GUIDE TO PROCESSING REFERRALS

A. Viewing and Uploading Appointment Schedule

1. Click Appointment Schedule on left side
2. Click Appointment Schedule in drop-down menu
3. Click gear next to Meriden-Middlesex County CAN
4. Click View Upcoming Reservations
5. Change Appointment Date to today's date to view all appointments scheduled for today
6. Click Search
7. Click the tear drop in the top right corner of screen
8. Click the first option on drop-down menu (Excel Export)
9. Click the Excel pop-up icon to upload the document

B. Checking if VI-SPDAT was Administered

1. Click Find Client
2. Type client's Caseworthy ID from appointment schedule into Casworthy ID box (it is imperative you use the Caseworthy ID from the appointment schedule to process the client or the data will be incorrect)
3. Click VI-SPDAT v2 on left-hand side
   a. Click VI-SPDAT- Dashboard (Current) to check for VI-SPDAT 2
   b. Click VI-SPDAT- Dashboard (Legacy) to check for older VI-SPDAT
4. If you see a box on the right hand side, click it to see the client's score
   a. To view VI-SPDAT, click the gear on the left hand side and click the survey date
5. If right hand side is blank, a VI-SPDAT was not administered

C. No Shows

1. Click Find Client
2. Type client's Caseworthy ID from appointment schedule into Casworthy ID box (it is imperative you use the Caseworthy ID from the appointment schedule to process the client or the data will be incorrect)
3. Click Client Management on left-hand side
4. Click Complete Referral/Enrollment
5. Click gear next to Coordinated Access 211 (THIS IS THE ONLY TIME YOU WILL CLICK THE GEAR NEXT TO COORDINATED ACCESS 211)
6. Click Client is a No Show
7. Click the check-mark next to Meriden-Middlesex County-Wallingford CAN (if there are multiple referrals to our CAN, click the check mark next to the date closest to their intake date)
8. Change Referral Status to No Show in the drop-down menu
9. Click Save and Done

D. Clients Accepted for Enrollment (sent to shelter the same day as their intake appointment)

1. Click Process Referral
2. Type client's Caseworthy ID from appointment schedule into Caseworthy ID Search (it is imperative you use the Caseworthy ID from the appointment schedule to process the client or the data will be incorrect)
3. Click Check for Duplicates
4. Click the client's name in the pop-up screen (if client comes up multiple times, make sure the Caseworthy ID matches the one from the appointment schedule)
5. On Release of Information page, make sure the start date matches today's date and click Save

6. On Enrollment page, under Program, select Meriden-Middlesex County-Wallingford CAN
7. Click Save
8. Fill in answers and click Save and Done
9. Click Client Management
10. Click Compete Referral/Enrollment
11. Click the gear next to Meriden-Middlesex County-Wallingford CAN
12. Click Complete CA Referral (Enroll or Divert)
13. On the next page, click Save
14. Click the check-mark next to Meriden-Middlesex County-Wallingford CAN (if there are multiple referrals to our CAN, click the check mark next to the date closest to their intake date)
15. Change Referral Status to Accepted for enrollment in the drop-down menu
16. Click Save
17. Select appropriate answer under Housing Status
18. Click drop-down menu under Exit Outcome (CA)
19. Click Program Enrollment
20. Click drop-down menu under Exit Destination (HUD)
21. Click Emergency Shelter
22. Click Save and Done

E. Processing Clients Added to Waitlist

1. Click Process Referral
2. Type client's Caseworthy ID from appointment schedule into Caseworthy ID Search (it is imperative you use the Caseworthy ID from the appointment schedule to process the client or the data will be incorrect)
3. Click Check for Duplicates

4. Click the client's name in the pop-up screen (if client comes up multiple times, make sure the Caseworthy ID matches the one from the appointment schedule)
5. On Release of Information page, make sure the start date matches today's date and click Save
6. On Enrollment page, under Program, select Meriden-Middlesex County-Wallingford CAN
7. Click Save
8. Fill in answers and click Save and Done
9. Click Client Management
10. Click Compete Referral/Enrollment
11. Click the gear next to Meriden-Middlesex County-Wallingford CAN
12. Click Add to Waitlist
13. Under Program Waitlist, select Meriden-Middlesex County-Wallingford CA-Waitlist
14. Under Waitlist Type, select Emergency Shelter for individuals or Families for families
15. Under Waitlist Note, please include notes such "bottom bunk only" or if they need to be at a particular shelter for work-related purposes (no transportation during the hours they work), and family sizes/composition (ex: 2 kids, mom, and dad)
16. Leave Status as Open
17. Click Save
18. Click the check-mark next to Meriden-Middlesex County-Wallingford CAN (if there are multiple referrals to our CAN, click the check mark next to the date closest to their intake date)
19. Change Referral Status to Added to Waitlist in the drop-down menu
20. Click Save and Done

F. Processing Diverted Clients, Clients Who Refused Shelter, or Clients Not Appropriate for Shelter

1. Click Process Referral
2. Type client's Caseworthy ID from appointment schedule into Caseworthy ID Search (it is imperative you use the Caseworthy ID from the appointment schedule to process the client or the data will be incorrect)
3. Click Check for Duplicates
4. Click the client's name in the pop-up screen (if client comes up multiple times, make sure the Caseworthy ID matches the one from the appointment schedule)
5. On Release of Information page, make sure the start date matches today's date and click Save
6. On Enrollment page, under Program, select Meriden-Middlesex County-Wallingford CAN
7. Click Save
8. Fill in answers and click Save and Done
9. Click Client Management
10. Click Compete Referral/Enrollment
11. Click the gear next to Meriden-Middlesex County-Wallingford CAN
12. Click Complete CA Referral (Enroll or Divert)
13. On the next page, click Save
14. Click the check-mark next to Meriden-Middlesex County-Wallingford CAN (if there are multiple referrals to our CAN, click the check mark next to the date closest to their intake date)
15. Change Referral Status to either Diverted Before CAN Appointment, Diverted At CAN Appointment, Client Refused Shelter, or Not Currently Appropriate in the drop-down menu
16. Click Save
17. Select appropriate answer under Housing Status
18. Click drop-down menu under Exit Outcome (CA)

19. Select appropriate answer
20. Click drop-down menu under Exit Destination (HUD)
21. Select appropriate answer
22. Click Save and Done

G. VI-SPDAT

1. Click VI-SPDAT v2 on left side
2. Click VI-SPDAT Enroll Client
3. Type Client's social security #
4. Click Check for Duplicates
5. Click the client's name in the pop-up screen (if client comes up multiple times, make sure the Caseworthy ID matches the one from the appointment schedule)
6. Select which VI-SPDAT was administered (Individual or Family)
7. Under Program, select either Individual VI-SPDAT or Family VI-SPDAT
8. Fill in appropriate answers on each page and click Save
9. Click Done