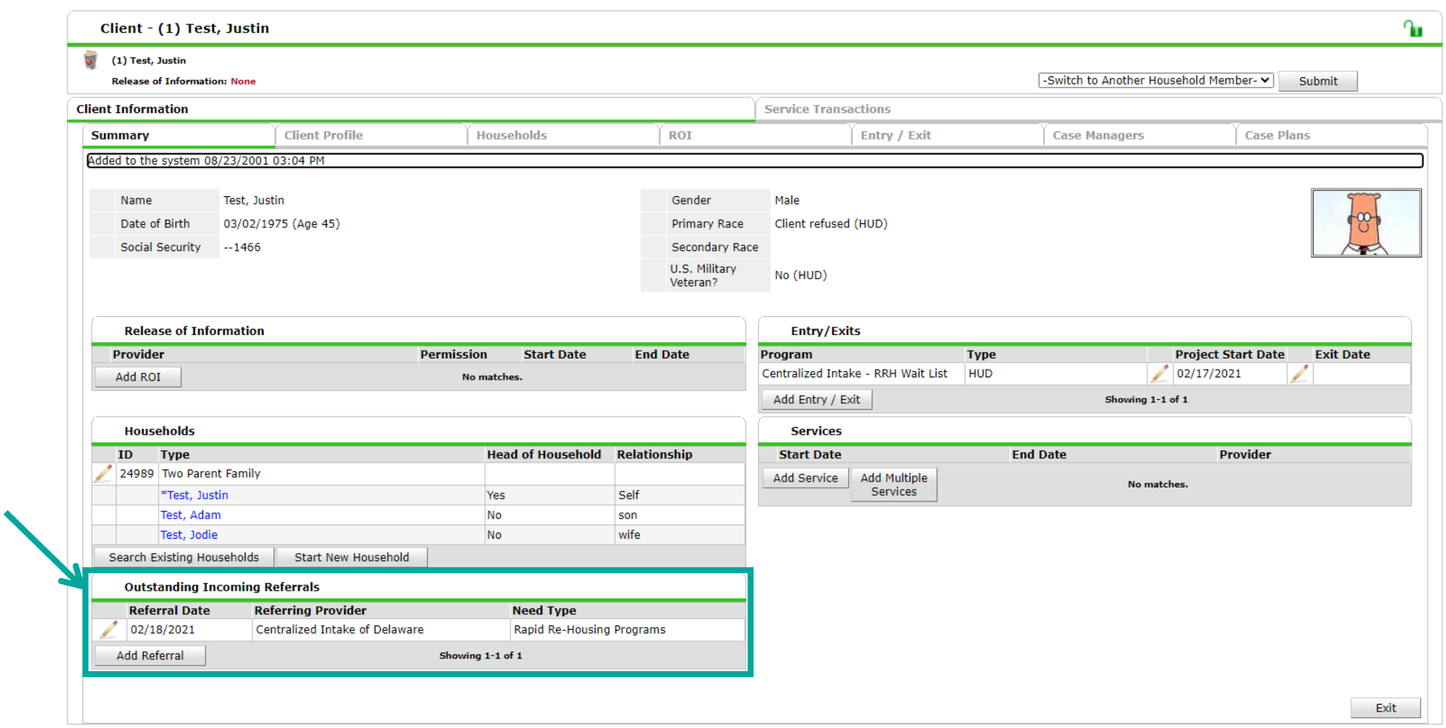
CMIS Referrals – ClientPoint

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.

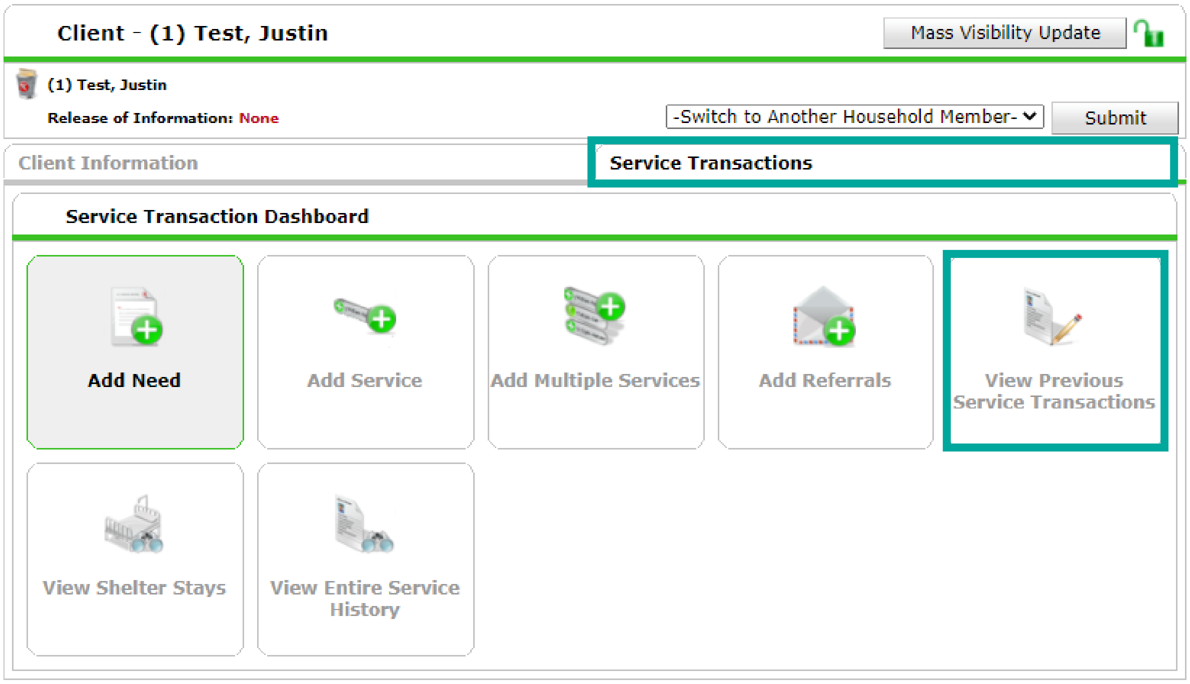


- If the "Outstanding Incoming Referrals" section is not visible on the Client Summary page, contact a DE-CMIS administrator.

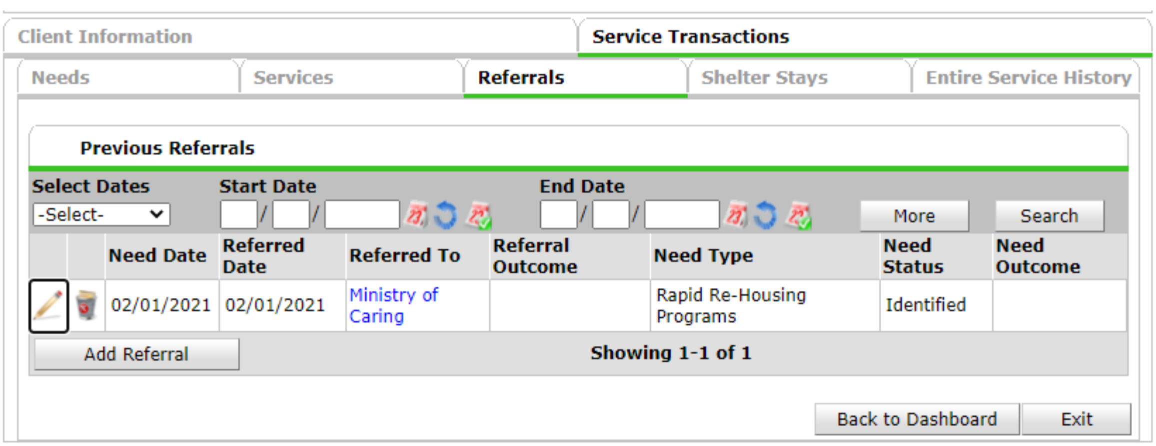
If you have any further questions about using Referrals in CMIS, please contact Amelia Ramsaran, Data Training Manager, at aramsaran@housingalliancede.org.

2. 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.



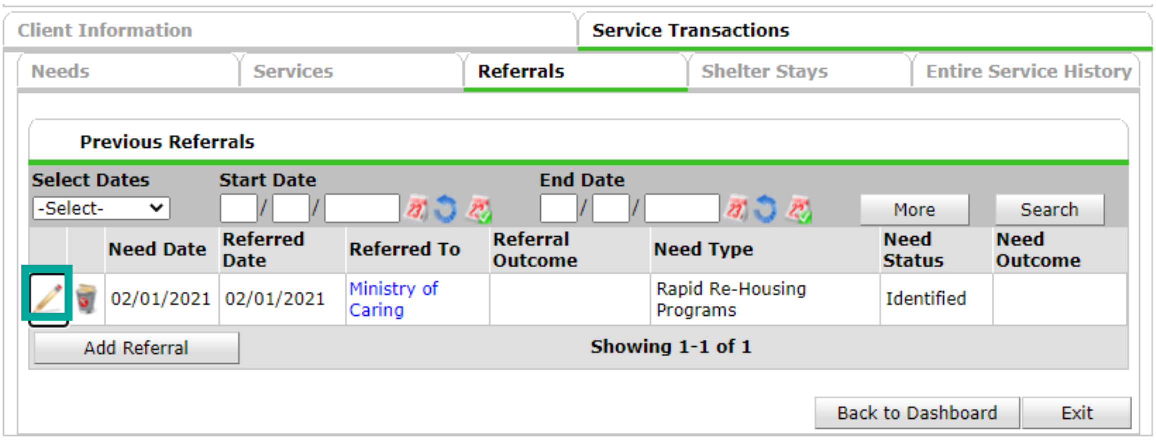
After clicking "View Previous Service Transactions", click the "Referrals" tab to see all Referrals in the system for the client.



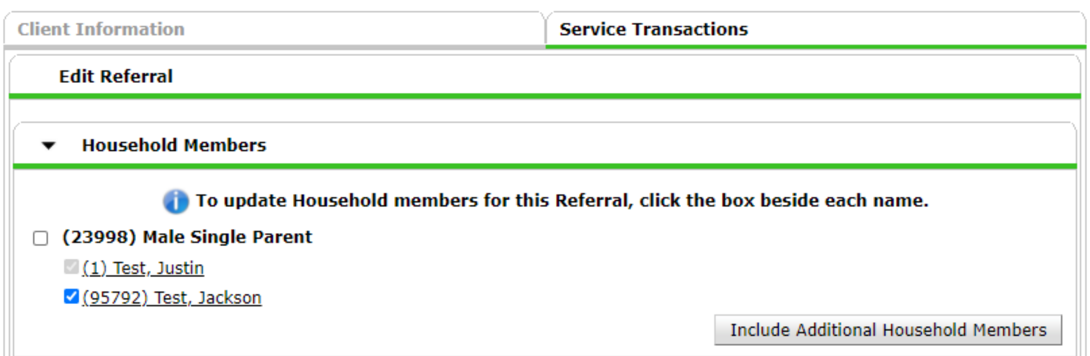
If you have any further questions about using Referrals in CMIS, please contact Amelia Ramsaran, Data Training Manager, at aramsaran@housingalliancede.org.

To Decline/Cancel a Referral:

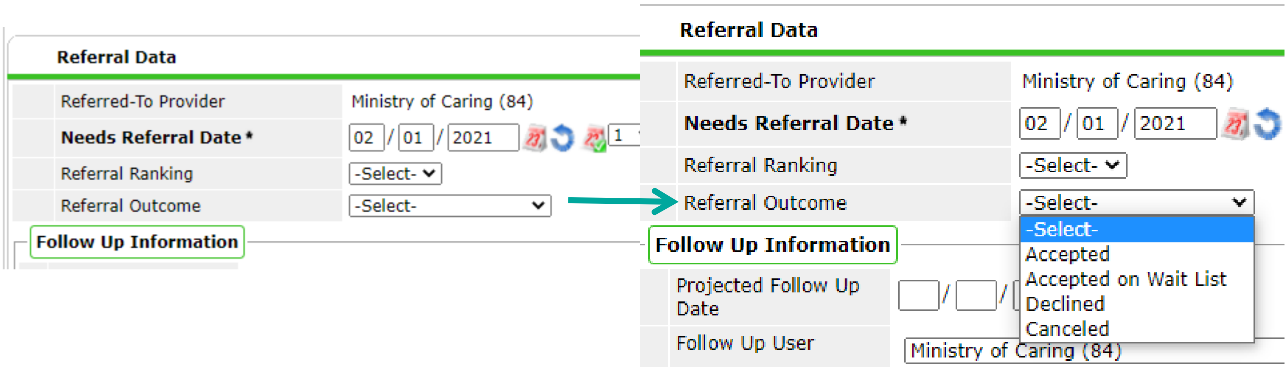
1. Click on the pencil icon next to the date of the referral you are closing out. The **Referral Outcome** column will be blank.



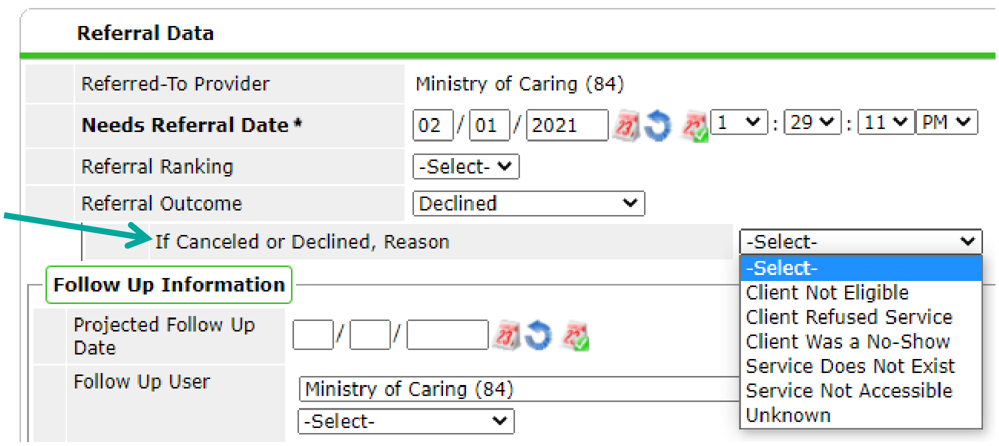
2. Referral information will come up for the entire household referred (if not a single individual). If you are only declining/canceling the referral for some household members, but not all, un-check the names of the clients you are still planning to serve. *If you are declining/canceling the entire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



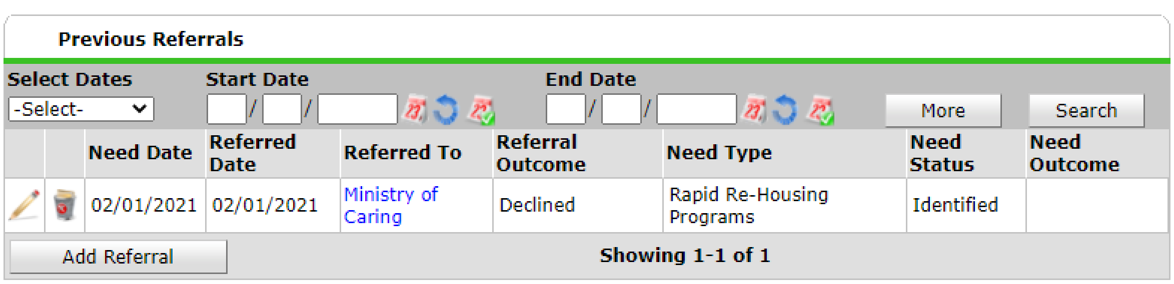
3. Update the **Referral Outcome** to "Declined" if your organization is choosing not to proceed with the client's referral, or "Canceled" if your organization cannot proceed with the client's referral.



4. 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.



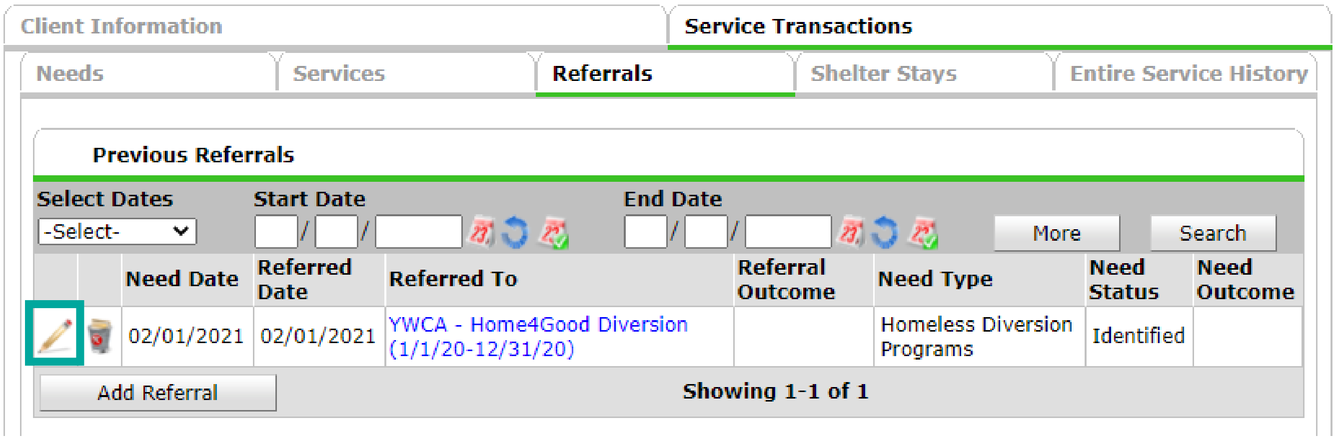
5. Click the "Save & Exit" button to save the update on this Referral.



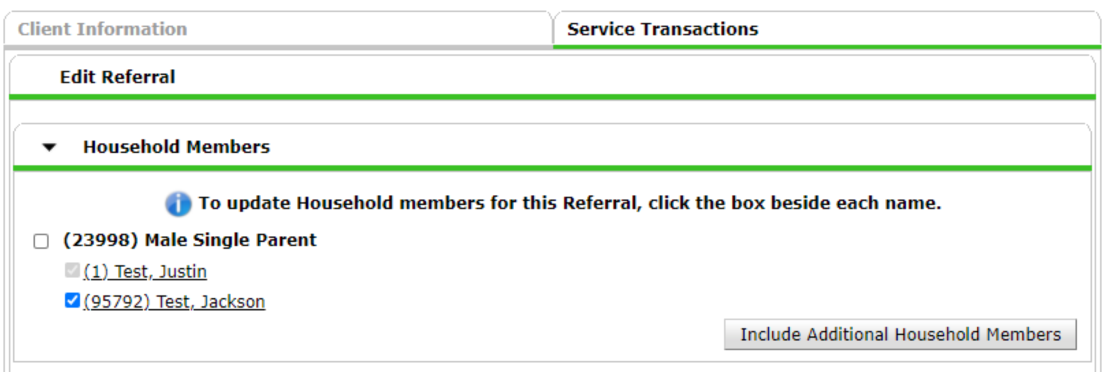
If you have any further questions about using Referrals in CMIS, please contact Amelia Ramsaran, Data Training Manager, at aramsaran@housingalliancede.org.

To Accept a Referral:

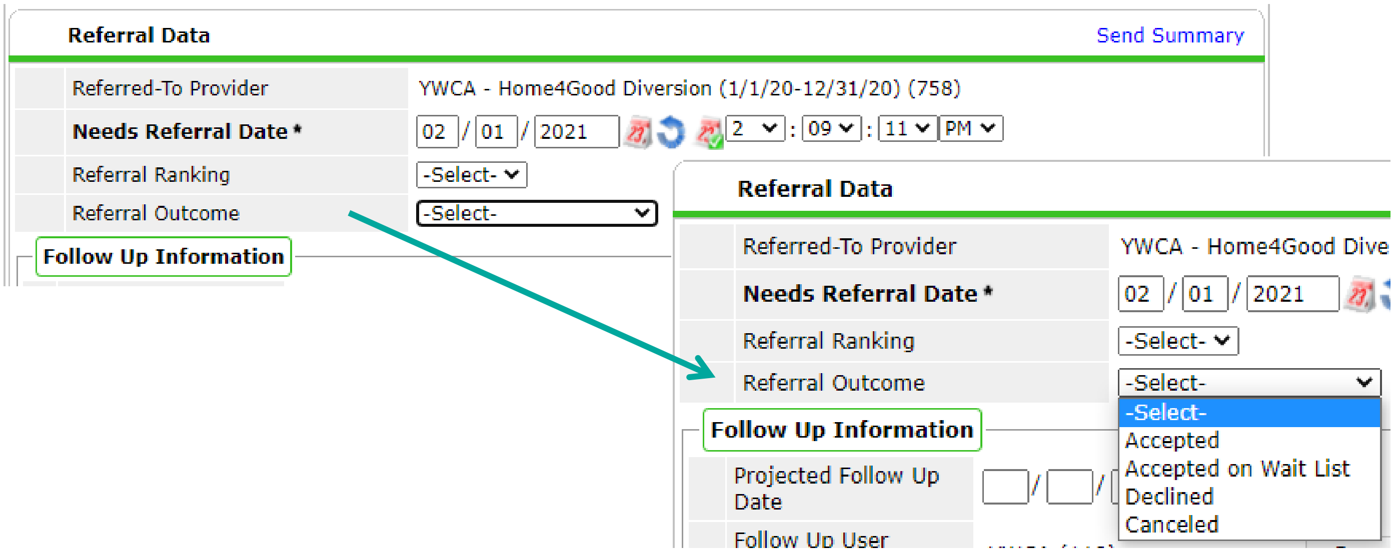
1. Click on the pencil icon next to the referral that you are accepting. The **Referral Outcome** column will be blank.



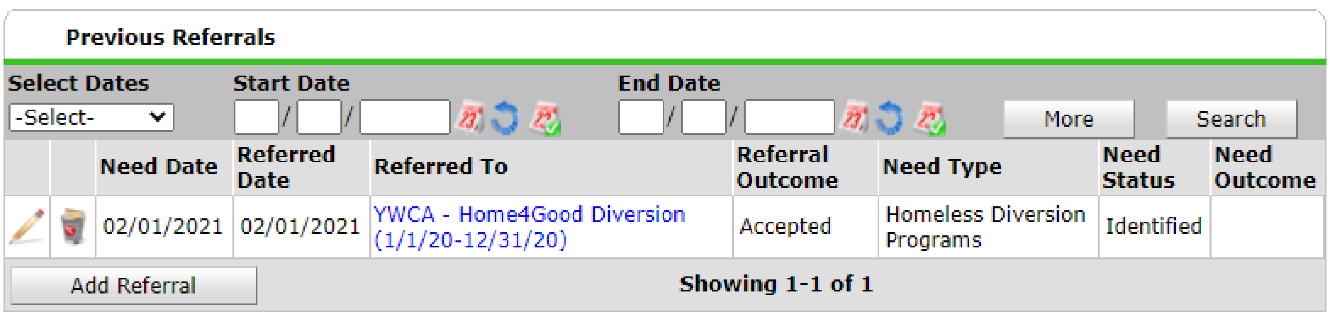
2. Referral information will come up for the entire household referred (if not a single individual). If you are only accepting the referral for some household members, but not all, un-check the names of the clients you are not planning to serve. *If you are accepting the entire referral, skip this step.*



3. Update the **Referral Outcome** to “Accepted”.



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



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.

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