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.
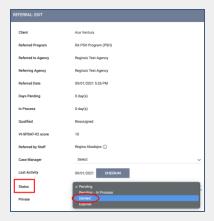6. The updated referral now appears in green, and the access point is notified that the referral is being processed.

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. Unless the client has specific needs that cannot be met by the shelter they were referred to, Select **"No"** and **do not send to Community Queue.** For example, if client needs ADA accommodations that weren't previously disclosed they would be referred back to the queue – but do not refer back to the queue if the client refuses all shelter options or does not call back after repeated attempts.
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 could not be located" from the denial reasons, then your denial message might say "Called client 3 times and left voicemails".

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."