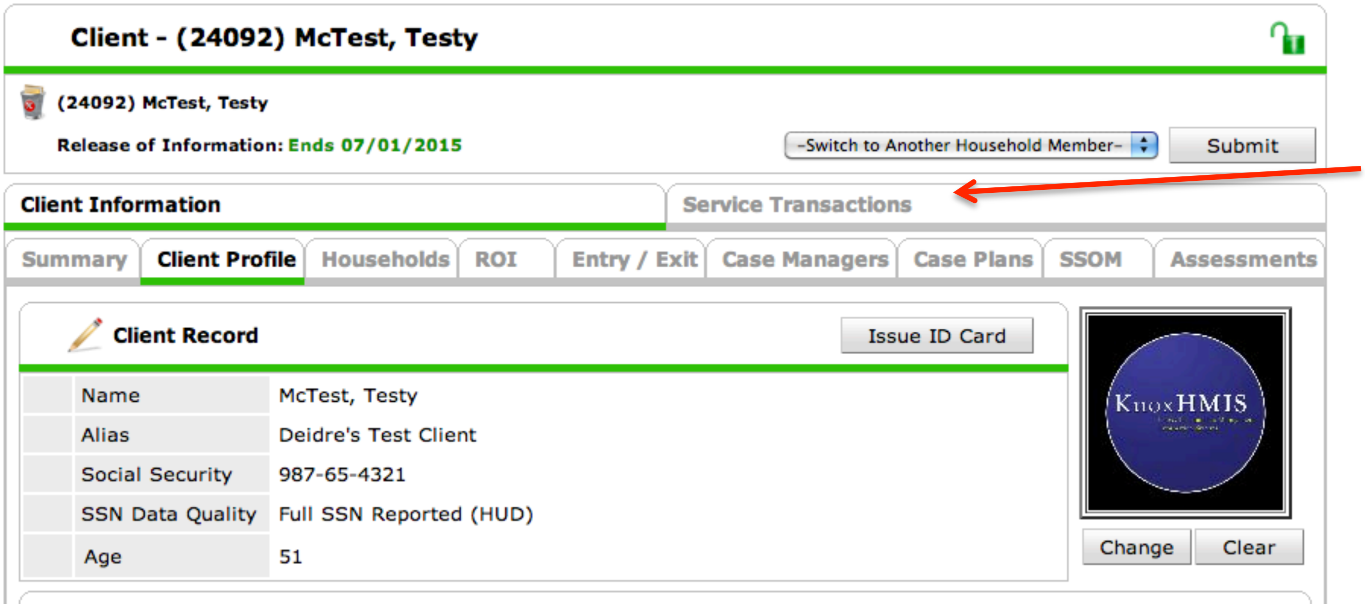

Figure 1a 4

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.**

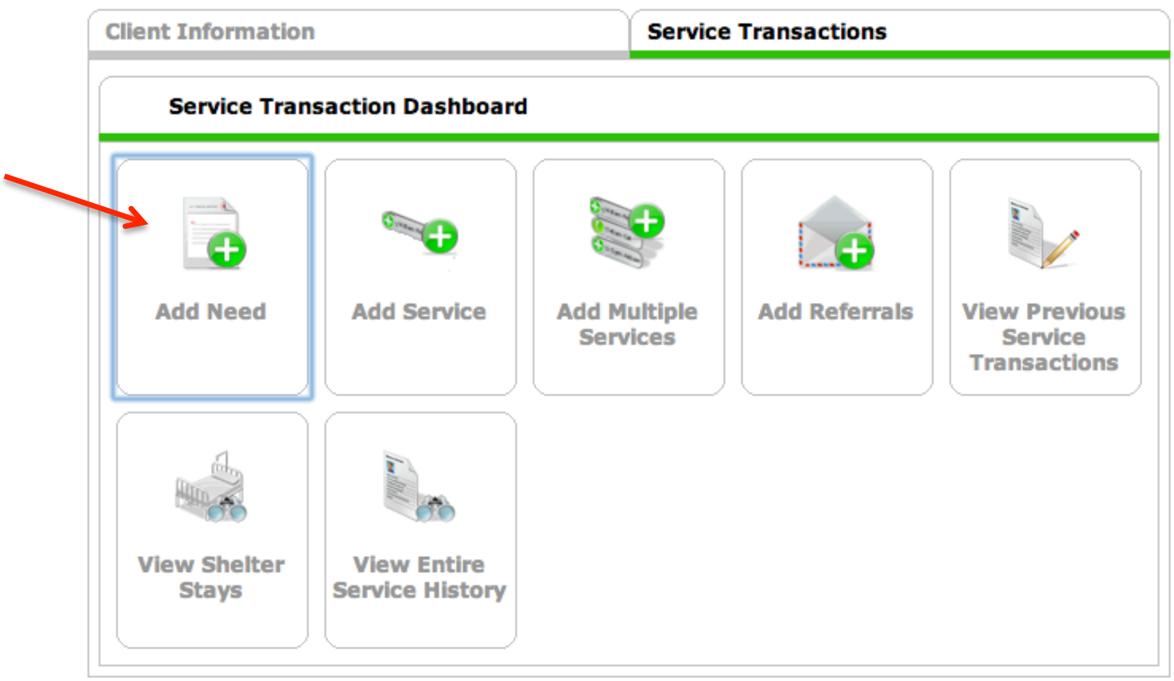

Figure 1-5

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.

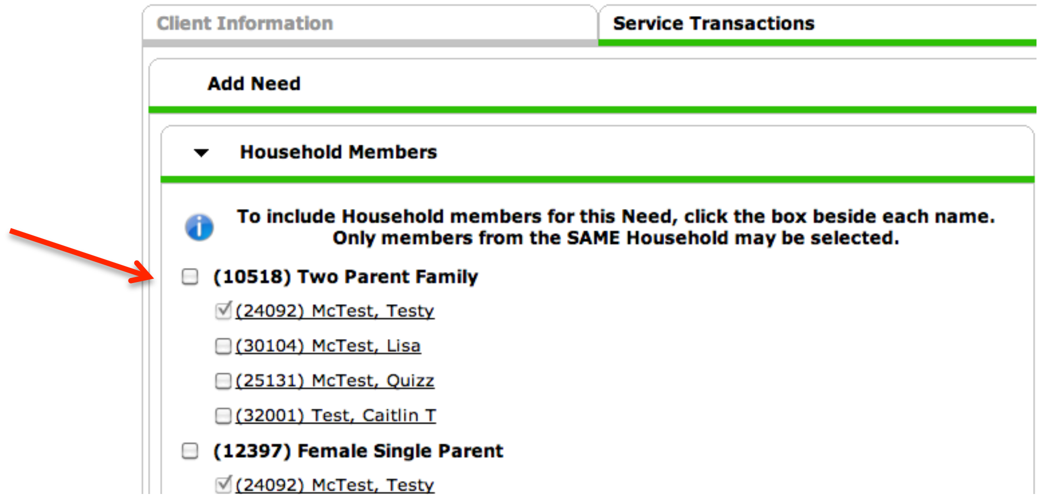

Figure 1-6

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."

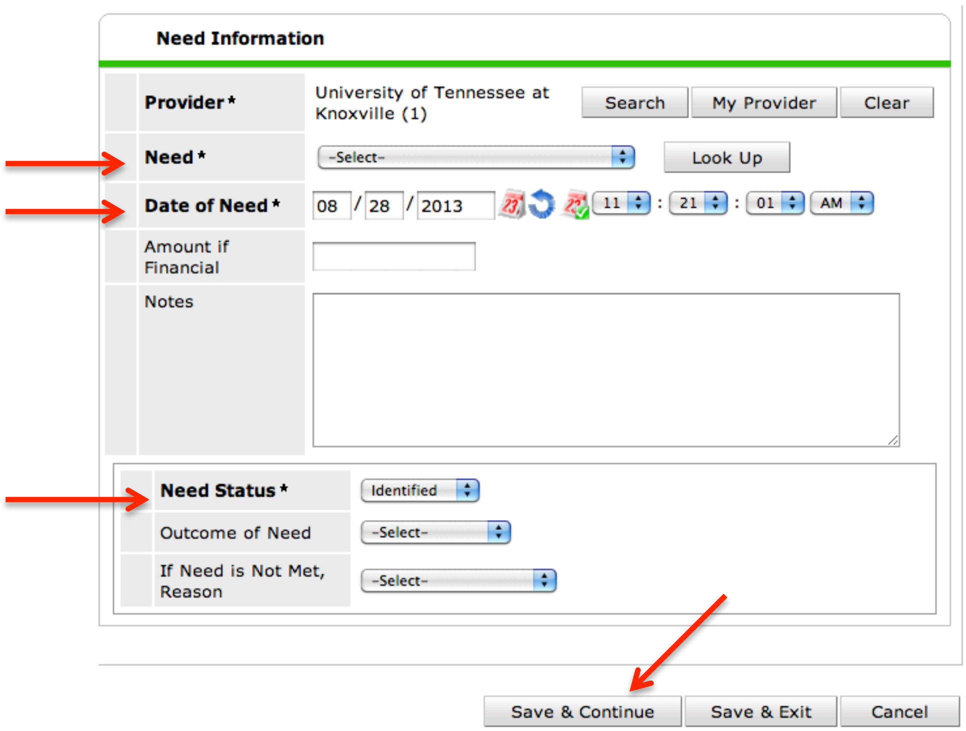

Figure 1-7

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.

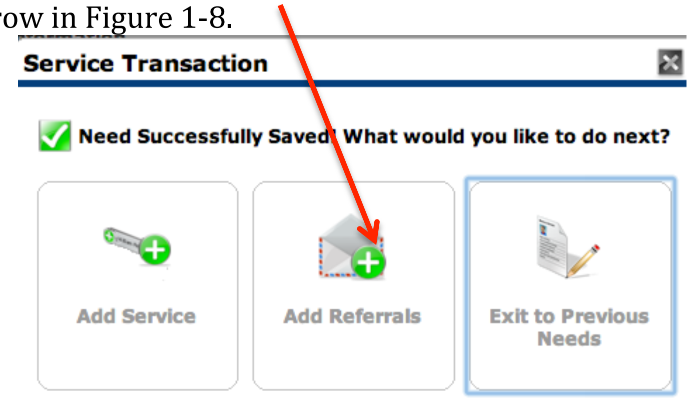

Figure 1-8

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.

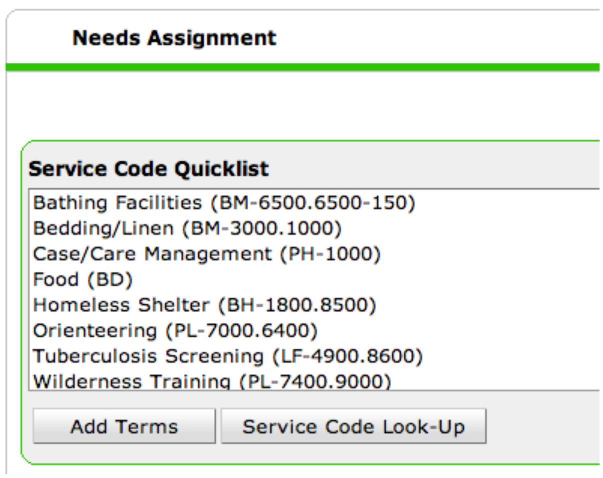

Figure 1-9

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 and we will be happy to do so. If your preferred provider is not available, please proceed to part two of this step.

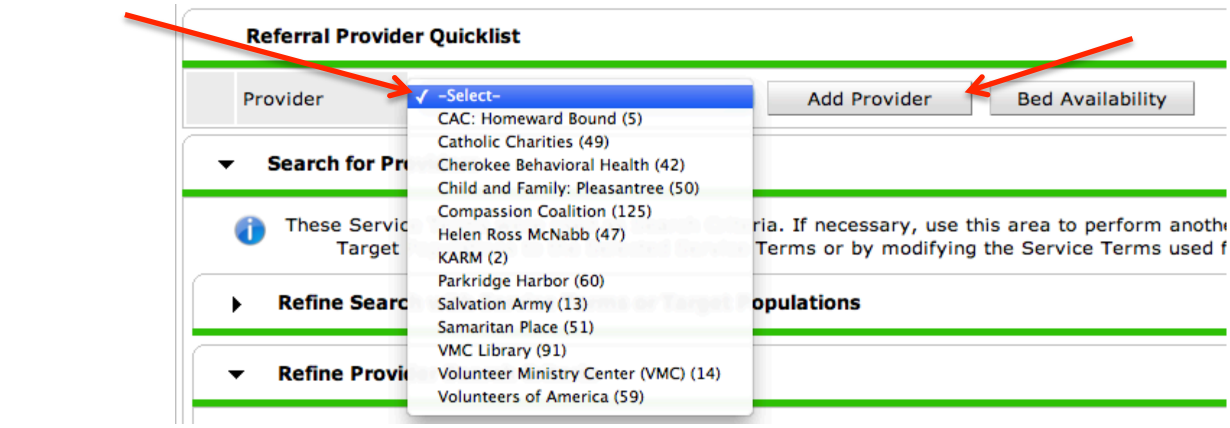

Figure 1-10

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.

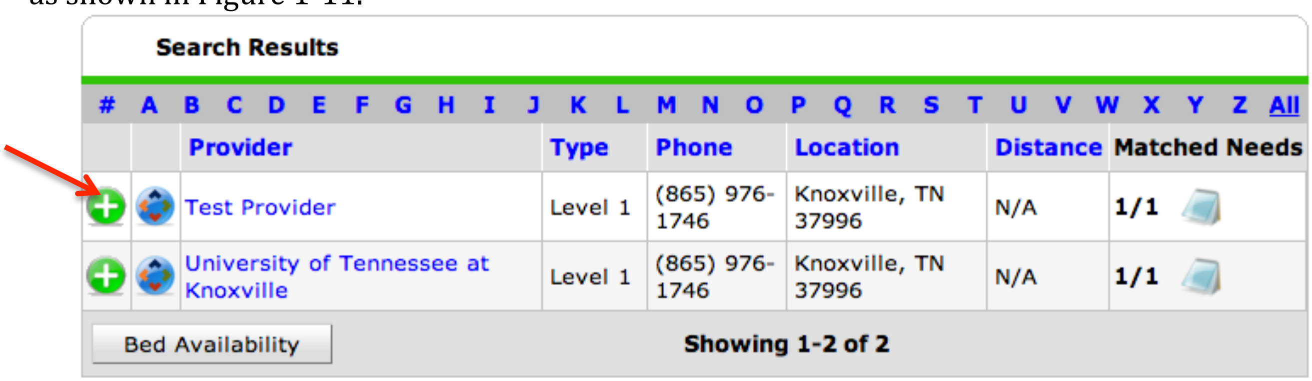

Figure 1-11

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.

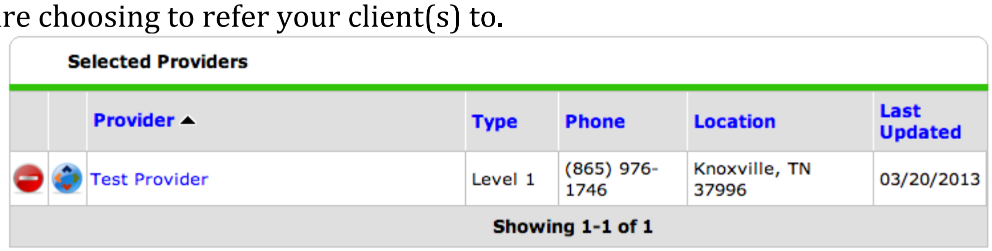

Figure 1-12

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.

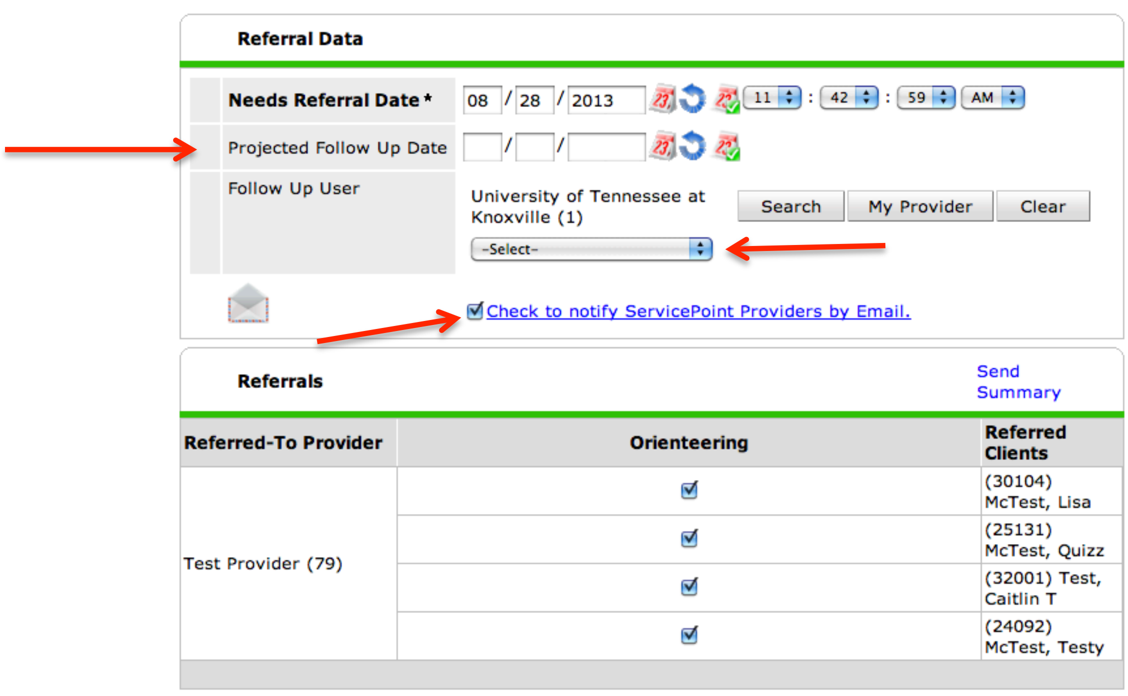

Figure 1-13

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!