Managing Incoming Direct Referrals

Guidance on responding to direct referrals from a client's profile and referral tab flow

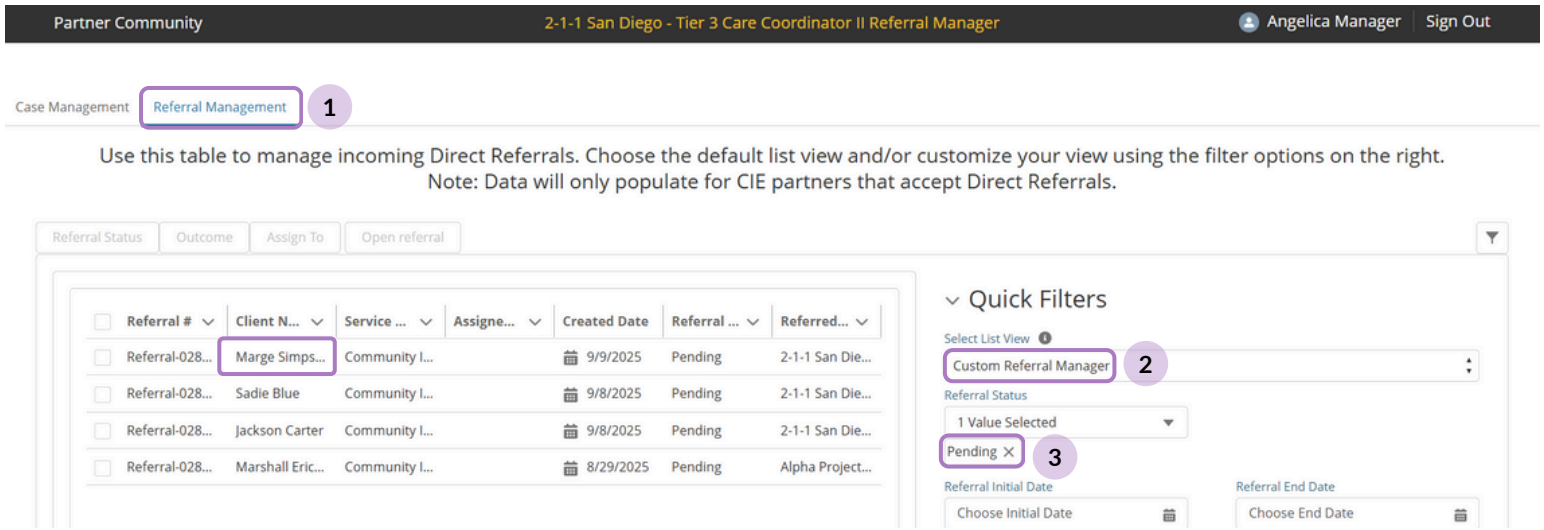
- Login to Partner Community https://211.my.site.com/s/login/

  1 Click into the "**Referral Management**" dashboard view

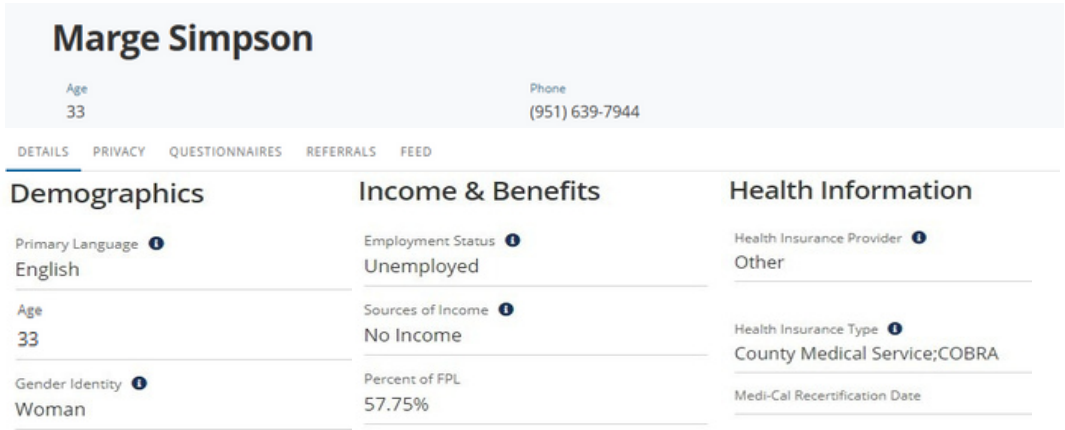
- Go to Quick Filters and make these adjustments:

  2 Select List View: "**Referral Manager**"

  3 Referral Status: "**Pending**"



- From your results: **click on the client's name** to enter and review their profile to determine eligibility



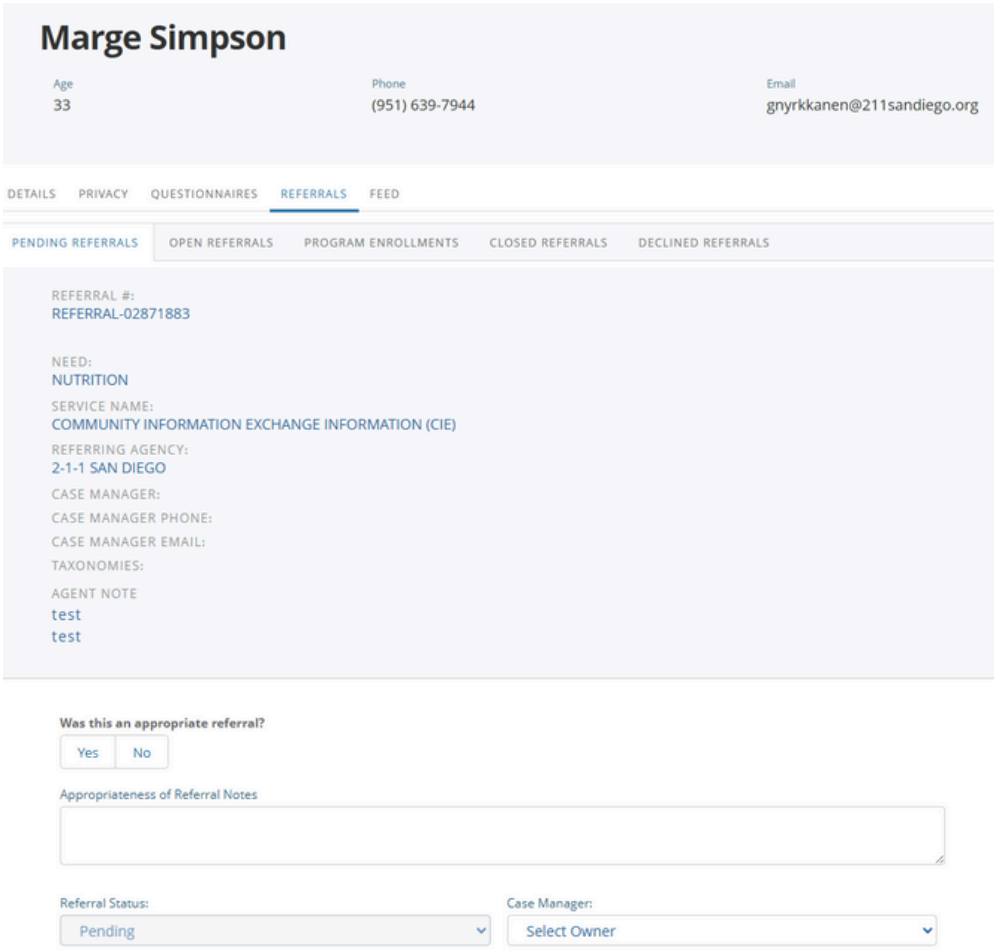
Responding to New Referrals

- Click into the "**Referrals**" tab
- Go to: **Pending Referrals** tab
  - Select "Appropriateness"

- Appropriateness "**Yes**"

  - Appropriateness of Referral Notes (optional)
  - Referral Status: change to "Active"
  - Case Manager: Assign to self or other care coordinator in your team

- Appropriateness "**No**"
  - Appropriateness of Referral Notes (mandatory): this information is helpful for the referral sender to understand why the referral was not appropriateness
  - Referral Status: select either,
    - Declined - Ineligible
    - Declined - Duplicate



Completing Open Referrals

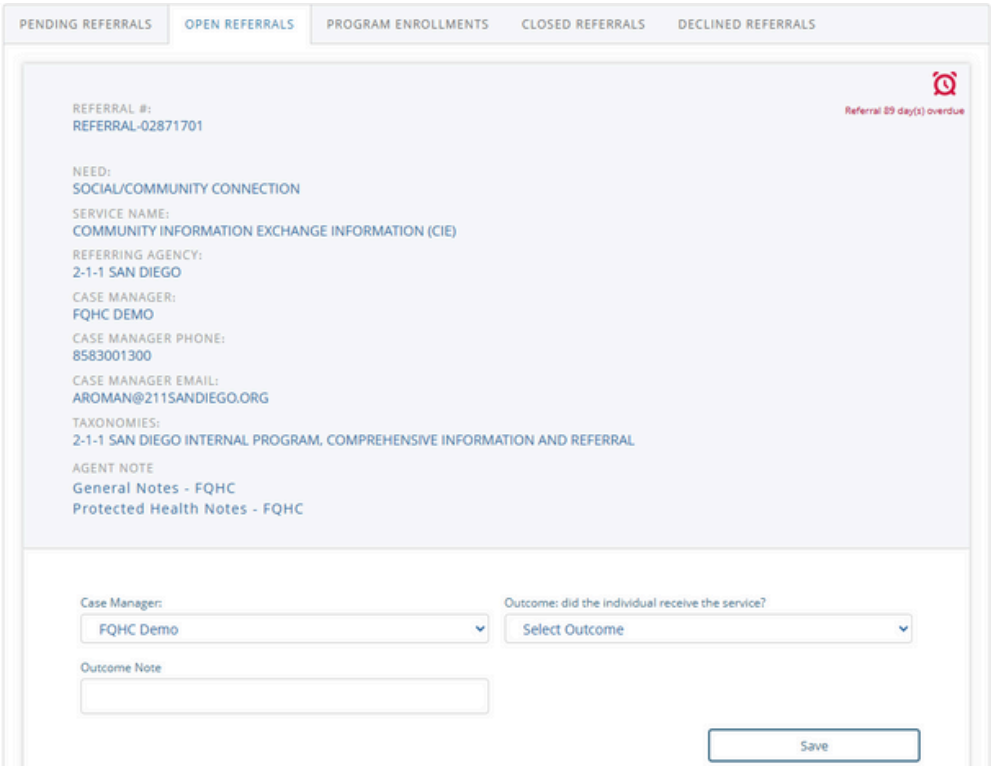
- Click into the "**Referrals**" tab
- Go to: **Open Referrals** tab

  - Case Manager: (only change this field if the case was reassigned to someone else in your team)

  - Outcome: did the individual receive the service?
    - Open this drop-down list to select either:
      - On Waitlist
      - Legal Privilege

      - Receiving/Received Services
        - Option to add self to "Care Team"
        - Option to Create Program Enrollment

      - Did not Receive Services
        - Will require to add "Reason Client was not connected" from a drop-down list



Created by: Angelica Esparza Bañuelos

Managing Incoming Direct Referrals

Guidance on responding to direct referrals from your Referral Management dashboard

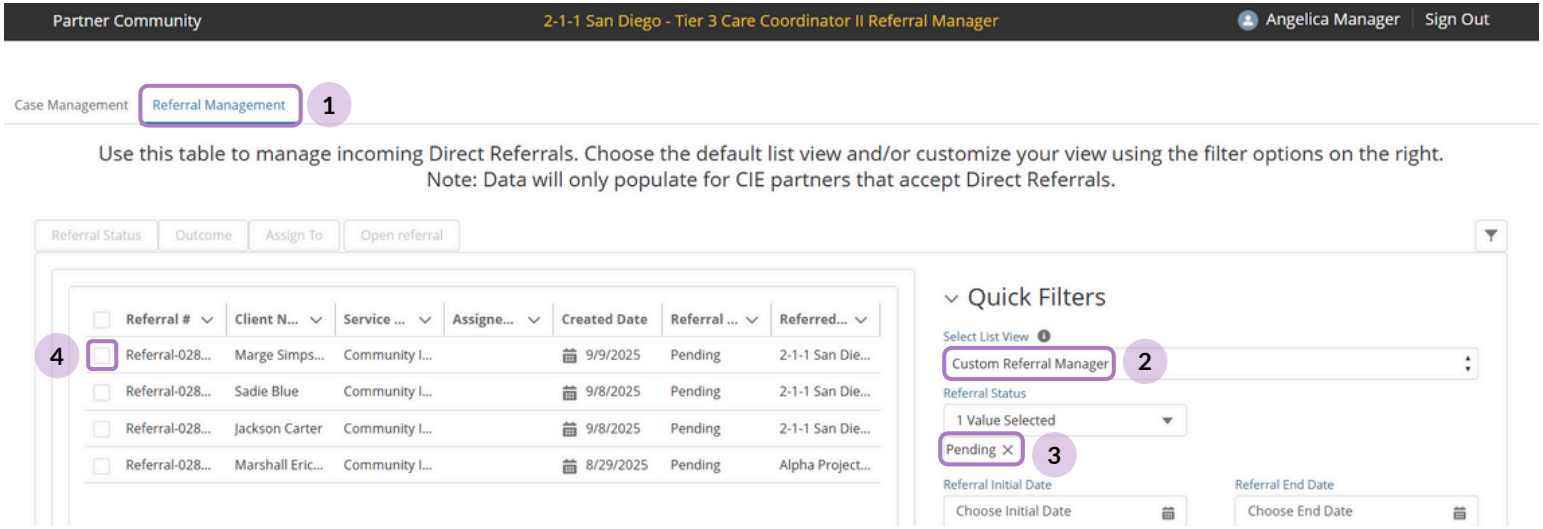
Responding to New Referrals

- Login to Partner Community https://211.my.site.com/s/login/

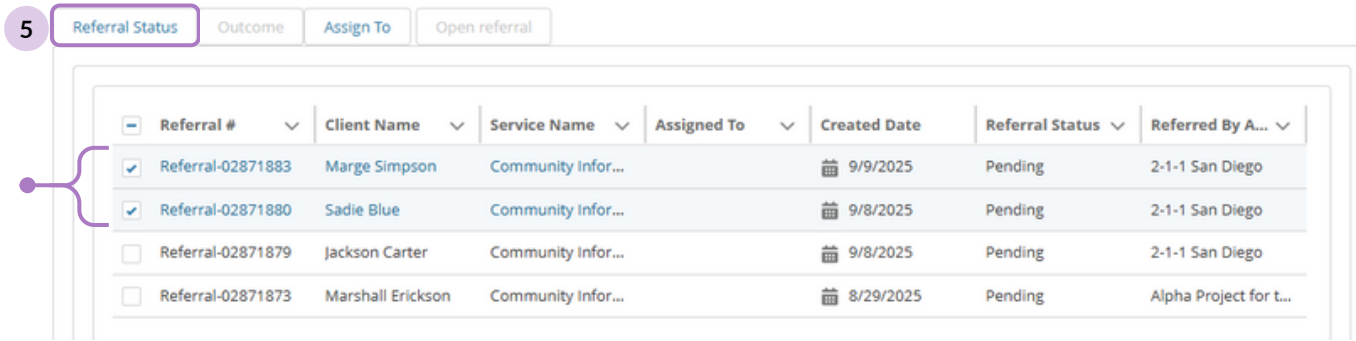
1. Click into the "**Referral Management**" dashboard view

- Go to Quick Filters and make these adjustments:

2. Select List View: "**Referral Manager**"
3. Referral Status: "**Pending**"
4. From your results: **click on the check box to the left of the client's name.**

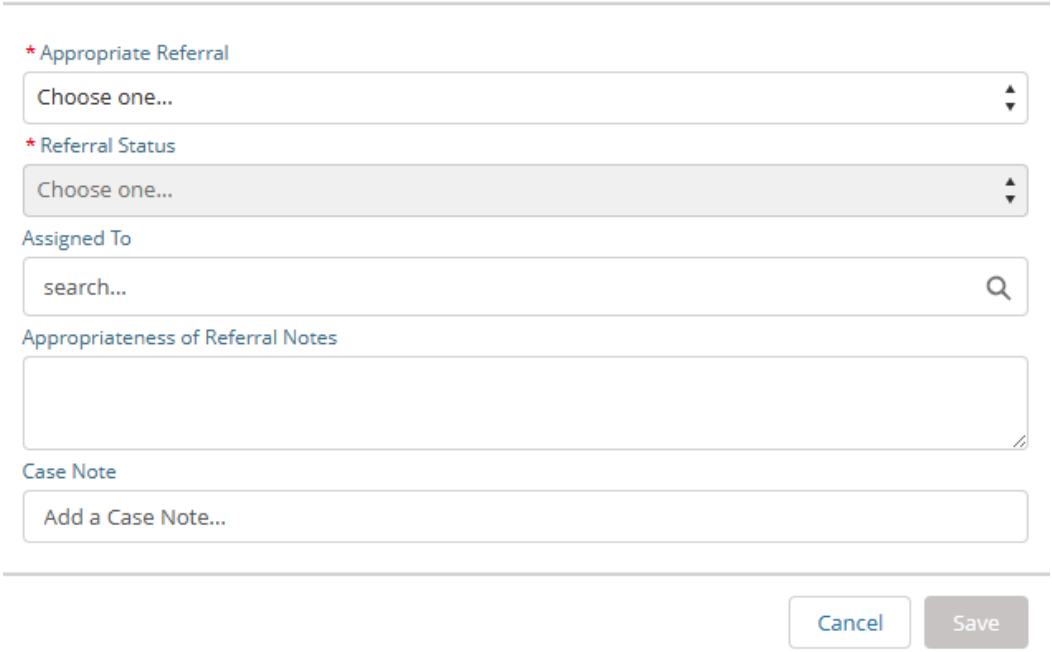


- You can select one record or multiple records to bulk update the referral statuses



5. Click "Referral Status" tab to launch the referral flow

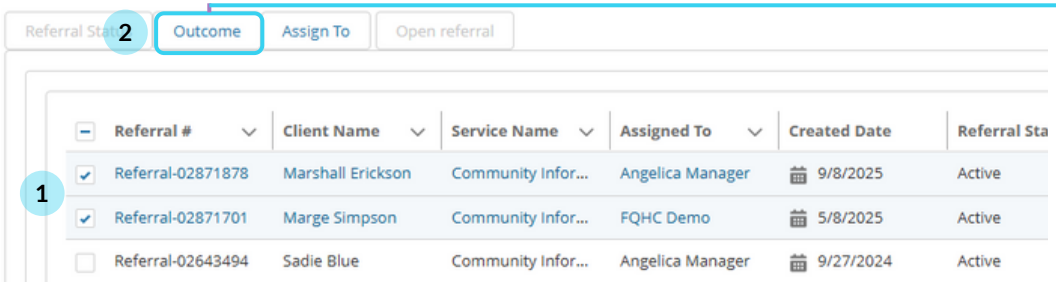
Note: only select multiple records if each referral has the same changes ex: all being assigned to a care coordinator, or all have been evaluated for eligibility and can be sent into an active status

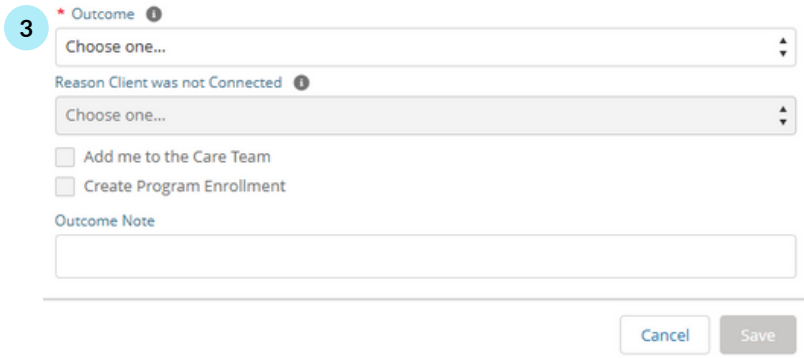


Complete the following fields:

- Select “Appropriateness”
  - Appropriateness “**Yes**”
    - Appropriateness of Referral Notes (optional)
    - Referral Status: change to “Active”
    - Case Manager: Assign to self or other care coordinator in your team
  - Appropriateness “**No**”
    - Appropriateness of Referral Notes (mandatory): this information is helpful for the referral sender to understand why the referral was not appropriateness
    - Referral Status: select either,
      - Declined - Ineligible
      - Declined - Duplicate

Completing Open Referrals





For Active Referrals you wish to update:

1. Select the record(s) you have outcomes for
2. Click the “Outcome” button to launch the outcome flow
3. Complete the required fields (will vary based on the outcome selected)