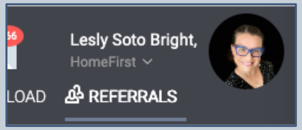
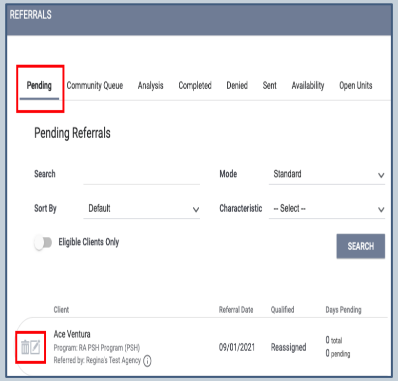
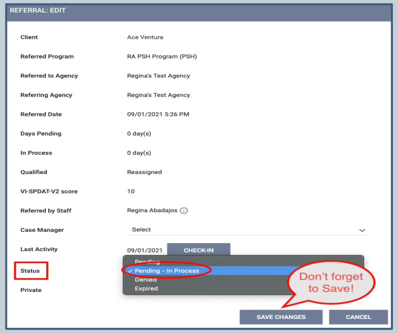
Managing Referrals - This document will assist in steps taken to accept/deny a referral and when needed enroll a client into program.

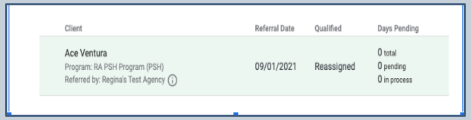
CHANGING THE STATUS OF A REFERRAL

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.



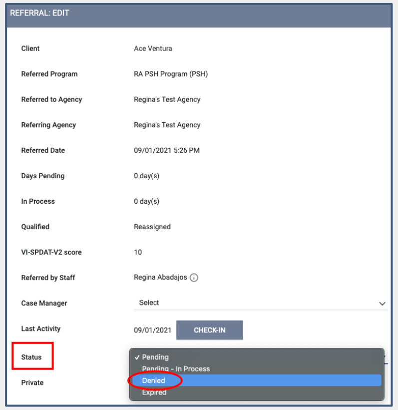


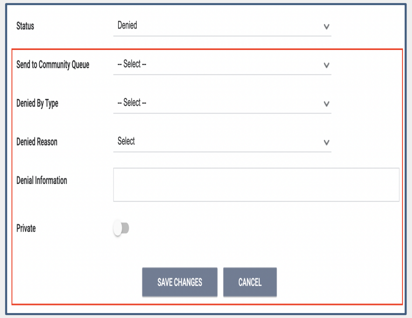




DENYING A REFERRAL

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".

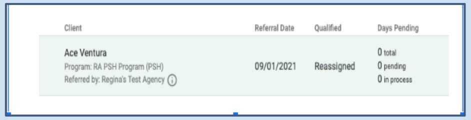




If you are accepting a referral you will want to proceed with enrolling the client into the program referred to.

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).



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."