

Accepting/Declining ClientTrack Referrals SOP

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

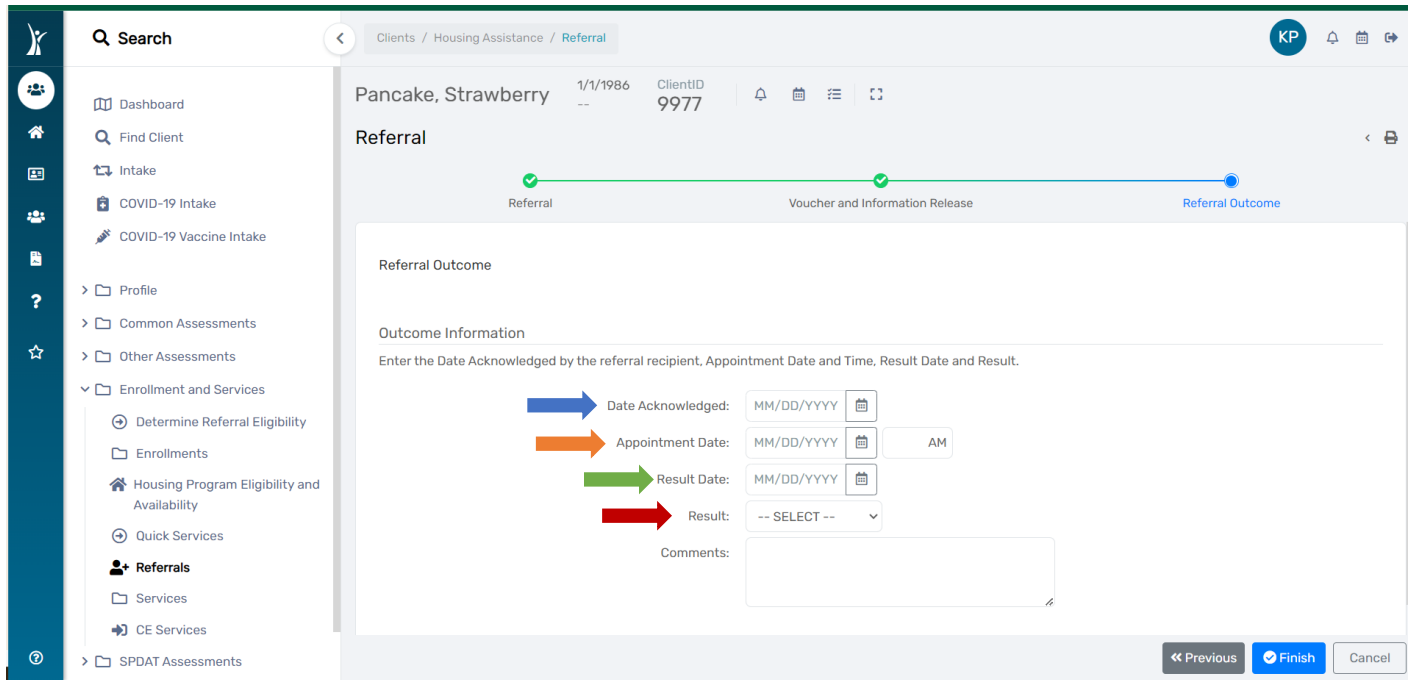
The screenshot shows the ClientTrack interface for a client named Strawberry Pancake. The left sidebar contains a navigation menu with the following items: Dashboard, Find Client, Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Profile, Common Assessments, Other Assessments, Enrollment and Services (highlighted with a blue arrow), Determine Referral Eligibility, Enrollments, Housing Program Eligibility and Availability, Quick Services, Referrals (highlighted with a blue arrow), Services, CE Services, and SPDAT Assessments. The main content area displays the client's name, birth date (1/1/1986), and ClientID (9977). Below this is a section for 'Strawberry's Enrollments' with a table header: Enrollment Description, Active Household Members, Household Type, and Project Date.

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 screenshot shows the ClientTrack interface for the 'Client Referrals' page for Strawberry Pancake. The left sidebar is the same as in the previous screenshot, with 'Referrals' highlighted. The main content area shows the client's name, birth date, and ClientID. Below this is a section for 'Client Referrals' with a list of existing referrals. A table shows one referral for 'Housing Assistance' on 11/20/2023, with a status of 'Referral Made'. A dropdown menu is open for this referral, showing options: Edit Referral, Referral Outcome (highlighted with a blue arrow), and Delete Referral. The 'Referrals' item in the sidebar is also highlighted with a blue arrow.

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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.

