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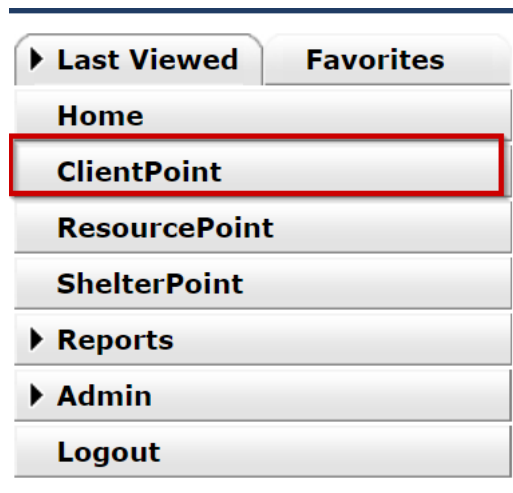
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## HSSC Staff Creates Referral to PAO

### Phase 1: Ensure Client Profile Complete

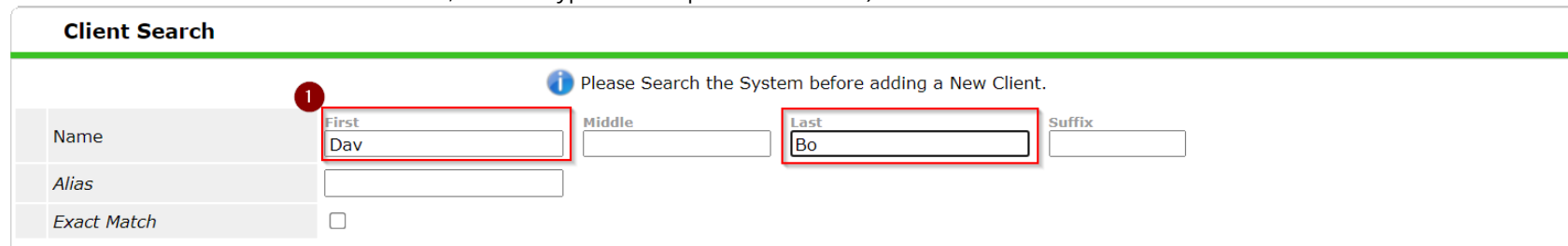
#### Step 1.1: ClientPoint – Client Profile Tab

1. From the menu, select ClientPoint.



A screenshot of a web application menu. At the top are two tabs: 'Last Viewed' and 'Favorites'. Below them is a list of menu items: 'Home', 'ClientPoint', 'ResourcePoint', 'ShelterPoint', 'Reports', 'Admin', and 'Logout'. The 'ClientPoint' item is highlighted with a red rectangular box.

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).



A screenshot of a 'Client Search' form. At the top, there is a green header bar with the text 'Client Search'. Below the header, there is a blue information icon and the text 'Please Search the System before adding a New Client.' To the left of the search fields is a red circle with the number '1'. The search fields are: 'First' (containing 'Dav'), 'Middle' (empty), 'Last' (containing 'Bo'), and 'Suffix' (empty). Below these fields are three rows: 'Name' (with a red box around the 'First' field), 'Alias' (with an empty text box), and 'Exact Match' (with an unchecked 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

Please Search the System before adding a New Client.

1

First

David

Middle

2

Last

Bowie

Suffix

Alias

Exact Match

☐

Search

Clear

3

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.

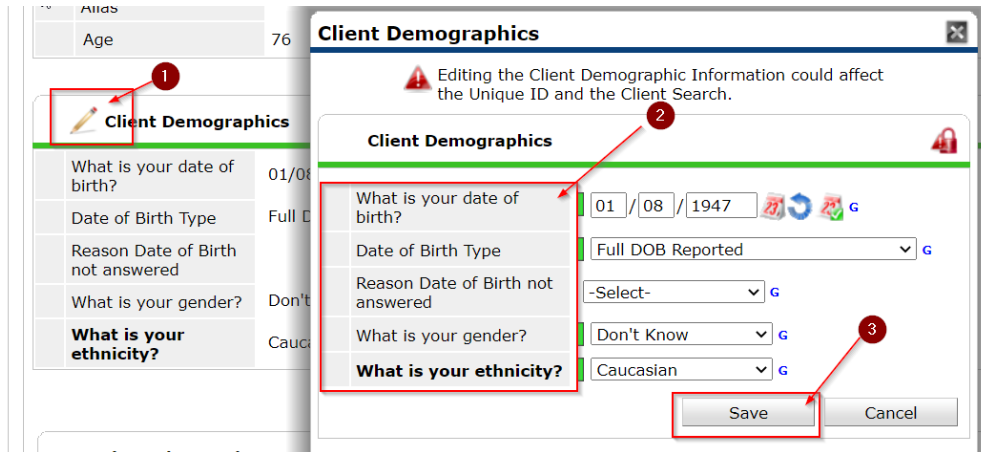
### Add New Client Information

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.



The screenshot shows a web application interface for editing client demographics. A modal window titled "Client Demographics" is open, displaying a form with several fields. Red callouts with numbers 1, 2, and 3 point to specific elements:

- Callout 1:** Points to a pencil icon next to the "Client Demographics" tab in the background interface.
- Callout 2:** Points to the "What is your date of birth?" field in the modal, which contains the date "01 / 08 / 1947".
- Callout 3:** Points to the "Save" button at the bottom of the modal.

The modal form includes the following fields:

- What is your date of birth?**: A date input field showing "01 / 08 / 1947".
- Date of Birth Type**: A dropdown menu showing "Full DOB Reported".
- Reason Date of Birth not answered**: A dropdown menu showing "-Select-".
- What is your gender?**: A dropdown menu showing "Don't Know".
- What is your ethnicity?**: A dropdown menu showing "Caucasian".

At the bottom of the modal are "Save" and "Cancel" buttons.

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

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

Client Notes

	Provider	Note Date	Note Preview	Full Note
No matches.				

Add New Client Note
Print

File Attachments

	Date Added	Name	Description	Type	Provider	Added From
No matches.						

Add New File Attachment

Incidents

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

Add New Incident

Save
Save & Exit
Exit

**\*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.

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

- 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'.**

**Release of Information File Attachments**

Date Added	Name	Description	Type	Provider
Add New File Attachment				

No matches.

Exit

**Upload Attachment**

Name *	Choose File	No file chosen
Description	PAO ROI	

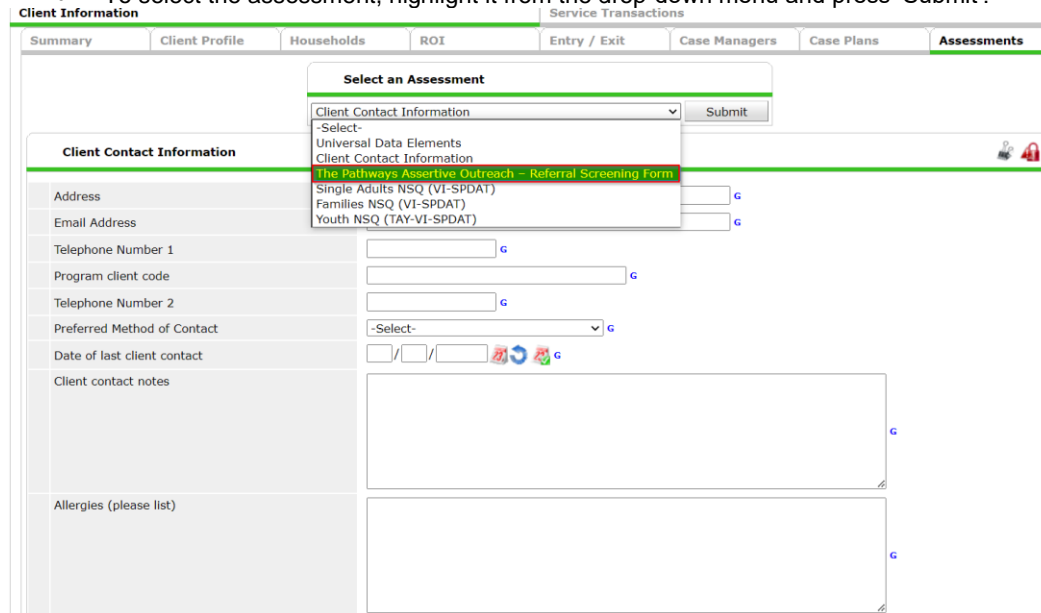
Upload Cancel

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

### 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'.



**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

Date of last client contact

Client contact notes

Allergies (please list)



## Phase 2: Create Referral to Pathways Assertive Outreach

### Step 1.4: 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








1. 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			


2. 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



- 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

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

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.

**Client - (3592) Bowie, David**

Mass Visibility Update 

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

Client Information

Needs

Services

**Referrals**

Shelter Stays

Entire Service History

Service Transactions

Previous Referrals

Select Dates


-Select-

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	<a href="#">Pathways Assertive Outreach - The Alex</a>		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, it will be visible to PAO Staff on their Qlik dashboard the next morning.

6/29/2023

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