Oneby1 Access Point Intake Instructions

1. Log into ServicePoint.
2. If your default is not set to Coordinated Entry, click **ENTER DATA AS** and select your agency's **ACCESS POINT-COORDINATED ENTRY PROGRAM** program.
3. Click on **CLIENTPOINT** from the list of menu options on the left hand side of the screen.
4. **SEARCH FOR THE CLIENT**; Common practices include a **SEARCH** by Client's First Name, Last Name, and/or Social Security Number. **YOU MUST SEARCH FOR THE CLIENT.**

5. If the Client has an Active HMIS ID, the Client's name will appear in the Search Results at the bottom of the screen.

   For New Clients:

   If the Client is a New Client, fill out the remaining fields and select **ADD NEW CLIENT WITH THIS INFORMATION**

6. The Client's Summary will appear. If the Client is an existing Client, check the **ENTRY/EXIT** field to ensure the Client has not already been entered into the Coordinated Entry project.

   If the Client does not have an **ENTRY/EXIT** for an **ACCESS POINT**, or is a New Client, begin the Entry/Exit process by selecting the **ENTRY/EXIT** tab.

7. Select the Provider as **COORDINATED ENTRY** and the Type **BASIC.**

8. If the Client is part of a Household, select only the **PRIMARY** to be entered into Coordinated Entry. **SAVE & CONTINUE.**

9. If Client is an Existing Client, **VERIFY ALL INFORMATION** and **UPDATE IF NECESSARY.**

   If Client is a New Client, **COMPLETE THE INTAKE** adhering to the 4 C's of data collection: CORRECT, CURRENT, CONSISTENT AND COMPLETE.

10. The Client **MUST** have a **VI-SPDAT** completed that is not older than **6 WEEKS.**
    a. Add the **VI-SPDAT** corresponding to the Client's demographic.

11. **SAVE & EXIT.**

Creating a Referral Instructions

1. Once you have successfully entered the Client into the Coordinated Entry Project, you will begin the **REFERRAL** project as you normally would.
2. Click on the **SERVICES TRANSACTION** tab. Select **ELIGIBILITY SEARCH.**
3. From the Service Code Quicklist, select **one** term that accurately represents what your client is in need of
   a. Rule of thumb: Select either Permanent Supportive Housing ***or*** Rapid Re-housing Program. Click **ADD TERM(S).**
4. **ELIGIBILITY SERVICE SEARCH RESULTS** will display the project(s) the client is **ELIGIBLE, POTENTIALLY ELIGIBLE,** and **NOT ELIGIBLE** for.
5. Click the **GREEN PLUS SIGN** to add the Search Results to the **SELECTED ELIGIBILTY SERVICE TERM**.
6. Select **CONTINUE.** This will take you to the Referral Page.
7. From there, the client may choose **ONE** provider to be referred to. Click the **GREEN PLUS SIGN** to add the provider to the **SELECTED PROVIDER** field.
8. Once a Provider has been selected, choose a referral ranking (High for Literally Homeless Clients), and select the box to notify Service Point Providers by Email.
9. Verify the referral is correct and complete.
10. Click **SAVE ALL.**
11. Once the **ONE** Referral for is complete, a warm handoff to the referring agency is **REQUIRED.**
    a. **THIS CAN BE DONE VIA PHONE CALL OR EMAIL TO THE REFERRING AGENCY. YOU CAN FIND THIS BY CLICKING ON THE REFERRING AGENCY TO PULL UP PROVIDER PROFILE AND NOTING THE PRIMARY CONTACT INFORMATION.**

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Exit Instructions

1. Once a referral is sent, you will **EXIT** the Client from **ACCESS POINT-COORDINATED ENTRY.**
2. Enter the Exit Data as: The **REASON FOR LEAVING** will be **COMPLETED PROGRAM**. The **DESTINATION** will be the same answer the Client gave you upon entry for the **RESIDENCE PRIOR TO PROJECT ENTRY** assessment.
3. In the Assessment Disposition field, select the **HOUSING PROJECT TYPE** the Client is being referred to.
4. **SAVE & EXIT**
5. If the Client is not immediately being housed, the Client **MUST** have a **SAFETY PLAN** in place.