Contents

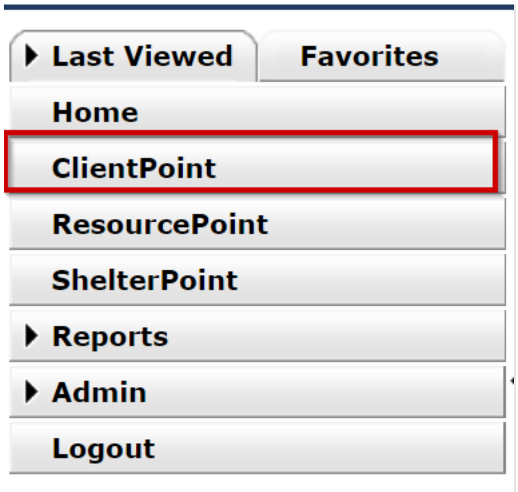
Part 1 (Optional) PAO Staff Creates Referral to PAO (for Primary Systems)

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

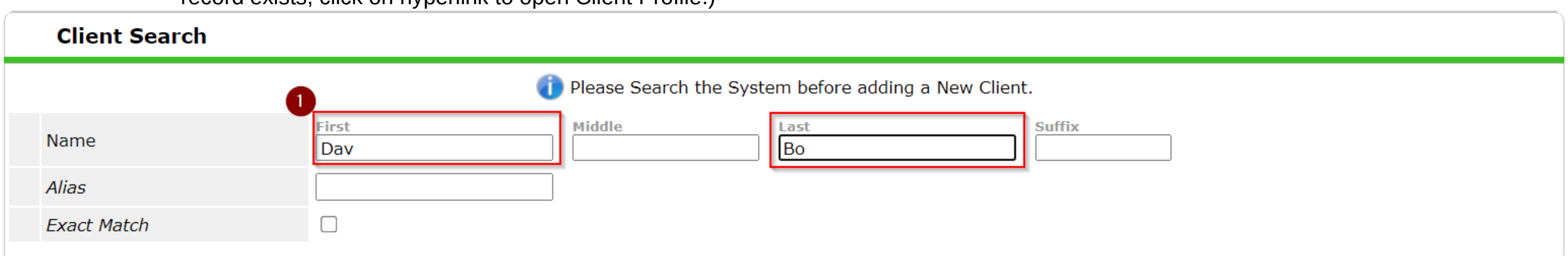
- Follow the Golden Rule to ensure all tabs within the Client's Profile have been completed in sequential order

Step 1.1: ClientPoint - Client Profile Tab

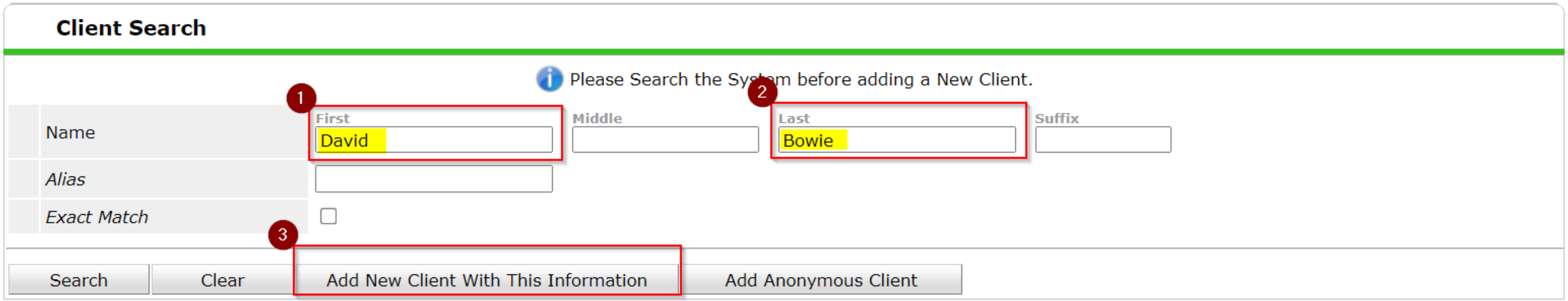
1. From the menu, select ClientPoint.



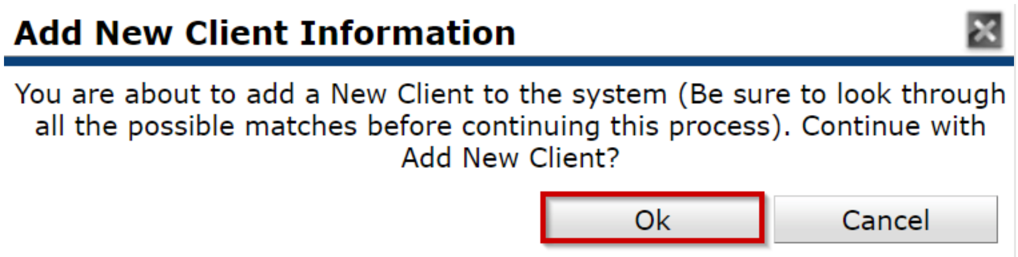
2. Establish if Client Record already exists in HMIS by 'less is more' search.
    a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist. If record exists, click on hyperlink to open Client Profile.)



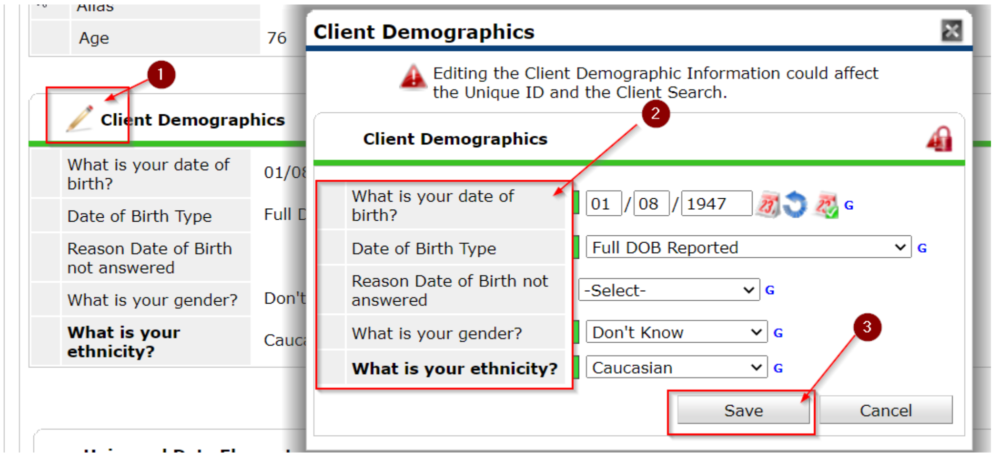
3. IF NEW CLIENT:
    a. Type full name correctly in First & Last Name search fields (do not enter data in other search fields)
    b. Press 'Add New Client with This Information'



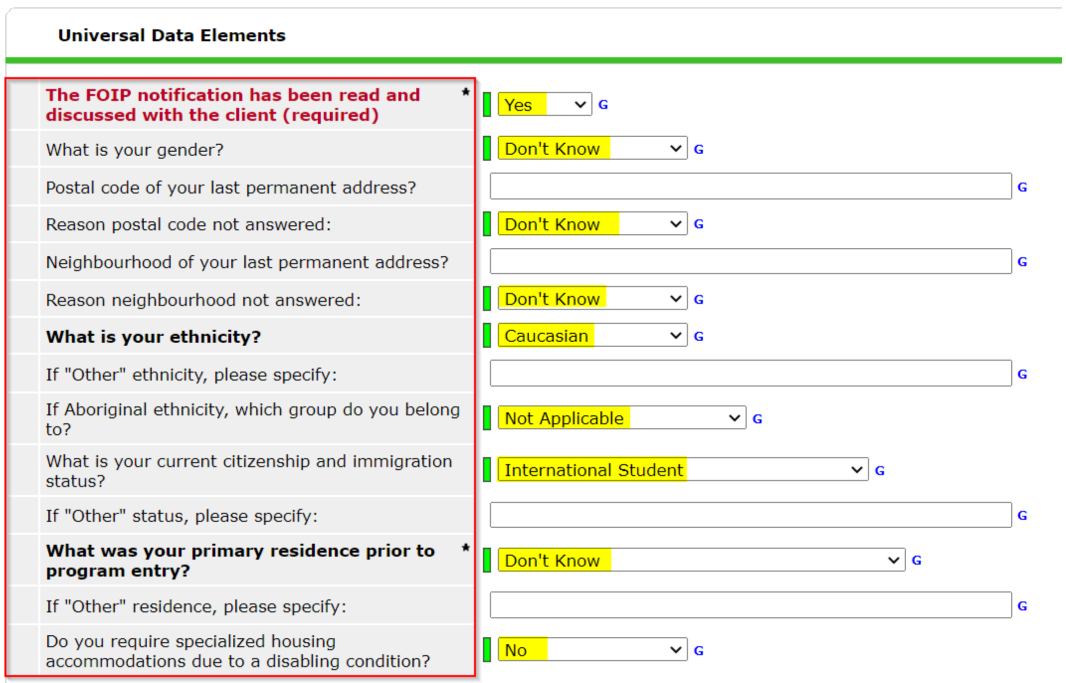
c. A warning window will pop up reminding you to check the system for duplicate client profiles.
d. Press 'Ok' to continue.



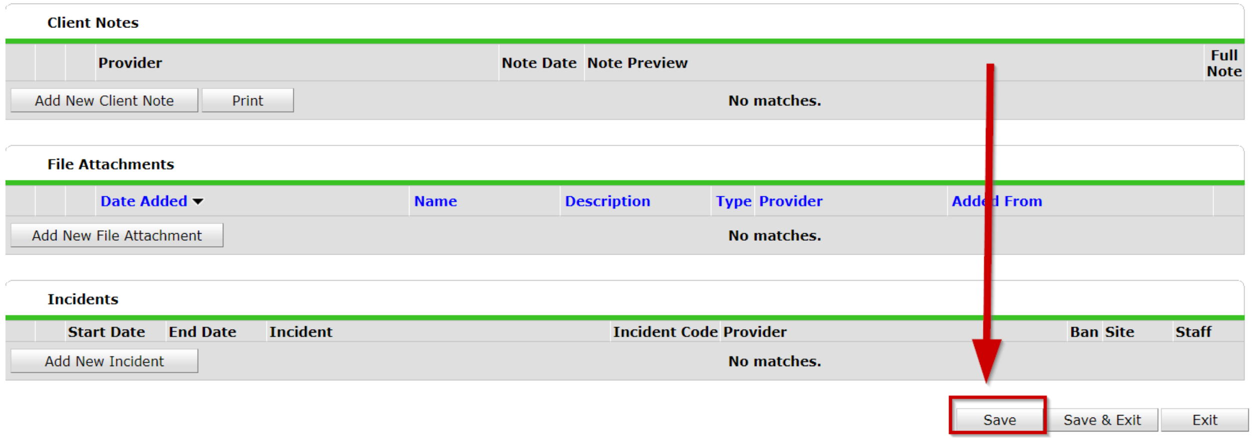
4. Under the Client Profile tab, ensure Client Demographics are complete and/or accurate
   a. Click pencil next to 'Client Demographics to edit/update
   b. Answer all pertinent questions
   c. Press Save



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.



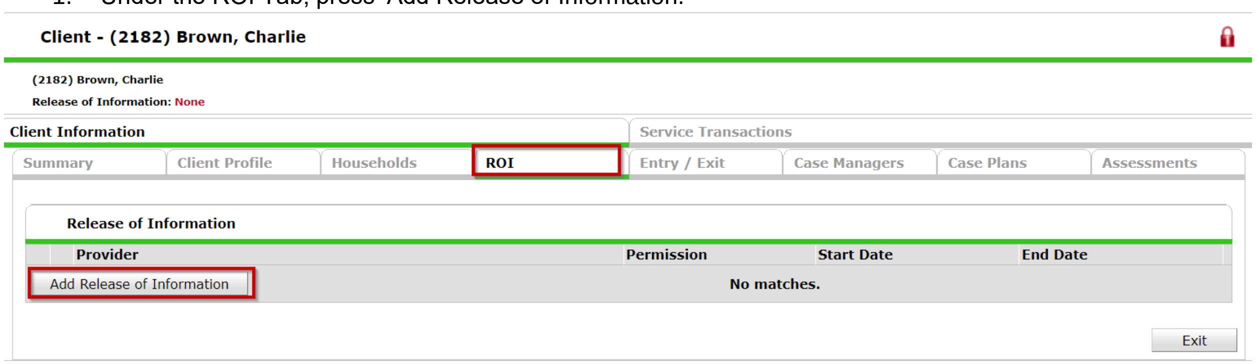
b. Scroll to the bottom of screen, press ‘Save’.



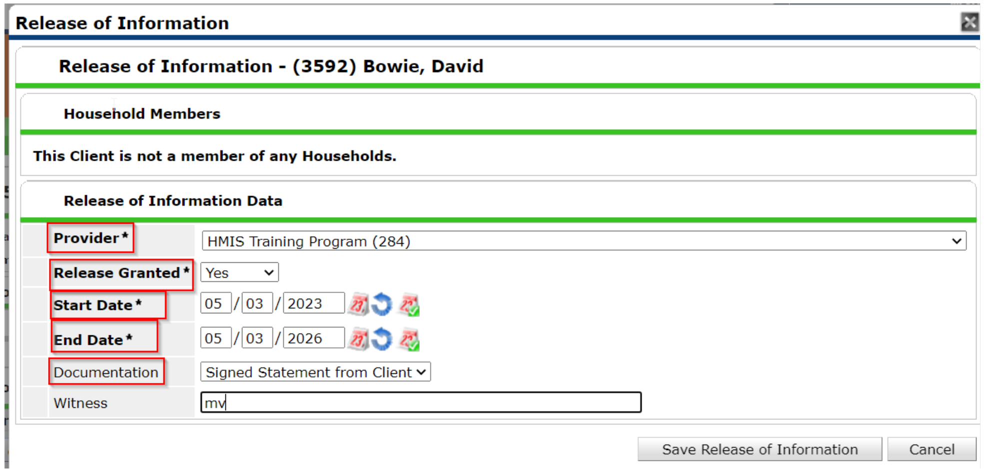
*Once saved, green history bars will appear next to each answer field.

Step 1.2: ClientPoint – ROI Tab

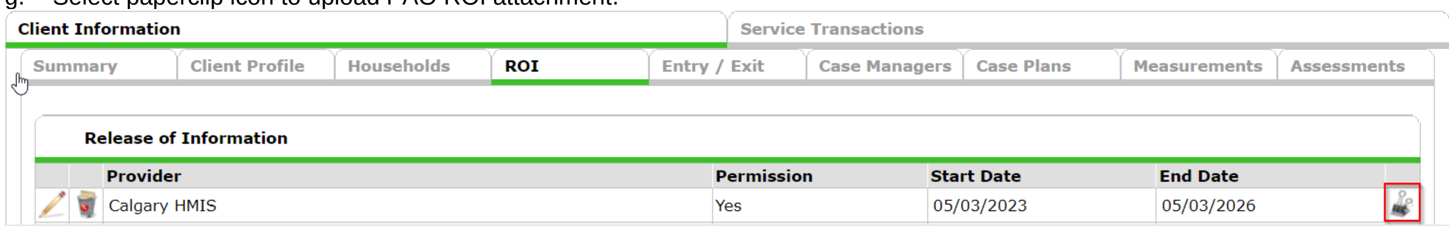
1. Under the ROI Tab, press ‘Add Release of Information.’



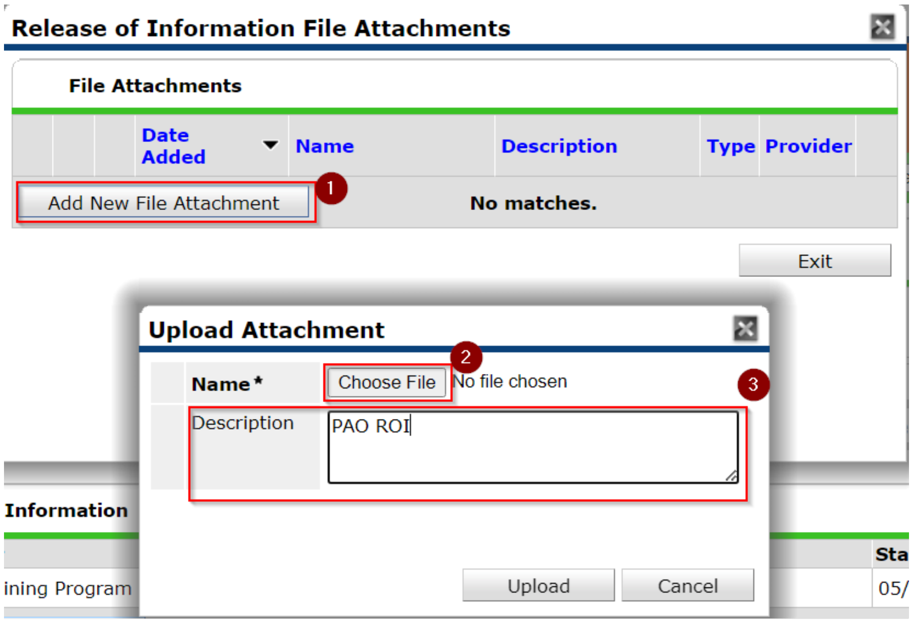
2. Answer pertinent fields:
   a. Ensure Correct Provider.
   b. Indicate Yes/No to ‘Release Granted.’
   c. Enter Start and End Dates for ROI (length is agency dependent)
   d. Documentation: enter ‘Signed Statement From Client.’
   e. Witness: enter name of witness.
   f. Press ‘Save Release of Information.’



g. Select paperclip icon to upload PAO ROI attachment.



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

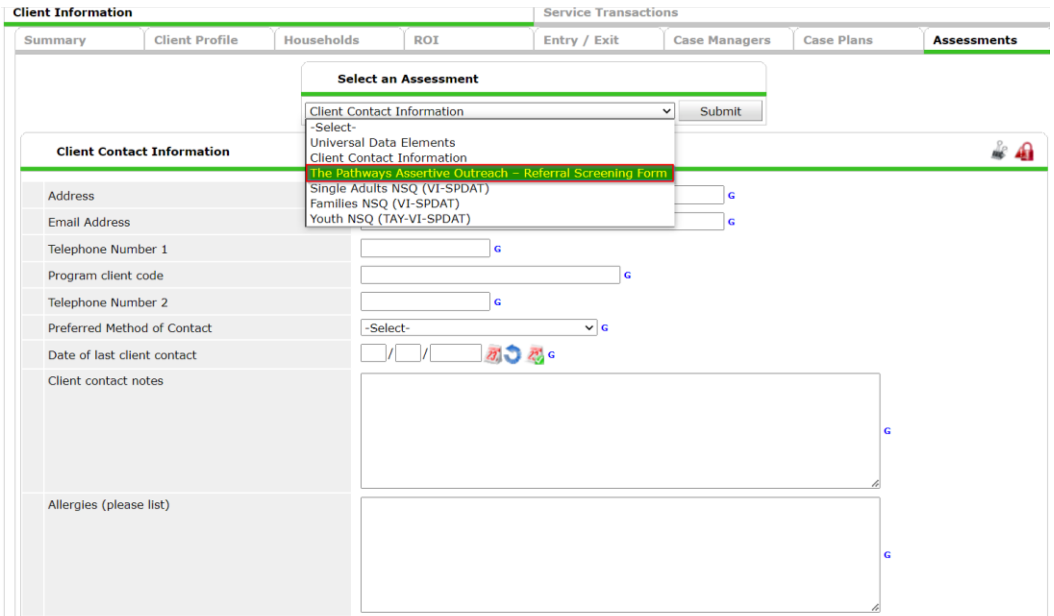
Skip the entry/exit tab because you will only provide an entry for your participant after they are successfully screened & accepted into PAO

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'.

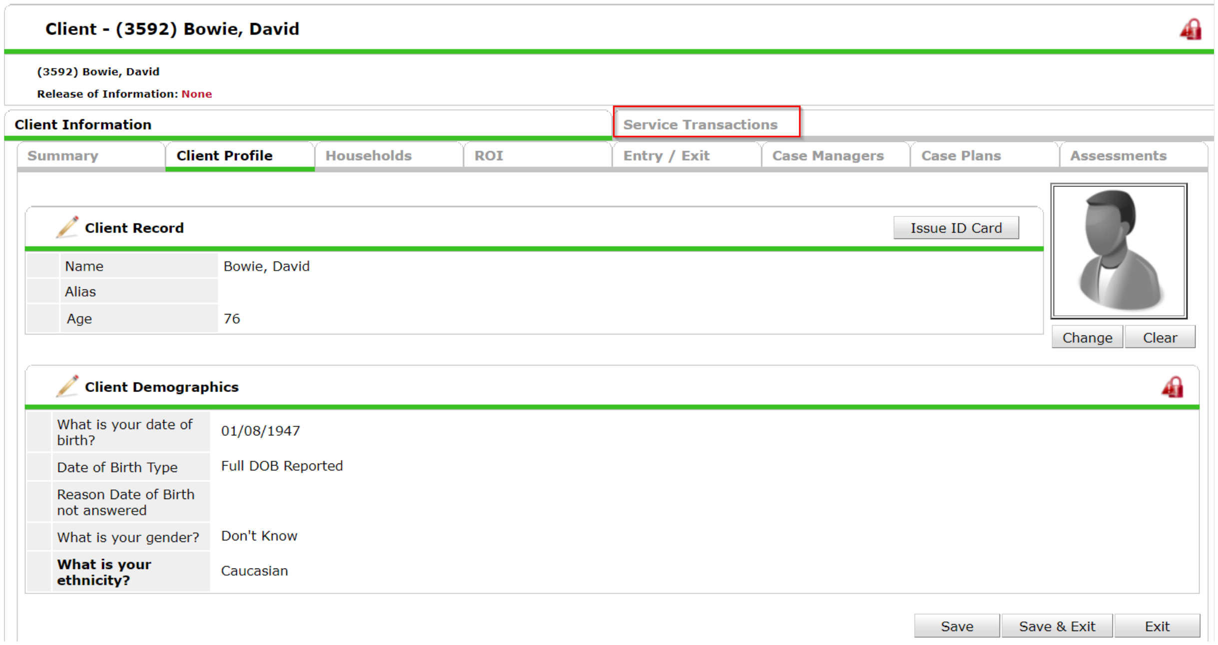
The data entry of this assessment should reflect the actual date of the screening application, use the back date tool if applicable.

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.

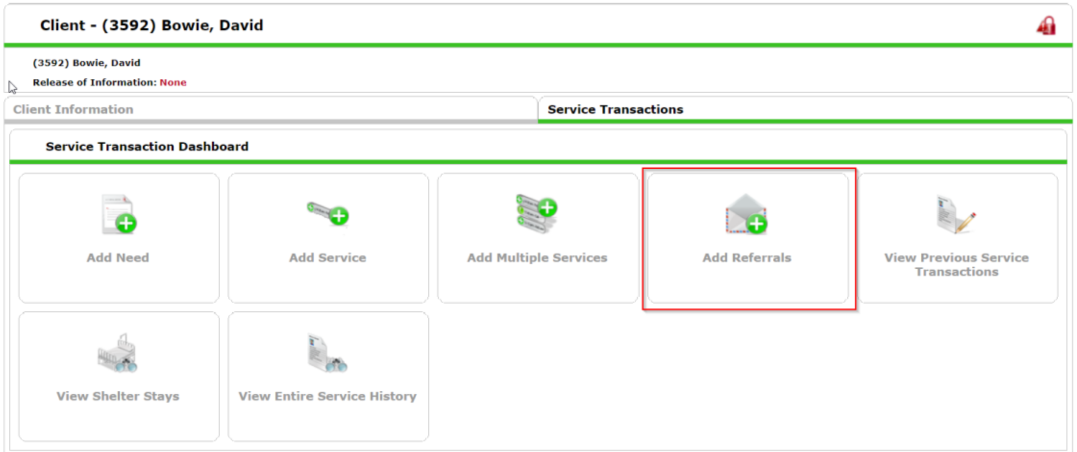

Client Information
Service Transactions
Summary
Client Profile
Households
ROI
Entry / Exit
Case Managers
Case Plans
Assessments
Select an Assessment
Client Contact Information
Submit
-Select-
Universal Data Elements
Client Contact Information
The Pathways Assertive Outreach – Referral Screening Form
Single Adults NSQ (VI-SPDAT)
Families NSQ (VI-SPDAT)
Youth NSQ (TAY-VI-SPDAT)
Client Contact Information
Address
Email Address
Telephone Number 1
Program client code
Telephone Number 2
Preferred Method of Contact
-Select-
Date of last client contact
Client contact notes
Allergies (please list)

Phase 2: Create Referral to Pathways Assertive Outreach

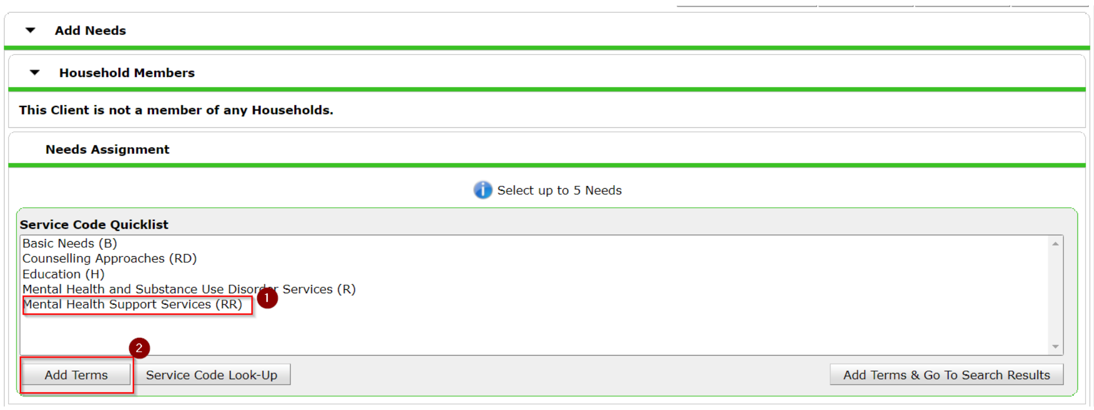
2. Navigate to the ‘Service Transactions’ tab.



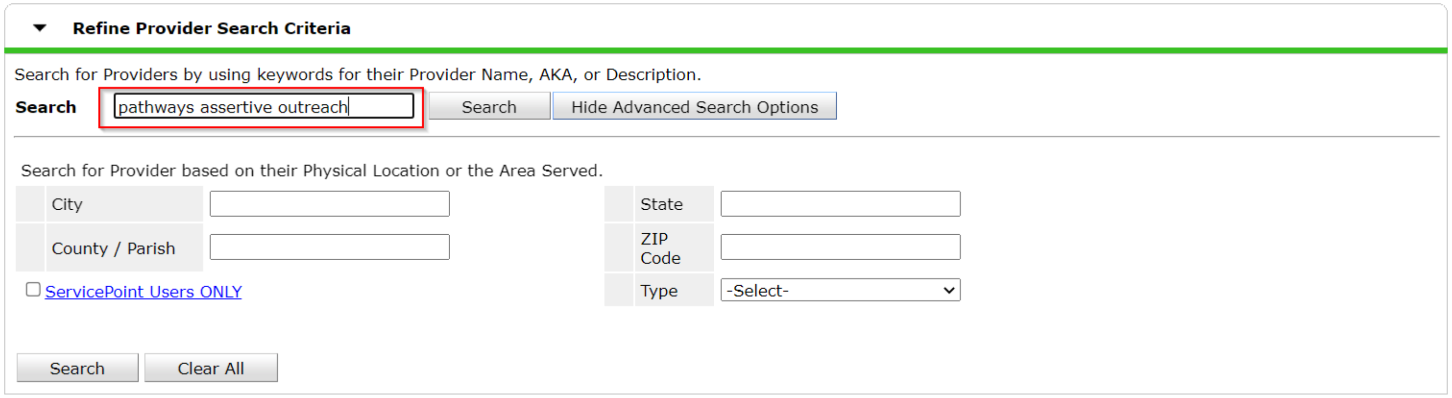
3. Click on the ‘Add Referrals’ button.



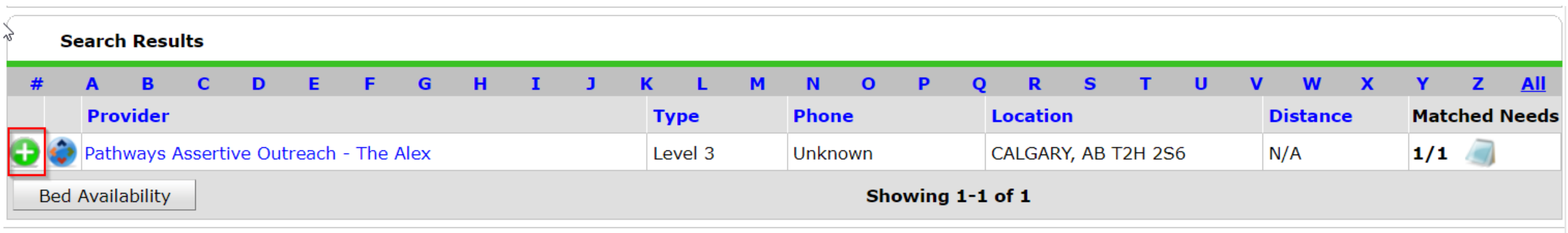
4. Navigate to the ‘Needs Assignment’ and select ‘Mental Health Support Services (RR) and then press ‘Add Terms.’



5. In the ‘Refine Provider Search Criteria’ section, type in ‘Pathways Assertive Outreach’ into the search bar and select ‘Search.’

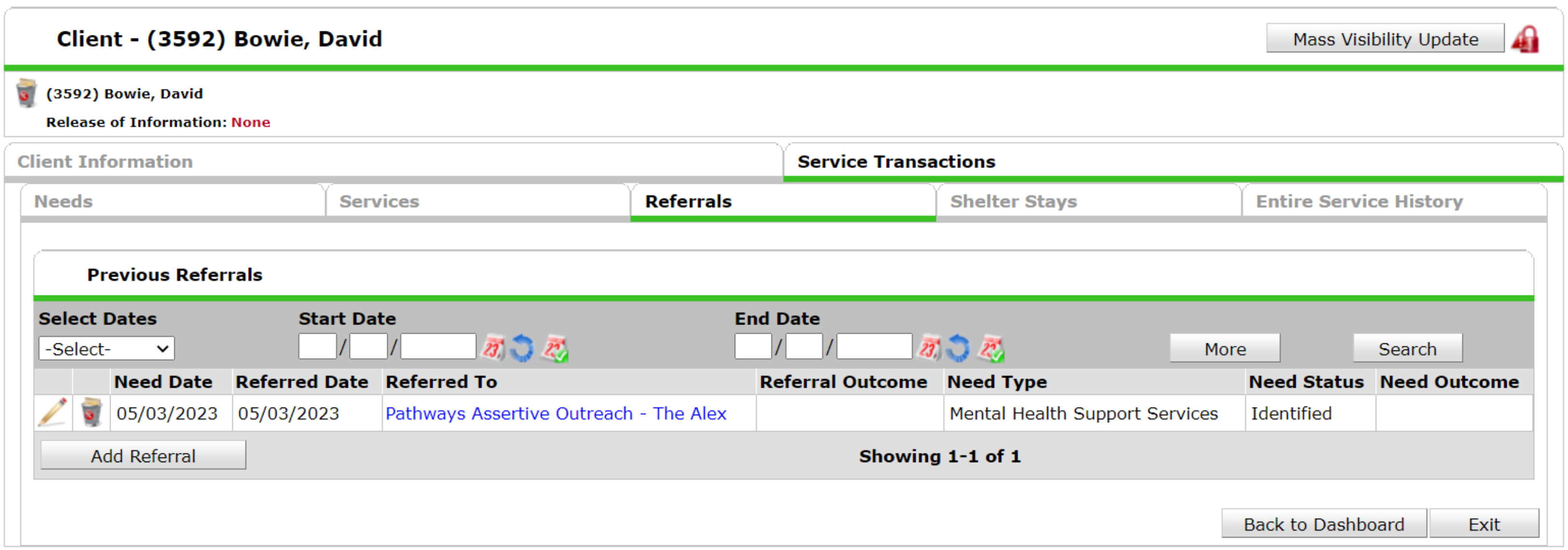


6. Once 'Pathways Assertive Outreach – The Alex' appears under search results, select it by pressing the green '+' button.



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.'

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.



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)

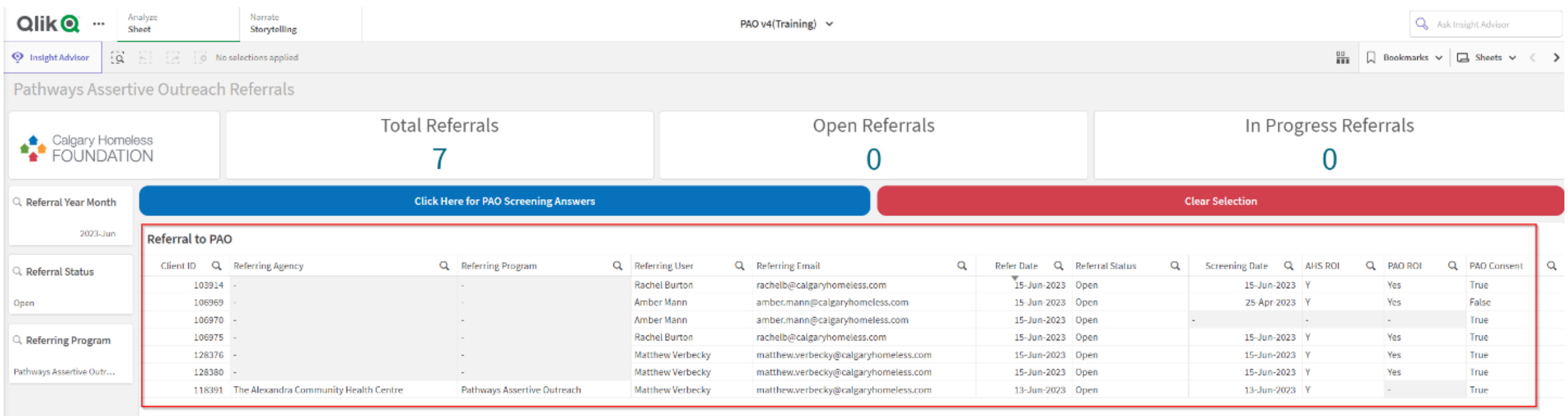
Part 2 (Required): Review PAO Qlik Dashboard & Submit Form

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

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

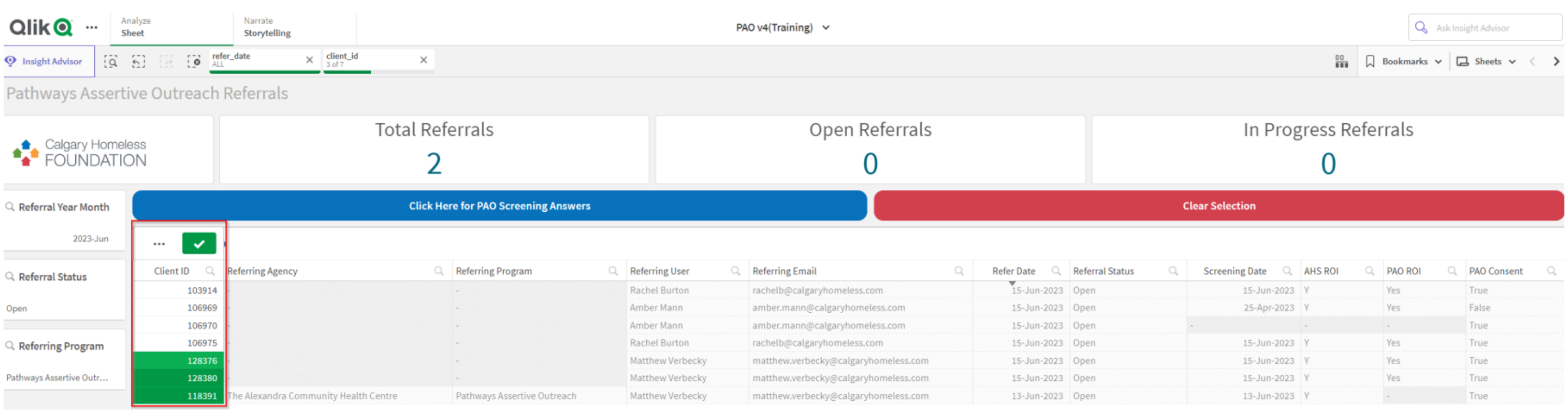
1. Review all CIDs present on your dashboard, you will need them for the next steps.

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.

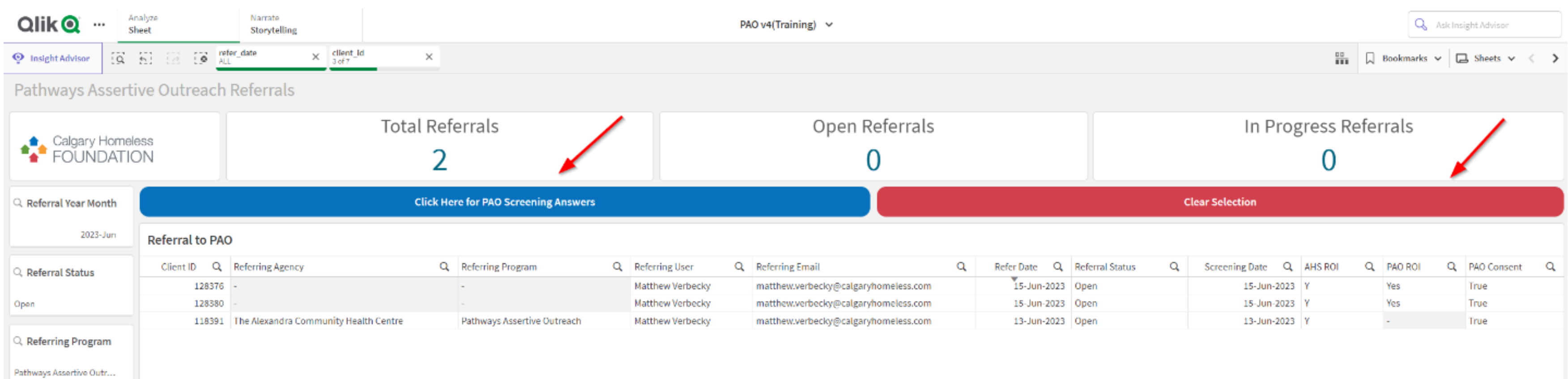


If you wish to filter and compare specific referrals, click on any number of CIDs to select the specific referrals you wish to look at. When you are ready, press the green check mark to confirm selection.

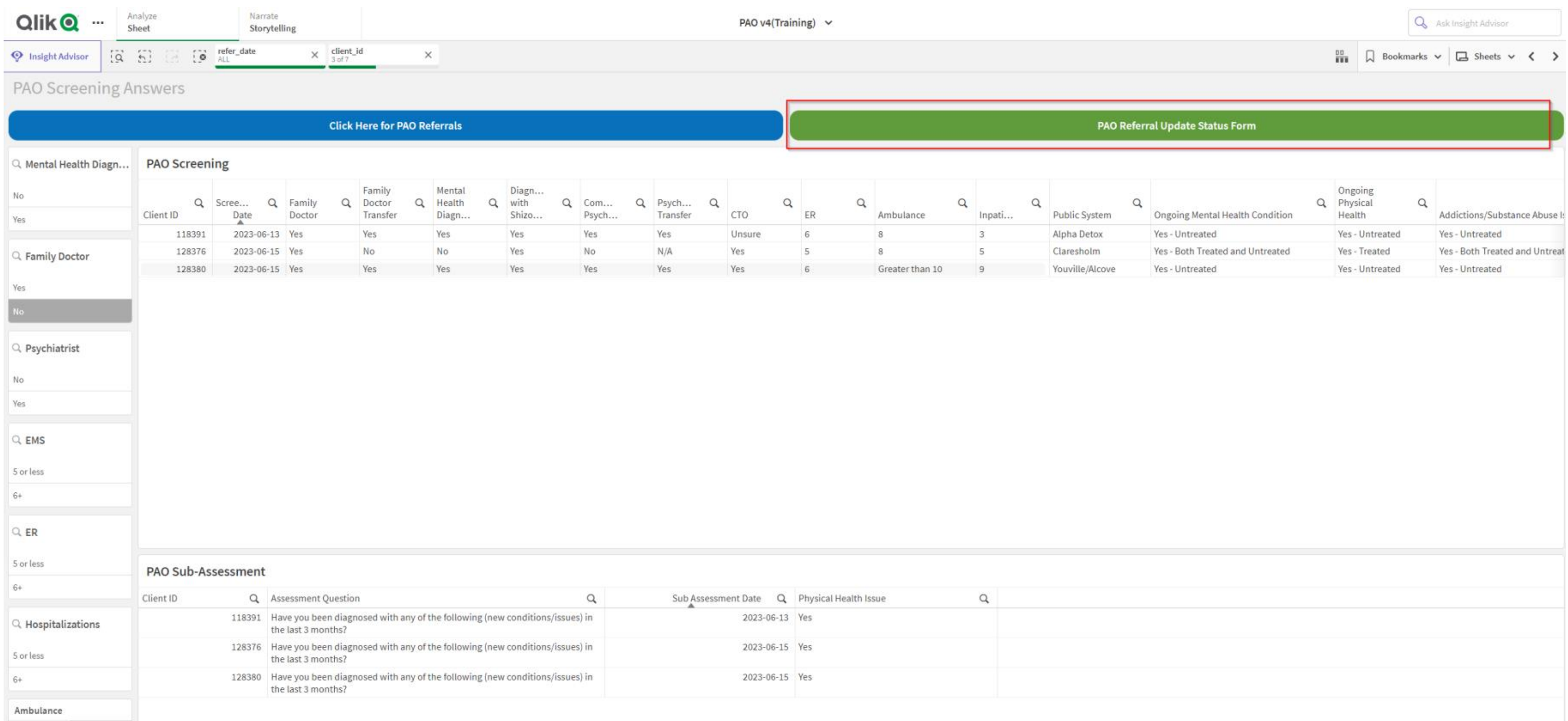
If you do not click on CIDs to filter, the next step will show all referrals



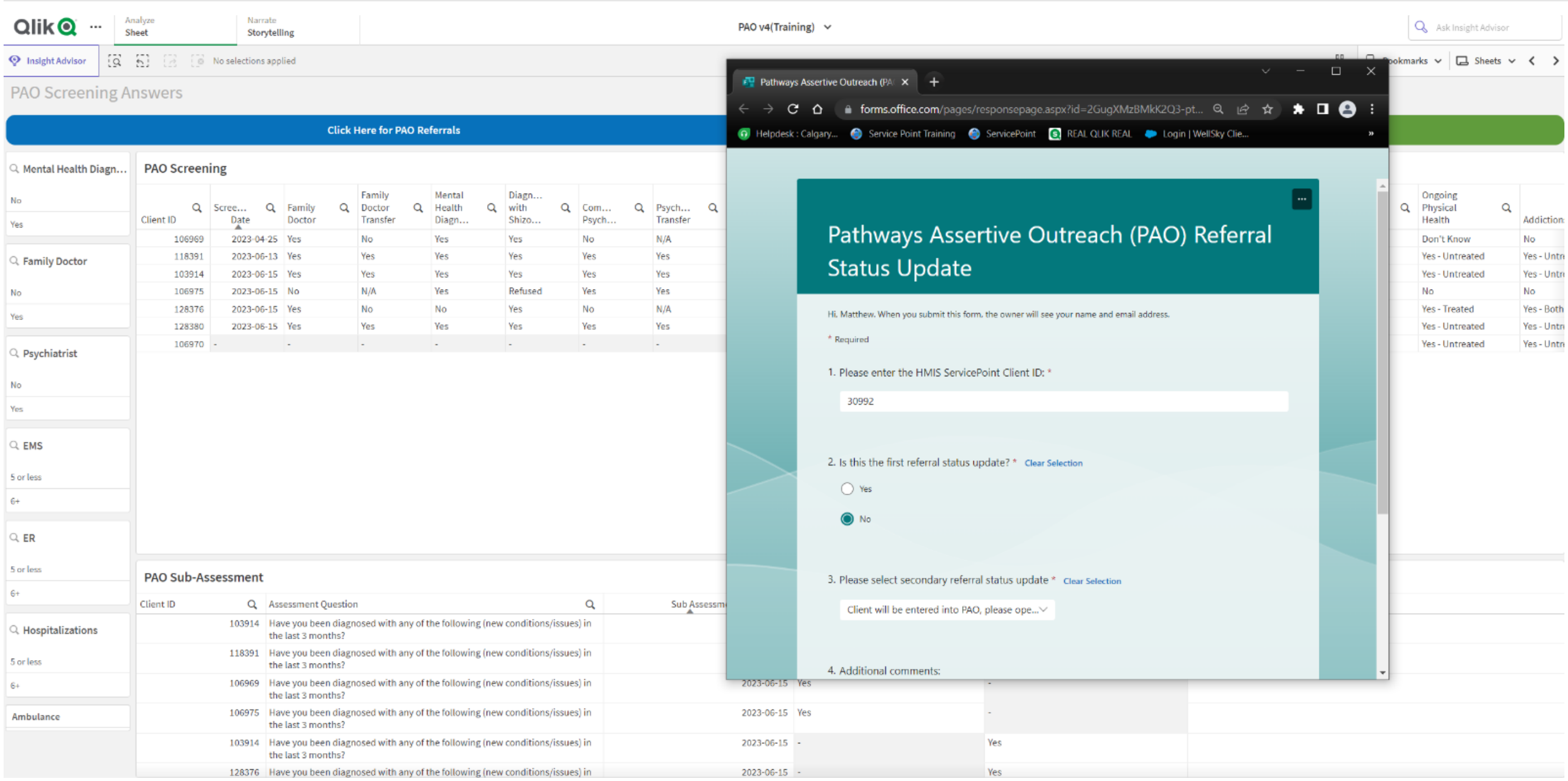
2. From there you can either press “Clear selection”, which will de-select the referrals you just selected and bring up the referrals on your dashboard OR you can press “Click here for PAO screening answers” to go back to the main page where you can access the referrals.



3. 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.”



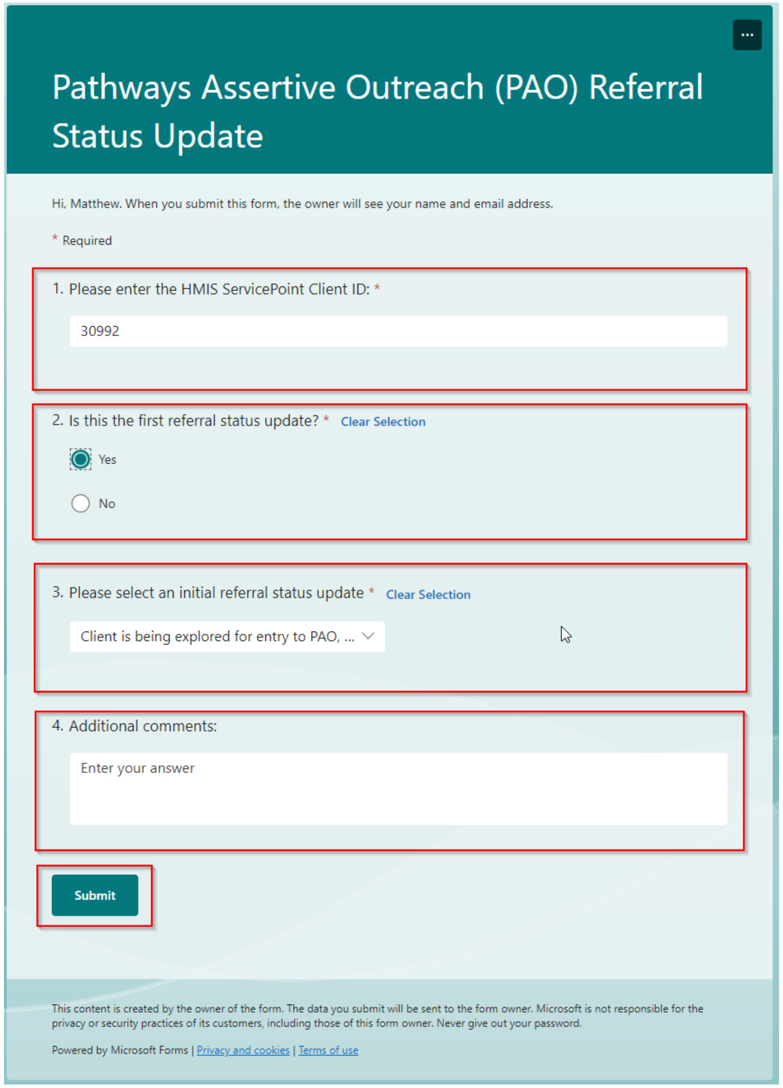
4. Once you press the button, a new tab on your browser will pop up with the form. You can open this window on another screen to make entering information on the form easier.



- 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: *

30992

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:

Enter your answer

Submit

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.

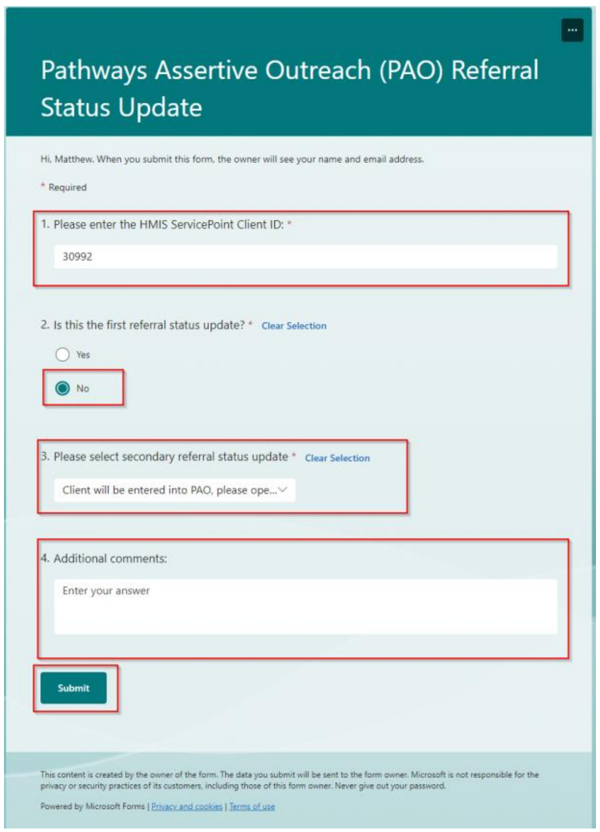
Powered by Microsoft Forms | Privacy and cookies | Terms of use

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 ope...

4. Additional comments:

Enter your answer

Submit

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.

Powered by Microsoft Forms | Privacy and cookies | Terms of use