

CHANGING THE STATUS OF 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. 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.
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. Don't forget to press “SAVE!”
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.

The screenshot shows the user interface for managing referrals. At the top, the user's name 'Lesly Soto Bright, HomeFirst' is visible. Below this is a navigation bar with 'LOAD' and 'REFERRALS' buttons. The main area is titled 'REFERRALS' and has several tabs: 'Pending', 'Community Queue', 'Analysis', 'Completed', 'Denied', 'Sent', 'Availability', and 'Open Units'. The 'Pending' tab is selected and highlighted with a red box. Below the tabs is a search and filter section with a 'SEARCH' button. A table of pending referrals is shown, with one entry for 'Ace Ventura' highlighted in white. To the right of this entry is an edit icon. Below the table is a 'REFERRAL: EDIT' form. In the 'Status' dropdown menu, 'Pending - In Process' is selected and highlighted with a red box. A red callout bubble says 'Don't forget to Save!'. At the bottom of the form are 'SAVE CHANGES' and 'CANCEL' buttons. Below the form is a summary table showing the referral details in green, indicating it is being processed.

DENYING A REFERRAL

1. Repeat steps 1-3 in changing the status of a referral.
2. In this case instead of changing the status to Pending - In Process change to **Denied**.
3. Once the status is changed to denied, three associated denial fields will populate that need to be completed. Click “Save Changes”.
4. 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”.
5. Denied Reason: Select a reason from the drop down list
6. 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”.

The screenshot shows the 'REFERRAL: EDIT' form with the 'Status' dropdown set to 'Denied'. Below the status dropdown are three fields: 'Send to Community Queue', 'Denied By Type', and 'Denied Reason'. The 'Denied Reason' field is highlighted with a red box. Below these fields is a 'Denial Information' text area and a 'Private' toggle switch. At the bottom are 'SAVE CHANGES' and 'CANCEL' buttons.

If you are accepting a referral you will want to proceed with enrolling the client into the program referred to.

ENROLLING INTO PROGRAM

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 icon).

Client	Referral Date	Qualified	Days Pending
Ace Ventura Program: RA PSH Program (PSH) Referred by: Regina's Test Agency	09/01/2021	Reassigned	0 total 0 pending 0 in process

1. You will be navigated to the client profile - select the Programs Tab.
2. From the PROGRAM AVAILABLE select the appropriate program.
3. The enrollment screen will expand.
4. 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.
5. Click “Enroll.”