

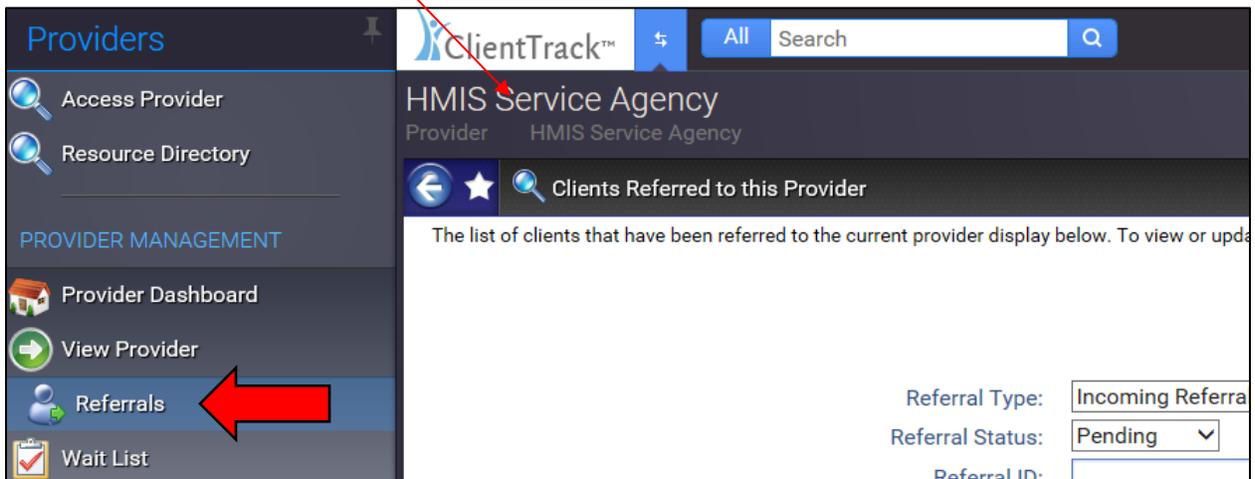
Referrals / Referral Management:

All referrals are sent (or should be sent) through the Coordinated Entry Intake processes for their continuum. All referral management, where referrals are accepted / rejected occur stand-alone within the Provider tab.

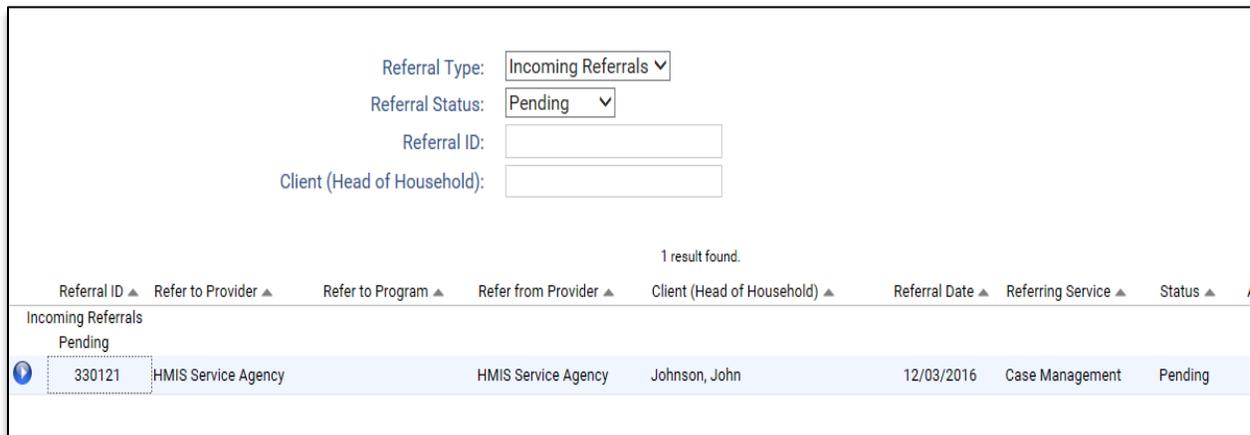
Please note that Referrals and Community Queue/Priority List are completely different, referral cannot be directly sent or directly accepted within the Group Wait List. Referrals should be processed within the below Referrals area.

All referrals from the reviewing / accepting side should be accessed within the Provider -> Provider Management -> Referrals option highlighted below.

Please note that for Referral Management (and Group Waitlist Management) to function properly you should ensure the correct Provider is loaded on the Provider tab. If the wrong Provider is loaded, use the Access Provider option on the top of the menu to choose your organization's Provider entity.



Within the Referrals function, the system will load by default all referrals sent to (incoming) and sent from (outgoing) the Provider that is loaded. The Referrals page has a number of filters for type (incoming vs. outgoing), status (pending vs. accepted vs. rejected...) plus the ability to search by Referral ID and Client Name.



For standard referral management, the main filters will be to view Incoming, Pending referrals as these are the referrals that a Provider needs to immediately review and take action upon.

1 result found.

Referral ID ▲	Refer to Provider ▲	Refer to Program ▲	Refer from Provider ▲	Client (Head of Household) ▲	Referral Date ▲	Referring Service ▲	Status ▲
Incoming Referrals							
Pending							
330121	HMIS Service Agency		HMIS Service Agency	Johnson, John	12/03/2016	Case Management	Pending

Accept/Reject Referral

Referral Information Form

Accept/Reject Referral option will allow for the Provider to process the referral. The only data element that affects the referral’s status is the Acknowledgement Status field. Providers need to update this status to update the referral (i.e. accepted or rejected), all other fields are optional.

REFERRAL OUTCOME ?

Outcome Information - Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Acknowledgment Status: Pending ▼

Date Acknowledged:

Appointment Date: AM

Result: -- SELECT -- ▼

Updating the status to Accepted will permanently update the client(s) associated to be imported into the current organization. A status of cancelled or rejected will close out any temporary sharing and the client(s) will not be permanently imported into the organization.

Once a referral is accepted/rejected, the following options are available for the record in this screen.

Referral ID ▲	Refer to Provider ▲	Refer to Program ▲	Refer from Provider ▲	Client (Head of Household) ▲	Referral Date ▲	Referrin
Incoming Referrals						
Accepted						
330460	HMIS Service Agency		HMIS Service Agency	Manziel, Johnny	01/23/2017	Emerge
			HMIS Service Agency	Kringle, Kris	01/24/2017	Perman
			HMIS Service Agency	Kringle, Kris	01/24/2017	Perman
			HMIS Service Agency	Kringle, Kris	01/24/2017	Perman

Review Referral

Referral Information Form

Select Client

Also, if a referral is accepted and saved, the referral screen will refresh and a “Start an Enrollment” option will be available at the top of the screen. This allows for an immediate accept and enroll process, if the provider so wishes.

REFERRAL TRANSACTION 

Complete the information below to identify the service and the provider being referred to.



Referral Service/Included Household Members - Please note any additional household members associated with this referral along with the service requested.

Client Name: Manziel, Johnny

Referral Information Form:

This is a new report/form feature that has been added to all referral records, regardless of the referral status, that provides a “referral summary” on the information included. This can be viewed by the Provider for informational purposes, as well as printed out and given to the associated client(s) as a referral receipt to help with the process.

Service Referral Form

Client: Manziel, Johnny

Referral Date: 1/23/2017

Referring Provider

Provider: HMIS Service Agency
Main Address: 1 Elm Street - Harrisburg PA, 17106
Main Telephone: **Website:**
Primary Contact: _____

Referred By: Brian Miller
Service Request: Emergency Shelter Housing

Client Information

Primary Client: Manziel, Johnny
Age: 32 **Gender:** Male

Household Members: No Household Members

Refer To Provider

Provider: HMIS Service Agency

The referral information form not only generates information about the client(s) and referral transaction, but also includes information on the Providers involved in the request.