Updating the Status of a Referral

Overview

A referral's *Status* impacts where it displays in the [Global REFERRALS tab](#).
The *Status* communicates if a program accepted a referral, if the client is in the enrollment process, or if the referral expired.

Note: *You cannot update a [Community Queue](#) referral's Status until it is reassigned to a program. A Community Queue referral's Status can, however, automatically change to "Expired" if it meets the [Inactive Referral Expiration Threshold](#).*

Five referral statuses correspond with the Global *Referrals t*abs: [Pending](#), [Pending - In Process](#), [Denied](#), [Expired](#), and [Completed](#).

Updating a Referral's Status

Note: *You can only edit the Status field from the Global REFERRALS tab's Pending, Sent, and Denied tabs. You cannot edit the Status field from the client record.*

To update a referral's Status, click *REFERRALS*.
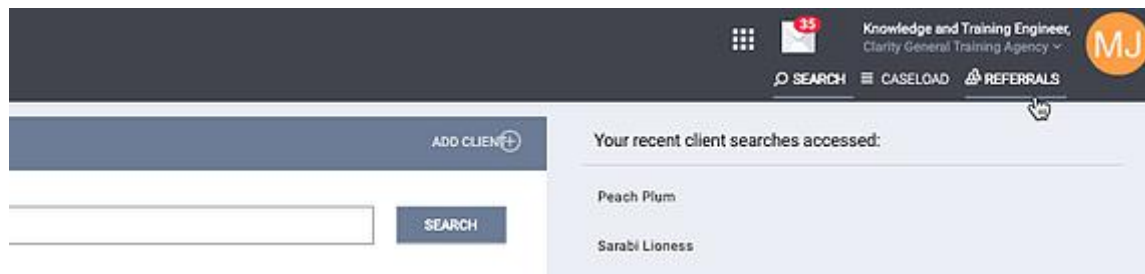
Locate the referral you would like to update and click the edit icon.

REFERRALS

Dashboard	Pending	Community Queue	Analysis	Completed	Denied	Sent	Availability	Open Units

Pending Referrals

Search			Mode	Standard	⌄
Characteristic	-- Select --	⌄	Sort By	Default	⌄

Eligible Clients Only

SEARCH

| Client	Referral Date	Qualified	Days Pending
Thumper Rabbit Program: Demo 1-2 Referred by: System	12/13/2019	No	75 total 75 pending
Edit			
Brown Program: Demo 1-2	12/13/2019	No	75 total 75 pending

The REFERRAL: EDIT page appears.

REFERRAL: EDIT

Client	Ted Flanders
Referred Unit	A
Referred Program	Sample Program
Referred to Agency	Test Agency
Referring Agency	[TRAINING] System
Referred Date	08/02/2021 10:45 AM
Days Pending	69 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	90
Referred by Staff	Admin Admin
Case Manager	Select ⌄
Last Activity	08/02/2021 CHECK-IN
Status	Pending ⌄
Private	⬤

SAVE CHANGES   CANCEL

Note: *The Referred Unit line shown above only appears when there is a Unit referral.*

Scroll down to the *Status* field.
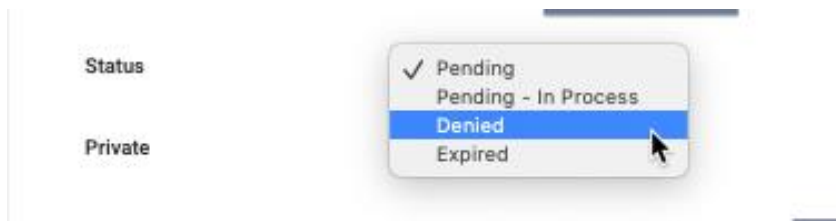
Updating from the Pending Tab

A pending referral's Status can be updated to "Pending - In Process," "Denied," or "Expired."

If you select "Denied" or "Expired," the system displays additional fields.


- •Denied by Type: This allows you to indicate if a program denied the referral ("Provider") or if the client declined services ("Client"). If the referral status is "Expired," this field defaults to "Provider;" however, you can choose another selection if applicable.
- •Denied Reason: the reason the program denied the referral. This field is required. If the referral status is "Expired," this field defaults to "Referral time expired;" however, you can choose another selection if applicable.
- •Denial Information: a text box to record a note about the reason the program denied the referral. This field is required.

Note: *When you save a denied referral with Send to Community Queue answered "Yes," the system generates a new referral. The old referral appears in the Denied tab.*

Updating from the Sent Tab

Suppose the client declines services or the referral was not appropriate. As long as the sent referral is not currently on a *Community Queue* or did not auto-generate a new referral to a queue, you can update the Status of the referral to move it from the *Sent* tab to the appropriate tab.
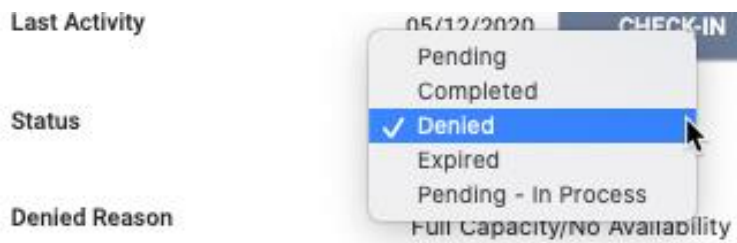
Updating from the Denied Tab

If a referral was denied or expired in error, you can update the Status to move the referral from the Denied tab to the appropriate tab.

Updating a Completed Referral's Status

You can only update a referral with a "Completed" status from the *Sent tab*.

If a user deletes the enrollment connection from a referral in the *Completed tab*, the system automatically sets the referral status to "Pending."

Sending a Referral to a Community Queue when Updating the Status to "Denied" or "Expired"

When updating a referral's Status to "Denied" or "Expired," you may have the option to create a new referral to a *Community Queue*, depending on the system *Display Option to "Send to Queue" at Denial or Expiration* setting.

If the referral was initially made to a *Community Queue*, indicating "Yes" to *Send to Queue* creates a new referral to the *Community Queue* that the original referral came from. If the referral was a direct referral, you'll select which *Community Queue* to send the new referral to (if the system has *Multiple Community Queues*, there is more than one option from which to choose). Selecting "No" does not create a new referral to

a *Community Queue*. Regardless of your selection, the original referral appears in the *Denied tab*.

Automatic Status Updates

Two settings cause the system to automatically update a referral's Status: *Inactive Referral Expiration Threshold* and *Community Referral Threshold*.

Inactive Referral Expiration Threshold

When a system administrator enables *Inactive Referral Expiration Threshold* in *Referral Settings,* the system automatically changes the Status of a *Community Queue* referral to "Expired" and the *Denied by Type* field to "Provider" once the defined time period passes.

Community Referral Threshold

When a system administrator enables *Community Referral Threshold* in *Referral Settings,* the system automatically changes the Status of a pending referral to "Expired" once the defined time period passes.