# HMIS Job Aid

## REFERRALS TO A PROGRAM FROM THE COMMUNITY QUEUE

This section details the most common tasks performed in the REFERRALS when a client is referred to the community queue and then re-assigned to be referred to a program:

- How to View a Client from the Pending tab
- Changing a Referral Status to 'Pending – In Process'
- Enrolling a Client in the Referring Program
- Denying a Referral
- Referrals Tab Overview

Click on SEARCH so that the REFERRALS option appears
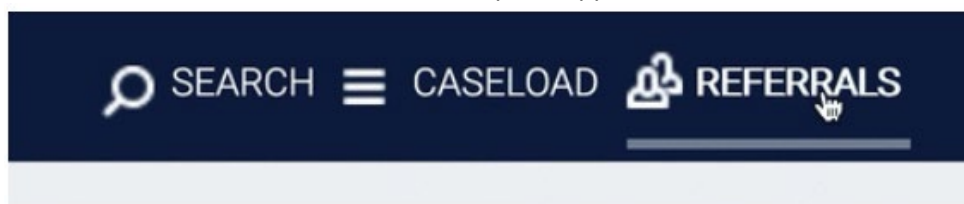

The REFERRALS page appears as this –
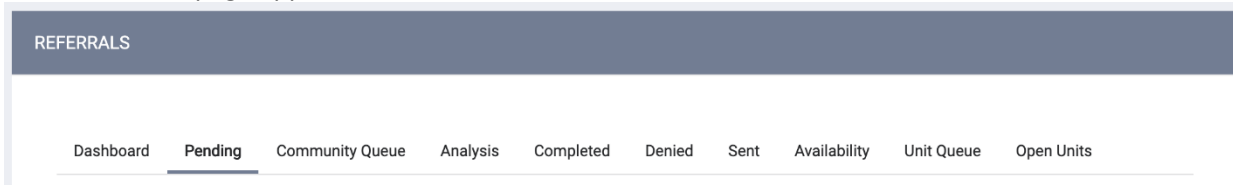
How to View a Client from the Pending tab

When a referral is sent to your agency and you are the person that has been identified to receive the referrals for a project in the system, you will receive an email notification that includes the Unique Identifier ID (UID) of the client that is being referred. Paste the UID in the search box in the Pending tab.

To work with that client in the Pending tab of the Referrals section, hover over the Client Name.

The Edit option will take you to the actual referral, where you can view the referral and any notes, as well as place the person as "Pending - In Process," or deny the referral and send it to the Community Queue tab.

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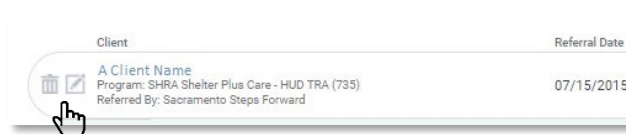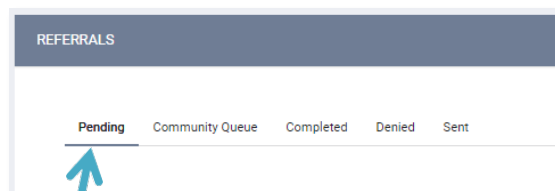
Changing a Referral Status to 'Pending – In Process"

After opening the referral by selecting the Edit ✏️ option, use the drop- down to change the status to "Pending – In Process", then save changes.

Next, scroll down to the 'Notes' section and write a brief note. Select the 'Send Note' button to save it.

Enter a note weekly during the process between your intake appointment and when you enroll the client into your project.

Note: Please do not use the 'Referral Connections' section of the referrals page; it is currently not implemented in the system.

Enrolling a Client in the Referring Program

Next, navigate to the 'PROGRAMS' tab:

1. Select the carrot/down arrow [⌄] next to the applicable available program to expand program details.
2. If the client is part of a group, you will be given the option add group members. Toggle on those group members you wish to include, if applicable.
   Note: If the enrollment is the result of a referral, the toggle will already be on - keep this toggle position to ensure the referral results are properly tracked.

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3. Make sure to keep the toggle "Program Placement a result of Referral provided by [*Name of the Agency*]".

4. Select "Enroll"
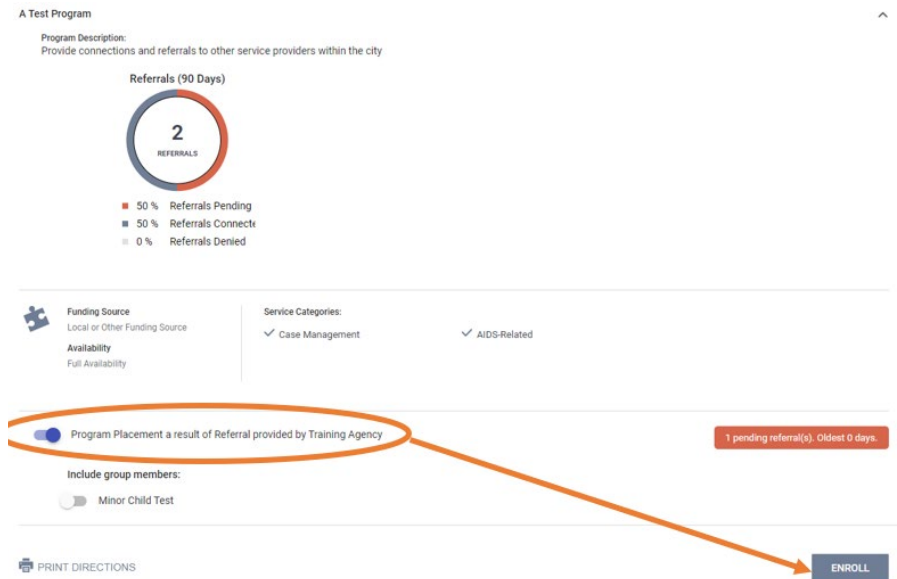
5. Complete ALL fields in the enrollment page for your client and click "Save & Next".

- If any other group members were included in this program, their Enrollment page will automatically come up next until each member has been completed.

6. Continue to click "Save & Next" after completing each group member's Enrollment. Enrolled group members will be listed in the right side bar under "Program Group Members".

Denying a Referral

If you need to deny a referral, including because a client is refusing your services, go into the Pending tab in the referral screen and open the referral by selecting the Edit ✏️ option.

After opening the referral by selecting the Edit ✏️ option, use the drop- down to change the status to "Denied' which will populate additional boxes to appear then click 'SAVE CHANGES'.

- Send to the Community Queue (Note: this will only appear if the client is <u>not</u> already on the Community Queue)
- Denied By Type
- Denied Reason
- Denial Information
- Private

Then, at "**Denied Reason**," select the answer from the drop-down menu that fits best for why your agency is denying the referral.

Write a note in the "**Denied Information**" section to provide additional information as to why the client is being denied. **Do Not Check the "Private" box.**

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When updating a referral's Status to "Denied" or "Expired," you have the option to create a new referral to a Community Queue if the client is <u>not</u> already on the Community Queue. Set the "**Send to Community Queue**" box to '**Yes**'. All denied referrals must be referred back to the Queue in order for them to be referred to another project. Select which Community Queue to send the new referral if there is more than one option from which to choose.

|	
Status	Denied ⌄
Send to Community Queue	-- Select -- ⌄
	-- Select --
	Yes
Denied By Type	No
Denied Reason	Select ⌄
Denial Information	
Private	◯

SAVE CHANGES   CANCEL

Referrals Tab Overview

In addition to the Pending tab, you may also see additional tabs that are available to view data, depending on your access level the additional tabs available to you will vary.

REFERRALS

Dashboard   **Pending**   Community Queue   Analysis   Completed   Denied   Sent   Availability
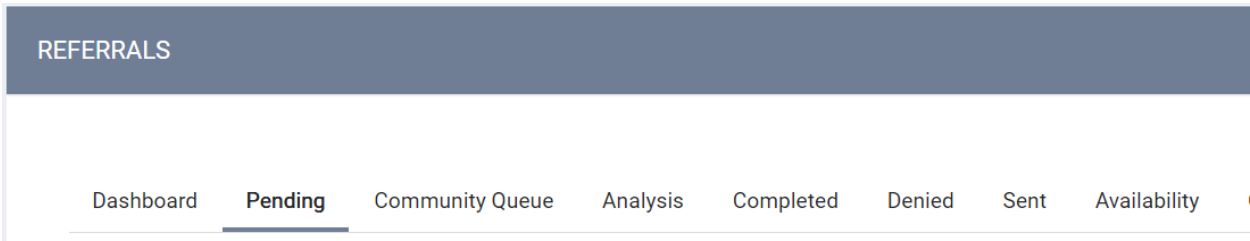
Dashboard: This tab shows specific data analysis dashboard reports configured by system administrators to display in the REFERRALS tab.

Pending: This tab shows when a referral is first sent to a program, this will be the default status (the status can also be manually set). The Pending tab displays all referrals sent to programs at the user's home agency or the agency the user is switched into. This is where agency staff review referrals either directly referred to their agency or re-assigned from the *Community Queue.*

Community Queue: This tab shows the name of every client in the *full* Community Queue and is managed by SSF in Sacramento County and your regional admins in Yolo .
Note: You will never need to work in this tab

Analysis: This tab accesses the *Data Analysis Tool* with filters for sorting the queue.

Completed: This tab shows the name of every client that was referred to you and that you have accepted into your project by completing enrollment in the system.

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Denied: This tab shows the name of every client that was referred to you and that you have denied and expired referrals in the system.
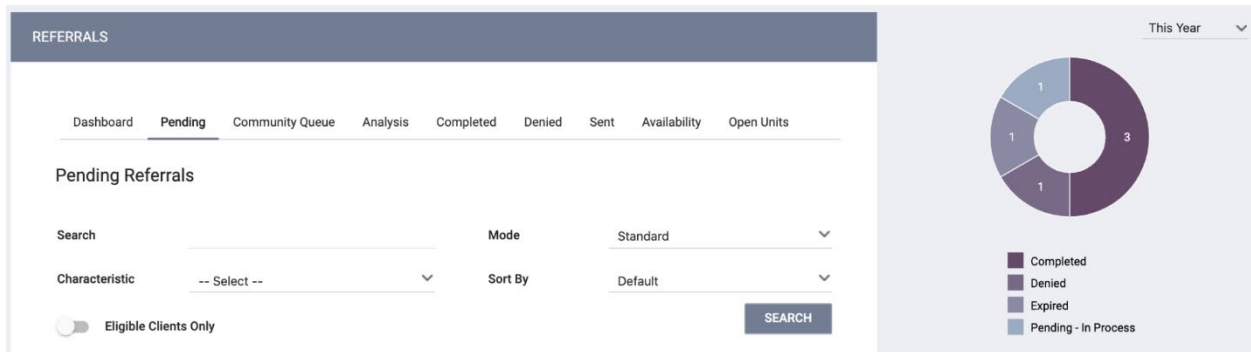
Sent: This tab shows the names of clients that your Agency referred. We *do not* have direct referrals between Agencies at this time and we are only using the Community Queue that is managed by SSF. ***Note: You will never need to work in this tab***

Availability: This allows users to set the availability, also known as "Openings" for programs within their agency.

Pending, Community Queue, Completed, Denied, Sent, and Availability Tabs
These tabs include a visual display corresponding to that tab in a pie graph that is adjustable by date.