

# Pathways Assertive Outreach Staff Referral Screening Process Checklist

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

Step	Platform	Location	Data Entry Action
1	Qlik	Qlik PAO Dashboard	Review PAO Referrals Dashboard
2	Qlik	Qlik PAO Dashboard	Filter CIDs & compare specific referrals
3	Qlik	Qlik Form	Open form and enter HMIS ServicePoint Client ID ( <i>one ID# per form</i> )
4	Qlik	Qlik Form	Answer 'Yes' to question "Is this the first referral status update"
5	Qlik	Qlik Form	Complete form accordingly

## Phase 2: Re-access PAO Referral Status Update Form

Step	Platform	Location	Data Entry Action
1	Qlik	Qlik Form	Open form and enter HMIS ServicePoint Client ID ( <i>one ID# per form</i> )
2	Qlik	Qlik Form	Answer 'No' to question "Is this the first referral status update?"
3	Qlik	Qlik Form	Complete form accordingly

## Phase 3: HMIS ServicePoint Data Entry

Step	Platform	Location	Data Entry Action
1	HMIS	ClientPoint: Client Profile Tab	Complete/Validate Client Demographics & Universal Data Elements
2	HMIS	ClientPoint: ROI Tab	Add valid ROI row.
3	HMIS	ShelterPoint	Provide program entry ( <i>reflect date client agrees to work with program</i> )