

Marin- Managing Referrals

Updating the Status of a Referral

To update the status of a referral, navigate to *Search* > *Referrals*. If you do not see the *Referrals* tab, click *Search* to go back to the home screen and it should appear.

		Knowledge and Training Enginee Clarity General Training Agency ~		Training Engineer, 'raining Agency ~	MJ
	م) search	≡ CASELOAD		
	Your recent client searche	es access	sed:	0	
	Peach Plum				
SEARCH	Sarabi Lioness				



Locate the referral you would like to update the status for. Click the edit icon next to the referral (figure 2).

REFERR	ALS							
Dashboar	rd Pending	Community Queue	Analysis	Completed	Denied Ser	t Availability	Open Units	
Pen	nding Refe	rrals						
Searc	ch				Mode	Standard		~
Sort	By De	fault		~	Characteristic	Select		~
0	Eligible Cli	ents Only					SEAF	ксн
	Client				Referral Date	Qualified	Days Pending	
īZ	Paul Meton Program: Berk Referred by: [T Entry Agency	ely RRH RAINING] San Francisco A	dult Coordinate	ed 8	12/11/2018	Reassigned	561 total 36 pending	
	Earl Sweats Program: Haig Referred by: [T Entry Agency (hirt ht Street Apartments RAINING] San Francisco Y	outh Coordinat	ed	04/17/2019	Reassigned	433 total 0 pending 0 in process	

figure 2

Scroll down to the *Status* field. Here you'll see your status options (figure 3). The status of a pending referral can be updated to "Pending - In Process", "Denied" or "Expired".

Note: When a referral is first received, the provider should change the status from to pending-in process within 48 hours.



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atus	✓ Pending
rivate	Pending - In Process
	Denied
	Expired

figure 3

If "Denied" is selected, additional fields will display (figure 4).

Status	Denied		~			
Send to Community Queue	Yes	~				
Select Community Queue	Default	~				
Denied By Type	Provider	~				
Denied Reason	Client prev	~				
Denial Information	Received services last year.					

figure 4

- Denied by Type: allows the user to indicate if the referral was denied by the agency ("Provider") or if the client declined services ("Client").
- Denied Reason: the reason the referral was denied. This field is required.
- Denial Information: a text box to record a note about the reason the referral was denied. This field is required.

Accepting a Referral

When enrolling a client or household in a program, you can indicate the enrollment is the result of an open referral by toggling on "Program Placement a result of Referral provided by (referring agency)" (figure 5). When the enrollment is recorded with this toggle on, an end date will be recorded for the open referral, and the enrollment information will be added to the *Referral Connections* section.



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Program Placement a result of Referral provided by Clarity General Training Agency

DOC REQUIREMENTS

1 pending referral(s). Oldest 3 days.

ENROLL

figure 5