

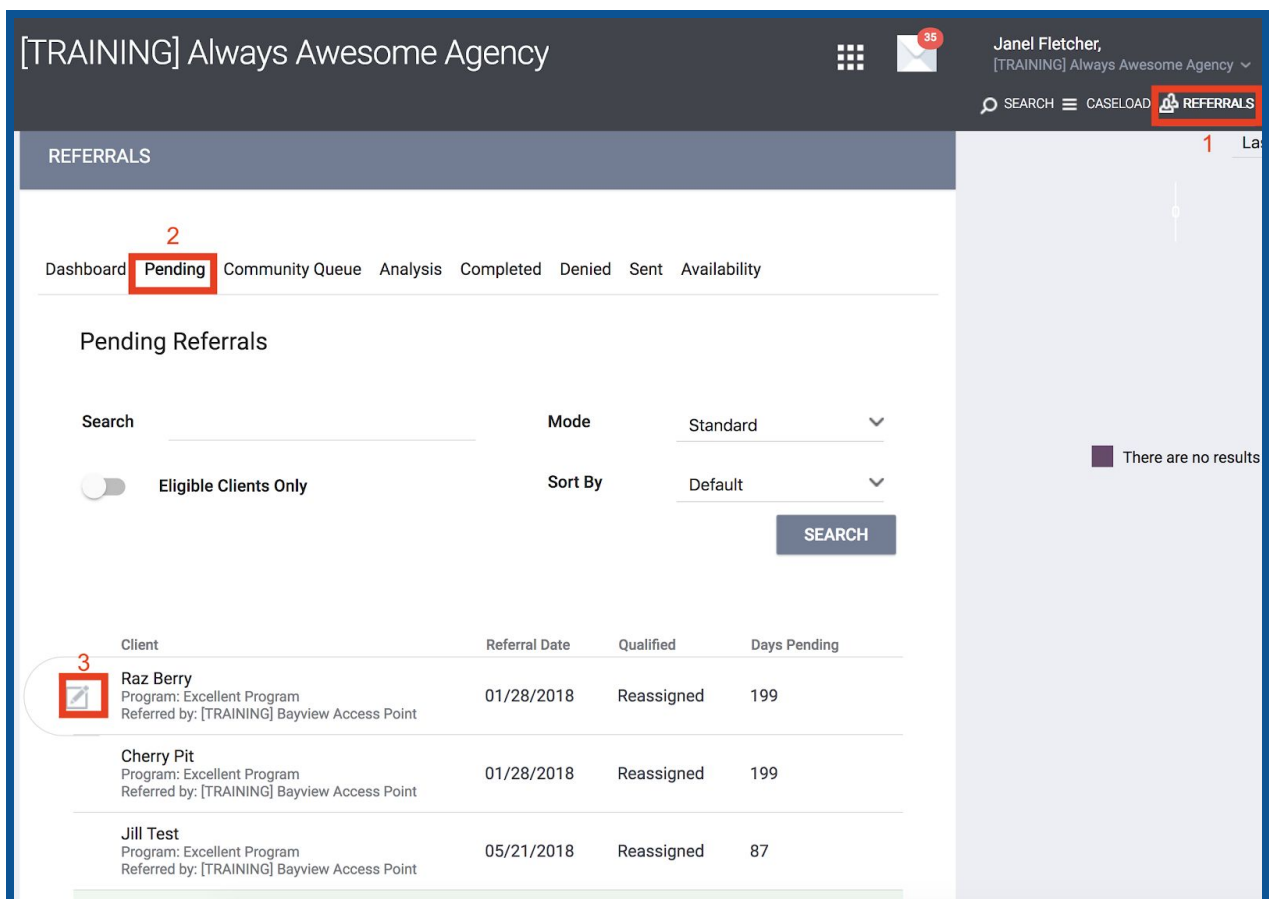
## Referrals: How to Accept a Referral

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 'SEARCH' button, and a table of pending referrals. The table has columns for Client, Referral Date, Qualified, and Days Pending. Three referrals are listed: Raz Berry, Cherry Pit, and Jill Test. The 'Raz Berry' referral is highlighted with a red box and a red number '3' next to it, indicating it is the referral to be reviewed.

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

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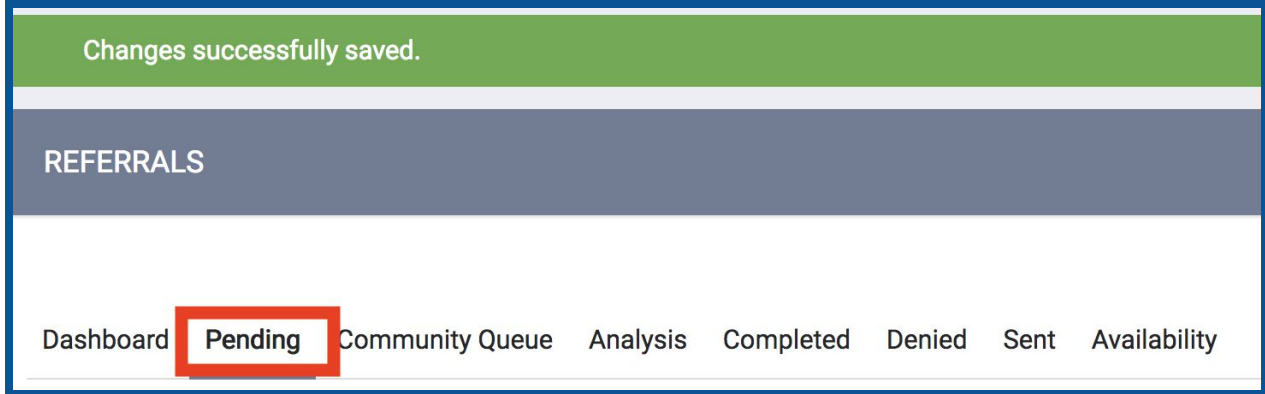
Dashboard Pending Community Queue Analysis Completed Denied Sent Availability

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"/>
<b>Status</b>	<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.

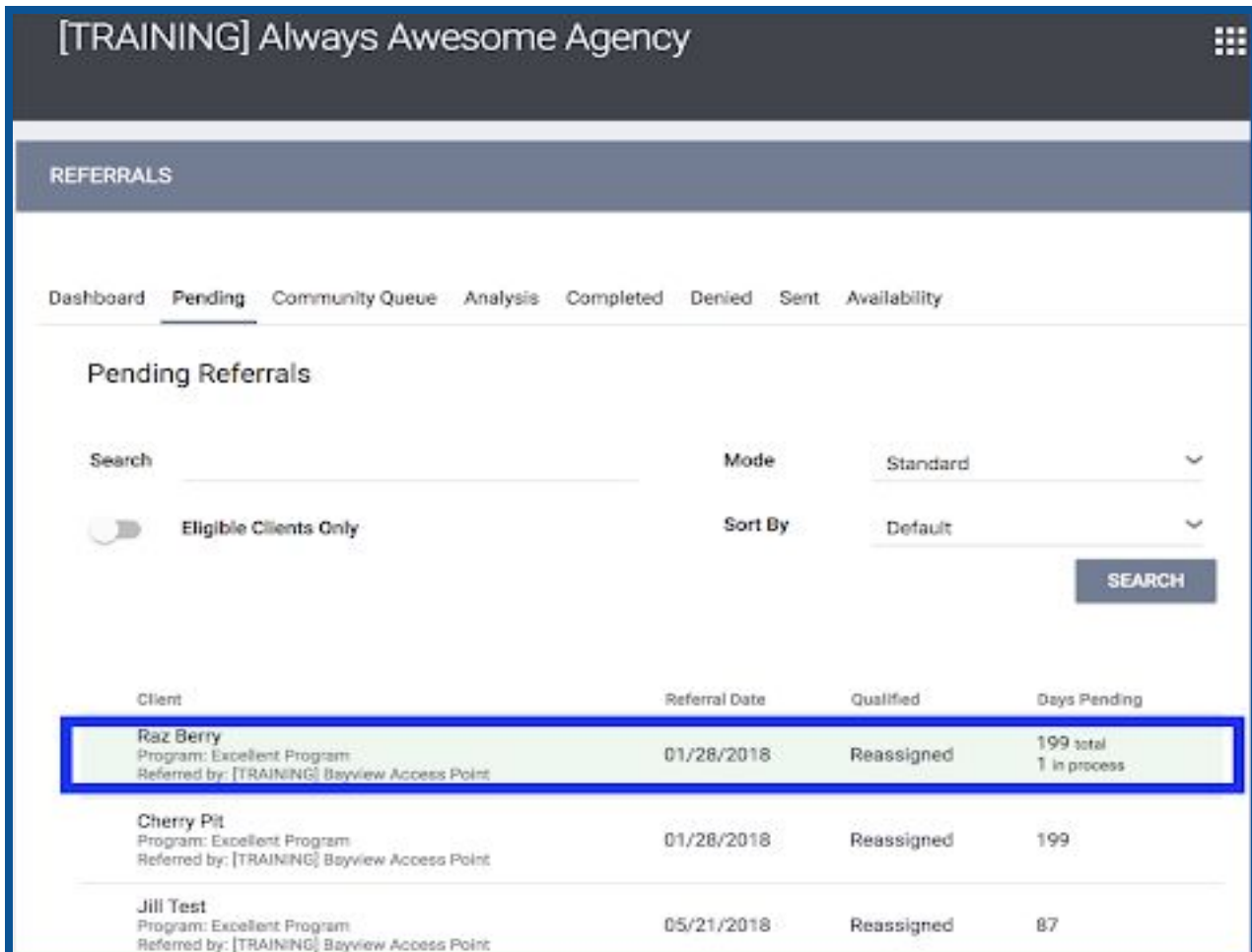


Changes successfully saved.

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.



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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). AU YbchYcZH Ydfc[ fUa ` bUa YZUg`nci `k]`bYYX`lc` bck `h Ydfc[ fUa `bUa Ylc `Vta d`YhY`H YfYZffU`In this example, the program name is the Excellent Program. Click on the client’s name to go to their profile

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☰

REFERRALS

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

### Pending Referrals

Search

Eligible Clients Only

Mode Standard ▼

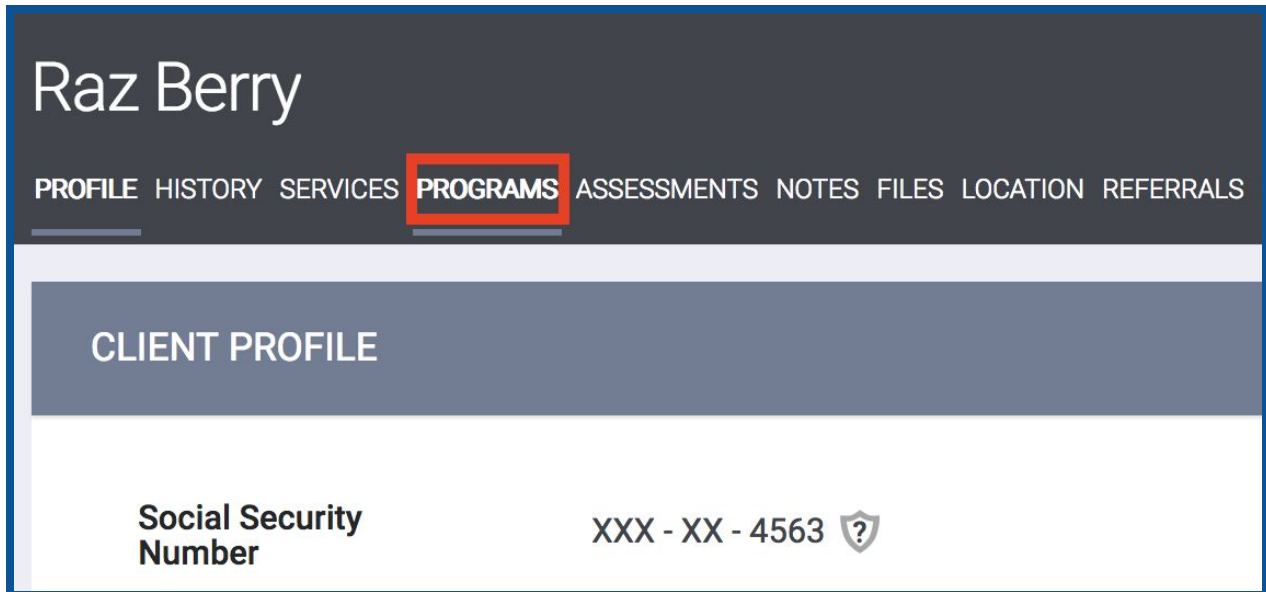
Sort By Default ▼

**SEARCH**

Client	Referral Date	Qualified	Days Pending
<div style="border: 2px solid red; display: inline-block; padding: 2px;">Raz Berry</div> <span style="color: blue; text-decoration: underline;">Program: Excellent Program</span> <span style="color: green; text-decoration: underline;">Referred by: [TRAINING] Bayview Access Point</span>	01/28/2018	Reassigned	199 total 1 in process
Cherry Pit <span style="color: blue; text-decoration: underline;">Program: Excellent Program</span> <span style="color: green; text-decoration: underline;">Referred by: [TRAINING] Bayview Access Point</span>	01/28/2018	Reassigned	199
Jill Test <span style="color: blue; text-decoration: underline;">Program: Excellent Program</span> <span style="color: green; text-decoration: underline;">Referred by: [TRAINING] Bayview Access Point</span>	05/21/2018	Reassigned	87

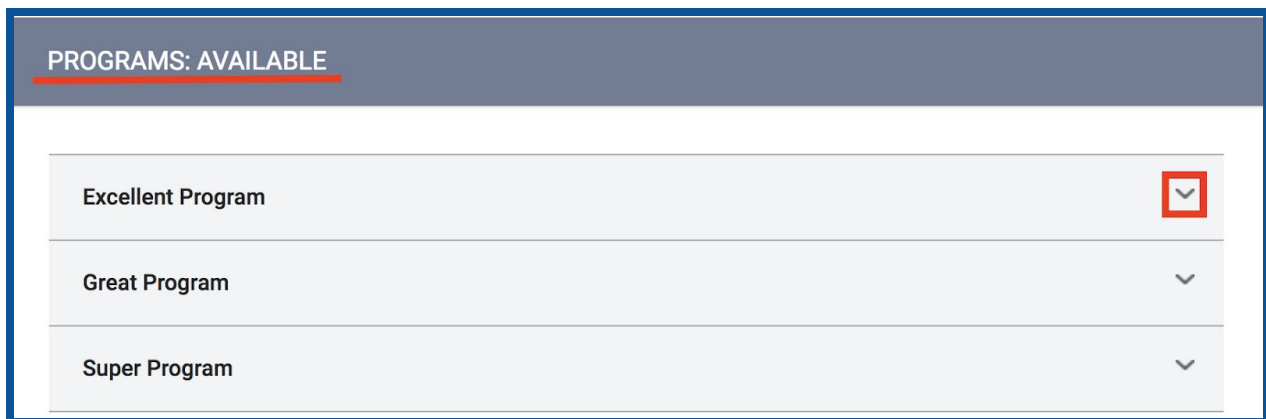
## Referrals: How to Accept a Referral

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.

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.

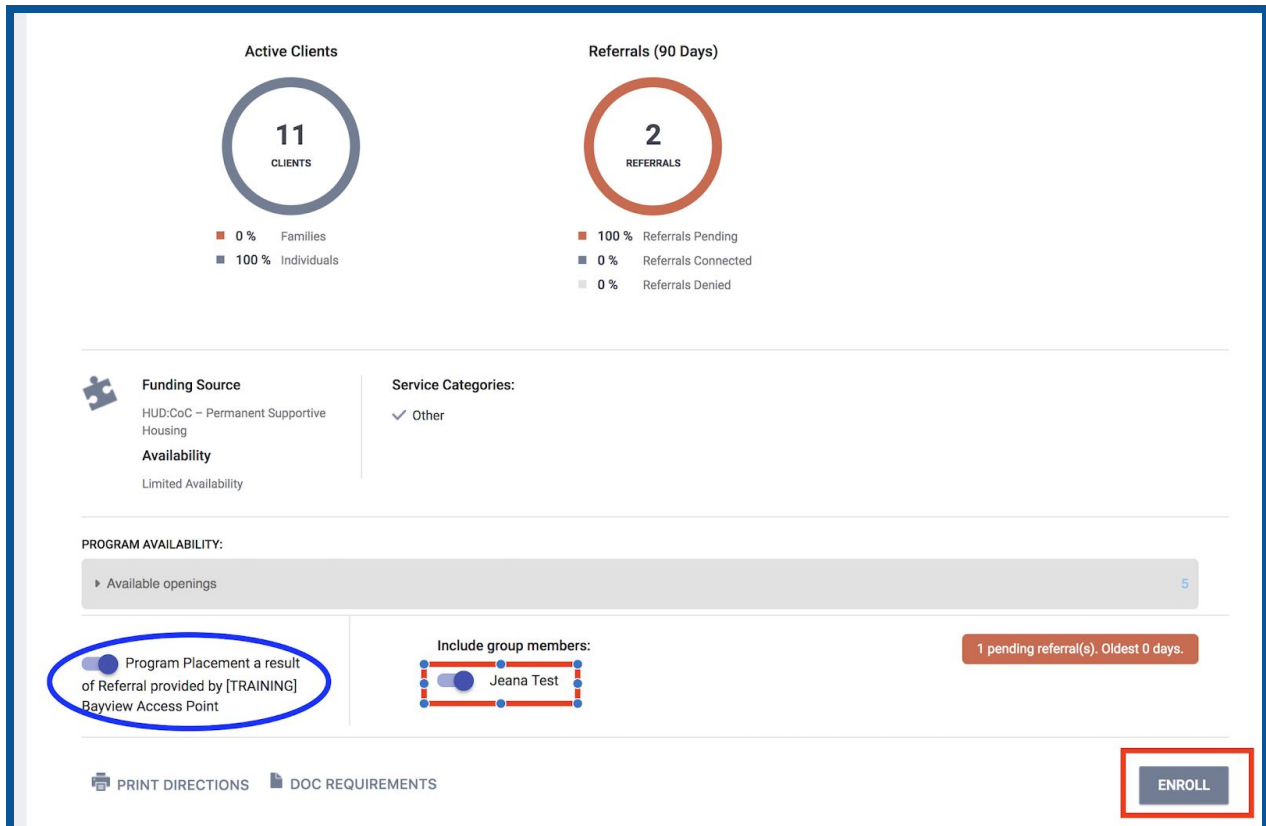


The screenshot shows the PROGRAMS: AVAILABLE section. It contains a list of three programs: Excellent Program, Great Program, and Super Program. Each program name is followed by a dropdown arrow. The dropdown arrow for the Excellent Program is highlighted with a red box.

## Referrals: How to Accept a Referral

10) The enrollment screen will expand. Enroll the client and family members (if applicable) into the program. *BchY]b`h YgWYYbg\ chVYck žH Ylc[ [ `YÍ Dfc[ fUa ` D`UMYa YbhUfYqi `hcZFYZffU`dfcj ]XYX`Vm* **OF5-B-B; Q6 Unj ]Yk `5 WYgg`Dc]bHĪ** 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 elements:

- 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 toggle switch is turned on (blue), labeled "Program Placement a result of Referral provided by [TRAINING] Bayview Access Point".
- Include group members:** A toggle switch is turned on (blue) for "Jeana Test".
- Referral Status:** 1 pending referral(s). Oldest 0 days.
- Actions:** PRINT DIRECTIONS, DOC REQUIREMENTS, and a highlighted ENROLL button.

