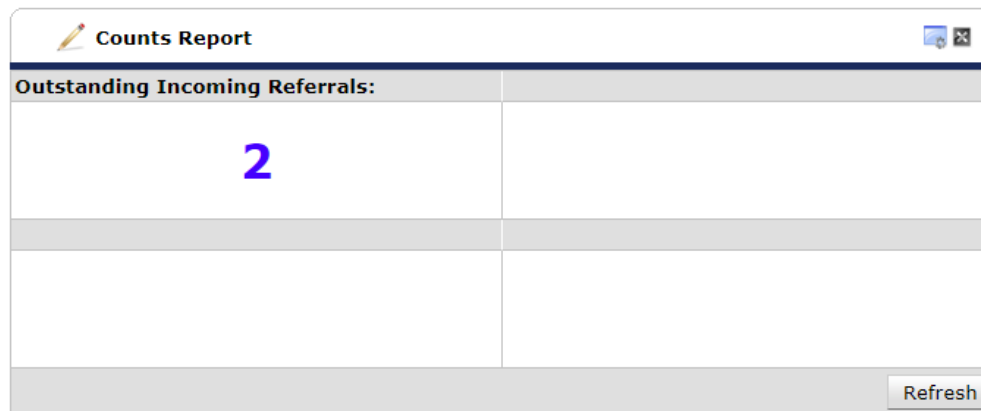
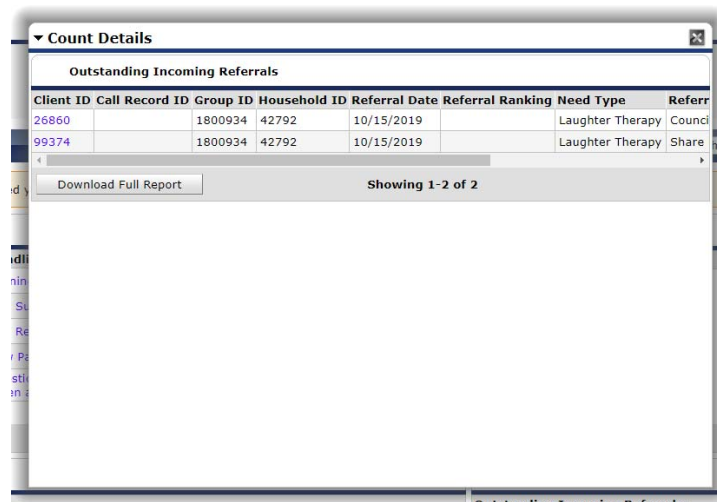


Accepting a Referral

There are two primary ways you can be notified of a referral: the referring agency alerts you outside of HMIS (usually through an email or a phone call), or you have a dashboard report that shows a count of how many open referrals you have. If you have a dashboard report, you will see something like this when you log in. If you don't have a dashboard report and want one, your HMIS team can set it up. Click on the blue number to view your referrals.




A pop-up window will appear with basic information about your pending referrals. Click on a blue client number to view and respond to the associated referral. This will take you straight to the client's summary page.



From this point, the process is the same whether you are notified of income referrals outside of HMIS or via a dashboard report.



Scroll down to the “Outstanding Incoming Referrals” dashlet on the Client Summary page and click the edit pencil for your outstanding referral. The location of this dashlet on your Client Summary page can be changed. If you do not see this dashlet, you can also open the referral by going to Service Transactions, clicking View Entire Service History, and clicking the edit pencil on the referral to your provider. If you want the dashlet added, let the HMIS team know.

Outstanding Incoming Referrals		
Referral Date	Referring Provider	Need Type
 10/15/2019	Council for the Homeless	Laughter Therapy
<input type="button" value="Add Referral"/>		Showing 1-1 of 1

Scroll down to the section labelled “Referral Data” and select the outcome from the dropdown. If you select Declined or Cancelled, a second dropdown will appear asking for the reason. The follow up information can be left blank if you are not currently using the case plan features of HMIS.

Referral Data [Send Summary](#)



Referred-To Provider: Share House (1535)

Needs Referral Date*: 10 / 15 / 2019    4 : 27 : 22 PM

Referral Ranking: -Select-



Referral Outcome: Accepted

Follow Up Information

Projected Follow Up Date: / /   

Follow Up User: Share House (1535)

Follow Up Made: -Select-

Completed Follow Up Date: / /   

Change the need status to Closed and select either Fully Met or Not Met as the outcome, depending on whether you were able to accept the referral. If the outcome is Not Met, you will again select the most appropriate reason the referral was declined. If you are providing a service at time of referral acceptance, you can do so here, but it is not required.


Need Status and Outcome

Need Status*: Closed

Outcome of Need: Fully Met

If Need is Not Met, Reason: -Select-

Service Information

 A Service has not yet been provided for this Referral.

Click Save & Exit. You have acknowledged a referral, and it will disappear from your dashboard tracker!