Calgary Homeless FOUNDATION

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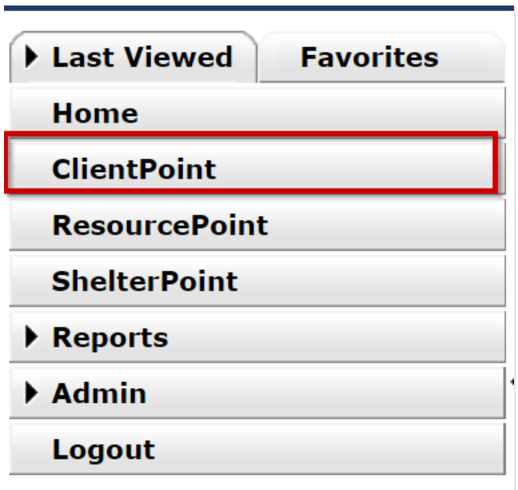
HSSC Staff Creates Referral to PAO

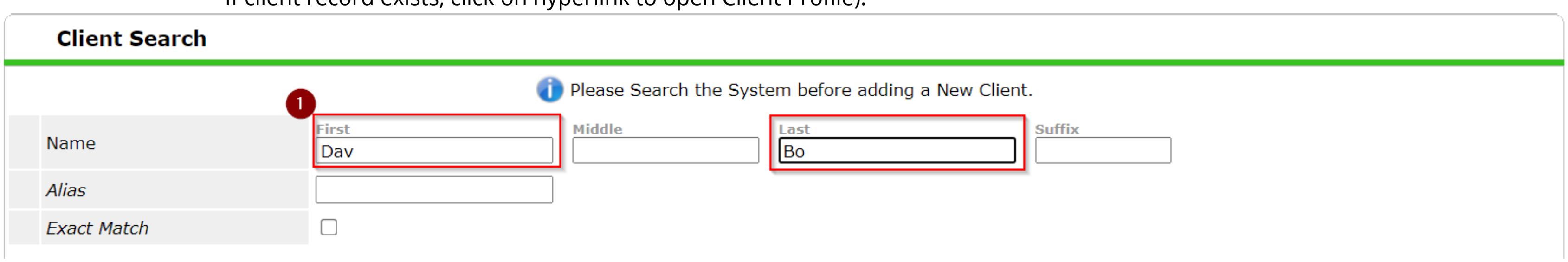
Phase 1: Ensure Client Profile Complete

Step 1.1: ClientPoint – Client Profile Tab

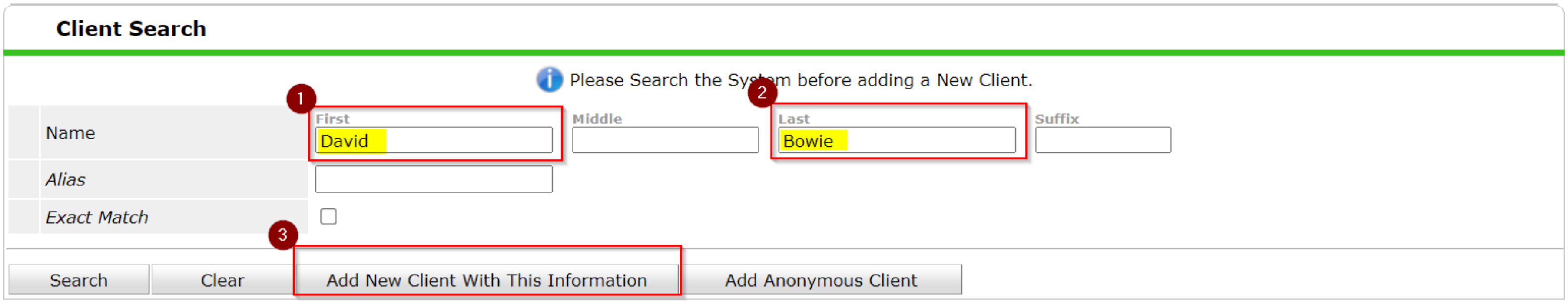
1. From the menu, select ClientPoint.



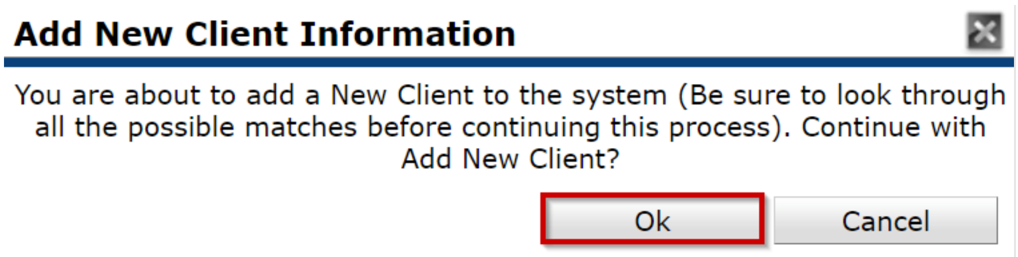
2. Establish if Client Record already exists in HMIS by "less is more" search.
   a. Type the first few letters of both first and last name and press "search". (This will check the system for possible records that may already exist. If client record exists, click on hyperlink to open Client Profile).



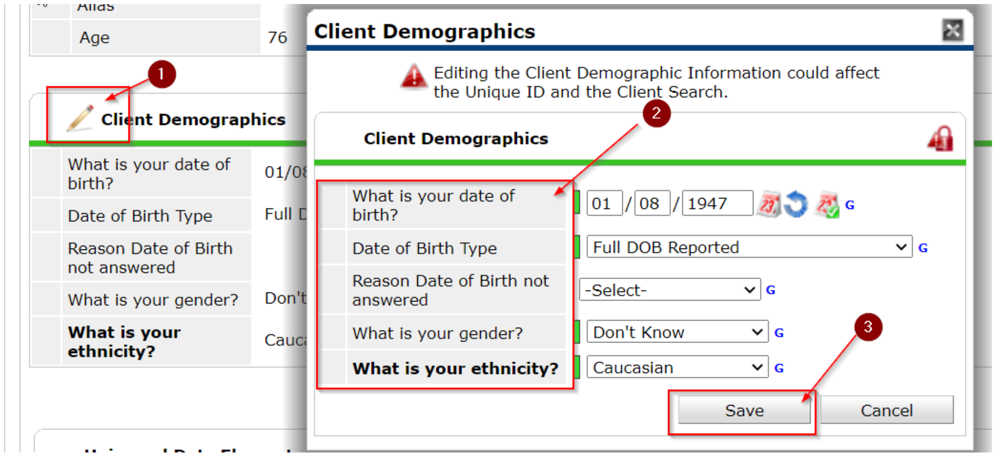
3. IF NEW CLIENT:
   a. Type full name correctly in First & Last Name search fields (do not enter data in other search fields)
   b. Press ‘Add New Client with This Information’.



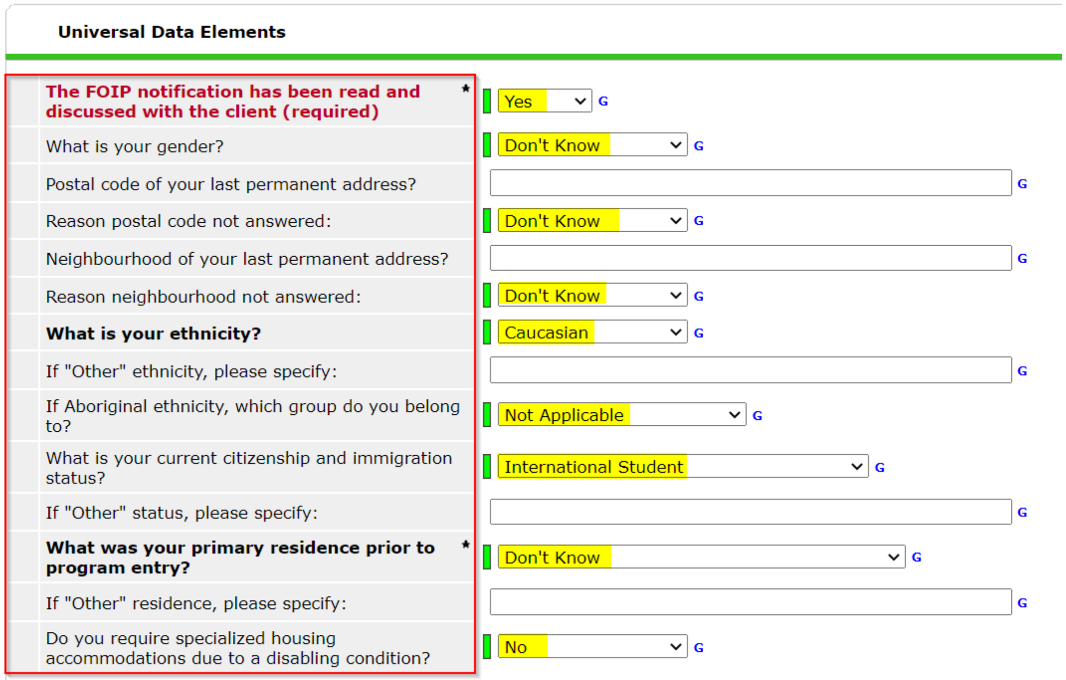
   c. A warning window will pop up reminding you to check the system for duplicate client profiles.
   d. Press ‘OK’ to continue.



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.

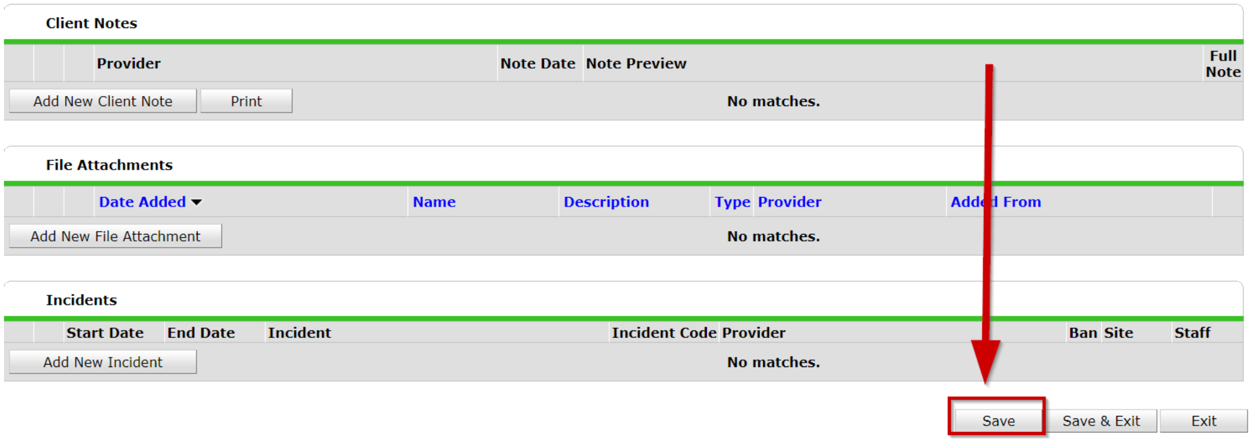


5. Under the Client Profile tab, ensure Universal Data Elements are complete.
   ***No data should be entered if FOIP Notification is left unanswered or indicated as ‘No’.**
   a. Answer and/or validate all pertinent questions.


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

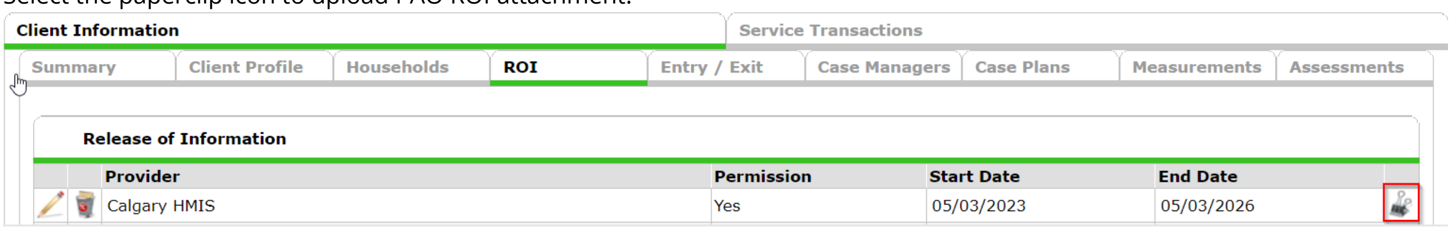
b. Scroll to the bottom of the screen, press ‘Save’.



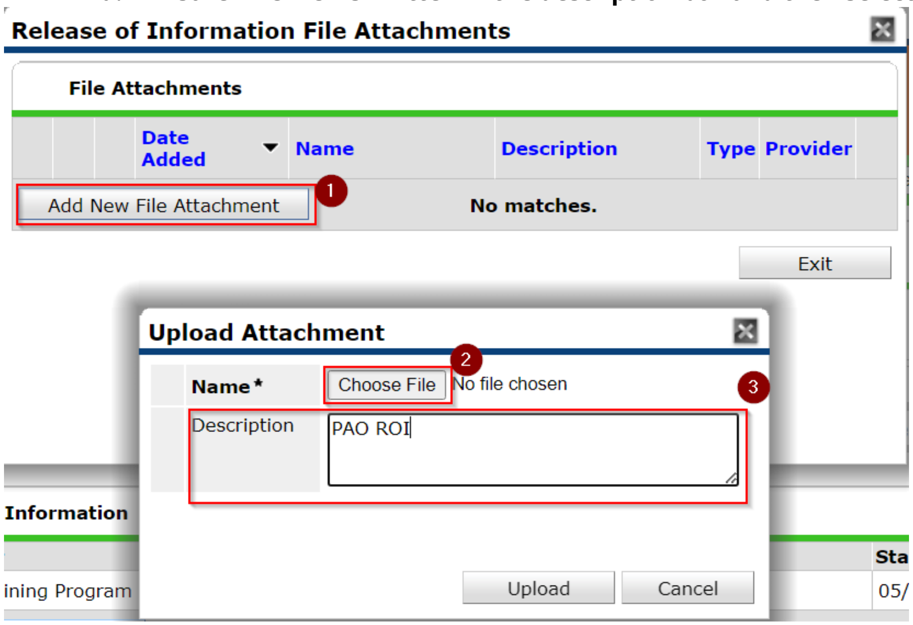
***Once saved, green history bars will appear next to each answer field.**

Step 1.2: ClientPoint – ROI Tab

1. Ensure program ROI row is present for program making referral to PAO. And add PAO ROI (client will need to sign)
   a. Select the paperclip icon to upload PAO ROI attachment.



b. Select 'Add New File Attachment.'
c. Choose the correct & valid PAO ROI document signed by participant to upload.
d. 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 the start/end dates.**

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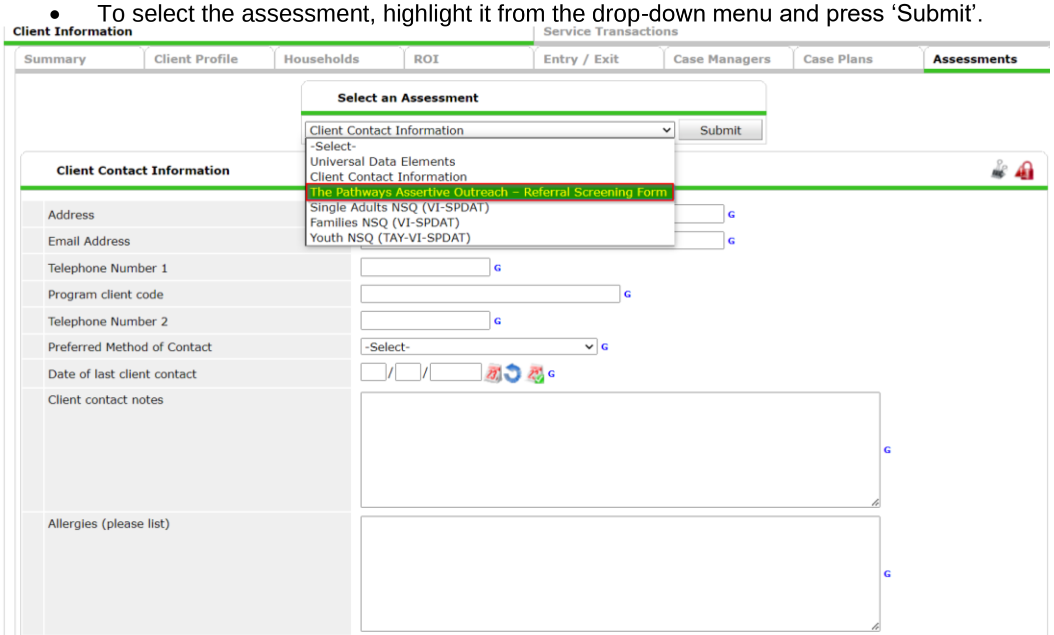
Step 1.3 – Assessments Tab

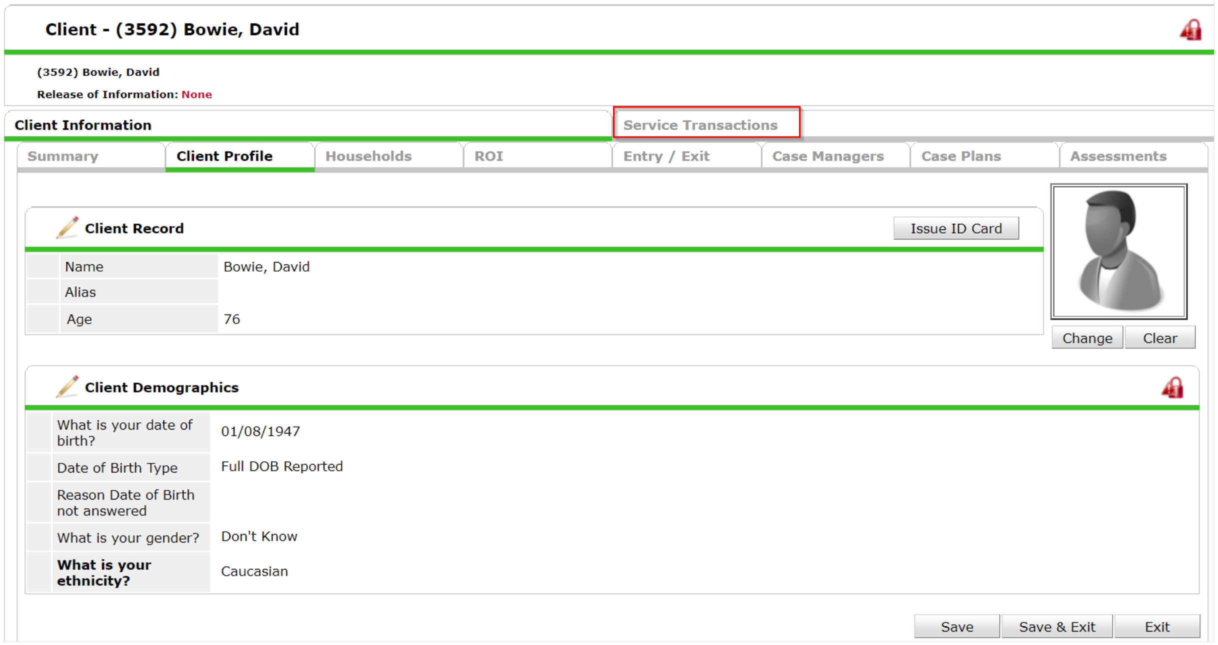
Under the Assessments tab, complete The Pathways Assertive Outreach – Referral Screening Form

- The data entry of this assessment should reflect the actual date of the screening application, use the back date tool if applicable.
- To select the assessment, highlight it from the drop-down menu and press ‘Submit’.

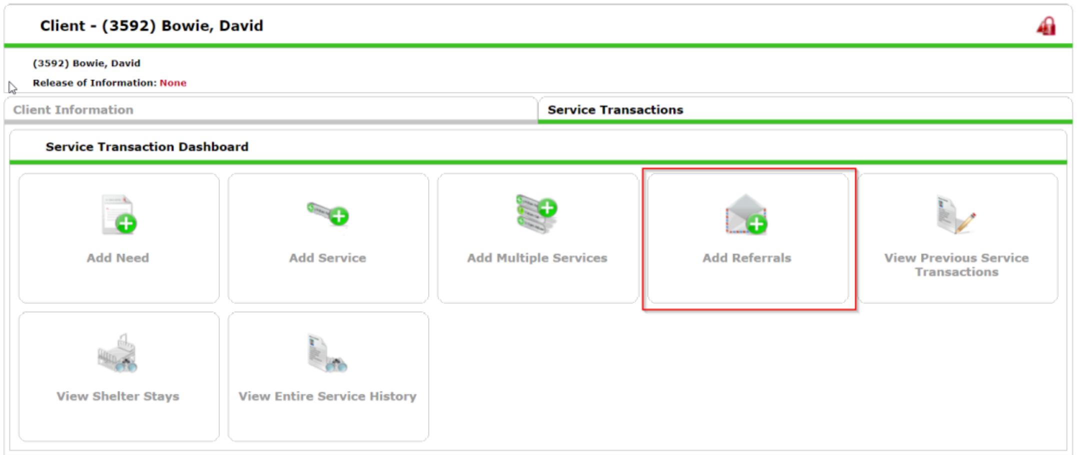


Phase 2: Create Referral to Pathways Assertive Outreach

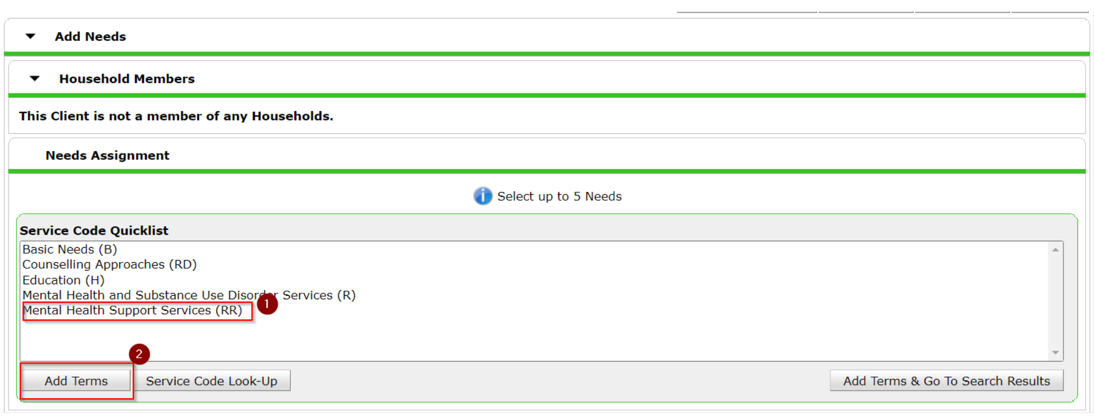
Step 1.4: Service Transactions tab



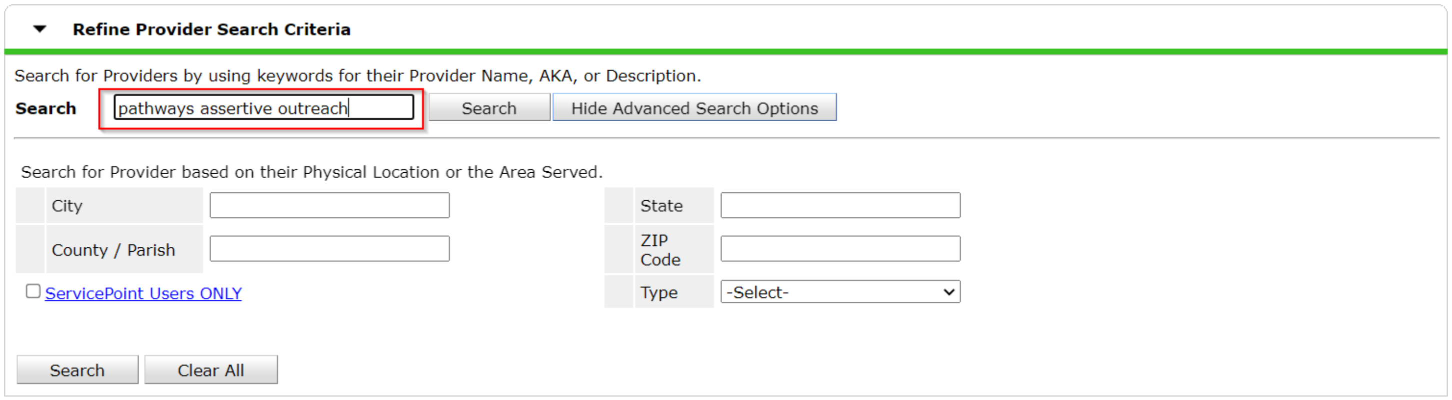
1. Click on the ‘Add Referrals’ button.



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

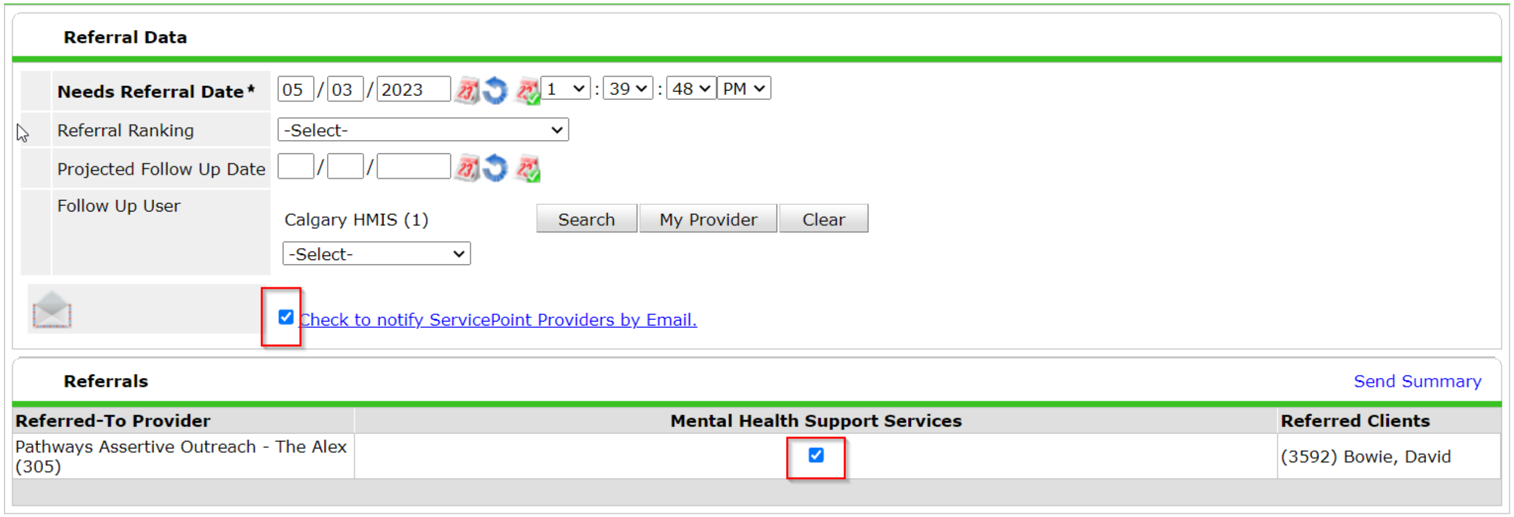


3. In the 'Refine Provider Search Criteria' section, type in 'Pathways Assertive Outreach' into the search bar and select 'Search'.



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

5. 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

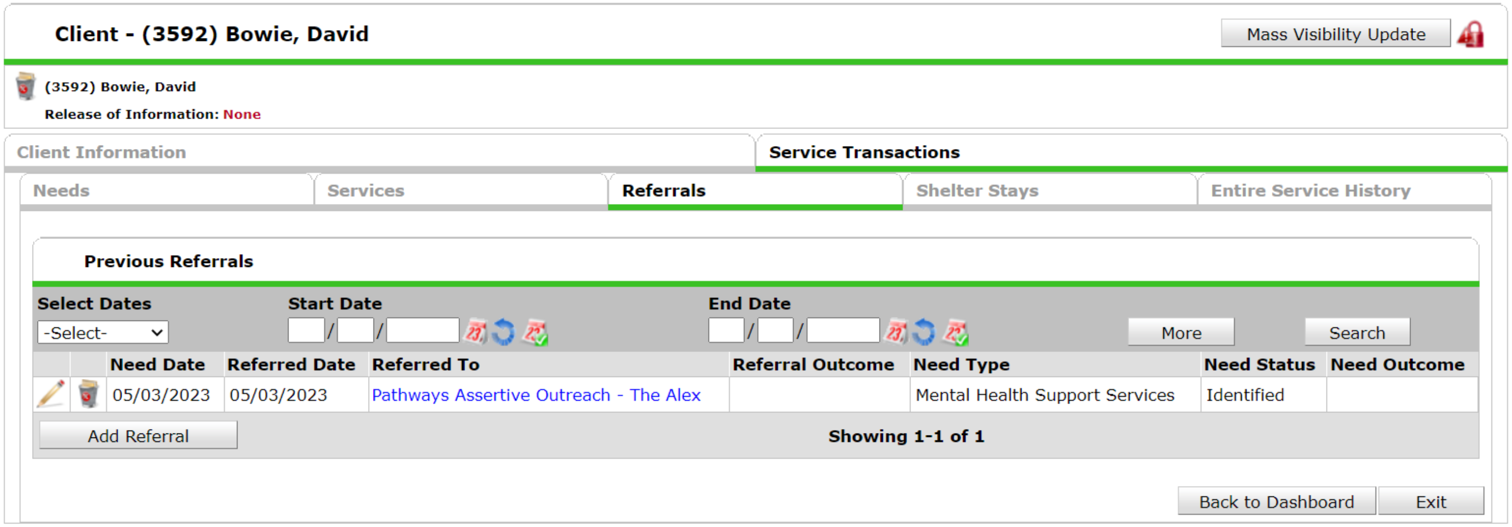
Needs Referral Date*	05 / 03 / 2023 1 : 39 : 48 PM
Referral Ranking	-Select-
Projected Follow Up Date	/ /
Follow Up User	Calgary HMIS (1) Search My Provider Clear -Select-

☑ 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)	☑	(3592) Bowie, David

6. 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, it will be visible to PAO Staff on their Qlik dashboard the next morning.