Rental Assistance Workflow w/ 211 Referral

Keep an eye out for an email from ServicePoint

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Log In #1 (When you receive a referral)

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Answering a Referral - Counts Report

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Review Client Eligibility Information & Contact Client

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Log In #2 (When Client Completes Consent Form)

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Create/Find Household (Skip if HH Size = 1)

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Create Entry (most of Intake #1 will already be complete)

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Log In #3 (After Payment has Been Made)

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Find Client

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Add Services

↓

Create Exit

With 211 Referral

Trigger Email

When 211 sends a referral to your agency 1 person will get an email saying that the agency has a referral in ServicePoint.

Answering a Referral

Any user can review the referral. In the counts report on the ServicePoint Home Page, you will have a number under outstanding incoming referrals. Click on the blue number. This will give you a list of the clients who have been referred to the agency for this program. Click one of the client IDs to see their information.

Review Client Information to Verify Eligibility

On the Client Summary Page, towards the bottom you will see the information entered by 211. At the bottom of that assessment is the client's phone number. Contact the client to gather the rest of the information and to obtain the proper consent forms. Close referral. Under Outstanding Incoming Referrals click on the pencil next to the referral. Change the status of referral outcome (Accepted, Cancelled (unable to contact), Declined (client doesn't meet criteria) etc.)

Find/Create HH (if HH size is >1)

If household size = 1 skip to create entry. On the Client Summary page check to see if the client is already in a household and if that household matches the client's current situation. If yes, continue to create entry. If no, click create a new household. Select Household Type at the top of the page. Search for clients in the client's household if they don't exist, Add New Client with this Information. Continue until the entire household is entered in ServicePoint. Click Continue. Identify head of household and each person's relationship to head of household. Click Save and Exit.

Create Entry

On the Client Summary page click Add Entry/Exit. At the top be sure to select the household or the members of the household individually. The Entry/Exit Type will always be Basic. The entry date should be the date the client was accepted into the program. Click Save and Continue. Finish Entry #1 Fill Out Entry #2. 211 will have partially completed Intake #1 for the Head of Household. Answer the questions that remain on Intake #1 and continue to Intake #2.

Add Service

On the Client Summary page, find the Services dashlet. Click Add Service. Select the Household. The service start date should be the same as the service end date. The start date should also be the date the payment was made to the landlord. From the dropdown menu select Service Type. Click Save and Continue.

There should be one service for each month of payment. For example if the client receives 2 months of arrears and 1 month of rent, there should be 3 services in ServicePoint. Skip Service Cost/Number of units. Add Funding Source. Select COVID-19 Housing Relief Fund. Under amount enter amount paid for that month for that service. Under Need Information set the need status to closed and the outcome of Need to Fully Met (if service prevents loss of housing).

Create Exit

On the Client Summary page, find the entry/exit that was created earlier. Click the pencil under exit date. Exit date should be the same as the service date. Select a Reason for Leaving and a Destination.