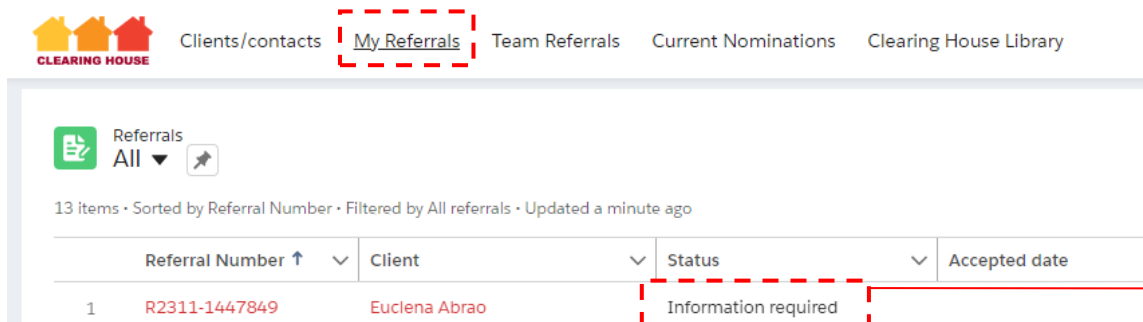


A GUIDE TO: UPDATING A CLEARING HOUSE ASSESSMENT ON THE PORTAL

❖ STEP 1: LOG INTO THE CLEARING HOUSE PORTAL

Via: <https://clearinghouse.my.site.com/login> click on the **'My Referrals'** tab and find the referral you wish to update. The status of the referral you need to update will be **'Information Required'** as pictured below.



❖ STEP 2: UPDATING AN ASSESSMENT

When on the referral you wish to update, scroll down to the section named **'Referral status'** – here you will again see the current status of your referral (which will be in **'Information required'** if updates are needed). Below will be the **7 support needs assessments** that require more information and need to be updated.

Symbol

This symbol indicates more information is required.

Status
Information required

Accepted date _____

Cancelled/Rejected date _____

Assessment review date
01/06/2024

On hold start date 1 _____

On hold end date 1 _____

On hold start date 2 _____

On hold end date 2 _____

- Alcohol use assessment
 Referral requires more information- use the link below to go to the assessment, then click Update
[Alcohol use assessment 23-11425952](#)
- Area Selection
 Referral requires more information- use the link below to go to the assessment, then click Update
[Area Selection 23-12426285](#)
- Finances
 Referral requires more information- use the link below to go to the assessment, then click Update
[Finances 23-12426264](#)
- Mental and Physical Health Assessment
 Referral requires more information- use the link below to go to the assessment, then click Update
[Mental and Physical Health Assessment 23-12426283](#)
- Substance use assessment
 Referral requires more information- use the link below to go to the assessment, then click Update
[Substance use assessment 23-12426284](#)
- Additional Support Needs
 Referral requires more information- use the link below to go to the assessment, then click Update
[Additional Support Needs 23-12426286](#)
- Risk Assessment
 Referral requires more information- use the link below to go to the assessment, then click Update
[Risk Assessment 23-12426290](#)

The 7 assessments

You will need to open each of these 7 assessments, one by one, by clicking on the red assessment number to provide the necessary updates.

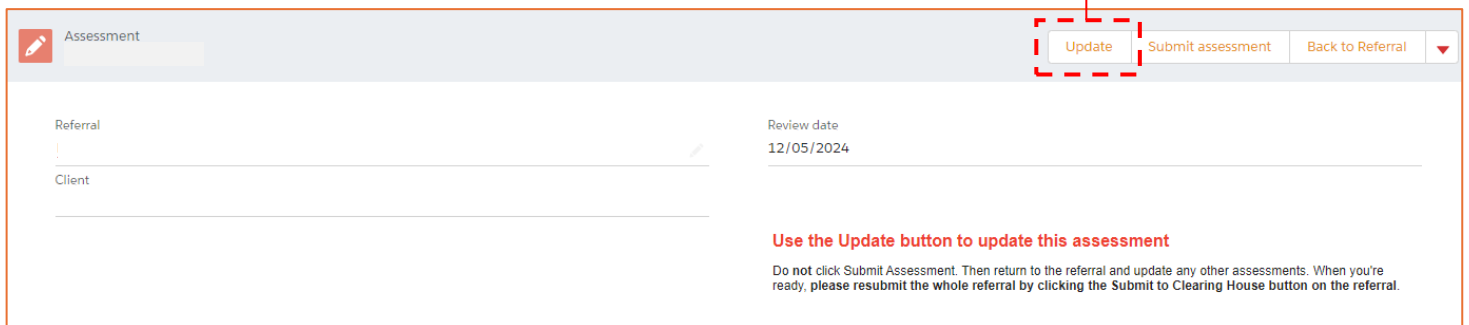
Have you been asked to provide more information on assessments?

Click into the red link by the relevant assessment and then use the Update button to make the updates. Once you have made updates to all the assessments the Clearing House team asked for, resubmit the whole referral using the Submit to Clearing House button at the top of this page.

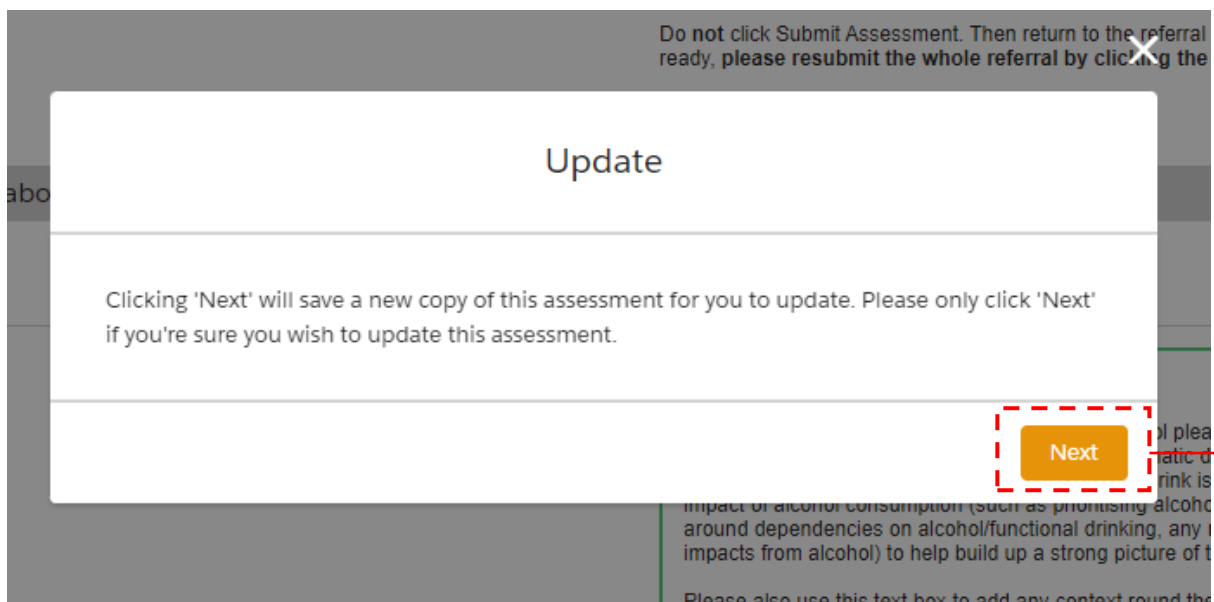
Click into the first assessment (e.g. Alcohol use assessment) by pressing the red assessment number as highlighted above. You will see the associated assessment complete with the information that you provided last time you submitted your referral to Clearing House.

You will also see guidance prompts across the assessment; these are there to provide you with guidance around what information should be provided within the assessment.

You should then click the **'Update'** button on the top right-hand side of the assessment highlighted below.



You will then get a pop up entitled **'Update'** (please see the image below) which will let you know you are making a copy of the assessment; this will allow you to build on the information you provided in the previous referral submission. Press **'Next'**. An edit pop will then appear allowing you to add to the information and provide the information or clarification requested by Clearing House.



Once you have entered all the necessary information, press **"save"**. This will take you to a summary of the new assessment you have created. Review your answers and check you are happy; if you need to edit any of the answers you can by pressing the small pencil icon.



IMPORTANT INFORMATION!

once you are finished with this assessment, **do not press the 'Submit Assessment' at the top of the assessment**. This button is only used when creating a brand new referral. Instead return to the referral (**with 'Back to referral' button**) and repeat the process for all assessments that require an update. The assessments will be submitted when the whole referral is.

Assessment

Update Submit assessment Back to Referral

Referral

Review date 12/05/2024

Client

Use the Update button to update this assessment
Do not click Submit Assessment. Then return to the referral and update any other assessments. When you're ready, please resubmit the whole referral by clicking the Submit to Clearing House button on the referral.

Update Submit assessment Back to Referral

❖ STEP 3: RE-SUBMITTING YOUR UPDATED ASSESSMENT

Once all assessments have been updated with the new information and you are ready to re-submit the referral, go to the top of the referral summary page and click **'Submit to Clearing House'**. This will submit the whole referral, including all the assessments you just updated to Clearing House for assessment. (see example below)

CLEARING HOUSE Clients/contacts My Referrals Team Referrals Current Nominations Clearing House Library

Referral

Housing History Submit to Clearing House Edit

Status Information required Client

PLEASE BE AWARE THAT IF NO PRIVACY NOTICE IS PROVIDED WE WILL RECALL THE REFERRAL WITHOUT ASSESSING IT. PLEASE ENSURE THAT A SIGNED PRIVACY NOTICE (INCLUDING YOUR CLIENT'S FULL PRINTED NAME, SIGNATURE AND DATE) IS UPLOADED TO THE FILES SECTION ON THE RIGHT OF THIS PAGE

Referral Completion Guide

Create 5 years of Housing History using the Housing History button at the top of the page. Each accommodation stay must be saved as an individual record.

Complete all 7 assessments using the New button in the assessments list

Your referral has now been re-submitted to Clearing House. If you encounter any problems, please get in contact with Clearing House either by emailing CH@mungos.org or call us on 020 3856 6008 (**lines open 9-5 Monday to Friday**).

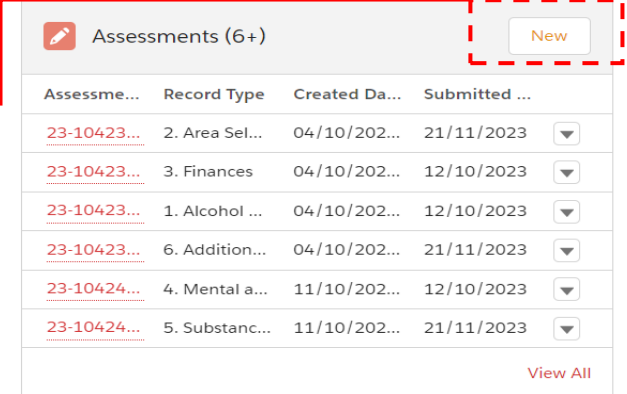
FURTHER INFORMATION:

Housing History

If you have been asked by Clearing House to provide clarification on your client's five year Housing History you will not be able to edit any Housing History records (you can create new ones to fill any gaps however). If this is the case please email CH@mungos.org with the requested information and a member of the Clearing House team will update these records for you.

Assessments

Do not press the **'New'** assessment button in the table on the right hand side of the screen when viewing the referral (pictured right). This will create a brand new blank assessment and will not count towards updating the referral with the requested information. This table just gives a summary of all assessment associated with the referral and should not be used when asked to update a referral (assessments should instead be accessed via the method shown above).



Assessme...	Record Type	Created Da...	Submitted ...
23-10423...	2. Area Sel...	04/10/202...	21/11/2023
23-10423...	3. Finances	04/10/202...	12/10/2023
23-10423...	1. Alcohol ...	04/10/202...	12/10/2023
23-10423...	6. Addition...	04/10/202...	21/11/2023
23-10424...	4. Mental a...	11/10/202...	12/10/2023
23-10424...	5. Substanc...	11/10/202...	21/11/2023

[View All](#)

Referral statuses

During it's lifetime your referral will be found in different statuses, which inform what is currently happening with a referral. Below is a summary of all the statuses a referral can be in and what they mean.

- **Not submitted** – the referral has not been submitted to Clearing House yet
- **Pending assessment** – the referral has been submitted to Clearing House and is awaiting assessment
- **Information required** – the referral has been sent back to you for more information. Details of what information is needed will be asked via email and assessments should be updated using the process detailed in this document.
- **Rejected** – the referral was rejected by Clearing House
- **Expired** – the referral has expired due to inactivity, This occurs after a period of 3 months without activity.
- **Accepted onto the waiting list** – the referral/client has been accepted onto the Clearing House waiting list and is awaiting a suitable property for nomination
- **Accepted – Review required** - referral has been accepted onto the waiting list but either needs an update after six months or has been sent back for an update due to new information/changes to support needs
- **On hold** – the referral/client has been accepted onto the waiting list but is currently on hold and will not be nominated to a property
- **Nominated** – the client has been nominated to a property.
- **Cancelled** – the referral was cancelled for various reasons e.g. after a failed nomination or referral is no longer needed on the waiting list