

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”

Partner Community 2-1-1 San Diego - Tier 3 Care Coordinator II Referral Manager Angelica Manager Sign Out

Case Management **Referral Management** 1

Use this table to manage incoming Direct Referrals. Choose the default list view and/or customize your view using the filter options on the right.
Note: Data will only populate for CIE partners that accept Direct Referrals.

Referral #	Client N...	Service ...	Assigne...	Created Date	Referral ...	Referred...
<input type="checkbox"/> Referral-028...	Marge Simps...	Community I...		9/9/2025	Pending	2-1-1 San Die...
<input type="checkbox"/> Referral-028...	Sadie Blue	Community I...		9/8/2025	Pending	2-1-1 San Die...
<input type="checkbox"/> Referral-028...	Jackson Carter	Community I...		9/8/2025	Pending	2-1-1 San Die...
<input type="checkbox"/> Referral-028...	Marshall Eric...	Community I...		8/29/2025	Pending	Alpha Project...

Quick Filters

Select List View 1
Custom Referral Manager 2

Referral Status
1 Value Selected
Pending X 3

Referral Initial Date
Choose Initial Date

Referral End Date
Choose End Date

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

Marge Simpson

Age 33 Phone (951) 639-7944

DETAILS PRIVACY QUESTIONNAIRES REFERRALS FEED

Demographics	Income & Benefits	Health Information
Primary Language 1 English	Employment Status 1 Unemployed	Health Insurance Provider 1 Other
Age 33	Sources of Income 1 No Income	Health Insurance Type 1 County Medical Service;COBRA
Gender Identity 1 Woman	Percent of FPL 57.75%	Medi-Cal Recertification Date

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

Marge Simpson

Age: 33 | Phone: (951) 639-7944 | Email: gnyrkkanen@211sandiego.org

DETAILS | PRIVACY | QUESTIONNAIRES | **REFERRALS** | FEED

PENDING REFERRALS | OPEN REFERRALS | PROGRAM ENROLLMENTS | CLOSED REFERRALS | DECLINED REFERRALS

REFERRAL #: REFERRAL-02871883

NEED: NUTRITION

SERVICE NAME: COMMUNITY INFORMATION EXCHANGE INFORMATION (CIE)

REFERRING AGENCY: 2-1-1 SAN DIEGO

CASE MANAGER:

CASE MANAGER PHONE:

CASE MANAGER EMAIL:

TAXONOMIES:

AGENT NOTE
test
test

Was this an appropriate referral?

Appropriateness of Referral Notes

Referral Status: Pending | Case Manager: Select Owner

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

PENDING REFERRALS | **OPEN REFERRALS** | PROGRAM ENROLLMENTS | CLOSED REFERRALS | DECLINED REFERRALS

REFERRAL #: REFERRAL-02871701

NEED: SOCIAL/COMMUNITY CONNECTION

SERVICE NAME: COMMUNITY INFORMATION EXCHANGE INFORMATION (CIE)

REFERRING AGENCY: 2-1-1 SAN DIEGO

CASE MANAGER: FQHC DEMO

CASE MANAGER PHONE: 8583001300

CASE MANAGER EMAIL: AROMAN@211SANDIEGO.ORG

TAXONOMIES: 2-1-1 SAN DIEGO INTERNAL PROGRAM, COMPREHENSIVE INFORMATION AND REFERRAL

AGENT NOTE
General Notes - FQHC
Protected Health Notes - FQHC

Case Manager: FQHC Demo | Outcome: did the individual receive the service? Select Outcome

Outcome Note

Save

Managing Incoming Direct Referrals

Guidance on responding to direct referrals from your Referral Management dashboard

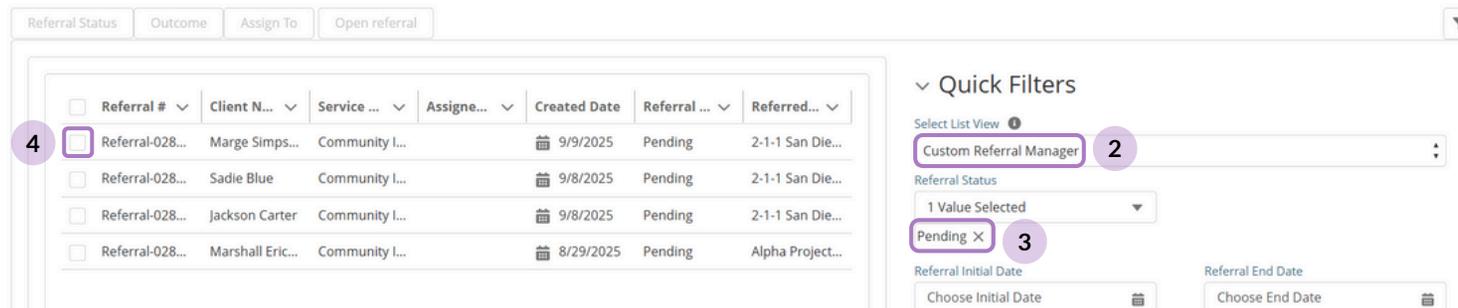
Responding to New Referrals

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 - 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.

Partner Community 2-1-1 San Diego - Tier 3 Care Coordinator II Referral Manager Angelica Manager Sign Out

Case Management Referral Management 1

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Referral Status Outcome Assign To Open referral

Referral #	Client N...	Service ...	Assigne...	Created Date	Referral ...	Referred...
<input type="checkbox"/>	Referral-028...	Marge Simps...	Community I...	9/9/2025	Pending	2-1-1 San Die...
<input type="checkbox"/>	Referral-028...	Sadie Blue	Community I...	9/8/2025	Pending	2-1-1 San Die...
<input type="checkbox"/>	Referral-028...	Jackson Carter	Community I...	9/8/2025	Pending	2-1-1 San Die...
<input type="checkbox"/>	Referral-028...	Marshall Eric...	Community I...	8/29/2025	Pending	Alpha Project...

Quick Filters

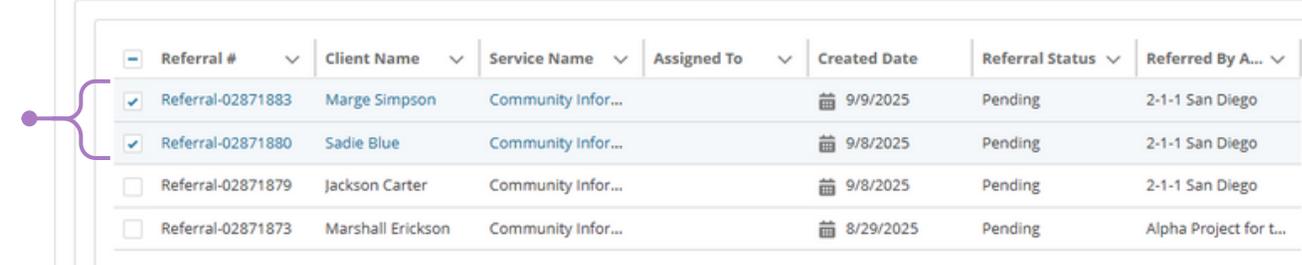
Select List View
Custom Referral Manager 2

Referral Status
1 Value Selected
Pending X 3

Referral Initial Date
Choose Initial Date

Referral End Date
Choose End Date

5 Referral Status Outcome Assign To Open referral



Referral #	Client Name	Service Name	Assigned To	Created Date	Referral Status	Referred By A...
<input checked="" type="checkbox"/>	Referral-02871883	Marge Simpson	Community Infor...	9/9/2025	Pending	2-1-1 San Diego
<input checked="" type="checkbox"/>	Referral-02871880	Sadie Blue	Community Infor...	9/8/2025	Pending	2-1-1 San Diego
<input type="checkbox"/>	Referral-02871879	Jackson Carter	Community Infor...	9/8/2025	Pending	2-1-1 San Diego
<input type="checkbox"/>	Referral-02871873	Marshall Erickson	Community Infor...	8/29/2025	Pending	Alpha Project for t...

- 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

* Appropriate Referral
Choose one...

* Referral Status
Choose one...

Assigned To
search...

Appropriateness of Referral Notes

Case Note
Add a Case Note...

Cancel Save

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

Referral Status 2 Outcome Assign To Open referral

Referral #	Client Name	Service Name	Assigned To	Created Date	Referral Sta
<input checked="" type="checkbox"/> Referral-02871878	Marshall Erickson	Community Infor...	Angelica Manager	9/8/2025	Active
<input checked="" type="checkbox"/> Referral-02871701	Marge Simpson	Community Infor...	FQHC Demo	5/8/2025	Active
<input type="checkbox"/> Referral-02643494	Sadie Blue	Community Infor...	Angelica Manager	9/27/2024	Active

3 * Outcome ⓘ

Choose one...

Reason Client was not Connected ⓘ

Choose one...

Add me to the Care Team

Create Program Enrollment

Outcome Note

Cancel Save

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)