

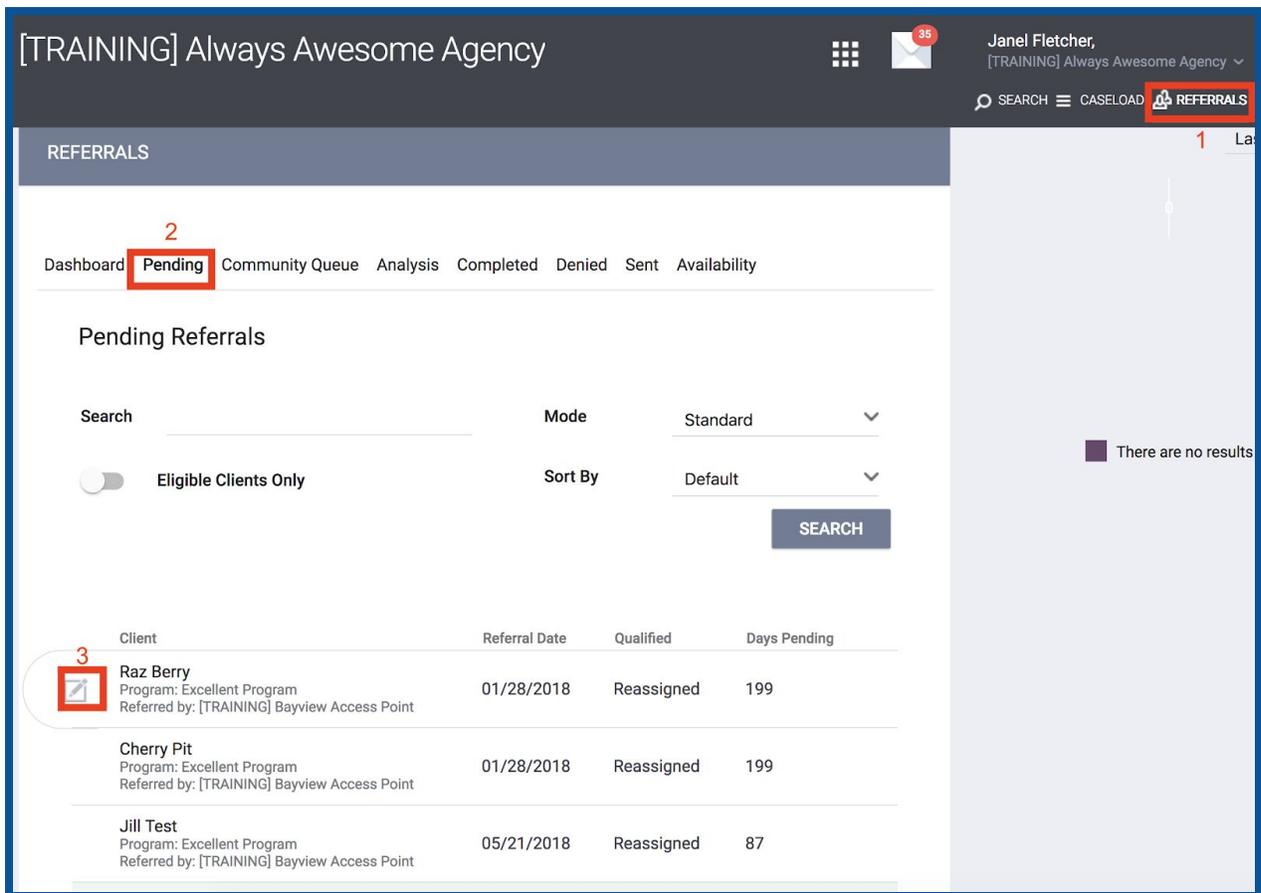
Referrals: How to Accept a Referral

This workflow will show how to accept a referral from the Access Point and enroll the client into the program.

Acknowledge Pending Referrals

These steps will notify the Access Point that the Agency received the referral.

- 1) Log in and select the Referrals icon.
- 2) Next, select Pending. The Pending tab will show a list of client referrals sent to the agency, but not yet accepted into a program at the agency.
 - New Referrals from the Access Point appear in white.
- 3) Open the referral you want to review.



The screenshot shows the Bitfocus Referrals interface for the user Janel Fletcher at [TRAINING] Always Awesome Agency. The 'REFERRALS' tab is selected, and the 'Pending' sub-tab is active. The interface displays a search bar, a toggle for 'Eligible Clients Only', and a 'SEARCH' button. Below the search controls is a table of pending referrals. The first row, for 'Raz Berry', is highlighted in white, indicating it is a new referral from the Access Point. The table columns are Client, Referral Date, Qualified, and Days Pending.

Client	Referral Date	Qualified	Days Pending
 Raz Berry Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Cherry Pit Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Jill Test Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	05/21/2018	Reassigned	87

Referrals: How to Accept a Referral

4) Change the Status dropdown to Pending-In Process and click Save Changes. This will notify the Access Point that your Agency has received the referral, but has not yet enrolled the client into the program.

[TRAINING] Always Awesome Agency

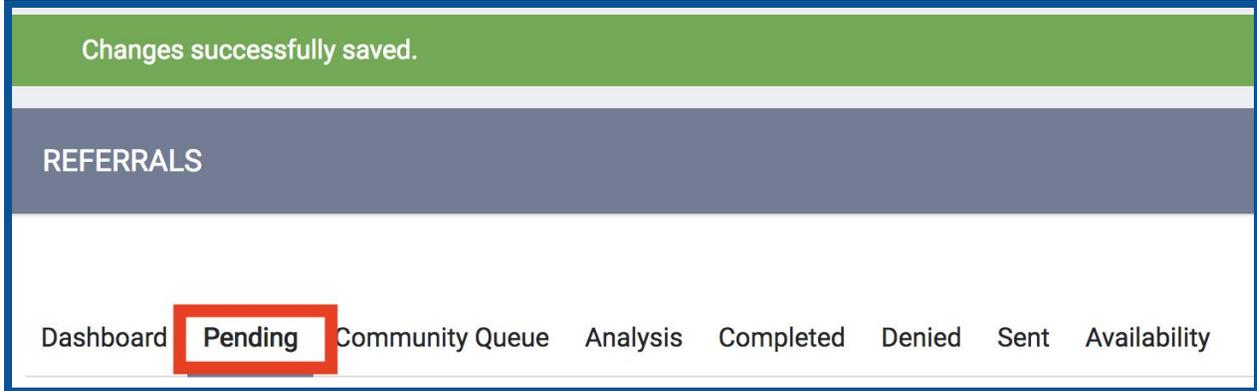
Dashboard Pending Community Queue Analysis Completed Denied Sent Availability

REFERRAL: EDIT

Client	Raz Berry
Referred Program	Excellent Program
Referred Program Opening	01/29/2018 74. 2br apt ADA accessible
Referred to Agency	[TRAINING] Always Awesome Agency
Referring Agency	[TRAINING] Bayview Access Point
Referred Date	01/28/2018 11:27 PM
Days Pending	199 day(s)
Qualified	Reassigned
Fam Priority score	66
Referred by Staff	Janel Fletcher
Case Manager	Select <input type="button" value="v"/>
Last Activity	01/28/2018 <input type="button" value="CHECK-IN"/>
Status	<input type="button" value="Pending"/> <input checked="" type="button" value="Pending - In Process"/> <input type="button" value="Denied"/> <input type="button" value="Expired"/>
Private	

Referrals: How to Accept a Referral

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

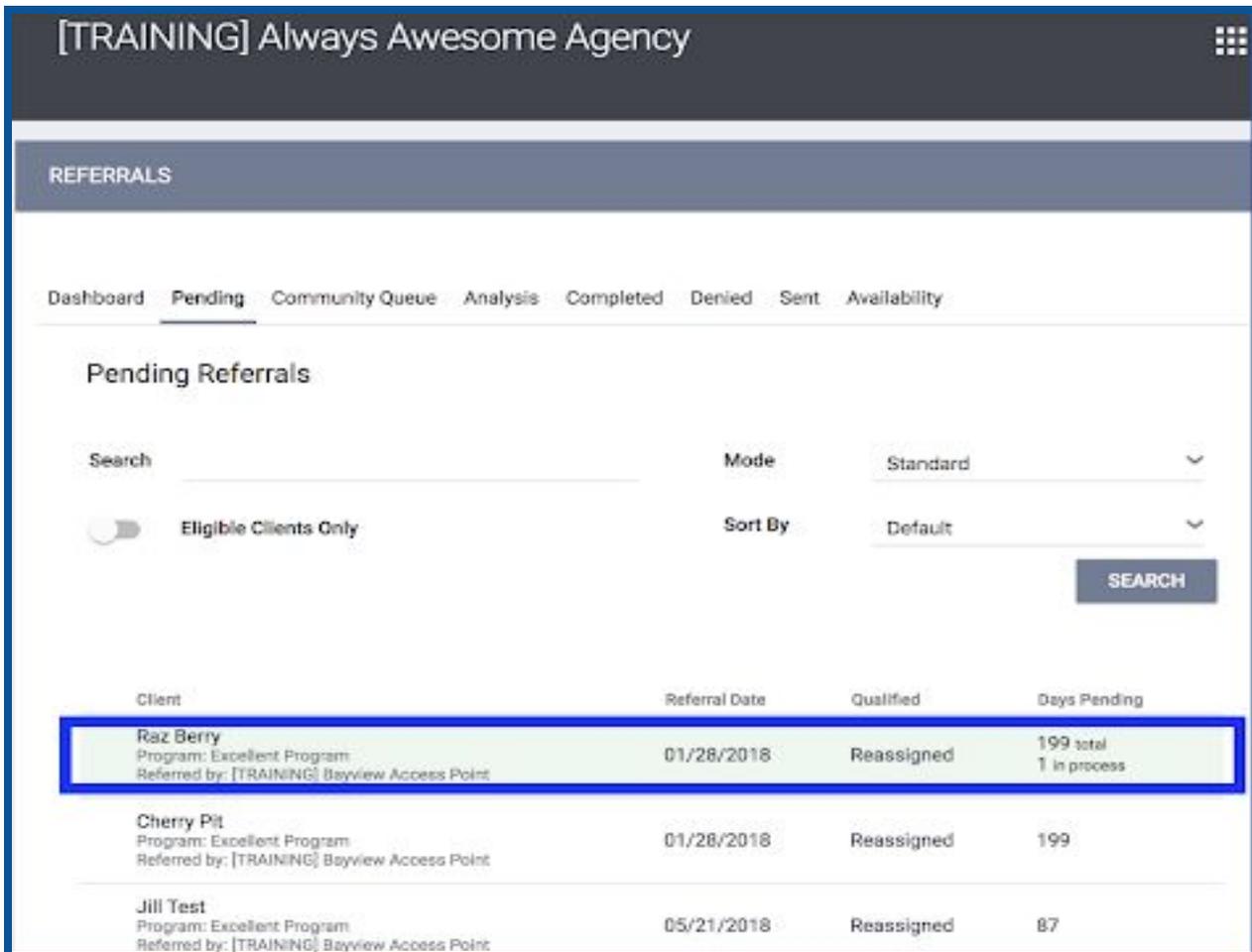


Changes successfully saved.

REFERRALS

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

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



[TRAINING] Always Awesome Agency

REFERRALS

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

Pending Referrals

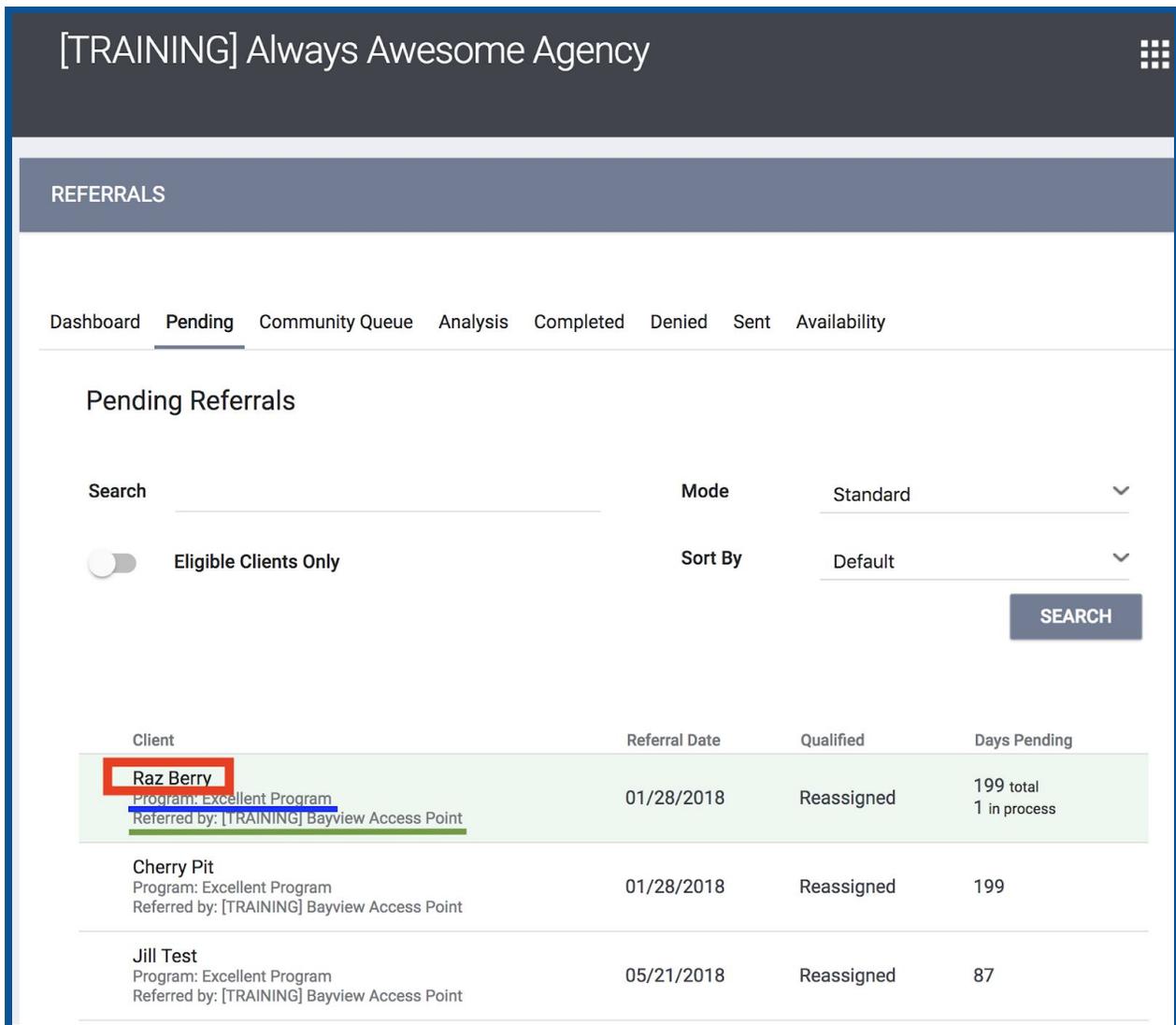
Search Mode Standard
Eligible Clients Only Sort By Default

Client	Referral Date	Qualified	Days Pending
Raz Berry Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199 total 1 in process
Cherry Pit Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Jill Test Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	05/21/2018	Reassigned	87

Referrals: How to Accept a Referral

Accept referral/Enroll into Program

7) In the screenshot below, the pending referral in green shows shows the client's name (red box), the program the client is referred to (underlined in blue), and the Access Point that referred the client to the agency (underlined in green). **Make note of the program name, as you will need to know the program name to complete the referral.** In this example, the program name is the Excellent Program. Click on the client's name to go to their profile



[TRAINING] Always Awesome Agency

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability

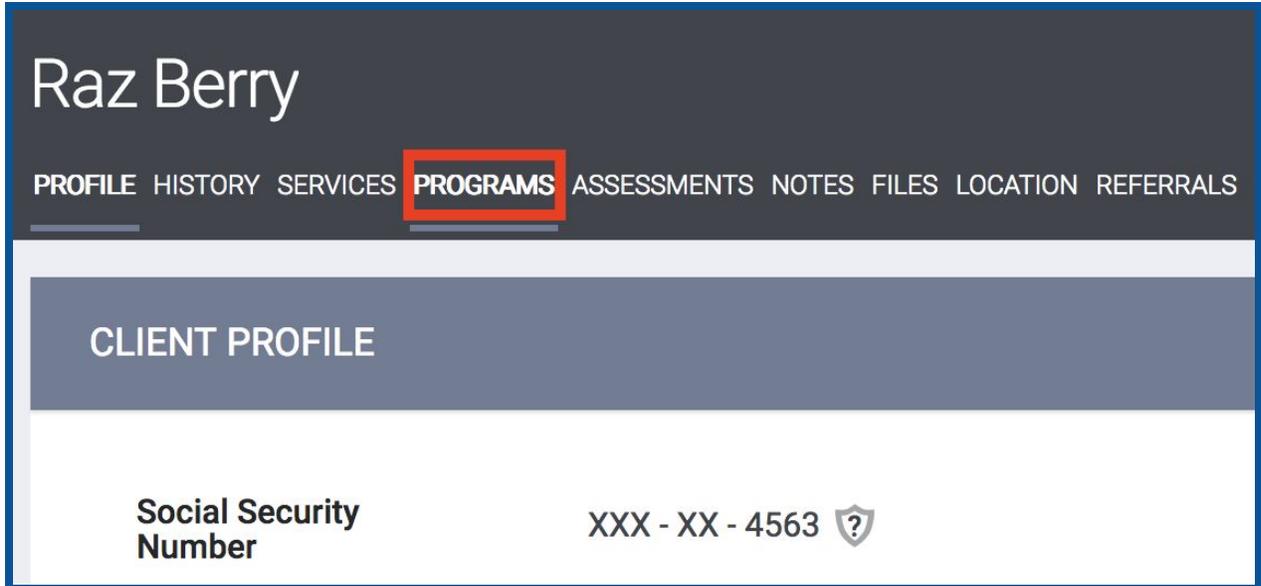
Pending Referrals

Search Mode Standard
Eligible Clients Only Sort By Default

Client	Referral Date	Qualified	Days Pending
Raz Berry <u>Program: Excellent Program</u> <u>Referred by: [TRAINING] Bayview Access Point</u>	01/28/2018	Reassigned	199 total 1 in process
Cherry Pit Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Jill Test Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	05/21/2018	Reassigned	87

Referrals: How to Accept a Referral

8) Next, select Programs.



The screenshot shows the Raz Berry client profile page. The navigation menu at the top includes PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, LOCATION, and REFERRALS. Below the navigation is a section titled CLIENT PROFILE. Underneath, the Social Security Number is displayed as XXX - XX - 4563 with a question mark icon to its right.

9) In the PROGRAMS:AVAILABLE section click on the dropdown arrow to the right of the program name. In this example, as mentioned in step 7, the client will be enrolled in the Excellent Program.



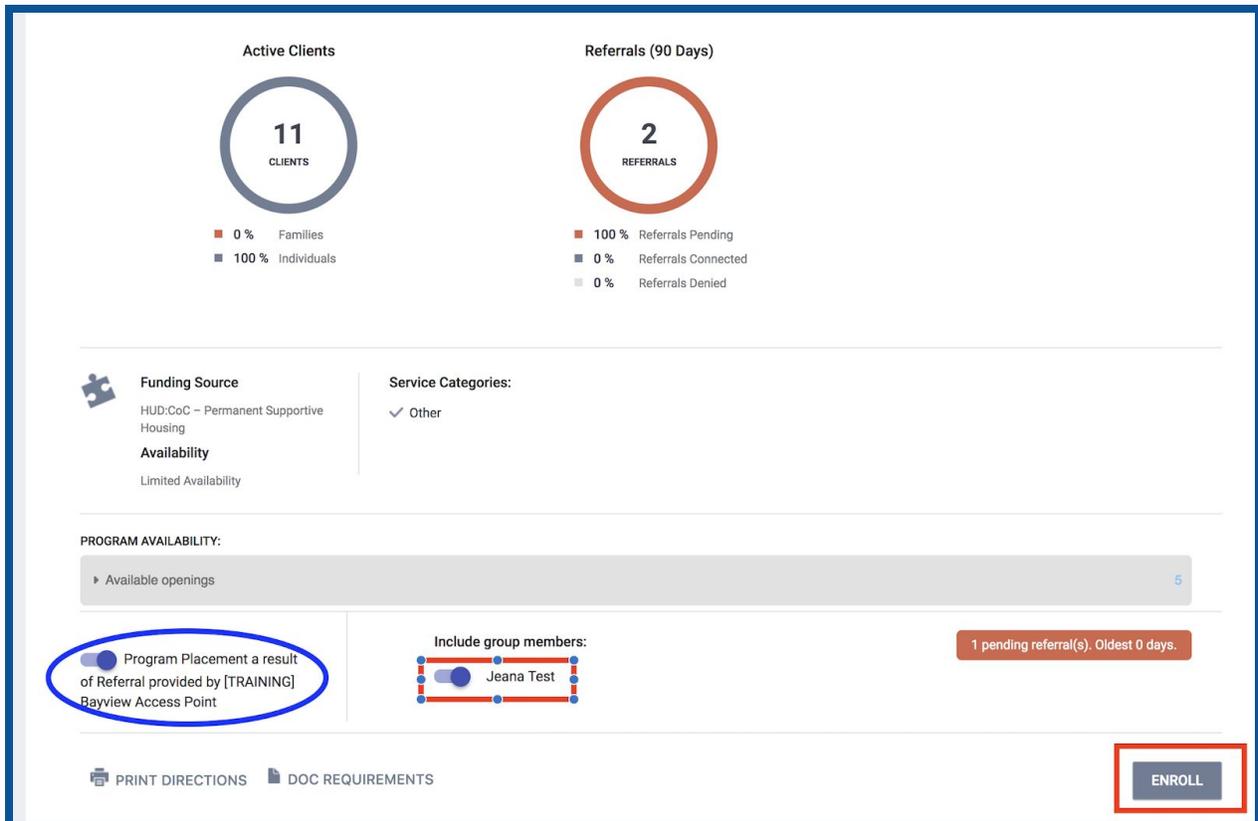
The screenshot shows the PROGRAMS: AVAILABLE section. It contains a list of three programs, each with a dropdown arrow to its right. The first program, Excellent Program, has its dropdown arrow highlighted with a red box. The other two programs, Great Program and Super Program, have their dropdown arrows unhighlighted.

Program Name	Action
Excellent Program	<input checked="" type="checkbox"/>
Great Program	<input type="checkbox"/>
Super Program	<input type="checkbox"/>

Referrals: How to Accept a Referral

10) The enrollment screen will expand. Enroll the client and family members (if applicable) into the program. ***Note in the screenshot below, the toggle “Program Placement a result of Referral provided by [TRAINING] Bayview Access Point.” This toggle indicates that the program enrollment is connected to a referral made by the Access Point. No action is needed regarding this toggle. It will be toggled on (blue) prior to enrolling in the program. If you do not see this toggle, the referral was not accepted properly.***

Click Enroll.



The screenshot displays the enrollment interface with the following components:

- Active Clients:** 11 CLIENTS. Legend: 0% Families, 100% Individuals.
- Referrals (90 Days):** 2 REFERRALS. Legend: 100% Referrals Pending, 0% Referrals Connected, 0% Referrals Denied.
- Funding Source:** HUD:CoC – Permanent Supportive Housing. Availability: Limited Availability.
- Service Categories:** Other (checked).
- PROGRAM AVAILABILITY:** Available openings: 5.
- Program Placement a result of Referral provided by [TRAINING] Bayview Access Point:** Toggled ON (blue).
- Include group members:** Jeana Test (checked).
- Referral Status:** 1 pending referral(s). Oldest 0 days.
- Buttons:** PRINT DIRECTIONS, DOC REQUIREMENTS, and ENROLL.

Referrals: How to Accept a Referral

11. The Enrollment screen will appear. Complete and save the enrollment screen to accept the referral and enroll the client into the program.

Raz Berry

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

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response) ▾

Is the Program Type a Permanent Housing Program Type? Yes (Automatically Generated Response) ▾

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 

LIVING SITUATION

Type of Residence Select ▾

Length of Stay in Prior Living Situation Select ▾

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Select ▾

Physical Disability Select ▾

Developmental Disability Select ▾

Chronic Health Condition Select ▾

HIV - AIDS Select ▾

Mental Health Problem Select ▾

Substance Abuse Problem Select ▾

Domestic Violence Victim/Survivor Select ▾

CASH INCOME FOR INDIVIDUAL

Income from Any Source Select ▾

NON-CASH BENEFITS

Receiving Non-Cash Benefits Select ▾

HEALTH INSURANCE

Covered by Health Insurance Select ▾

SAVE & CLOSE CANCEL