

Creating Referrals for PATH Providers

Adding Referrals

To add Referrals to a client record, click on the Service Transactions tab and choose “Add Referrals” from the Dashboard:

The screenshot shows a client record for "Client - (98334) mouse, mickey". The "Service Transactions" tab is selected and highlighted with a red circle. Below the tabs is the "Service Transaction Dashboard" with several buttons: "Add Need", "Add Service", "Add Multiple Services", "Add Referrals" (circled in red), "View Previous Service Transactions", "View Shelter Stays", and "View Entire Service History".

To record Referrals for multiple household members, check off the household members you are including in the referral or, to include all, click on the check box next to the bold household number.

The screenshot shows the "Household Members" section of the interface. It includes a dropdown menu for "Add Needs" and a section for "Household Members". An information icon and text state: "To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected." Below this is a list of household members:

- (12134) Other**
- (96425) Flinstone, Wilma
- (72192) Flinstone, Fred
- (72190) Flinstone, Pebbles

The list is enclosed in a red box.

Add Need by highlighting the corresponding need in the Service Quicklist and clicking on the “Add Terms” button.

Add Needs

Household Members

This Client is not a member of any Households.

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Basic Income Maintenance Programs (NL-1000)
- Case/Care Management (PH-1000)
- Educational Support Services (HL)
- Employment (ND)
- Family Maintenance/Reunification (PH-6500.1500-200)
- Health Care Referrals (LH-2600)
- Homeless Employment Programs (ND-6500.3050)
- Housing Counseling (BH-3700)

Add Terms Service Code Look-Up Add Terms & Go To Search Results

Add Provider by choosing the corresponding PATH referral type and choose “Add Provider”

Referral Provider Quicklist

Provider -Select- **Add Provider** Bed Availability

Selected Provider

- Select-
- Community Mental Health (PATH Referral) (Z) (916)
- Educational Services (PATH Referral) (Z) (920)
- Employment Assistance (PATH Referral) (Z) (925)
- Housing Placement Assistance (PATH Referral) (Z) (922)
- Income Assistance (PATH Referral) (Z) (924)
- Job Training (PATH Referral) (Z) (919)
- Medical Assistance (PATH Referral) (Z) (923)
- Primary Health Services (PATH Referral) (Z) (918)
- Relevant Housing Services (PATH Referral) (Z) (921)
- Substance Use Treatment (PATH Referral) (Z) (917)

Refer to Provider

Type	Phone

When you have added the Provider, the provider will be listed in the Selected Providers section:

Referrals [Send Summary](#)

Referred-To Provider	Referred Clients
Community Mental Health (PATH Referral) (Z) (916)	(98334) mouse, mickey

In the Referral Data section, update the Needs Referral Date to reflect when the Referral was provided and choose the Type of PATH Referral from the drop down list and the Outcome.

Refer to Providers

Referral Data

Needs Referral Date * 08 / 03 / 2015 4 : 21 : 50 PM

Referral Ranking -Select-

Type of PATH Referral -Select-

If any "Type of PATH Referral" made, select Outcome -Select-

Projected Follow Up Date

Follow Up User AA_Training PATH (521) Search My Provider Clear

[Check to notify ServicePoint Providers by Email.](#)

In the Referrals section, be sure to click the check box under the referral type for each person included in the Referral

Referrals [Send Summary](#)

Referred-To Provider	Basic Income Maintenance Programs	Referred Clients
Community Mental Health (PATH Referral) (Z) (916)	<input checked="" type="checkbox"/>	(98334) mouse, mickey

In the Need Data section, update the Date of Need to equal the Needs Referral Date

Need Data

Date of Need * 08 / 03 / 2015 4 : 21 : 50 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Basic Income Maintenance Programs (NL-1000)		Identified -Select- -Select-	

At the bottom of the screen, select "Save All"