

CMIS Referrals – ShelterPoint

Referrals sent by Centralized Intake to programs that utilize ShelterPoint (ES, TH, and single-site PSH) can be accessed by project. Any incoming referrals will be listed in the "Outstanding Referrals" section found beneath your Shelter Inventory/bed list.

Outstanding Referrals - Ministry of Caring - Nazareth Permanent Housing PSH (530) - 2 total								Check Unit Availability
	Referral Date	Name	Ranking	Need Type	Referred By	Date of Birth	Gender	Group ID
	01/25/2021	(1) Test, Justin		Homeless Permanent Supportive Housing	Centralized Intake of Delaware (464)	03/02/1975	Male	789803
	01/25/2021	(95792) Test, Jackson		Homeless Permanent Supportive Housing	Centralized Intake of Delaware (464)		Male	789803

Showing 1-2 of 2

To Decline/Cancel a Referral:

1. Click the pencil icon next to a client whose referral you are closing out.

Outstanding Referrals - Ministry of Caring - Nazareth Perma			
	Referral Date	Name	R
	01/25/2021	(1) Test, Justin	
	01/25/2021	(95792) Test, Jackson	

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 Data

Overview

Client ID	Client Name	Referral Date	Reason Canceled
95792	Test, Jackson	01/25/2021 11:54:16 AM	
1	Test, Justin	01/25/2021 11:54:16 AM	

Showing 1-2 of 2

(1) Test, Justin

Referral Date: 01/25/2021 11:54:16 AM
 Referring Provider: Centralized Intake of Delaware (464)
 Referred To: Ministry of Caring - Nazareth Permanent Housing PSH (530)
 Referral Ranking: -Select-
 Referral Outcome: -Select-

Follow Up Information

If needed, Referral Projected Follow Up Date: / /

Referral Follow Up User: Centralized Intake of Delaware (464)
 -Select-

Referral Follow Up Made: -Select-
 Referral Completed Follow Up Date: / /

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

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

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

The screenshot shows the 'Edit Referral Data' window. At the top, there is an 'Overview' table with columns for Client ID, Client Name, Referral Date, and Reason Canceled. Below this, the details for '(1) Test, Justin' are shown, including Referral Date, Referring Provider, Referred To, Referral Ranking, and Referral Outcome. The 'Referral Outcome' dropdown menu is open, showing options: '-Select-', 'Accepted', 'Accepted on Wait List', 'Declined', and 'Canceled'. A green arrow points from the 'Declined' option in the dropdown to the 'Referral Outcome' field in the main form. Below the 'Referral Outcome' field is the 'Follow Up Information' section, which includes fields for 'If needed, Referral Projected Follow Up Date', 'Referral Follow Up User', 'Referral Follow Up Made', and 'Referral Completed Follow Up Date'. At the bottom, there is a 'Household Members' section with a list of members and checkboxes to select them for update. The 'Save Referral Information' and 'Cancel' buttons are at the bottom right.

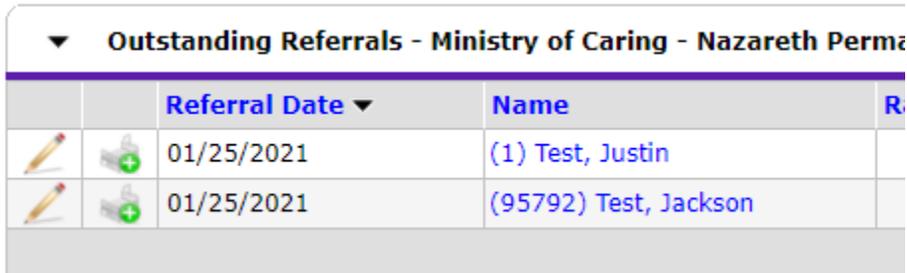
- Once "Declined" or "Canceled" is selected for the Referral Outcome, another assessment line appears that says, "**If Canceled or Declined, Reason**". Select the option that best matches why the referral will not be accepted.

This close-up screenshot shows the 'Referral Outcome' dropdown menu set to 'Canceled'. Below it, the 'If Canceled or Declined, Reason' dropdown menu is open, showing options: '-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 'If Canceled or Declined, Reason' label to the dropdown menu. Below this, the 'Follow Up Information' section is partially visible, showing the 'If needed, Referral Projected Follow Up Date' and 'Referral Follow Up User' fields.

- Click the "Save Referral Information" box. The clients will no longer show in the "Outstanding Referrals" section as their referral was updated.

To Accept a Referral:

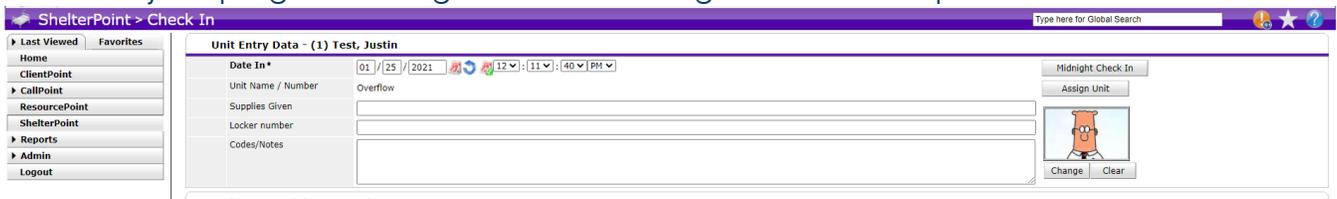
1. Click the bed icon next to a client whose referral you are accepting.



A screenshot of a web application showing a table titled "Outstanding Referrals - Ministry of Caring - Nazareth Perma". The table has columns for "Referral Date" and "Name". There are two rows of data, each with a pencil icon and a bed icon to its left. The first row shows a referral date of 01/25/2021 and the name "(1) Test, Justin". The second row shows a referral date of 01/25/2021 and the name "(95792) Test, Jackson".

		Referral Date ▼	Name	R
		01/25/2021	(1) Test, Justin	
		01/25/2021	(95792) Test, Jackson	

2. This immediately takes you the client's Check In screen. Checking the client into your program through the Outstanding Referrals accepts the referral.



A screenshot of the ShelterPoint web application showing the "Check In" screen for a client named Justin Test. The screen has a purple header with "ShelterPoint > Check In" and a search bar. On the left is a navigation menu with options like Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, Reports, Admin, and Logout. The main content area is titled "Unit Entry Data - (1) Test, Justin" and contains a form with fields for "Date In*" (01/25/2021), "Unit Name / Number" (Overflow), "Supplies Given", "Locker number", and "Codes/Notes". There are also buttons for "Midnight Check In", "Assign Unit", "Change", and "Clear".

3. Continue the Check In process as outlined during trainings. [Consult your ShelterPoint Training PowerPoint if you have any questions about the check-in process.](#)