Accepting Referrals, Linking Consents, & Accepting the Initial Authorization

Reviewing the Referral

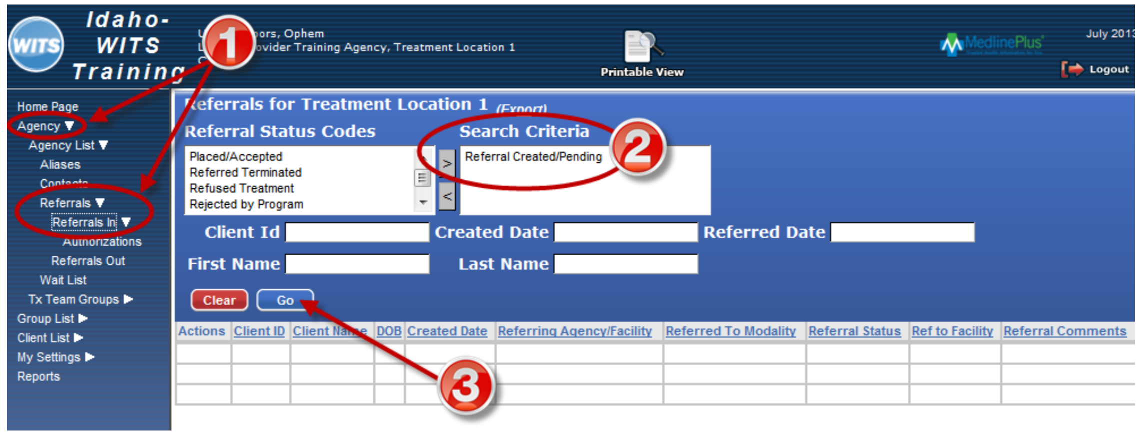
Only designated staff should accept Referrals and Authorizations from other agencies.

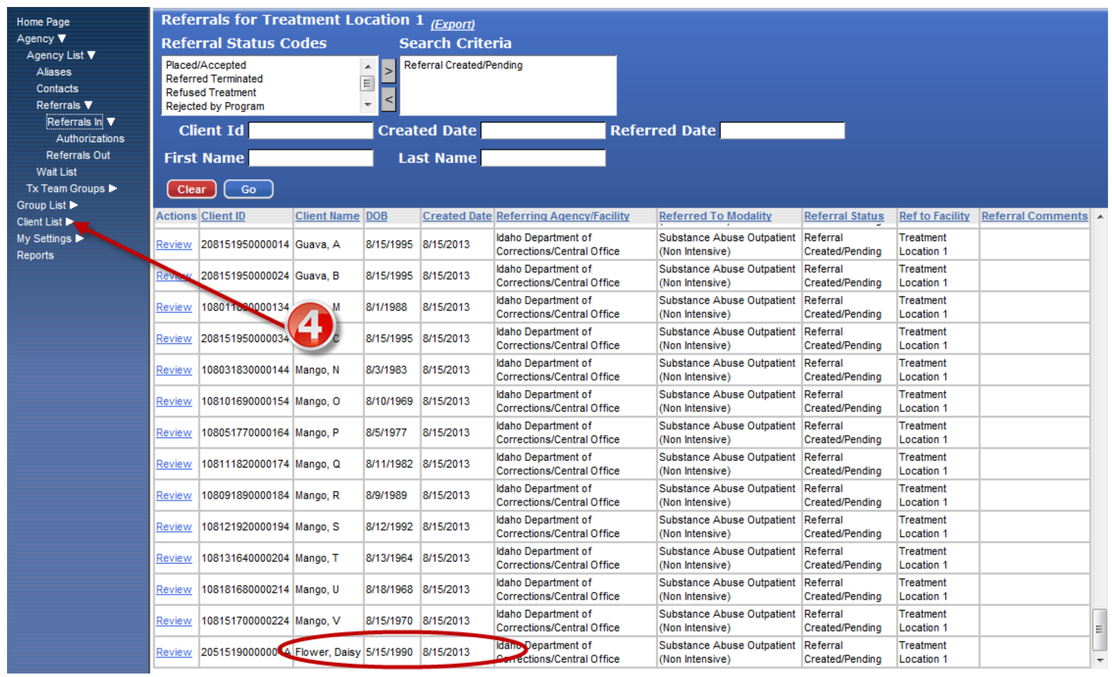
1. **Getting here:** Login, select **Facility 1**, select **Agency**, **Referrals**, and **Referrals In** on the left menu.

2. Move the Referral Status Code of **Referral Created/Pending** to the Search Criteria box.

3. The list of Pending Referrals displays.

4. **Verify the client does not already exist in your agency**. Click **Client List**.





Searching for the Client and Linking the Consent

5. **Enter the search criteria** for the client in your agency. The example uses the first three letters of the client last name with an asterisk.

6. Click **Go**. Using the asterisk in the Last name field will display all clients with the last name starting with the letters of flo.

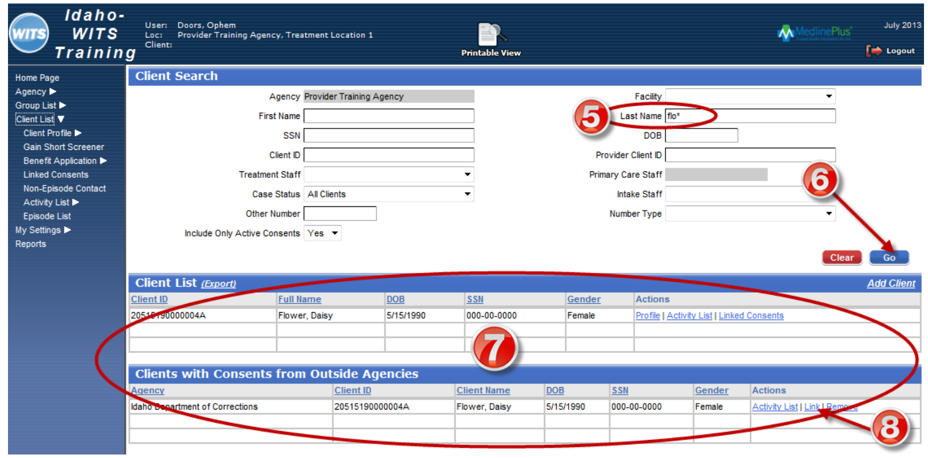
7. Clients in your agency will display in the Client List section of the screen. Clients with consents from another agency will display in the Clients with Consents from Outside Agencies section of the screen. **Verify the clients are the same**.

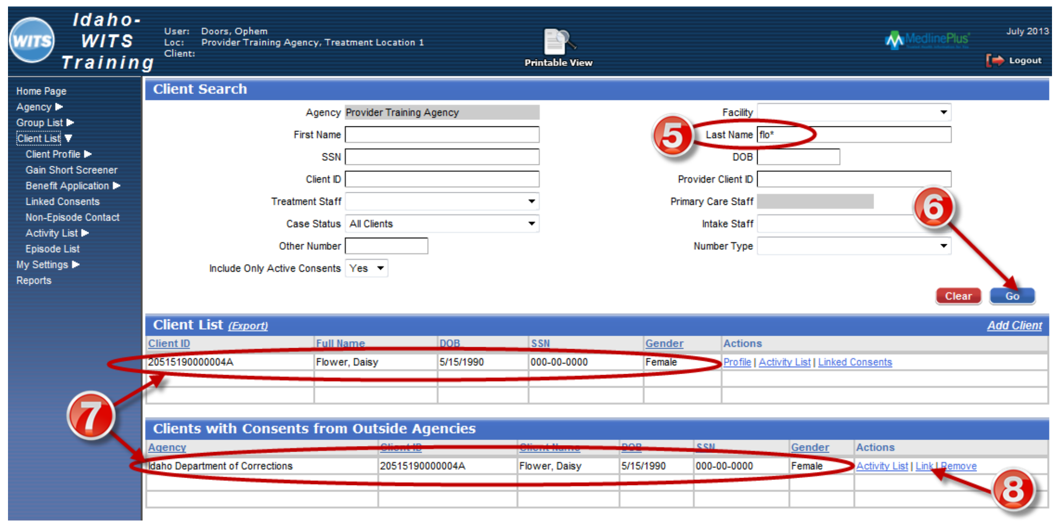
8. Click **Link**.

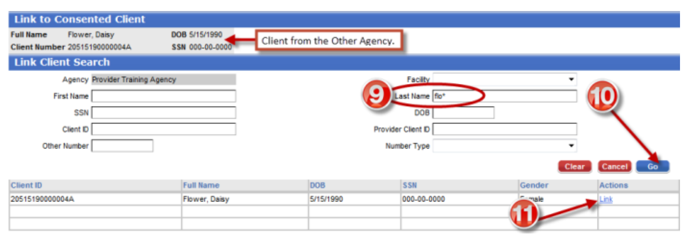
9. **Enter the search criteria** for the client in your agency.

10. Click **Go**.

11. Click **Link**.

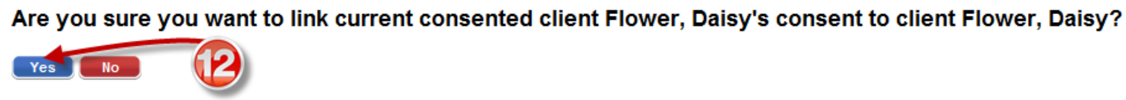


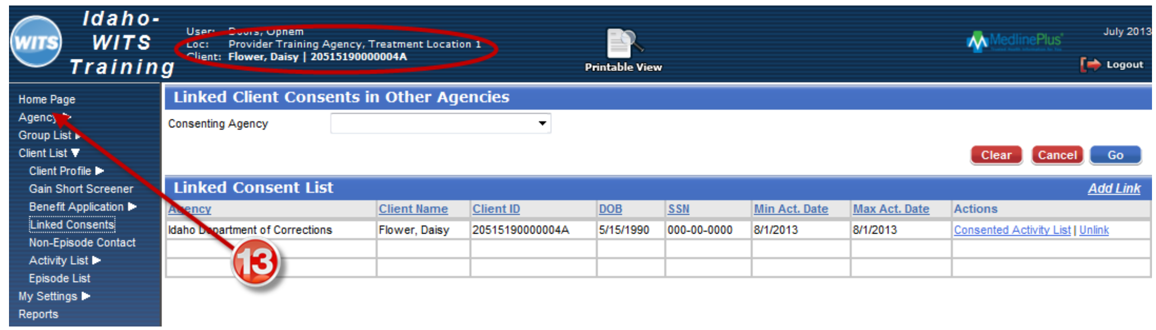




12. Click **Yes**.

13. The consented information from the outside agency is linked to the existing client in your agency. Click **Agency** on the left menu to accept the Referral.





Accepting the Referral

14. Select **Referrals** and **Referrals In** on the left menu.

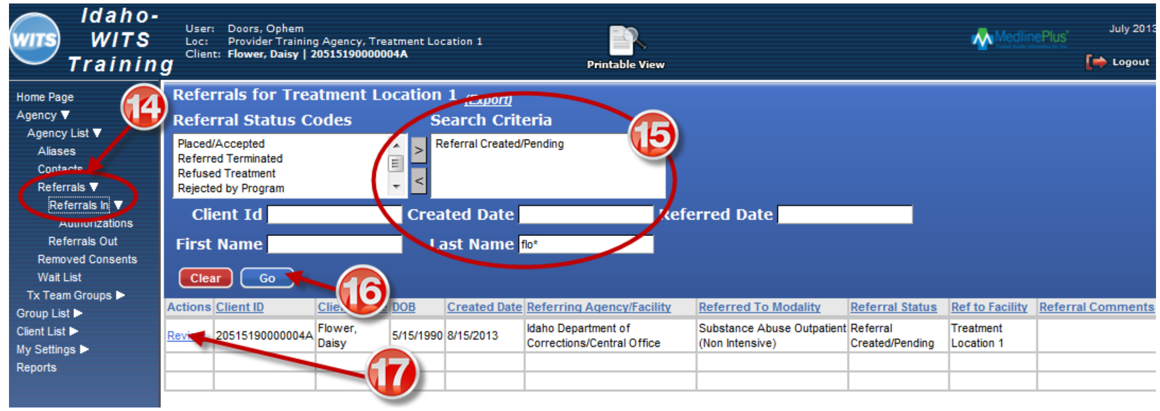
15. Move the Referral Status Code of **Referral Created/Pending** to the Search Criteria box and enter any additional search criteria.

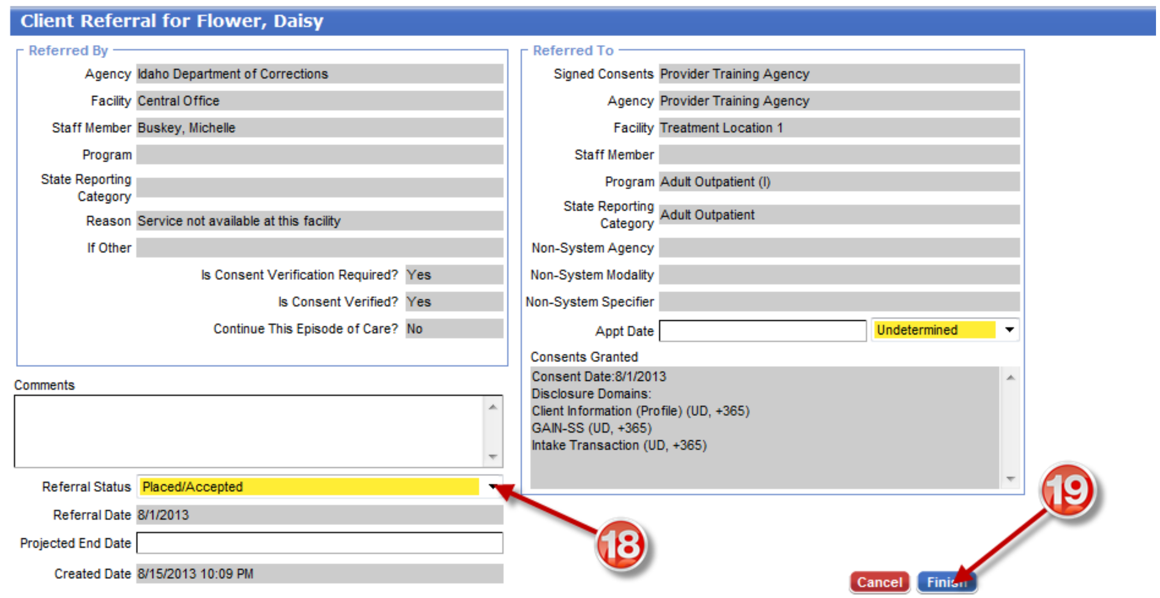
16. Click **Go**.

17. Click **Review** for the selected Referral.

18. Select **Placed/Accepted** as the Referral Status.

19. Click **Finish**.

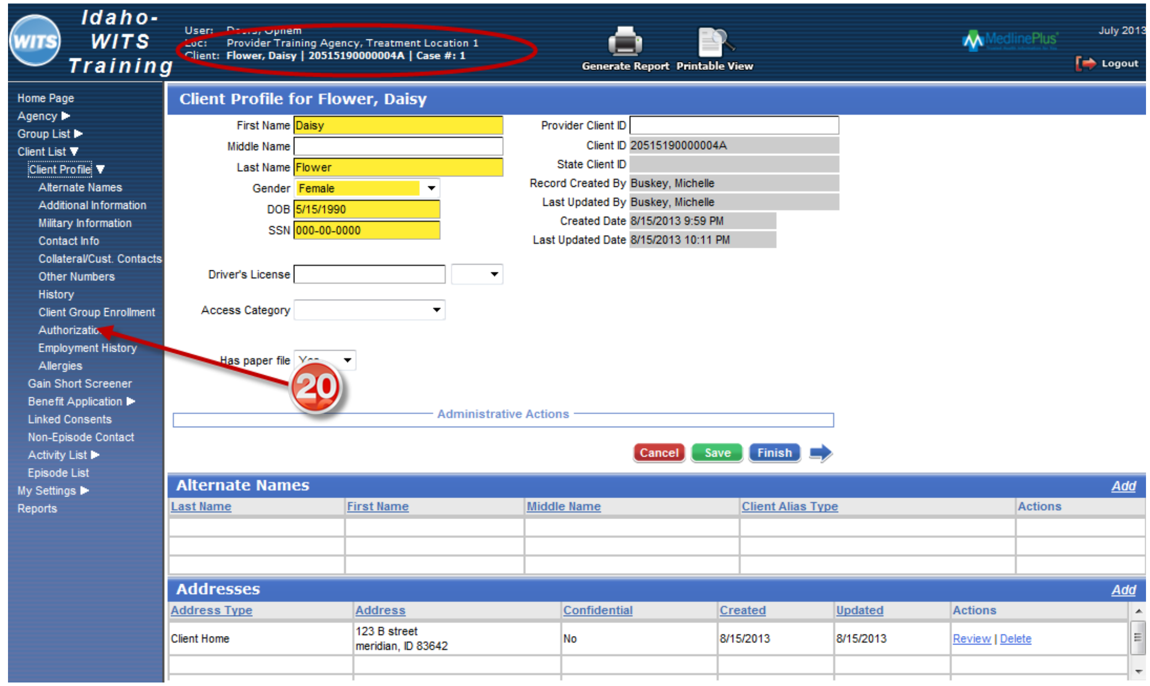


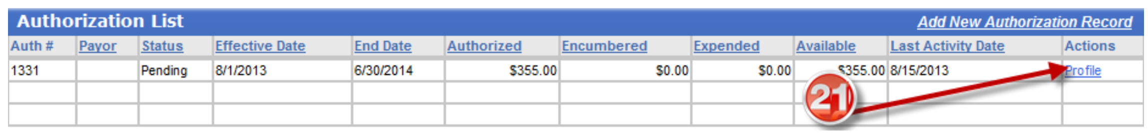


Accept the Authorization

20. The Client Profile displays. Click **Authorization** on the left menu.

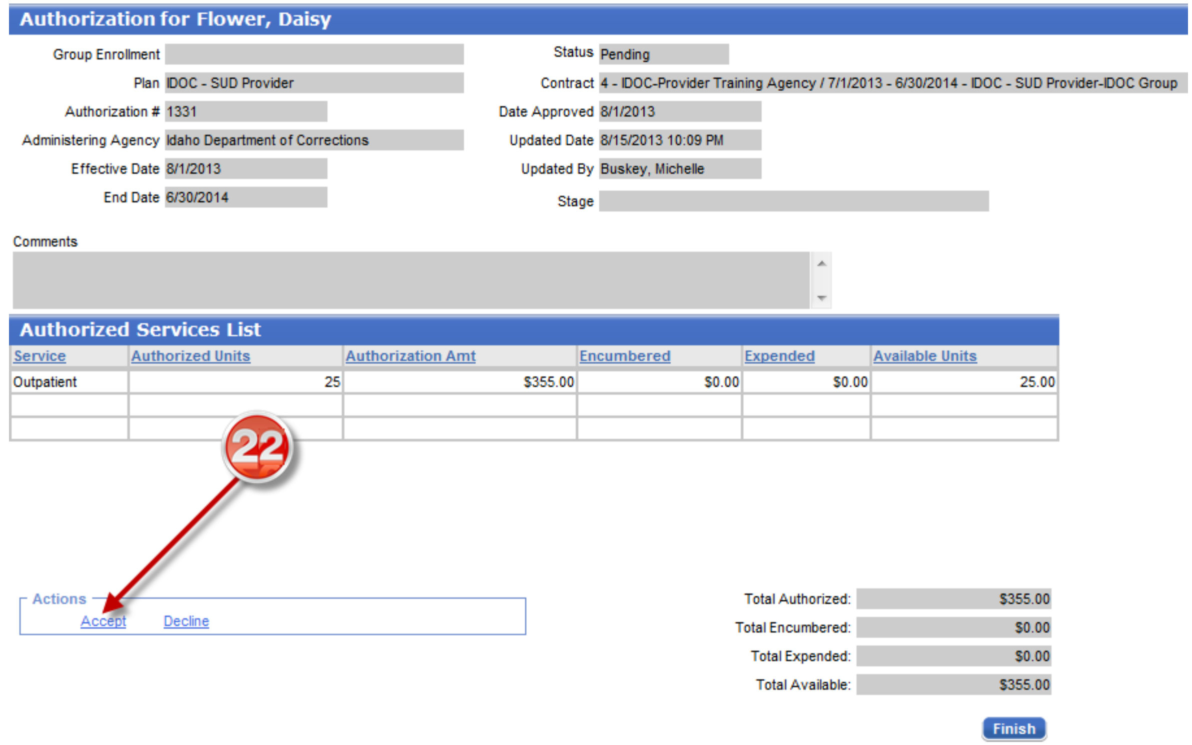
21. Click **Profile**.





22. Click **Accept**.

23. Click **Yes**.



24. The Authorization is Active. Click **Finish**.