

Making a Referral

Start by opening your client’s profile in ClientPoint. Navigate to the Service Transactions tab. Verify that you have an active ROI for this client by checking that you see a green date in the top left corner. If you do not, add an ROI before adding your referral.

Client - (26860) Bowman, Test A

(26860) Bowman, Test A
Release of Information: Ends 10/07/2020

-Switch to Another Household Member- Submit

Client Information | **Service Transactions** | Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

Added to the system 07/12/2007 02:25 PM

Name	Bowman, Test A	Gender	Male
Date of Birth	01/01/1998 (Age 21)	Primary Race	Client refused (HUD)
Social Security	555-55-5555	Secondary Race	
		U.S. Military Veteran?	No (HUD)

Click on “Add Referrals”

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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

Check the household box for the household you are referring. Verify that all referred household members are selected.

▼ Add Needs

▼ Household Members

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

- (42792) Couple With No Children
 - (26860) Bowman, Test A
 - (99374) Bowman, Jill L

Click on the need/s for which you are submitting a referral and click “Add Terms.” Select the provider to which you are sending the referral from the dropdown and click “Add Provider.”

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Brew Pubs (PL-6000.1500-150)
- Food and Wine Museums (TA-5500.2150)
- Laughter Therapy (RP-8000.4400)
- Worm Farming Support (BD-2600.0500-950)

Add Terms Service Code Look-Up Add Terms & Go To Search Results

Referral Provider Quicklist

Provider: Share House (1535) Add Provider Bed Availability

Scroll down until you see the heading “Referrals.” Check the boxes for the appropriate combination of people, services needed, and referral providers. In this example, Jill and Test are both being referred to the Share House, but Jill is being referred for both Worm Farming Support AND Laughter Therapy, while Test is only being referred for Laughter Therapy.

Do not change anything in the “Need” section.

Referrals Send Summary

Referred-To Provider	Worm Farming Support	Laughter Therapy	Referred Clients
Share House (1535)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(99374) Bowman, Jill L
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(26860) Bowman, Test A

▼ Need Data

Date of Need * 10 / 15 / 2019 4 : 27 : 22 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Worm Farming Support (BD-2600.0500-950)		Identified -Select- -Select-	
Laughter Therapy (RP-8000.4400)		Identified -Select- -Select-	

Remove All Needs

Save Needs ONLY Save ALL Clear ALL Cancel

Click “Save ALL.” You have made a referral!