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Part 1 (Optional) PAO Staff Creates Referral to PAO (for Primary Systems)

Phase 1: Ensure Client Profile Complete in HMIS (*Except Entry/Exit Tab)

- Follow the Golden Rule to ensure all tabs within the Client's Profile have been completed in sequential order

Step 1.1: ClientPoint - Client Profile Tab

1. From the menu, select ClientPoint.

▶ Last Viewed

Favorites

Home

ClientPoint

ResourcePoint

ShelterPoint

▶ Reports

▶ Admin

Logout

2. Establish if Client Record already exists in HMIS by 'less is more' search.
 - a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist. If record exists, click on hyperlink to open Client Profile.)

Client Search

1

Please Search the System before adding a New Client.

Name

First

Dav

Middle

Last

Bo

Suffix

Alias

Exact Match

☐

3. IF NEW CLIENT:
 - a. Type full name correctly in First & Last Name search fields (do not enter data in other search fields)
 - b. Press 'Add New Client with This Information'

6/22/2023

2

Client Search

Please Search the System before adding a New Client.

Name	First David	Middle	Last Bowie	Suffix
Alias				
Exact Match	<input type="checkbox"/>			

- c. A warning window will pop up reminding you to check the system for duplicate client profiles.
- d. Press 'Ok' to continue.

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?

4. Under the Client Profile tab, ensure Client Demographics are complete and/or accurate
 - a. Click pencil next to 'Client Demographics to edit/update
 - b. Answer all pertinent questions
 - c. Press Save

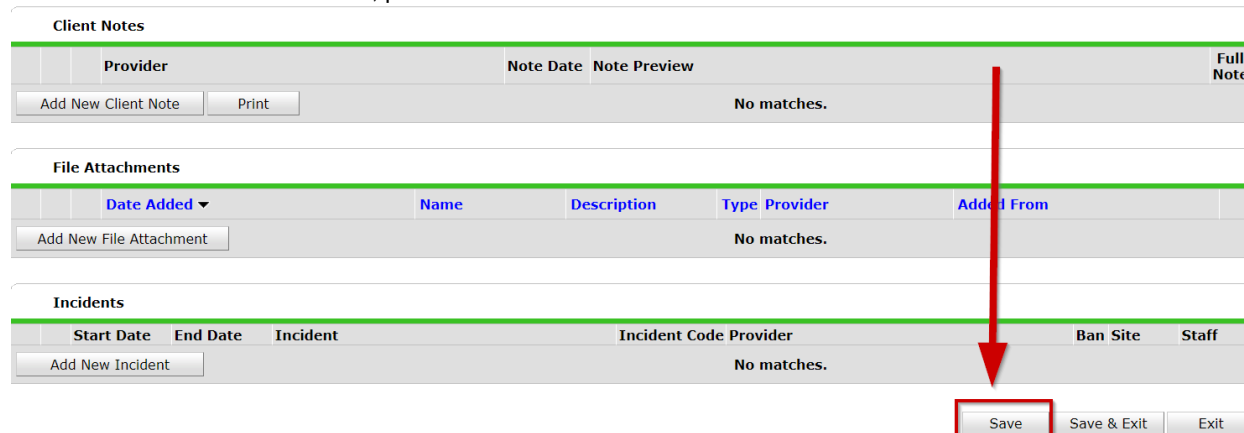
The screenshot shows a 'Client Demographics' form. Callout 1 points to the 'Client Demographics' tab in the sidebar. Callout 2 points to the 'What is your date of birth?' field, which contains '01 / 08 / 1947'. Callout 3 points to the 'Save' button at the bottom of the form. A warning message at the top states: 'Editing the Client Demographic Information could affect the Unique ID and the Client Search.'

5. Under the Client Profile tab, ensure Universal Data Elements are complete
 - *No data should be entered if FOIP Notification is left unanswered or indicated as 'no'.
 - a. Answer and/or validate all pertinent questions.

The screenshot shows the 'Universal Data Elements' form. A red box highlights the first section, which includes the following questions and answers:

- The FOIP notification has been read and discussed with the client (required)** * ☐ Yes ☐ G
- What is your gender? ☐ Don't Know ☐ G
- Postal code of your last permanent address? G
- Reason postal code not answered: ☐ Don't Know ☐ G
- Neighbourhood of your last permanent address? G
- Reason neighbourhood not answered: ☐ Don't Know ☐ G
- What is your ethnicity?** ☐ Caucasian ☐ G
- If "Other" ethnicity, please specify: G
- If Aboriginal ethnicity, which group do you belong to? ☐ Not Applicable ☐ G
- What is your current citizenship and immigration status? ☐ International Student ☐ G
- If "Other" status, please specify: G
- What was your primary residence prior to program entry?** * ☐ Don't Know ☐ G
- If "Other" residence, please specify: G
- Do you require specialized housing accommodations due to a disabling condition? ☐ No ☐ G

- b. Scroll to the bottom of screen, press 'Save'.



Client Notes

Provider	Note Date	Note Preview	Full Note
No matches.			

File Attachments

Date Added	Name	Description	Type	Provider	Added From
No matches.					

Incidents

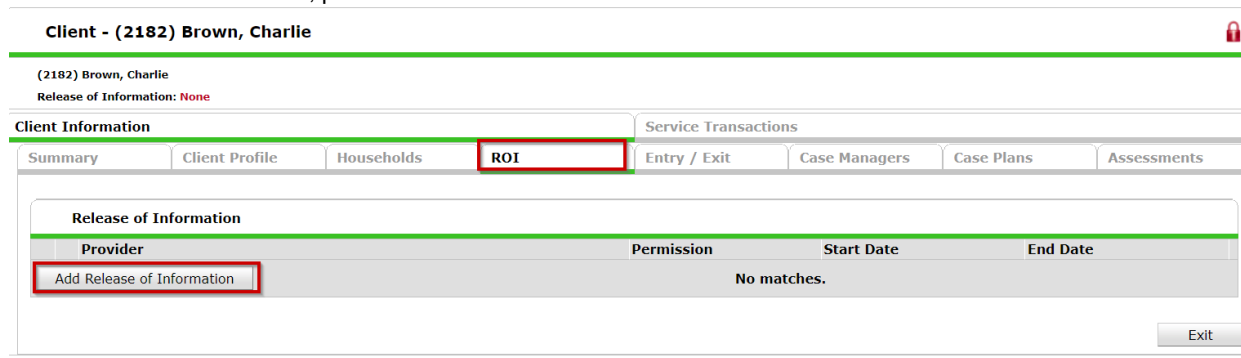
Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Save **Save & Exit** **Exit**

*Once saved, green history bars will appear next to each answer field.

Step 1.2: ClientPoint – ROI Tab

1. Under the ROI Tab, press 'Add Release of Information.'



Client - (2182) Brown, Charlie

(2182) Brown, Charlie
Release of Information: None

Client Information

Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments								
Release of Information <table border="1"> <thead> <tr> <th>Provider</th> <th>Permission</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td colspan="4">No matches.</td> </tr> </tbody> </table>								Provider	Permission	Start Date	End Date	No matches.			
Provider	Permission	Start Date	End Date												
No matches.															

Add Release of Information **Exit**

2. Answer pertinent fields:
- Ensure Correct Provider.
 - Indicate Yes/No to 'Release Granted.'
 - Enter Start and End Dates for ROI (length is agency dependent)
 - Documentation: enter 'Signed Statement From Client.'
 - Witness: enter name of witness.
 - Press 'Save Release of Information.'

Release of Information

Release of Information - (3592) Bowie, David

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *	HMIS Training Program (284)
Release Granted *	Yes
Start Date *	05 / 03 / 2023
End Date *	05 / 03 / 2026
Documentation	Signed Statement from Client
Witness	my


Save Release of Information Cancel

g. Select paperclip icon to upload PAO ROI attachment.

Client Information **Service Transactions**

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

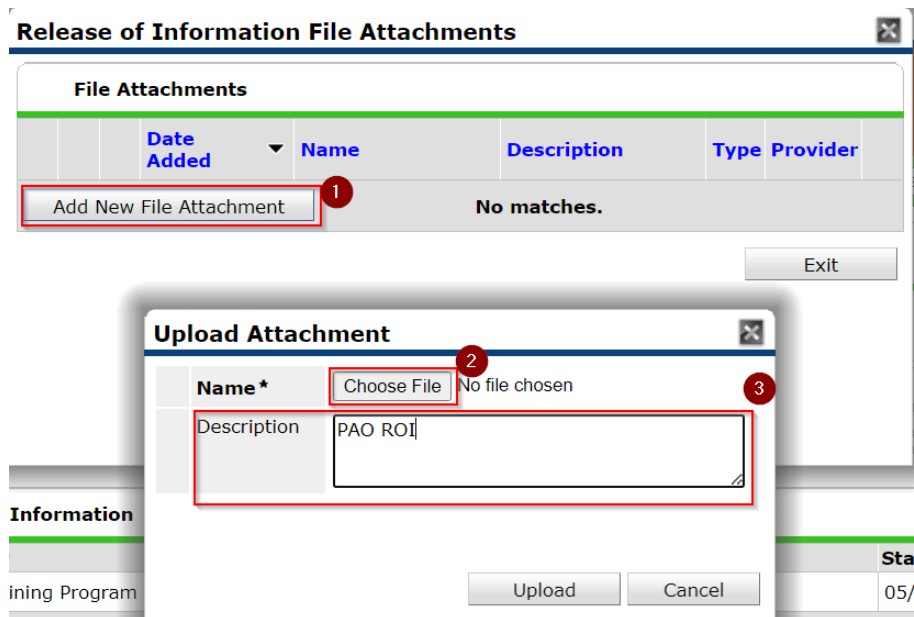
Release of Information

Provider	Permission	Start Date	End Date
 Calgary HMIS	Yes	05/03/2023	05/03/2026

h. Select 'Add New File Attachment.'

i. Choose the correct & valid PAO ROI document signed by participant to upload.

j. Ensure 'PAO ROI' is written in the description box and then select 'Upload.'



*When ROI is about to expire, add new ROI row rather than editing start/end dates.

Step 1.3: ClientPoint - Entry/Exit Tab

Skip the entry/exit tab because you will only provide an entry for your participant after they are successfully screened & accepted into PAO

Step 1.4: ClientPoint - Assessments Tab

1. Under the Assessments tab, complete The Pathways Assertive Outreach – Referral Screening Form. To select the assessment, highlight it from the drop-down menu and press 'Submit'.

The data entry of this assessment should reflect the actual date of the screening application, use the back date tool if applicable.

Since the referral screening assessment pulls questions from the individual's housing quarterly assessment, there may already be old answers in this section. Please ensure you are filling out these questions to provide the most up-to-date information on the assessment.

6/22/2023

Phase 2: Create Referral to Pathways Assertive Outreach

- Navigate to the 'Service Transactions' tab.

Client - (3592) Bowie, David

(3592) Bowie, David

Release of Information: None

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Client Record

Name


Bowie, David

Alias

Age

76

Issue ID Card



Change

Clear

Client Demographics

What is your date of birth?

01/08/1947

Date of Birth Type

Full DOB Reported

Reason Date of Birth not answered

What is your gender?

Don't Know

What is your ethnicity?

Caucasian

Save

Save & Exit

Exit


- Click on the 'Add Referrals' button.


Client - (3592) Bowie, David


(3592) Bowie, David
Release of Information: **None**


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


- Navigate to the 'Needs Assignment' and select 'Mental Health Support Services (RR)' and then press 'Add Terms.'

▼ **Add Needs**

▼ **Household Members**

This Client is not a member of any Households.

Needs Assignment

 Select up to 5 Needs

Service Code Quicklist

Basic Needs (B)
Counselling Approaches (RD)
Education (H)
Mental Health and Substance Use Disorder Services (R)
Mental Health Support Services (RR)

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

- In the 'Refine Provider Search Criteria' section, type in 'Pathways Assertive Outreach' into the search bar and select 'Search.'

▼ Refine Provider Search Criteria

Search for Providers by using keywords for their Provider Name, AKA, or Description.

Search

Search for Provider based on their Physical Location or the Area Served.

City	<input type="text"/>	State	<input type="text"/>
County / Parish	<input type="text"/>	ZIP Code	<input type="text"/>
<input type="checkbox"/> ServicePoint Users ONLY		Type	-Select- ▼

6. Once 'Pathways Assertive Outreach – The Alex' appears under search results, select it by pressing the green '+' button.

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											
<div><div><div><div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></d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7. Once selected, you will be directed to the 'Referral Data' section, ensure you click the box next to 'Check to notify ServicePoint Providers by Email' as well as the box underneath 'Mental Health Support Services.'

Referral Data

Needs Referral Date * 05 / 03 / 2023 1 : 39 : 48 PM

Referral Ranking -Select-

Projected Follow Up Date

Follow Up User Calgary HMIS (1) Search My Provider Clear

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

Referrals [Send Summary](#)

Referred-To Provider	Mental Health Support Services	Referred Clients
Pathways Assertive Outreach - The Alex (305)	<input checked="" type="checkbox"/>	(3592) Bowie, David

8. Once these steps are complete, select the 'Save ALL' button, you will be directed to the referrals tab where you will be able to view the referral you just created.

Client - (3592) Bowie, David [Mass Visibility Update](#)

(3592) Bowie, David
Release of Information: **None**

Client Information **Service Transactions**

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

Previous Referrals

Select Dates **Start Date** **End Date** **More** **Search**

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
05/03/2023	05/03/2023	Pathways Assertive Outreach - The Alex		Mental Health Support Services	Identified	

Showing 1-1 of 1

The participant now has an open referral into the Pathways Assertive Outreach program.

* Once the referral is entered, PAO staff will have to wait until the next day to access the Qlik dashboard (the referral will be in Qlik by the next morning)

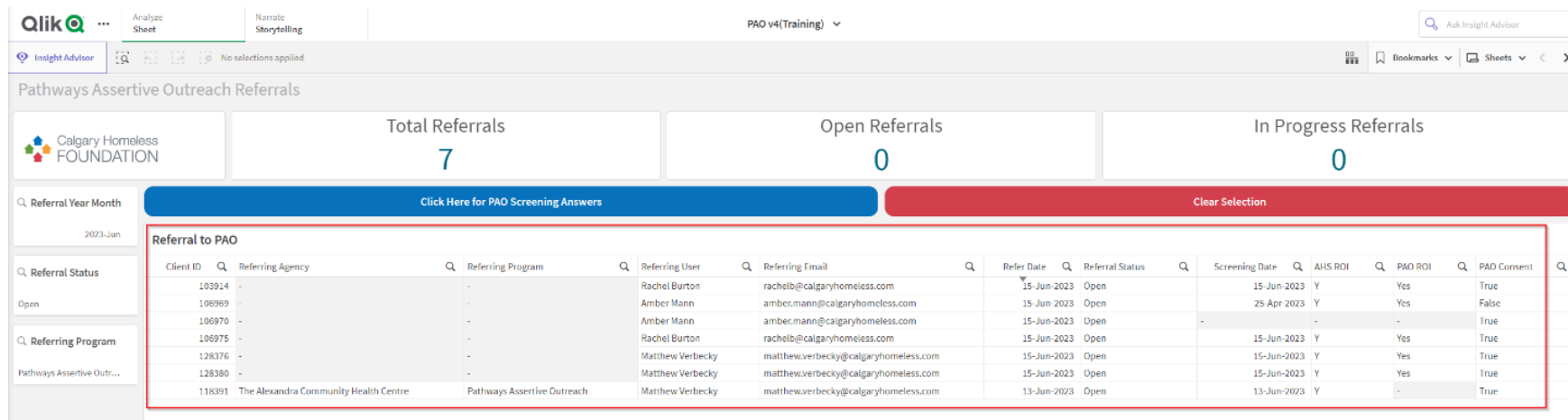
Part 2 (Required): Review PAO Qlik Dashboard & Submit Form

Phase 1: Verify Referral Information & Complete PAO Referral Status Update Form

Ensure you are currently accessing your PAO referral dashboard on Qlik.

1. Review all CIDs present on your dashboard, you will need them for the next steps.

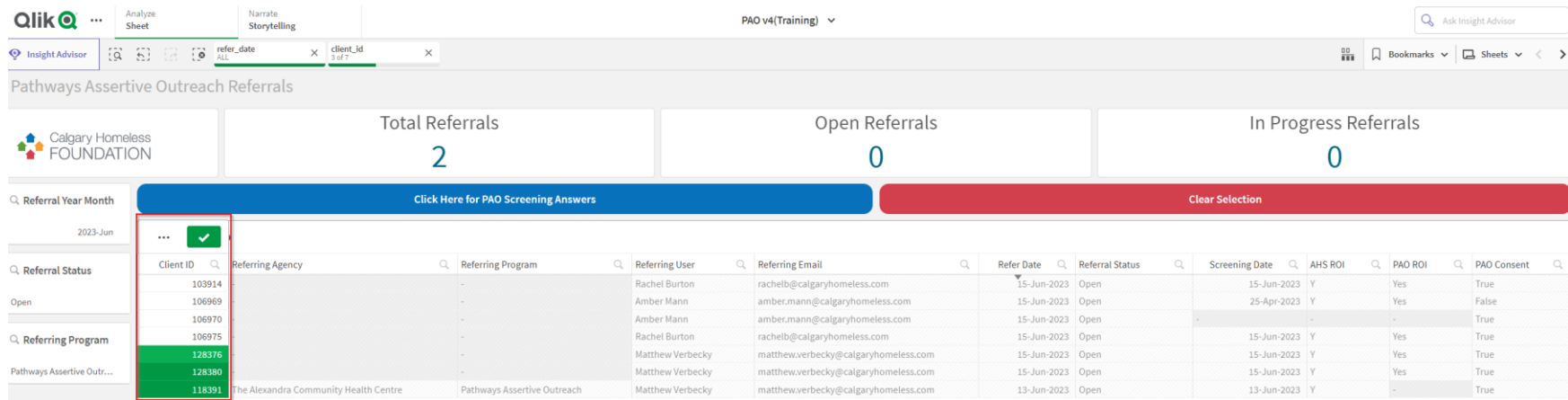
All referrals will show up in the "Referral to PAO" box. This box shows referral information including referring program, referring user, their email, and the referral date.



Client ID	Referring Agency	Referring Program	Referring User	Referring Email	Refer Date	Referral Status	Screening Date	AHS ROI	PAO ROI	PAO Consent
103914	-	-	Rachel Burton	rachelb@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
106969	-	-	Amber Mann	amber.mann@calgaryhomeless.com	15-Jun-2023	Open	25-Apr-2023	Y	Yes	False
106970	-	-	Amber Mann	amber.mann@calgaryhomeless.com	15-Jun-2023	Open	-	-	-	True
106975	-	-	Rachel Burton	rachelb@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
128376	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
128380	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
118391	The Alexandra Community Health Centre	Pathways Assertive Outreach	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	13-Jun-2023	Open	13-Jun-2023	Y	-	True

If you wish to filter and compare specific referrals, click on any number of CIDs to select the specific referrals you wish to look at. When you are ready, press the green check mark to confirm selection.

If you do not click on CIDs to filter, the next step will show all referrals



Qlik ... Analyze Sheet Narrate Storytelling PAO v4(Training) Ask Insight Advisor

Insight Advisor refer_date x client_id x

Pathways Assertive Outreach Referrals

Calgary Homeless FOUNDATION

Total Referrals 2

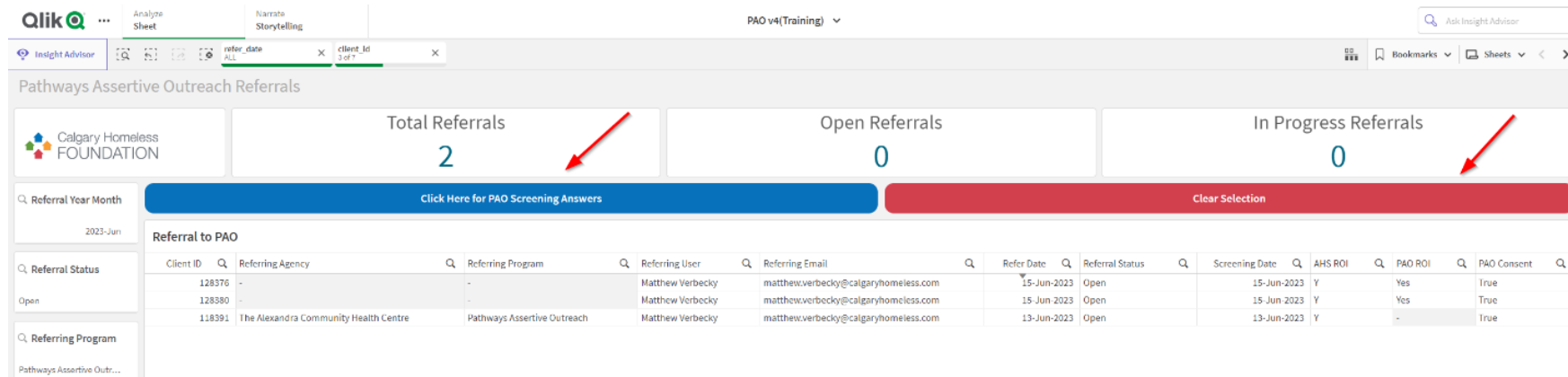
Open Referrals 0

In Progress Referrals 0

Referral Year Month 2023-Jun Click Here for PAO Screening Answers Clear Selection

Client ID	Referring Agency	Referring Program	Referring User	Referring Email	Refer Date	Referral Status	Screening Date	AHS ROI	PAO ROI	PAO Consent
103914	-	-	Rachel Burton	rachelb@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
106969	-	-	Amber Mann	amber.mann@calgaryhomeless.com	15-Jun-2023	Open	25-Apr-2023	Y	Yes	False
106970	-	-	Amber Mann	amber.mann@calgaryhomeless.com	15-Jun-2023	Open	-	-	-	True
106975	-	-	Rachel Burton	rachelb@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
128376	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
128380	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
118391	The Alexandra Community Health Centre	Pathways Assertive Outreach	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	13-Jun-2023	Open	13-Jun-2023	Y	-	True

- From there you can either press "Clear selection", which will de-select the referrals you just selected and bring up the referrals on your dashboard OR you can press "Click here for PAO screening answers" to go back to the main page where you can access the referrals.



Qlik ... Analyze Sheet Narrate Storytelling PAO v4(Training) Ask Insight Advisor

Insight Advisor refer_date x client_id x

Pathways Assertive Outreach Referrals

Calgary Homeless FOUNDATION

Total Referrals 2

Open Referrals 0

In Progress Referrals 0

Referral Year Month 2023-Jun Click Here for PAO Screening Answers Clear Selection

Referral to PAO

Client ID	Referring Agency	Referring Program	Referring User	Referring Email	Refer Date	Referral Status	Screening Date	AHS ROI	PAO ROI	PAO Consent
128376	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
128380	-	-	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	15-Jun-2023	Open	15-Jun-2023	Y	Yes	True
118391	The Alexandra Community Health Centre	Pathways Assertive Outreach	Matthew Verbecky	matthew.verbecky@calgaryhomeless.com	13-Jun-2023	Open	13-Jun-2023	Y	-	True

- From your main page that shows the PAO screening and sub-assessment, navigate to and select the green button that says, "PAO Referral Update Status Form."

Qlik ... Analyze Sheet Narrate Storytelling PAO v4(Training) v

Insight Advisor refer_date x client_id x

PAO Screening Answers

Click Here for PAO Referrals PAO Referral Update Status Form

PAO Screening

Client ID	Screening Date	Family Doctor	Family Doctor Transfer	Mental Health Diagn...	Diagn... with Shizo...	Com... Psych...	Psych... Transfer	CTO	ER	Ambulance	Inpati...	Public System	Ongoing Mental Health Condition	Ongoing Physical Health	Addictions/Substance Abuse I
118391	2023-06-13	Yes	Yes	Yes	Yes	Yes	Yes	Unsure	6	8	3	Alpha Detox	Yes - Untreated	Yes - Untreated	Yes - Untreated
128376	2023-06-15	Yes	No	No	Yes	No	N/A	Yes	5	8	5	Claresholm	Yes - Both Treated and Untreated	Yes - Treated	Yes - Both Treated and Untreated
128380	2023-06-15	Yes	Yes	Yes	Yes	Yes	Yes	Yes	6	Greater than 10	9	Youville/Alcove	Yes - Untreated	Yes - Untreated	Yes - Untreated

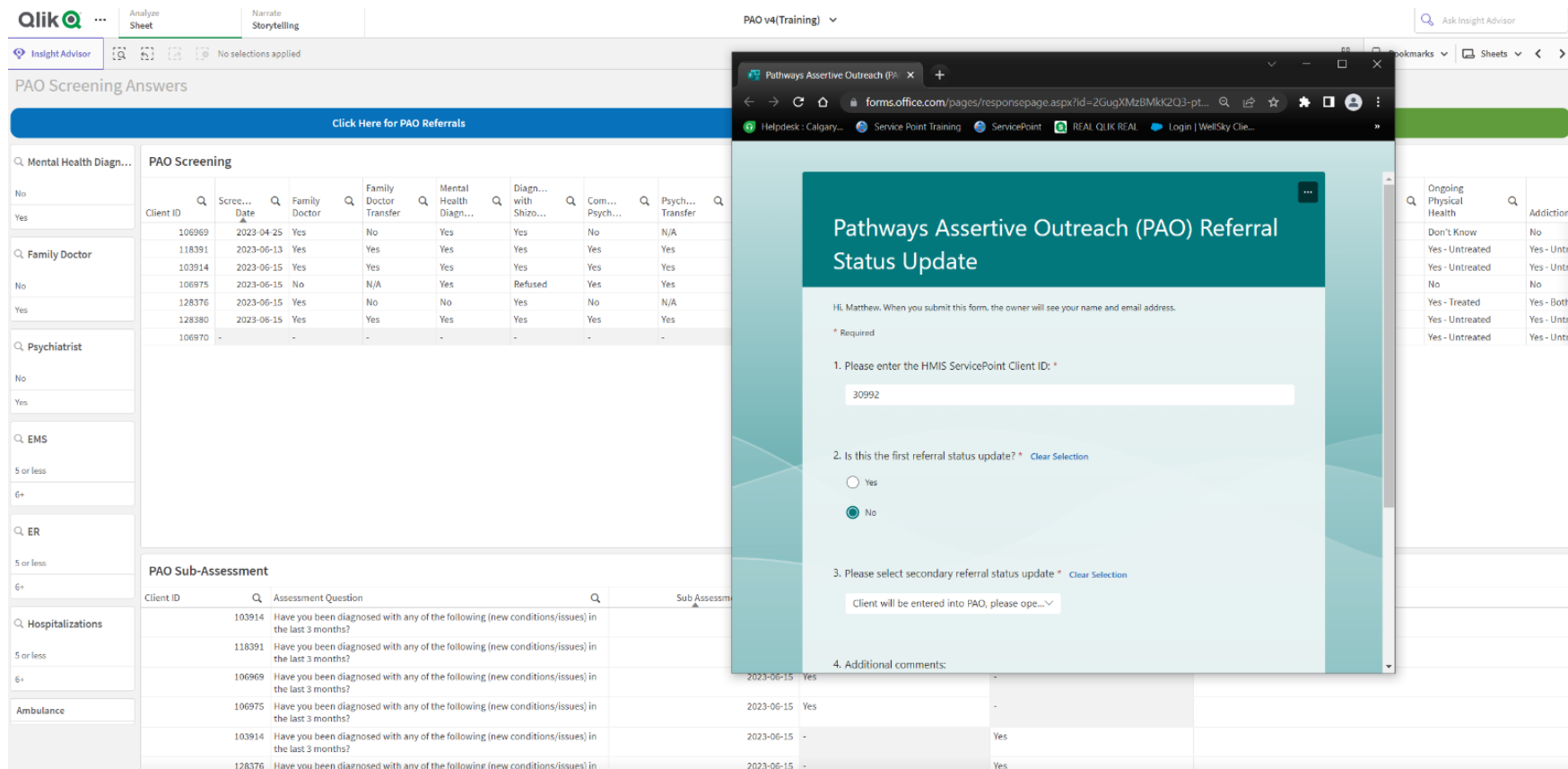
PAO Sub-Assessment

Client ID	Assessment Question	Sub Assessment Date	Physical Health Issue
118391	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-13	Yes
128376	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15	Yes
128380	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15	Yes

PAO Screening Filters:

- Mental Health Diagn...: No, Yes
- Family Doctor: No, Yes
- Psychiatrist: No, Yes
- EMS: 5 or less, 6+
- ER: 5 or less, 6+
- Hospitalizations: 5 or less, 6+
- Ambulance: 5 or less, 6+

- Once you press the button, a new tab on your browser will pop up with the form. You can open this window on another screen to make entering information on the form easier.




The screenshot displays the Qlik Insight Advisor interface. On the left, there are filters for 'Mental Health Diagn...', 'Family Doctor', 'Psychiatrist', 'EMS', 'ER', 'Hospitalizations', and 'Ambulance'. The main area shows two tables: 'PAO Screening' and 'PAO Sub-Assessment'. The 'PAO Screening' table lists client IDs, screening dates, and various medical history flags. The 'PAO Sub-Assessment' table lists client IDs and assessment questions. Overlaid on the right is a 'Pathways Assertive Outreach (PAO) Referral Status Update' form. The form includes a greeting, a required field for 'HMIS ServicePoint Client ID' (with value 30992), a question 'Is this the first referral status update?' (with 'No' selected), a question 'Please select secondary referral status update' (with a dropdown menu), and a section for 'Additional comments'.

- Enter one CID at a time for each form.
- Answer 'Yes' to question, "Is this the first referral status update?"
- Select "Client is being explored for entry to PAO, please mark referral as 'In Progress.'"
- Add any additional comments if necessary.

*Selecting the "Clear Selection" button will erase your answer

*An auto-email will go to the HMIS team to update referral status.



Pathways Assertive Outreach (PAO) Referral Status Update

Hi, Matthew. When you submit this form, the owner will see your name and email address.

* Required

1. Please enter the HMIS ServicePoint Client ID: *
2. Is this the first referral status update? * [Clear Selection](#)
☒ Yes
☐ No
3. Please select an initial referral status update * [Clear Selection](#)
4. Additional comments:

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

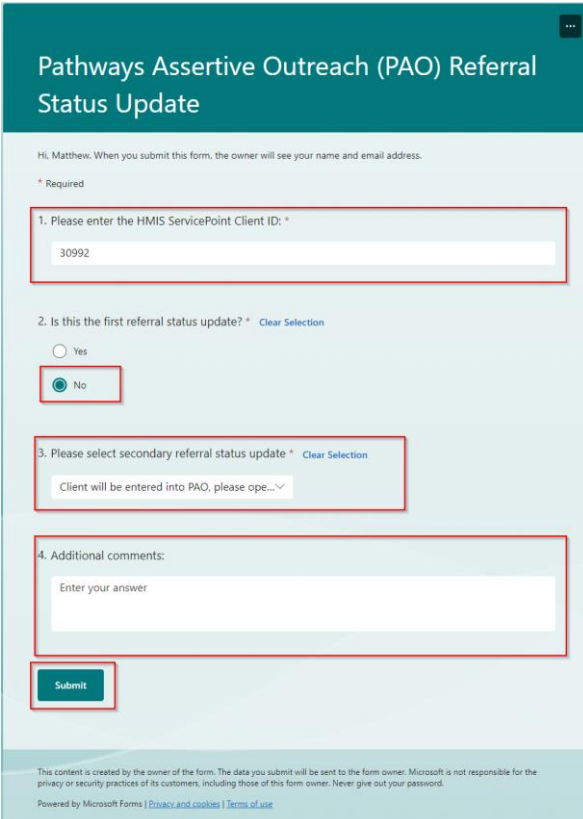
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Phase 2: Re-access PAO Referral Status Update Form

1. Due to the screening process, you will have to come back into Qlik to select the green button entitled "PAO Referral Status Update Form" to track whether the participant is accepted into PAO or not.
 - Open form and Re-enter HMIS ServicePoint Client ID.
 - Answer 'No' to question "Is this the first referral status update?"
 - Complete form accordingly & submit.

* If the participant is accepted into PAO, the HMIS team will receive auto-email and open visibility. Please navigate to HMIS ServicePoint to provide program entry into PAO within 1 business day.

* If the participant is not accepted into PAO, the HMIS team will close off the referral.



Pathways Assertive Outreach (PAO) Referral Status Update

Hi, Matthew. When you submit this form, the owner will see your name and email address.

* Required

1. Please enter the HMIS ServicePoint Client ID: *

30992

2. Is this the first referral status update? * [Clear Selection](#)

☐ Yes

☒ No

3. Please select secondary referral status update * [Clear Selection](#)

Client will be entered into PAO, please open...

4. Additional comments:

Enter your answer

Submit

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