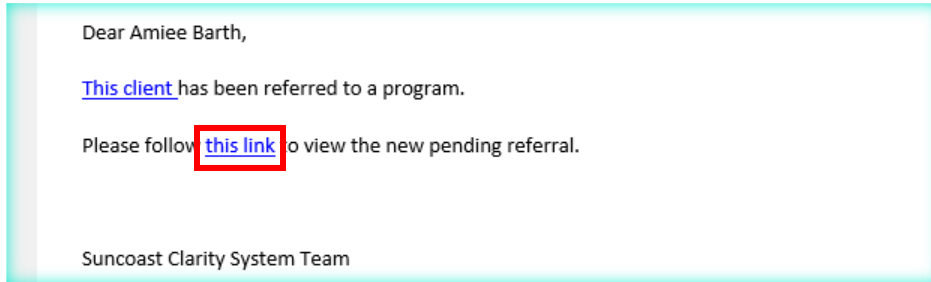




Step-by-Step: Receiving Referrals

1. Click on “this link” in the email referral that was received.



2. Select a Case Manager to review client’s information, determine if eligible for program and reach out to schedule appointment with Client
3. Update status from Pending to Pending – In Process.
4. Save Changes

Client	Brandon Test
Referred Program	Pasco HEART
Referred to Agency	Coalition for the Homeless Of Pasco County
Referring Agency	The Sword and Spoon
Referred Date	07/19/2022 11:09 AM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	No
Referred by Staff	Amiee Barth ⓘ
Case Manager	Select ▼
Last Activity	07/19/2022 CHECK-IN
Status	Pending ▼
Private	<input type="checkbox"/>

SAVE CHANGES **CANCEL**



Step-by-Step: Receiving Referrals

Once the eligible determination has been made. You can either enroll client which will close the referral or Deny the referral.

1. To **deny** a referral, select Denied for Status. Then, select the appropriate item for Denied By Type and Denied Reason. Be sure to enter detail notes on why the client was denied into Denial Information.
2. Save Changes
3. The referring party will receive an email informing them of this denial

A screenshot of a web form for denying a referral. The form is enclosed in a light blue border. It contains four main sections: "Status" with a dropdown menu set to "Denied"; "Denied By Type" with a dropdown menu set to "-- Select --"; "Denied Reason" with a dropdown menu set to "Select"; and "Denial Information" with a large text input field. Red rectangular boxes highlight the three dropdown menus.

4. To **accept** referral, go to the program to which the client was referred and enroll them. The pending notice about the enrollment button lets you know that this client was referred to this program. After the client is enrolled, the referral automatically will close.

A screenshot of a web interface for enrolling a client. The interface is divided into two columns. The left column has "Funding Source" (Local or Other Funding Source) and "Availability" (Full Availability). The right column has "Service Categories:" with three checked items: "No Category", "Rental Assistance", and "Utility Payments". Below this, a blue dot indicates "Program Placement a result of Referral provided by The Sword and Spoon". A red notification box says "1 pending referral(s). Oldest 0 days." At the bottom left is a "PRINT DIRECTIONS" link, and at the bottom right is a grey "ENROLL" button highlighted with a red rectangular box.