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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

i Please Search the System before adding a New Client.

Name	First <input style="border: 1px solid red;" type="text" value="Dav"/>	Middle <input style="width: 80%;" type="text"/>	Last <input style="border: 1px solid red;" type="text" value="Bo"/>	Suffix <input style="width: 80%;" type="text"/>
Alias	<input style="width: 90%;" type="text"/>			
Exact Match	<input type="checkbox"/>			

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'

Client Search

i Please Search the System before adding a New Client.

Name	<div style="border: 1px solid #ccc; padding: 2px;"> 1 <input style="width: 90%;" type="text" value="David"/> </div>	Middle	<div style="border: 1px solid #ccc; padding: 2px;"> 2 <input style="width: 90%;" type="text" value="Bowie"/> </div>	Suffix	<input style="width: 90%;" type="text"/>
Alias	<input style="width: 100%;" type="text"/>				
Exact Match	<input type="checkbox"/>				

Search
Clear
Add New Client With This Information
Add Anonymous Client

- 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?

Ok
Cancel

- 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

Client Demographics

Editing the Client Demographic Information could affect the Unique ID and the Client Search.

Client Demographics

What is your date of birth? 01/08/1947

Date of Birth Type Full DOB Reported

Reason Date of Birth not answered -Select-

What is your gender? Don't Know

What is your ethnicity? Caucasian

Save Cancel

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.

Universal Data Elements

The FOIP notification has been read and discussed with the client (required) *

Yes

What is your gender? Don't Know

Postal code of your last permanent address?

Reason postal code not answered: Don't Know

Neighbourhood of your last permanent address?

Reason neighbourhood not answered: Don't Know

What is your ethnicity?

Caucasian

If "Other" ethnicity, please specify:

If Aboriginal ethnicity, which group do you belong to? Not Applicable

What is your current citizenship and immigration status? International Student

If "Other" status, please specify:

What was your primary residence prior to program entry? *

Don't Know

If "Other" residence, please specify:

Do you require specialized housing accommodations due to a disabling condition? No

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

The screenshot shows a software interface with three main sections:

- Client Notes:** A table with columns: Provider, Note Date, Note Preview, Full Note. Below the table are buttons for 'Add New Client Note' and 'Print'. The table contains the text 'No matches.'
- File Attachments:** A table with columns: Date Added, Name, Description, Type, Provider, Added From. Below the table is a button for 'Add New File Attachment'. The table contains the text 'No matches.'
- Incidents:** A table with columns: Start Date, End Date, Incident, Incident Code, Provider, Ban Site, Staff. Below the table is a button for 'Add New Incident'. The table contains the text 'No matches.'

At the bottom right of the interface, there are three buttons: 'Save', 'Save & Exit', and 'Exit'. The 'Save' button is highlighted with a red box, and a red arrow points to it from the top of the Incidents section.

*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.'

The screenshot shows the ClientPoint software interface for a client named Charlie Brown. The 'ROI' tab is selected and highlighted with a red box. Below the tab, there is a 'Release of Information' section with a table and an 'Add Release of Information' button highlighted with a red box.

Client - (2182) Brown, Charlie

(2182) Brown, Charlie
Release of Information: None

Client Information | Service Transactions

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

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Add Release of Information

Exit

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

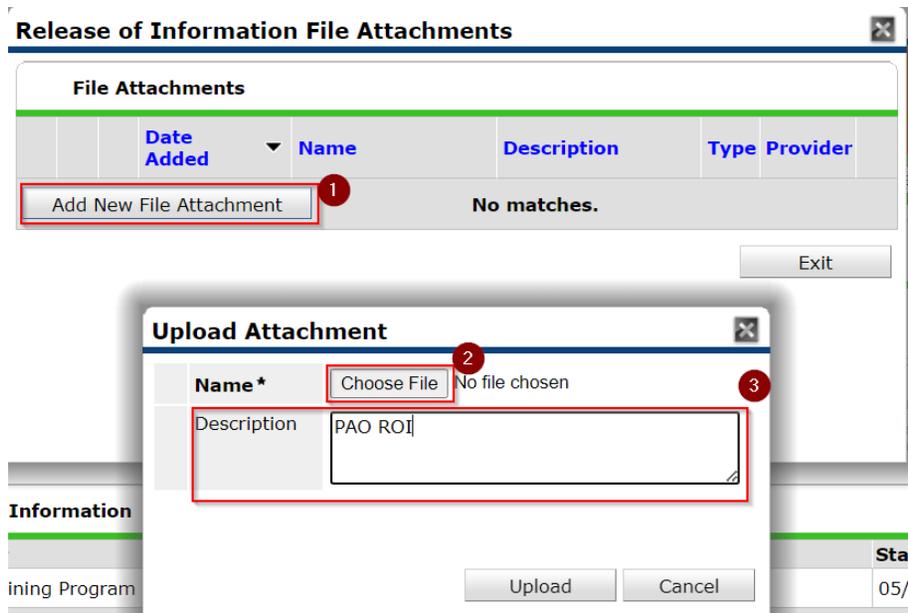
Release of Information

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.

Client Information		Service Transactions	
Summary	Client Profile	Households	ROI
Entry / Exit	Case Managers	Case Plans	Assessments
<div style="border: 1px solid gray; padding: 5px;"> <p style="text-align: center;">Select an Assessment</p> <p>Client Contact Information <input type="text" value="Client Contact Information"/> <input type="button" value="Submit"/></p> <p>-Select-</p> <p>Universal Data Elements</p> <p>Client Contact Information</p> <p>The Pathways Assertive Outreach – Referral Screening Form</p> <p>Single Adults NSQ (VI-SPDAT)</p> <p>Families NSQ (VI-SPDAT)</p> <p>Youth NSQ (TAY-VI-SPDAT)</p> </div>			
<p>Client Contact Information</p>			
Address	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone Number 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Program client code	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone Number 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred Method of Contact	<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text"/>
Date of last client contact	<input type="text"/>	<input type="text"/>	<input type="text"/>
Client contact notes	<input type="text"/>		
Allergies (please list)	<input type="text"/>		

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



 **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

- 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

4. 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

5. 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 State

County / Parish ZIP Code

[ServicePoint Users ONLY](#) Type

- 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										
		Pathways Assertive Outreach - The Alex											Level 3	Unknown	CALGARY, AB T2H 2S6	N/A	1/1 										
<input type="button" value="Bed Availability"/>												Showing 1-1 of 1															

- 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

-Select-

[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	

Add Referral Showing 1-1 of 1

Back to Dashboard Exit

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.

The screenshot displays the Qlik dashboard for 'Pathways Assertive Outreach Referrals'. At the top, there are three summary cards: 'Total Referrals' with a value of 7, 'Open Referrals' with a value of 0, and 'In Progress Referrals' with a value of 0. Below these cards is a navigation bar with a blue button labeled 'Click Here for PAO Screening Answers' and a red button labeled 'Clear Selection'. The main content area features a table titled 'Referral to PAO' with the following data:

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 Sense interface showing 'Pathways Assertive Outreach Referrals' dashboard. The dashboard includes three summary cards: Total Referrals (2), Open Referrals (0), and In Progress Referrals (0). Below these are two buttons: 'Click Here for PAO Screening Answers' (blue) and 'Clear Selection' (red). A table of referrals is displayed with columns: Client ID, Referring Agency, Referring Program, Referring User, Referring Email, Refer Date, Referral Status, Screening Date, AHS ROI, PAO ROI, and PAO Consent. The table contains 6 rows of data. A green checkmark is visible in the top-left corner of the table area.

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 Sense interface showing 'Pathways Assertive Outreach Referrals' dashboard. The dashboard includes three summary cards: Total Referrals (2), Open Referrals (0), and In Progress Referrals (0). Below these are two buttons: 'Click Here for PAO Screening Answers' (blue) and 'Clear Selection' (red). A table of referrals is displayed with columns: Client ID, Referring Agency, Referring Program, Referring User, Referring Email, Refer Date, Referral Status, Screening Date, AHS ROI, PAO ROI, and PAO Consent. The table contains 3 rows of data. Red arrows point to the 'Total Referrals' and 'In Progress Referrals' cards.

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) Ask Insight Advisor

Insight Advisor refer_date client_id

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

- 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 shows a Qlik dashboard with two main tables. The top table is 'PAO Screening' and the bottom table is 'PAO Sub-Assessment'. A browser window is overlaid on top, displaying a 'Pathways Assertive Outreach (PAO) Referral Status Update' form. The form includes fields for Client ID (30992), a question about whether it's the first referral status update (answered 'No'), and a dropdown for secondary referral status update (set to 'Client will be entered into PAO, please open...').

Client ID	Screening Date	Family Doctor	Family Doctor Transfer	Mental Health Diagn...	Diagn... with Shizo...	Com... Psych...	Psych... Transfer
106969	2023-04-25	Yes	No	Yes	Yes	No	N/A
118391	2023-06-13	Yes	Yes	Yes	Yes	Yes	Yes
103914	2023-06-15	Yes	Yes	Yes	Yes	Yes	Yes
106975	2023-06-15	No	N/A	Yes	Refused	Yes	Yes
128376	2023-06-15	Yes	No	No	Yes	No	N/A
128380	2023-06-15	Yes	Yes	Yes	Yes	Yes	Yes
106970	-	-	-	-	-	-	-

Client ID	Assessment Question	Sub Assessment
103914	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	
118391	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	
106969	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15 Yes
106975	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15 Yes
103914	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15 - Yes
128376	Have you been diagnosed with any of the following (new conditions/issues) in the last 3 months?	2023-06-15 - Yes

- 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](#)

Client is being explored for entry to PAO, ... ▾

4. Additional comments:

Submit

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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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