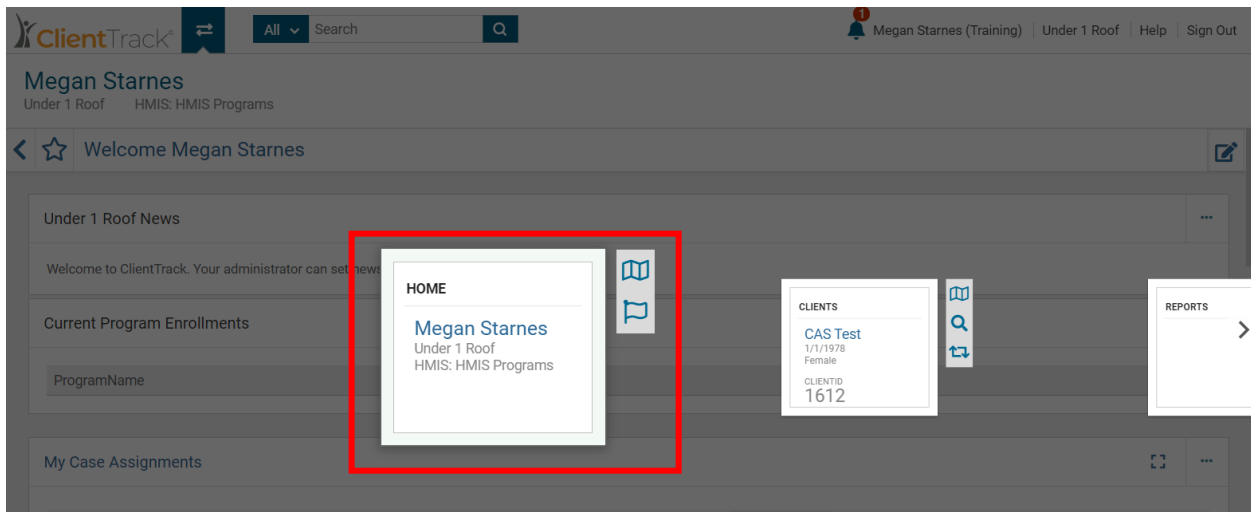# CAS Incoming Referrals
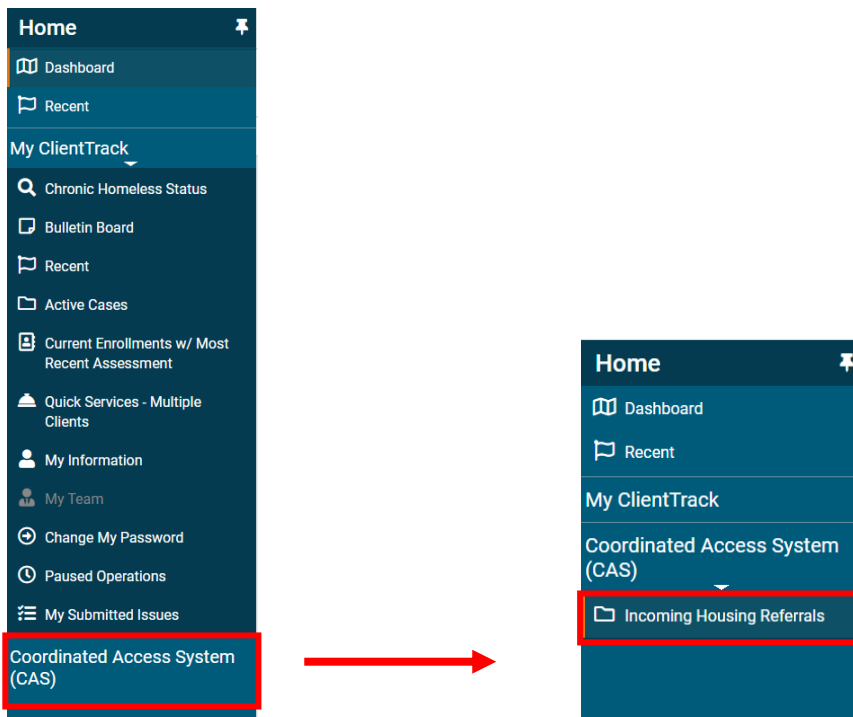
1. View Incoming Referrals

Where: Home Workspace

Steps:

1. Log in to ClientTrack and navigate to your Home workspace.

2. On the Favorites Menu, scroll down and select Coordinated Access System (CAS), then choose Incoming Referrals.

3. This page displays all incoming referrals to your agency from the CAS team.

2. Accept/Reject Referrals & No Shows

Accepting the Referral and Enrolling the Client:

From the Incoming Referrals page

1. Click the Start HMIS Intake button (shown above)
2. Complete intake for your program as usual (see cheat sheet on Entry Assessments for assistance)
3. Complete the Referral Outcome page
   a. Provider Result – Enrolled into program
   b. Referral Result – Successful referral: client accepted

4. Continue the workflow until you click Finish.
5. When the client moves in, record the Housing Move-in Date and check the client into the facility in HMIS. See the cheat sheets on these actions if you need further guidance.

No Show or Rejecting Referrals

From the Incoming Referrals page

		Referral Date ▲	Client Name ▲	Number of Family Members ▲	Housing Provider Name ▲	Project ▲	Project Type ▲	Eligibility	Result ▲	Case ID ▲
→	⊃	09/29/2020	Parker, Peter	1	Austin Street Center	ASC - RRH Subsidy ESG Tx (RRH)	PH - Rapid Re-Housing	✓ Passed		227

1. Click the Referral Outcome button to be taken to the Outcome Information page.

‹ 🗹 Referral

Comments:

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

2 Result Date: 09/28/2020 📅

3 Provider Result: -- SELECT -- ⓘ

4 Referral Result: -- SELECT --

5 Comments:

6 ✓ Save ✕ Cancel

2. Confirm the Result Date
3. Enter the Provider Result
   o Rejected – provider denied the referral
   o No Show – no contact/communication from client
4. Enter the Referral Result
   o Unsuccessful referral: client rejected
   o Unsuccessful referral: provider rejected

Note: If the Provider Result is "Rejected" then Referral Result should be "provider rejected". If the Provider Result is "No Show" then Referral Result should be "client rejected".

5. Add any comments if needed. Note that some Results may require comments.
6. Click Save