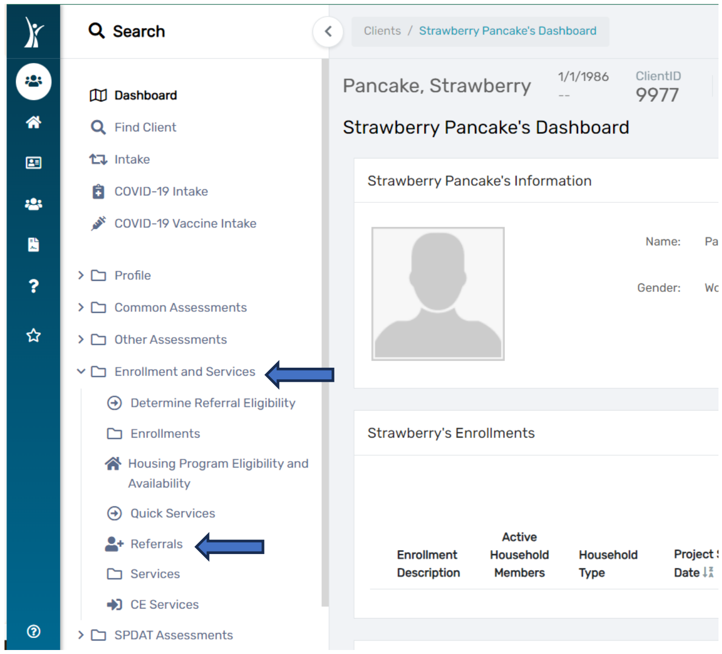
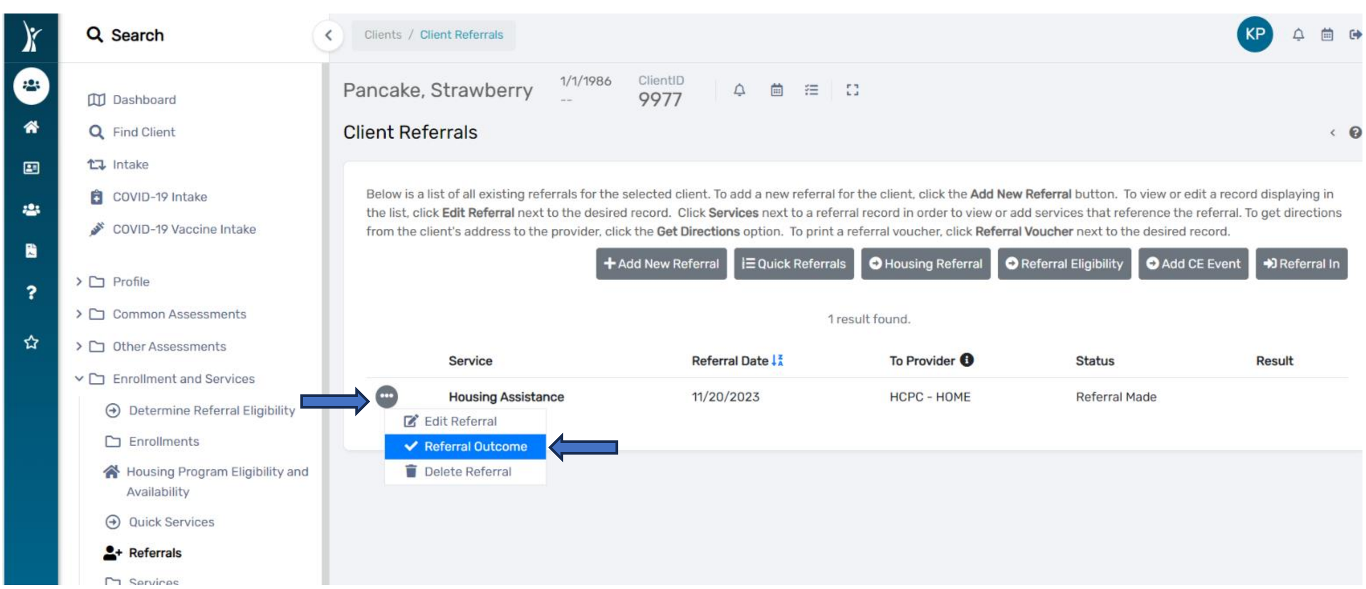
Accepting/Declining ClientTrack Referrals SOP

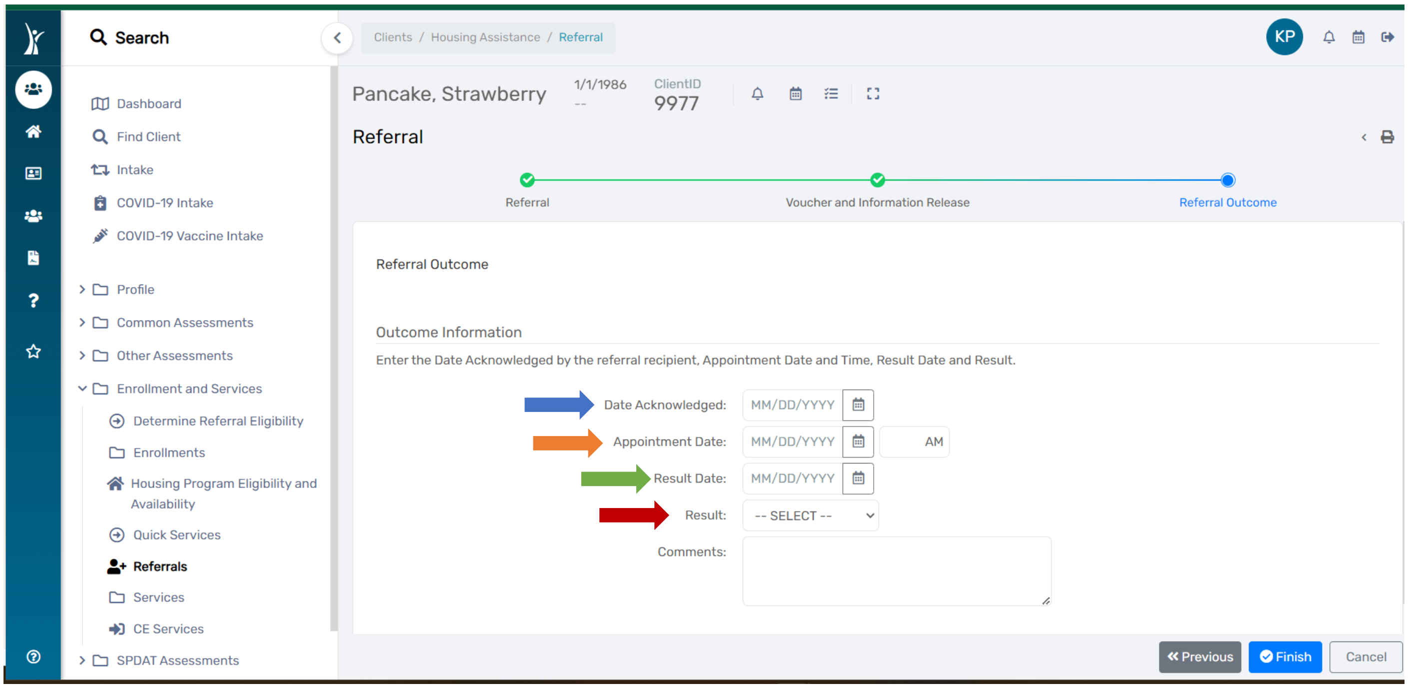
First, navigate to the client's Dashboard. Next, select "Enrollment and Services" and then "Referrals".



On the client referrals page, you can view the client's newest referral and the project they are referred to. Continue to click the 3 dots next to the referral and select "Referral Outcome".



The Referral Outcome page will display. It is *best practice* to complete this form as the referral intake progresses. Please continue to fill out "**Date Acknowledged**" once you have initiated contact with the client. Continue to update the "**Appointment Date**" once appointment is set. Continue to update "**Result Date**" once it is decided if the referral is accepted or declined. When you enter a result date, please continue to enter a "Result".



For Result options, we will only be using "**Service Provided**" for accepted and "**Rejected**" for declined. If Service Provided is selected, please add "Accepted" into the comment box. If "Rejected" is selected, please add the decline reason into the comment box.