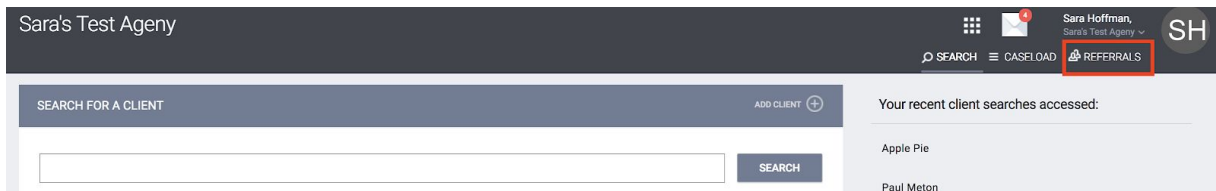


Managing Referrals/Changing the Status of Referrals

This document outlines how a Housing Provider will process a referral received through Coordinated entry.

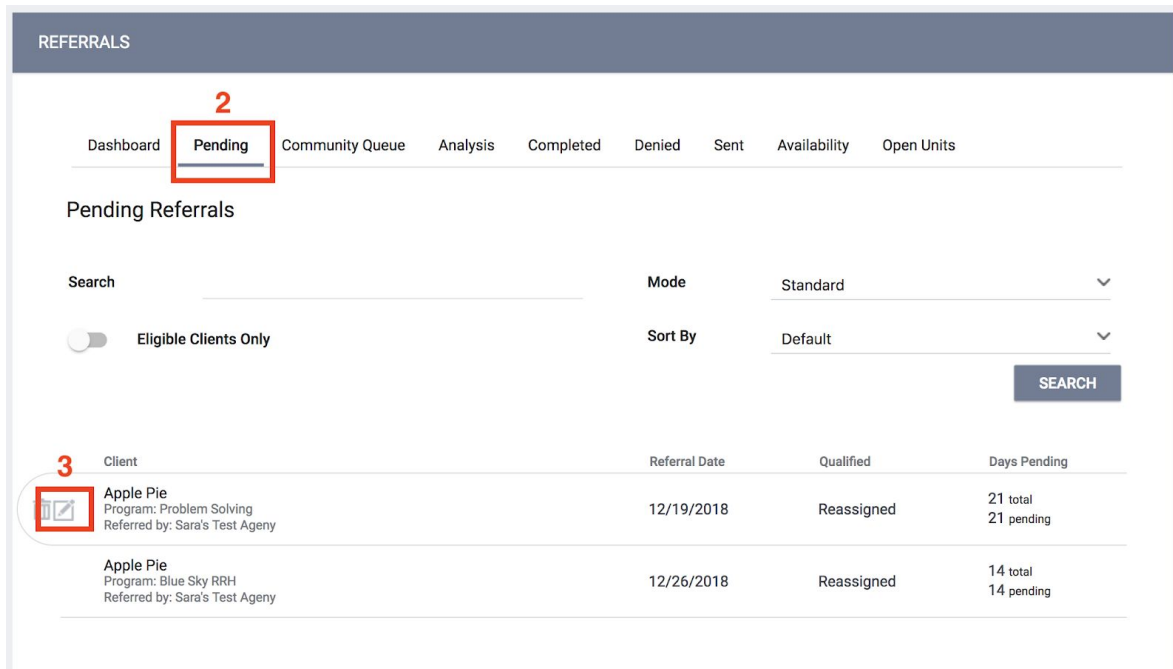
Pending- In Process

1) Click “Referrals” at the top right corner of the screen (under your name). *Note: If you do not see the “Referrals” tab, click “Search” to return to the Home Screen where the “Referrals” tab should appear.*



2) Click the “Pending” tab. The Pending tab will show a list of client referrals sent to the agency, but not yet enrolled into a program. *Note: New referrals appear in white.*

3) Open the referral you want to view by clicking the edit button to the left of the client's name.



Client	Referral Date	Qualified	Days Pending
Apple Pie Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	21 total 21 pending
Apple Pie Program: Blue Sky RRH Referred by: Sara's Test Agency	12/26/2018	Reassigned	14 total 14 pending

Managing Referrals/Changing the Status of Referrals

4) Click the dropdown for “Status” and change the status to Pending-In Process. Click “Save Changes”. This acknowledges that your agency has received the referral.

REFERRAL: EDIT

Client	Apple Pie
Referred Program	Problem Solving
Referred to Agency	Sara's Test Agency
Referring Agency	Sara's Test Agency
Referred Date	12/19/2018 8:51 AM
Days Pending	21 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	57
Referred by Staff	Sara Hoffman
Case Manager	Select ▼
Last Activity	01/09/2019 CHECK-IN
Status	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> ✓ Pending Pending - In Process Denied Expired </div>
Private	

5) After saving the changes, click on the Pending tab to return to the list of pending referrals.

6) The updated referral now appears in green and the access point is notified that the referral is being processed.

Dashboard
Pending
Community Queue
Analysis
Completed
Denied
Sent
Availability
Open Units

Pending Referrals

Search
 Eligible Clients Only

Mode Standard ▼
 Sort By Default ▼

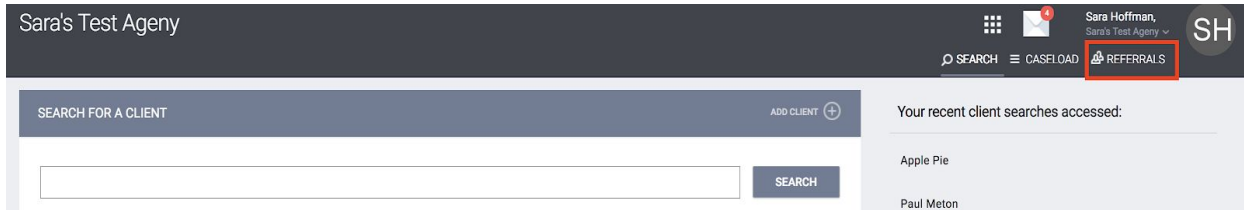
SEARCH

Client	Referral Date	Qualified	Days Pending
Apple Pie <small>Program: Problem Solving Referred by: Sara's Test Agency</small>	12/19/2018	Reassigned	21 total 21 pending 0 in process
Apple Pie <small>Program: Blue Sky RRH Referred by: Sara's Test Agency</small>	12/26/2018	Reassigned	14 total 14 pending

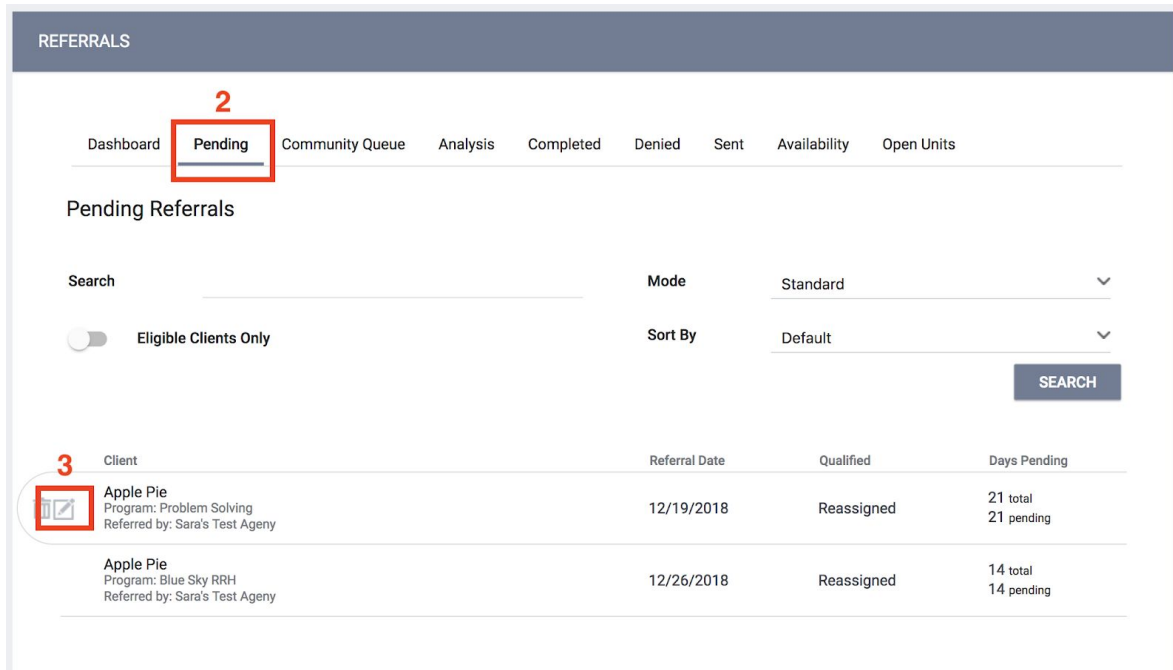
Managing Referrals/Changing the Status of Referrals


Denying a referral

- 1) Click “Referrals” at the top right corner of the screen (under your name). *Note: If you do not see the “Referrals” tab, click “Search” to return to the Home Screen where the “Referrals” tab should appear.*



- 2) Click the “Pending” tab. Click the edit button to the left of the client’s name for the referral you want to deny.



Client	Referral Date	Qualified	Days Pending
 Apple Pie Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	21 total 21 pending
Apple Pie Program: Blue Sky RRH Referred by: Sara's Test Agency	12/26/2018	Reassigned	14 total 14 pending

- 3) Change the Status dropdown to “Denied”.

Managing Referrals/Changing the Status of Referrals

REFERRAL: EDIT

Client	Apple Pie	
Referred Program	Problem Solving	
Referred to Agency	Sara's Test Agency	
Referring Agency	Sara's Test Agency	
Referred Date	12/19/2018 8:51 AM	
Days Pending	21 day(s)	
In Process	0 day(s)	
Qualified	Reassigned	
Adult Priority score	57	
Referred by Staff	Sara Hoffman	
Case Manager	Select ▼	
Last Activity	01/09/2019	CHECK-IN
Status	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #4a5558; color: white; padding: 2px;"> ✓ Pending </div> <div style="background-color: #e2e8e0; padding: 2px;"> Pending - In Process </div> <div style="background-color: #e2e8e0; padding: 2px;"> Denied </div> <div style="background-color: #e2e8e0; padding: 2px;"> Expired </div> </div>	
Private	<input type="checkbox"/>	

4) Once the status is changed to denied, three associated denial fields will populate that need to be completed. Click “Save Changes”.

- **Send the Referral to the Community Queue:** *If the client is still experiencing homelessness and has priority status, “Send the Referral to the Community Queue” should be set to “yes”.*
- **Denied Reason:** *Select a reason from the drop down list*
- **Denied Message:** *Please add notes to help explain why the referral was denied. For example, you select “Client ineligible” from the denial reasons, then your denial message might say “Client’s income increased client is now over 30% AMI”.*

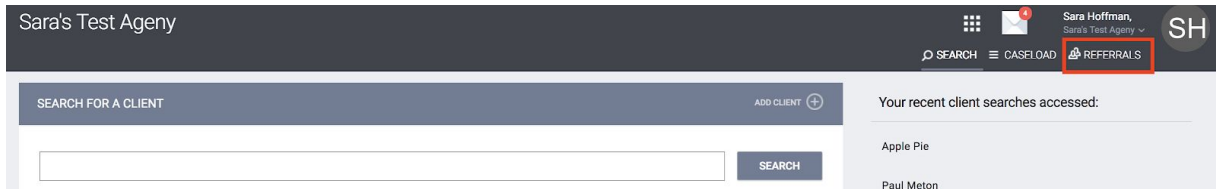
Qualified	Reassigned	
Adult Priority score	57	
Referred by Staff	Sara Hoffman	
Case Manager	Select ▼	
Last Activity	01/09/2019	CHECK-IN
Status	Denied ▼	
Send to Community Queue	-- Select -- ▼	
Denied Reason	Select ▼	
Denied Message	<input style="width: 100%;" type="text"/>	
Private	<input type="checkbox"/>	

SAVE CHANGES
CANCEL

Managing Referrals/Changing the Status of Referrals

Accept referral/Enroll into program

- 1) Click “Referrals” at the top right corner of the screen (under your name). *Note: If you do not see the “Referrals” tab, click “Search” to return to the Home Screen where the “Referrals” tab should appear.*



Sara's Test Agency

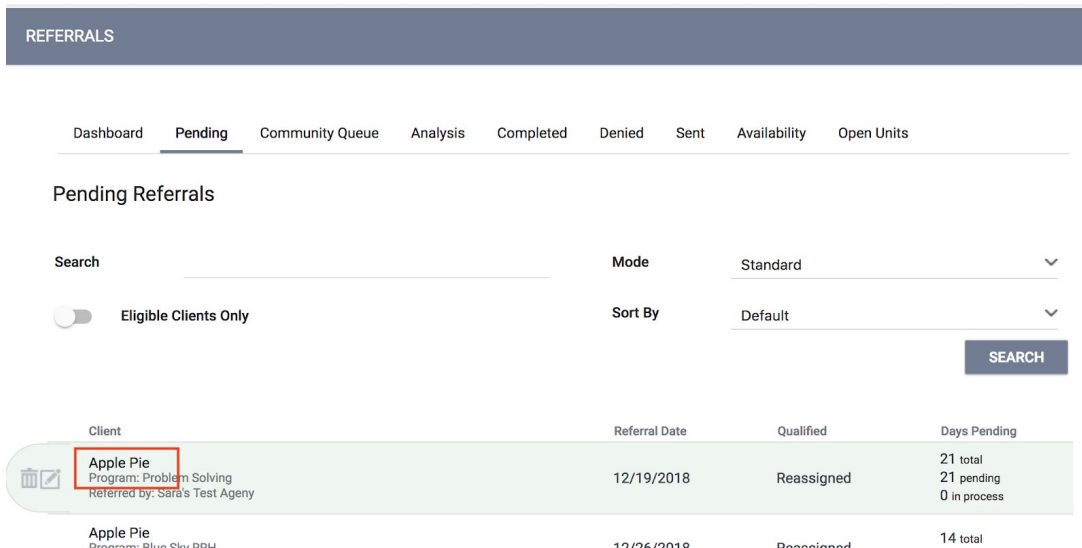
SEARCH FOR A CLIENT ADD CLIENT +

SEARCH CASELOAD **REFERRALS** SH

Your recent client searches accessed:

- Apple Pie
- Paul Meton

- 2) From the pending tab, open the client file of the referral you want to enroll by clicking on the client's name (not the edit button).




REFERRALS

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

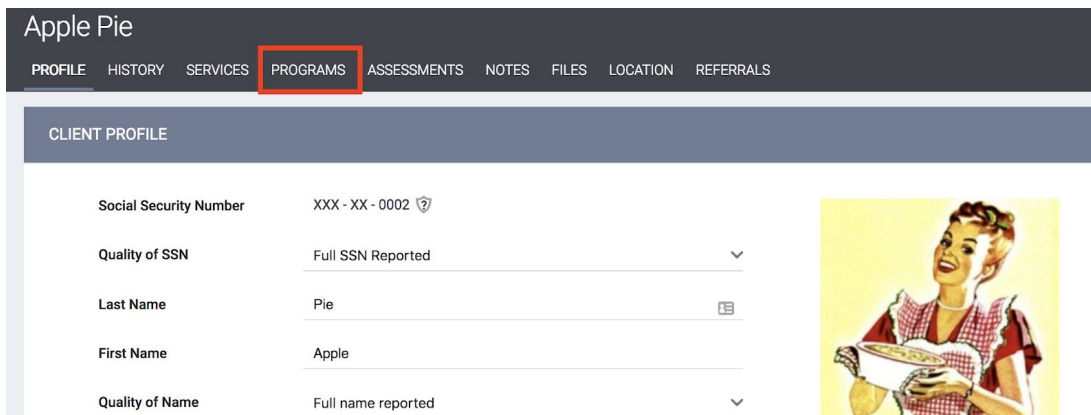
Pending Referrals

Search Mode Standard

Eligible Clients Only Sort By Default SEARCH

Client	Referral Date	Qualified	Days Pending
 Apple Pie Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	21 total 21 pending 0 in process
Apple Pie	12/26/2018	Reassigned	14 total

- 3) Click on the “Programs” tab.




Apple Pie

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION REFERRALS

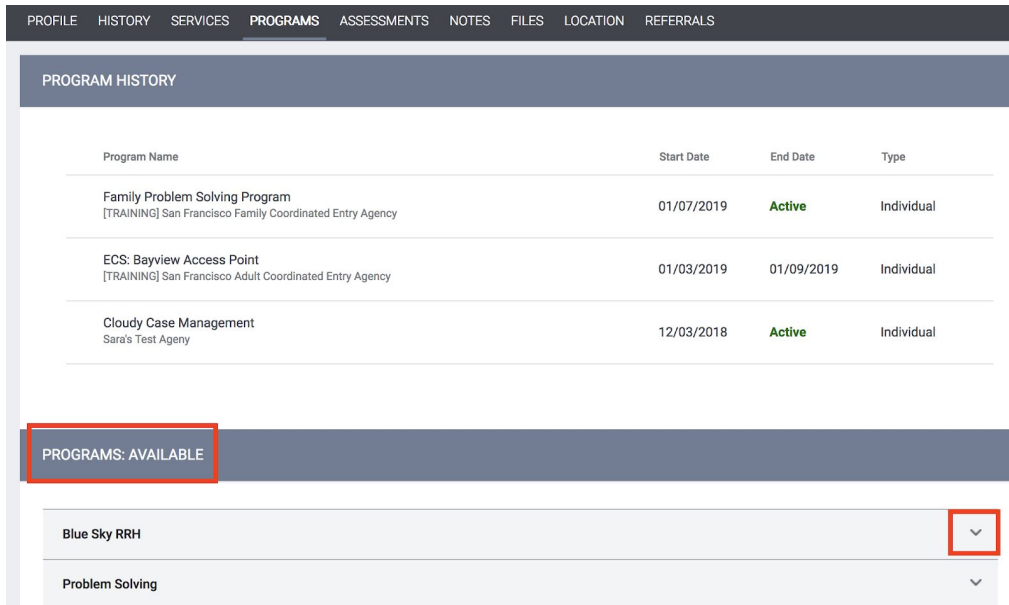
CLIENT PROFILE

Social Security Number	XXX - XX - 0002 ?
Quality of SSN	Full SSN Reported
Last Name	Pie
First Name	Apple
Quality of Name	Full name reported



Managing Referrals/Changing the Status of Referrals

4) In the PROGRAMS:AVAILABLE section, click on the dropdown arrow to the right of the program name.

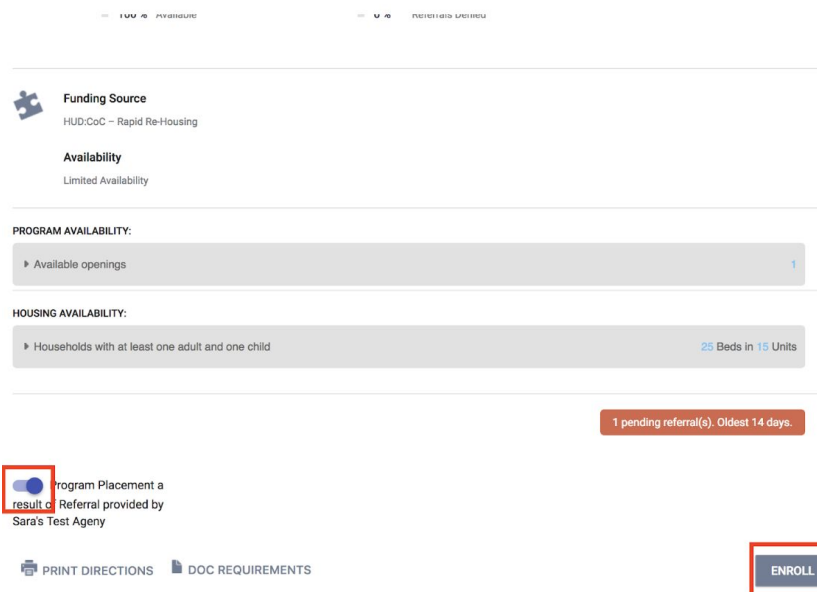


Program Name	Start Date	End Date	Type
Family Problem Solving Program [TRAINING] San Francisco Family Coordinated Entry Agency	01/07/2019	Active	Individual
ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	01/03/2019	01/09/2019	Individual
Cloudy Case Management Sara's Test Agency	12/03/2018	Active	Individual

PROGRAMS: AVAILABLE

- Blue Sky RRH
- Problem Solving

4)The enrollment screen will expand. In the bottom left corner, there is a “Program Placement a Result of Referral Provided by [agency name]” toggle. *Note: This toggle indicates that the program enrollment is connected to a referral and defaults to toggled on (blue). If the toggle does not indicate on, please click the toggle.*



Funding Source
HUD:CoC - Rapid Re-Housing

Availability
Limited Availability

PROGRAM AVAILABILITY:

- Available openings: 1

HOUSING AVAILABILITY:

- Households with at least one adult and one child: 25 Beds in 15 Units

1 pending referral(s). Oldest 14 days.

Program Placement a Result of Referral provided by Sara's Test Agency

[PRINT DIRECTIONS](#) [DOC REQUIREMENTS](#) [ENROLL](#)



Managing Referrals/Changing the Status of Referrals

5) Click “Enroll”.

6) The Enrollment screen will appear. Complete the fields on the form. Click “Save” to accept the referral and enroll the client into the program.

Enroll Program for client Jane Test

Project Start Date	03/19/2019
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) <input type="text"/>
Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response) <input type="text"/>
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT	
Housing Move-in Date	___/___/___
LIVING SITUATION	
Type of Residence	Select <input type="text"/>
Length of Stay in Prior Living Situation	Select <input type="text"/>
LIFETIME LENGTH OF HOMELESSNESS IN SF:	
Have you ever been homeless in SF?	Select <input type="text"/>
LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF:	
Have you ever been homeless outside of San Francisco?	Select <input type="text"/>
Last Permanent Zip Code	94103 <input type="text"/>
Quality of Zip Code	Full or Partial Zip Code Reported <input type="text"/>
DISABLING CONDITIONS AND BARRIERS	
Disabling Condition	No <input type="text"/>
Physical Disability	No <input type="text"/>
Developmental Disability	No <input type="text"/>
Chronic Health Condition	No <input type="text"/>

SAVE & CLOSE

CANCEL