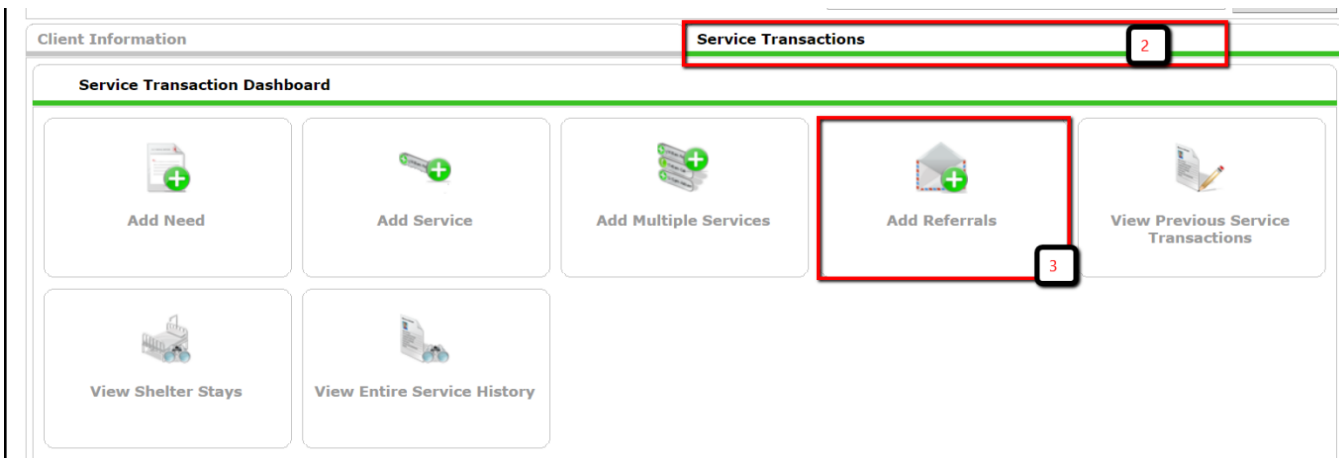


PATHWAYS ASSERTIVE OUTREACH REFERRAL

Before adding a referral to Pathways Assertive Outreach ensure that the ROI has been signed by the client and uploaded into HMIS; <http://calgaryhomeless.com/content/uploads/FOIP-Release-of-Information-ROI-Form.pdf>

HOW TO ADD A REFERRAL

1. Open the client file
2. Click on the **Service Transactions** tab
3. Click **Add Referral**



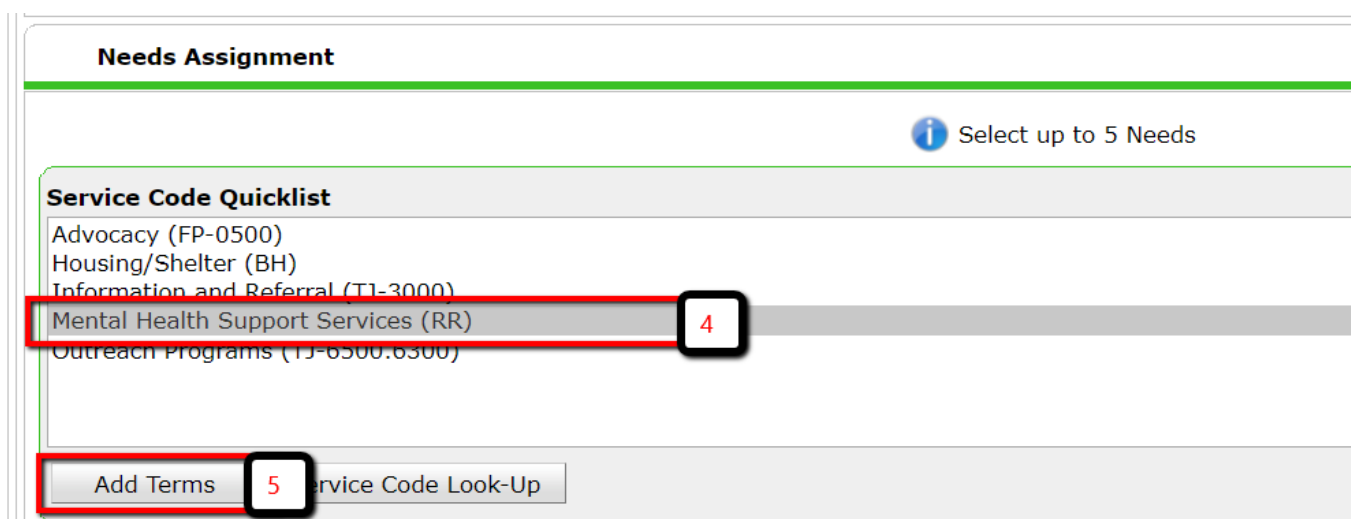
Client Information **Service Transactions** 2

Service Transaction Dashboard

Add Need Add Service Add Multiple Services **Add Referrals** 3 View Previous Service Transactions

View Shelter Stays View Entire Service History

4. Choose Service Code **Mental Health Support Services (RR)**



Needs Assignment

Select up to 5 Needs

Service Code Quicklist

Advocacy (FP-0500)
Housing/Shelter (BH)
Information and Referral (T1-3000)
Mental Health Support Services (RR) 4
Outreach Programs (TJ-6500.6300)

Add Terms 5 Service Code Look-Up

5. Click **Add Terms**

6. In the **Search Results** choose **Pathways Assertive Outreach - The Alex**

Search Results																											
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider												Type	Phone	Location	Distance	Matched Needs										
	Abbeydale - The Alex												Level 3	403-264-2252	CALGARY, AB T2A5X9	N/A	1/1										
	CASS - Langin Place												Level 3	403-237-5435	CALGARY, AB T2G 5J7	N/A	1/1										
	CASS - Stepping Stone Manor												Level 3	403-237-5435	CALGARY, AB T2G 5J7	N/A	1/1										
	Diversion - Boys and Girls Club Calgary												Level 3	403-828-4673	CALGARY, AB T2E1C8	N/A	1/1										
	Exit Reach - Wood's Homes												Level 3	Unknown	CALGARY, AB T2N 4N8	N/A	1/1										
	Homebase - The Alex												Level 3	403-277-9865	CALGARY, AB T2H 2X2	N/A	1/1										
	Hope Homes - Boys and Girls Clubs Calgary												Level 3	403-828-4673	CALGARY, AB T2E1C8	N/A	1/1										
	Pathways Assertive Outreach - The Alex												Level 3	Unknown	CALGARY, AB T2H 2S6	N/A	1/1										
	Prelude - The Alex												Level 3	403-264-2252	CALGARY, AB T2A5X9	N/A	1/1										
	Unity Project - Boys and Girls Clubs Calgary												Level 3	403-828-4673	CALGARY, AB T2E1C8	N/A	1/1										

7. Click **Check to notify ServicePoint Providers by Email**

Refer to Providers

Referral Data

Needs Referral Date * 06 / 26 / 2015 11 : 41 : 11 AM

Referral Ranking -Select-

Projected Follow Up Date / /

Follow Up User Hope Homes - McMan (123)

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

8. Scroll Down and Click **Save All**

Don't forget to email the HMIS team at hmis@calgaryhomeless.com to let us know the client Id and requesting to adjust visibility to Pathways Assertive Outreach.