

How to Deny a Referral

If you need to deny a referral, for example because a client is refusing your services, go into the Pending tab in the referral screen and open the referral by selecting the edit option.

Use the drop down to **change the status to “Denied,”** which will trigger the additional boxes to appear: Send to Community Queue, Denied Reason, Denied Message, and Private.

Case Manager	Select	▼
Last Activity	12/18/2017	CHECK-IN
Status	Pending	▼
Private	Pending Pending - In Process Denied Expired	

Set the “Send to Community Queue” box to Yes. All denied referrals must be referred back to the Queue in order for them to be referred to another project.

Status	Denied	▼
Send to Community Queue	-- Select --	▼
Denied Reason	-- Select -- Yes No	
Denied Message		

Then, at **“Denied Reason,”**

Status	Denied	▼
Send to Community Queue	Yes	▼
Denied Reason	Refused services	
Denied Message		
Private		

select the answer from the drop-down menu that fits best for why your Agency is denying the referral.

Write a note in the “Denied Message” section to provide additional information as to why the client is being denied.

Save Changes.