

## NEW Referral Process

Steps to adding a Referral

1. Service Transactions
2. Add Referrals
3. Referral Provider Quicklist
  - a. Use the drop down quicklist to select a Partner Agency (Add Provider)
  - b. **Do not use** Service Code Look-Up or Add Terms & Go To Search Results

**Household Members**

This Client is not a member of any Households.

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**Needs Assignment**

Select up to 5 Needs

**Service Code Quicklist**

Identification Cards (DF-7000.3300)  
Information and Referral (TJ-3000)

Add Terms    Service Code Look-Up

**Referral Provider Quicklist**

Provider: -Select-    Add Provider    Bed Availability

4. If the referral or provider is **not listed** in the Quicklist. Use Search tool.

**Note:** Only use keywords when searching

**Refine Provider Search Criteria**

Search for Providers by using keywords for their Provider Name, AKA, or Description.

Search:     Search    Hide Advanced Search Options

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Search for Provider based on their Physical Location or the Area Served.

City:     State:

County / Parish:     ZIP Code:

ServicePoint Users ONLY    Type:

Search    Clear All

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**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
	<b>Provider</b>												<b>Type</b>		<b>Phone</b>		<b>Location</b>		<b>Distance</b>		<b>Matched Needs</b>						
+	Career Closet - Multi-Cultural Center of Sioux Falls												Level 4		605-367-1401		Sioux Falls, SD 57104		N/A		0/0						
+	Children's Inn - Shelter and Crisis Intervention Services - Children's Home Society												Level 4		605-338-0116		Sioux Falls, SD 57104		N/A		0/0						
+	Dress For Success												Level 4		605-610-0665		Sioux Falls, SD 57104		N/A		0/0						
+	General - Center of Hope												Level 4		605-334-9789		Sioux Falls, SD 57104		N/A		0/0						
+	General - St Francis House												Level 4		605-334-3879		Sioux Falls, SD 57103		N/A		0/0						
+	General - The Salvation Army Sioux Falls												Level 4		605-338-6649		Sioux Falls, SD 57103		N/A		0/0						
+	General - Union Gospel Mission												Level 4		605-334-6732		Sioux Falls, SD 57103		N/A		0/0						
+	Minnehaha County Services - Inter-Lakes Community Action Partnership (ICAP)												Level 4		605-334-2808		Sioux Falls, SD 57104		N/A		0/0						
+	Sioux Falls - Norton Avenue - Goodwill of the Great Plains												Level 4		605-731-1930		Sioux Falls, SD 57105		N/A		0/0						

Bed Availability    Showing 1-9 of 9

5. Click the hyperlinked agency name in the **Selected Providers** area
6. Select from the list of referral options for that agency.
  - a. If Add Referral is **red** – that agency is currently not receiving referrals for that service.

7. **Please click box:** Check to notify ServicePoint Providers by Email.

a. this will send an email to the receiving agency to notify them of an incoming referral

8. If applicable- Add Notes to the referral for the receiving agency

9. Change Need Status to OPEN – do not complete Outcome

Refer to Providers

Referral Data

Needs Referral Date\* 04 / 20 / 2017 9 : 40 : 45 AM

Projected Follow Up Date

Follow Up User General - Center of Hope (15) Search My Provider Clear

-Select-

Check to notify ServicePoint Providers by Email.

Referrals [Send Summary](#)

Referred-To Provider	General Clothing Provision	Referred Clients
General - Center of Hope (15)	<input checked="" type="checkbox"/>	(324) Test, Helpline Center

Need Data

Date of Need\* 04 / 20 / 2017 9 : 40 : 45 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
General Clothing Provision (BM-6500.1500-250)		Open -Select- -Select-	

Remove All Needs

Save Needs ONLY Save ALL Clear ALL Cancel