

CMIS Referrals – ClientPoint

Referrals sent by Centralized Intake to programs that utilize only ClientPoint (Diversion, RRH, and scattered-site PSH) can be accessed by client. There are two methods to see and react to a client's Referral in CMIS.

1. Outstanding Referrals for RRH and scattered-site PSH programs can be found in the client's file under the **Client Summary tab**.

Scroll down to the "Outstanding Incoming Referrals" section of the Client Summary page and click the edit pencil for your outstanding referral.

- If your referral is not visible on this page (which is the case of Diversion referrals), follow method #2 below.

Client - (1) Test, Justin

(1) Test, Justin
Release of Information: None

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

Added to the system 08/23/2001 03:04 PM

Name	Test, Justin	Gender	Male
Date of Birth	03/02/1975 (Age 45)	Primary Race	Client refused (HUD)
Social Security	--1466	Secondary Race	
		U.S. Military Veteran?	No (HUD)

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Households

ID	Type	Head of Household	Relationship
24989	Two Parent Family		
	Test, Justin	Yes	Self
	Test, Adam	No	son
	Test, Jodie	No	wife

Outstanding Incoming Referrals

Referral Date	Referring Provider	Need Type
02/18/2021	Centralized Intake of Delaware	Rapid Re-Housing Programs

Services

Start Date	End Date	Provider
No matches.		

Entry/Exits

Program	Type	Project Start Date	Exit Date
Centralized Intake - RRH Wait List	HUD	02/17/2021	

- If the "Outstanding Incoming Referrals" section is not visible on the Client Summary page, contact a DE-CMIS administrator.

If you have any further questions about using Referrals in CMIS, please contact Amelia Ramsaran, Data Training Manager, at aramsaran@housingalliance.org.

- All incoming referrals can be found in the **Service Transactions tab** of a client's profile.

After going to the Service Transaction Dashboard, click "View Previous Service Transactions" to see the referral.

Client - (1) Test, Justin Mass Visibility Update

(1) Test, Justin
Release of Information: **None** -Switch to Another Household Member-

Client Information | **Service Transactions**

Service Transaction Dashboard

After clicking "View Previous Service Transactions", click the "Referrals" tab to see all Referrals in the system for the client.

Client Information | **Service Transactions**

Needs | Services | **Referrals** | Shelter Stays | Entire Service History

Previous Referrals

Select Dates: Start Date: / / End Date: / /

	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
	02/01/2021	02/01/2021	Ministry of Caring		Rapid Re-Housing Programs	Identified	

Showing 1-1 of 1

If you have any further questions about using Referrals in CMIS, please contact Amelia Ramsaran, Data Training Manager, at aramsaran@housingalliance.org.

To Decline/Cancel a Referral:

1. Click on the pencil icon next to the date of the referral you are closing out. The **Referral Outcome** column will be blank.

Client Information		Service Transactions					
Needs		Services		Referrals		Shelter Stays	Entire Service History
Previous Referrals							
Select Dates		Start Date		End Date		More	Search
-Select-		/ /		/ /			
Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome	
02/01/2021	02/01/2021	Ministry of Caring		Rapid Re-Housing Programs	Identified		
Add Referral				Showing 1-1 of 1			
						Back to Dashboard	Exit

2. Referral information will come up for the entire household referred (if not a single individual). If you are only declining/canceling the referral for some household members, but not all, un-check the names of the clients you are still planning to serve. *If you are declining/canceling the entire referral, skip this step.*

Edit Referral

▼ **Household Members**

To update Household members for this Referral, click the box beside each name.

(23998) Male Single Parent

(1) Test, Justin

(95792) Test, Jackson

Include Additional Household Members

- Update the **Referral Outcome** to "Declined" if your organization is choosing not to proceed with the client's referral, or "Canceled" if your organization cannot proceed with the client's referral.

The screenshot shows two views of the 'Referral Data' form. On the left, the 'Referral Outcome' dropdown is set to '-Select-'. A green box highlights the 'Follow Up Information' section. On the right, the 'Referral Outcome' dropdown is open, showing options: '-Select-', 'Accepted', 'Accepted on Wait List', 'Declined', and 'Canceled'. 'Declined' is highlighted in blue. A green arrow points from the dropdown in the left view to the dropdown in the right view.

- Once "Declined" or "Canceled" is selected for the Referral Outcome, another assessment line appears that says, "**If Canceled or Declined, Reason**". Select the option that best matches why the referral will not be accepted.

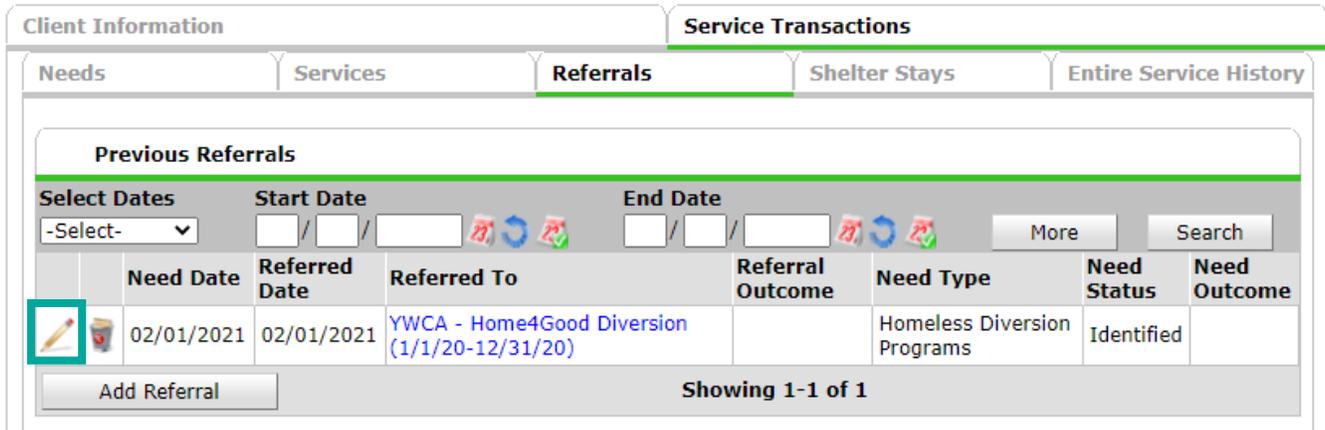
The screenshot shows the 'Referral Data' form with 'Declined' selected for 'Referral Outcome'. A green box highlights the 'Follow Up Information' section. Below the 'Referral Outcome' dropdown, a new field 'If Canceled or Declined, Reason' is visible with a dropdown menu open. The dropdown options are: '-Select-', 'Client Not Eligible', 'Client Refused Service', 'Client Was a No-Show', 'Service Does Not Exist', 'Service Not Accessible', and 'Unknown'. A green arrow points from the 'Declined' dropdown to the 'If Canceled or Declined, Reason' dropdown.

- Click the "Save & Exit" button to save the update on this Referral.

Previous Referrals							
Select Dates	Start Date		End Date		More	Search	
-Select-							
Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome	
02/01/2021	02/01/2021	Ministry of Caring	Declined	Rapid Re-Housing Programs	Identified		
Add Referral			Showing 1-1 of 1				

To Accept a Referral:

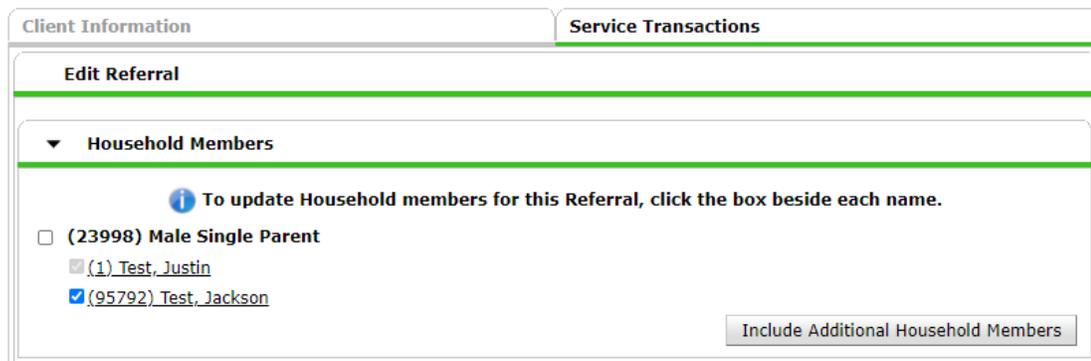
1. Click on the pencil icon next to the referral that you are accepting. The **Referral Outcome** column will be blank.



The screenshot shows the 'Referrals' tab in the CMIS system. It features a table with columns for 'Need Date', 'Referred Date', 'Referred To', 'Referral Outcome', 'Need Type', 'Need Status', and 'Need Outcome'. A single referral is listed with a pencil icon in the first column, indicating it is selected for editing. The referral details are: Need Date: 02/01/2021, Referred Date: 02/01/2021, Referred To: YWCA - Home4Good Diversion (1/1/20-12/31/20), Referral Outcome: (blank), Need Type: Homeless Diversion Programs, Need Status: Identified, and Need Outcome: (blank). Below the table is an 'Add Referral' button and a status indicator 'Showing 1-1 of 1'.

Select Dates	Start Date	End Date				
-Select-	/ /	/ /				
Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
 02/01/2021	02/01/2021	YWCA - Home4Good Diversion (1/1/20-12/31/20)		Homeless Diversion Programs	Identified	

2. Referral information will come up for the entire household referred (if not a single individual). If you are only accepting the referral for some household members, but not all, un-check the names of the clients you are not planning to serve. *If you are accepting the entire referral, skip this step.*



The screenshot shows the 'Edit Referral' screen. It displays a section for 'Household Members' with a list of members to be selected. The first member is '(23998) Male Single Parent' with a sub-list of '(1) Test, Justin' and '(95792) Test, Jackson'. The checkbox for '(95792) Test, Jackson' is checked. Below the list is an 'Include Additional Household Members' button.

Household Members

To update Household members for this Referral, click the box beside each name.

- (23998) Male Single Parent
 - (1) Test, Justin
 - (95792) Test, Jackson

Include Additional Household Members

3. Update the **Referral Outcome** to "Accepted".

The screenshot shows two instances of the 'Referral Data' form. The top form has a 'Referral Outcome' dropdown set to '-Select-'. A green box highlights the 'Follow Up Information' section. A green arrow points from this section to the 'Follow Up Information' section of the bottom form, where the 'Referral Outcome' dropdown is open, showing options: '-Select-', 'Accepted', 'Accepted on Wait List', 'Declined', and 'Canceled'. 'Accepted' is highlighted in blue.

4. Click the "Save & Exit" button to save the update on this Referral.

Previous Referrals							
Select Dates	Start Date		End Date		More	Search	
-Select-							
	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
	02/01/2021	02/01/2021	YWCA - Home4Good Diversion (1/1/20-12/31/20)	Accepted	Homeless Diversion Programs	Identified	
Add Referral		Showing 1-1 of 1					

5. Continue the project entry process as outlined during trainings, using the Entry/Exit tab. [Consult your ClientPoint Training PowerPoint if you have any questions about the project entry process.](#)