

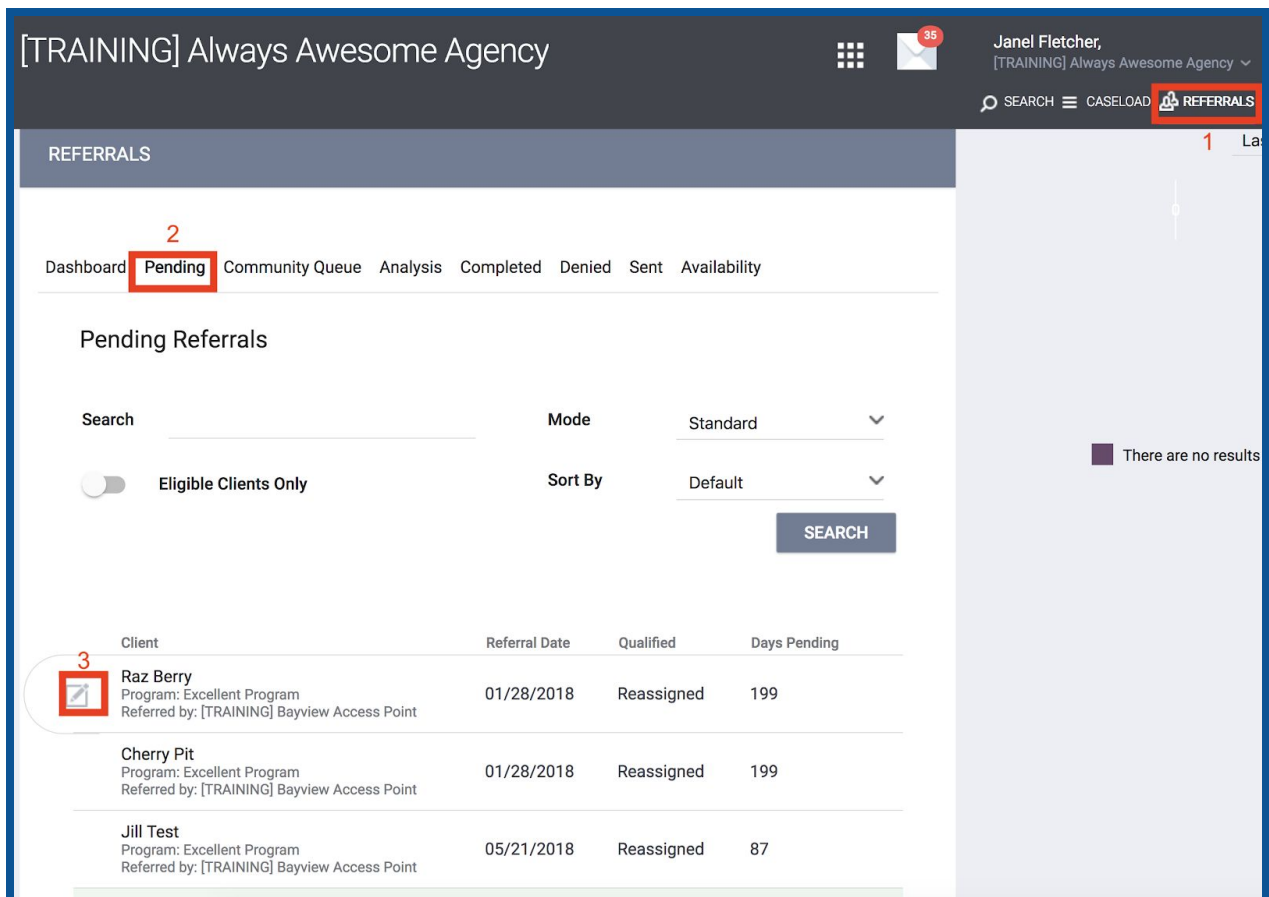
Referrals: How to Accept a Referral

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 web application interface. At the top, the header displays "[TRAINING] Always Awesome Agency" and the user "Janel Fletcher, [TRAINING] Always Awesome Agency". A navigation bar includes "SEARCH", "CASELOAD", and "REFERRALS" (highlighted with a red box and labeled '1'). Below this, the "REFERRALS" section is active, showing a tab labeled "Pending" (highlighted with a red box and labeled '2'). The "Pending Referrals" section includes a search bar, a "Mode" dropdown set to "Standard", a "Sort By" dropdown set to "Default", and a "SEARCH" button. A table lists three referrals:

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

The first referral, "Raz Berry", is highlighted with a red box and labeled '3'. A message on the right side of the interface states "There are no results".

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](#)

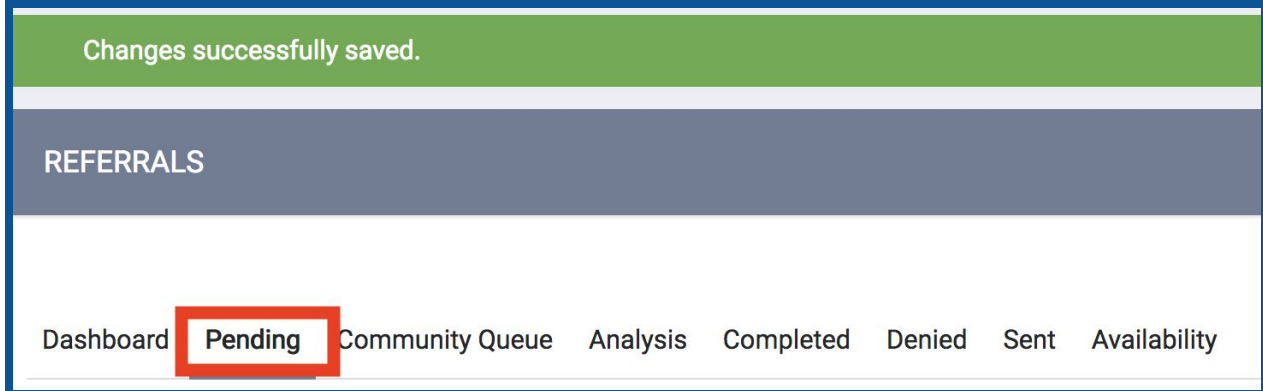
REFERRAL: EDIT

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
Last Activity	01/28/2018 CHECK-IN
Status	<div><div>✓ Pending</div><div>Pending - In Process</div><div>Denied</div><div>Expired</div></div>
Private	

[SAVE CHANGES](#) [CANCEL](#)

Referrals: How to Accept a Referral

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

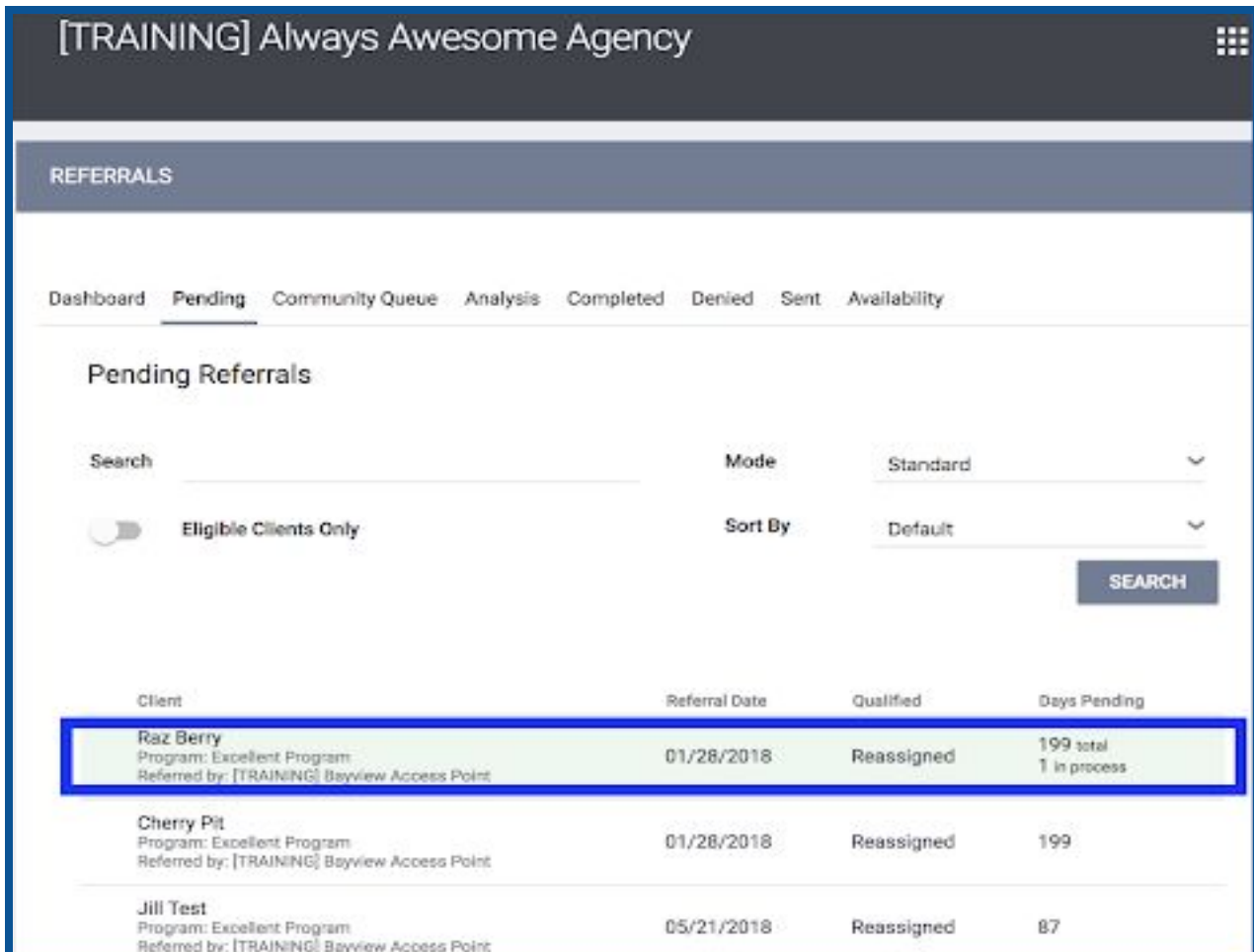


Changes successfully saved.

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 Pitt 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

ModeStandard

Eligible Clients Only

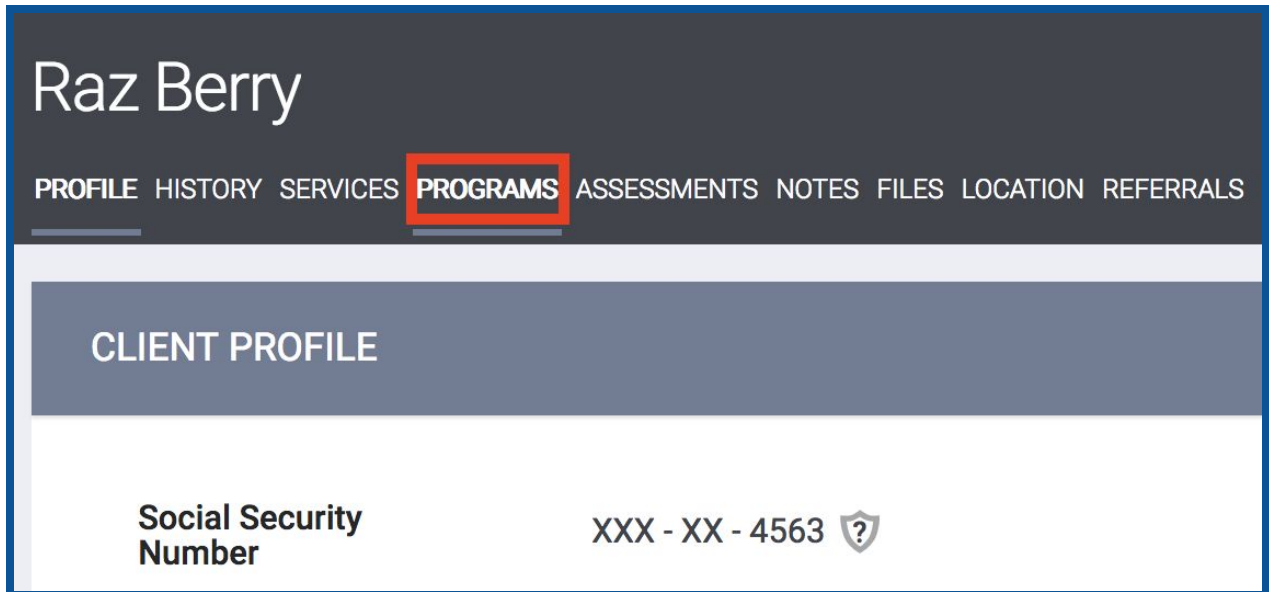
Sort ByDefault

SEARCH

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

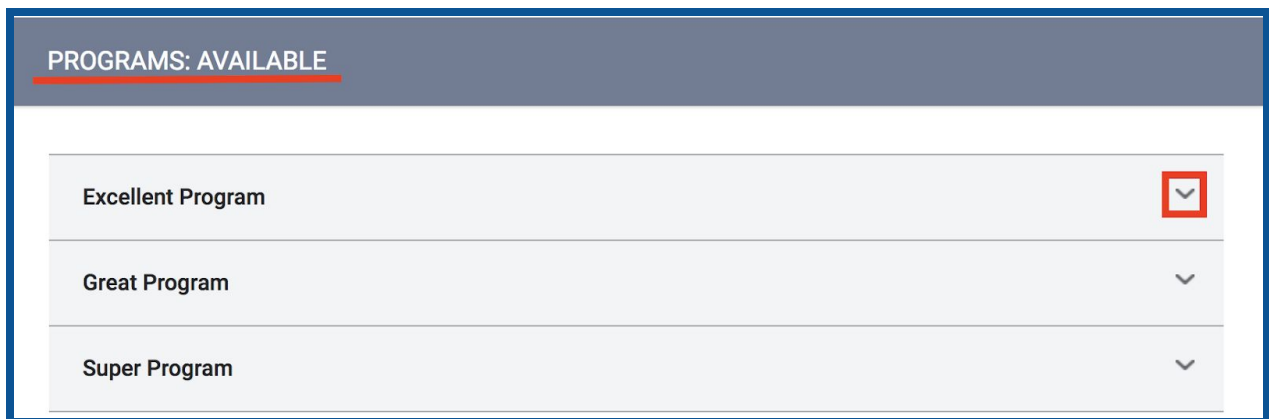
Referrals: How to Accept a Referral

8) Next, select Programs.



The screenshot shows the Raz Berry client profile page. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, LOCATION, and REFERRALS. Below the navigation bar is a section titled CLIENT PROFILE. Under this section, the Social Security Number is displayed as XXX - XX - 4563, followed by a shield icon with a question mark.

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.



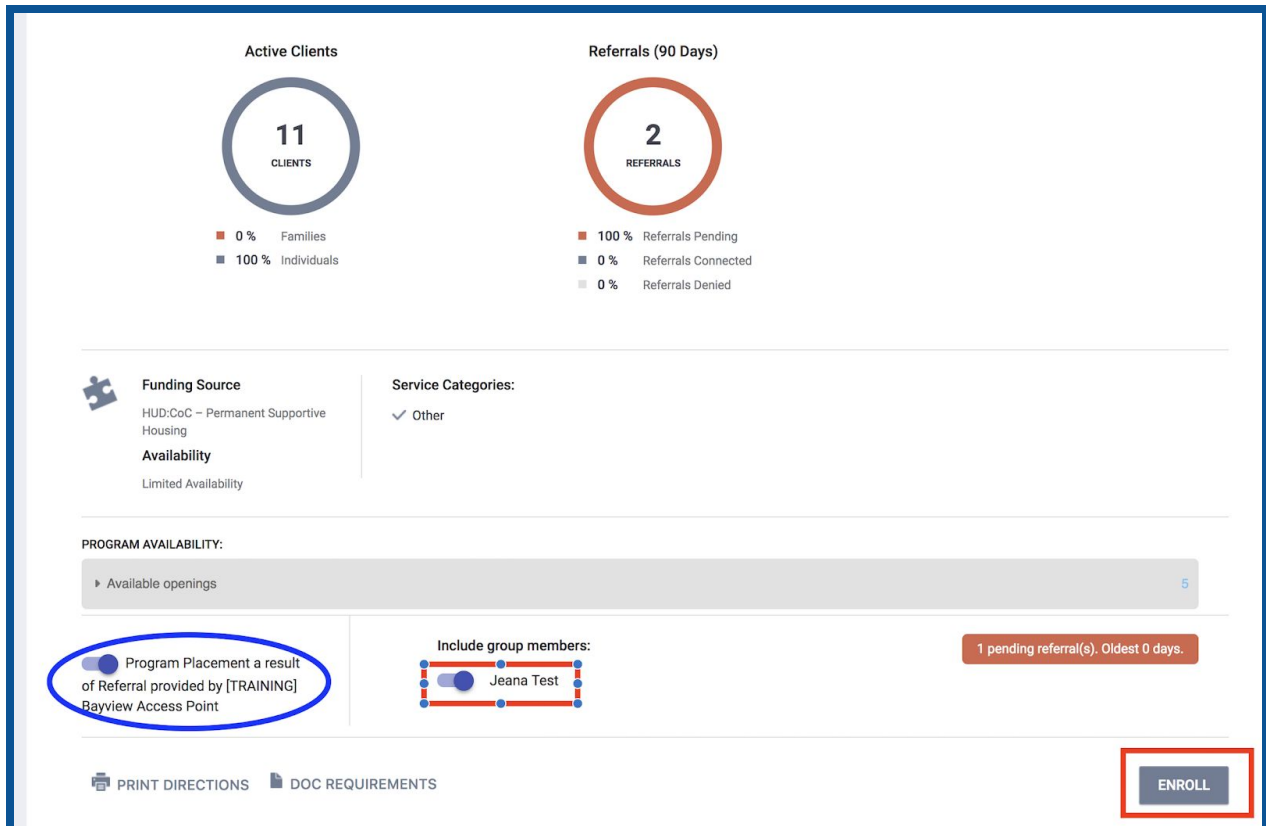
The screenshot shows the PROGRAMS: AVAILABLE section. It contains a table with three rows, each representing a program. The first row is 'Excellent Program' with a dropdown arrow highlighted by a red box. The second row is 'Great Program' with a dropdown arrow. The third row is 'Super Program' with a dropdown arrow.

PROGRAMS: AVAILABLE	
Excellent Program	▼
Great Program	▼
Super Program	▼

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:** A circular gauge showing 11 clients. The legend indicates 0% for Families and 100% for Individuals.
- Referrals (90 Days):** A circular gauge showing 2 referrals. The legend indicates 100% for Referrals Pending, 0% for Referrals Connected, and 0% for 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 labeled "Program Placement a result of Referral provided by [TRAINING] Bayview Access Point" is shown in the "on" (blue) position and is circled in blue.
- Include group members:** A section with a toggle switch and a list of members, including "Jeana Test".
- Referral Status:** A red box indicates "1 pending referral(s). Oldest 0 days."
- Bottom Bar:** Includes links for "PRINT DIRECTIONS" and "DOC REQUIREMENTS", and a red-bordered "ENROLL" button.

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

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESLOCATIONREFERRALS

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

__/__/__

25

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