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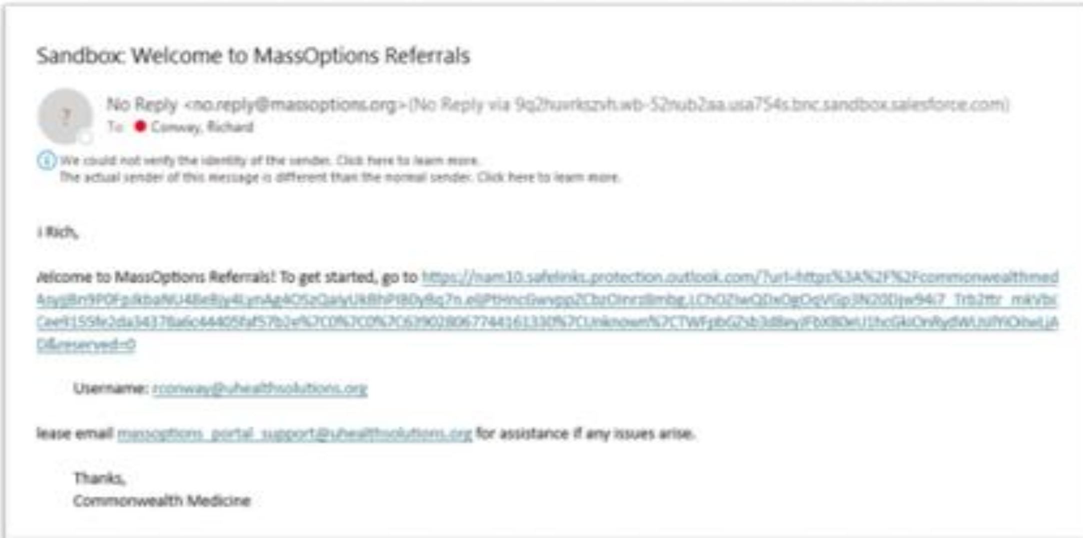
Overview of MassOptions Referral Portal

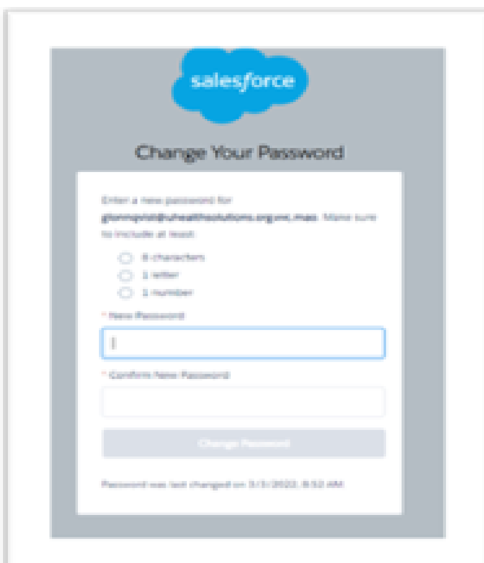
MassOptions utilizes Salesforce for our Customer Relationship Management (CRM) application. This tracks referral information regarding MassOptions consumers and allows us to share that with you, our partner agencies. Ensure all data fields in call were answered. This guide will provide you with instructions for using the MassOptions Referral Portal, such as logging into the portal, how to retrieve referrals, how to update status of your referrals, and will highlight some of our frequently asked questions.

Instructions – Setting up your MassOptions Referral Account

1. You will receive an email from Salesforce which contains a link to the portal. The subject of this email will be "Welcome to MassOptions Referrals". You will have 24 hours to activate your access from the time that you receive your email. Please check your inbox and junk folder for this email.



2. After you select the link in the email, you will be asked to change your Password. The screen will look like the image shown below.



After you have successfully changed your password, you will be logged into the MassOptions portal, and you will see the main interface screen.

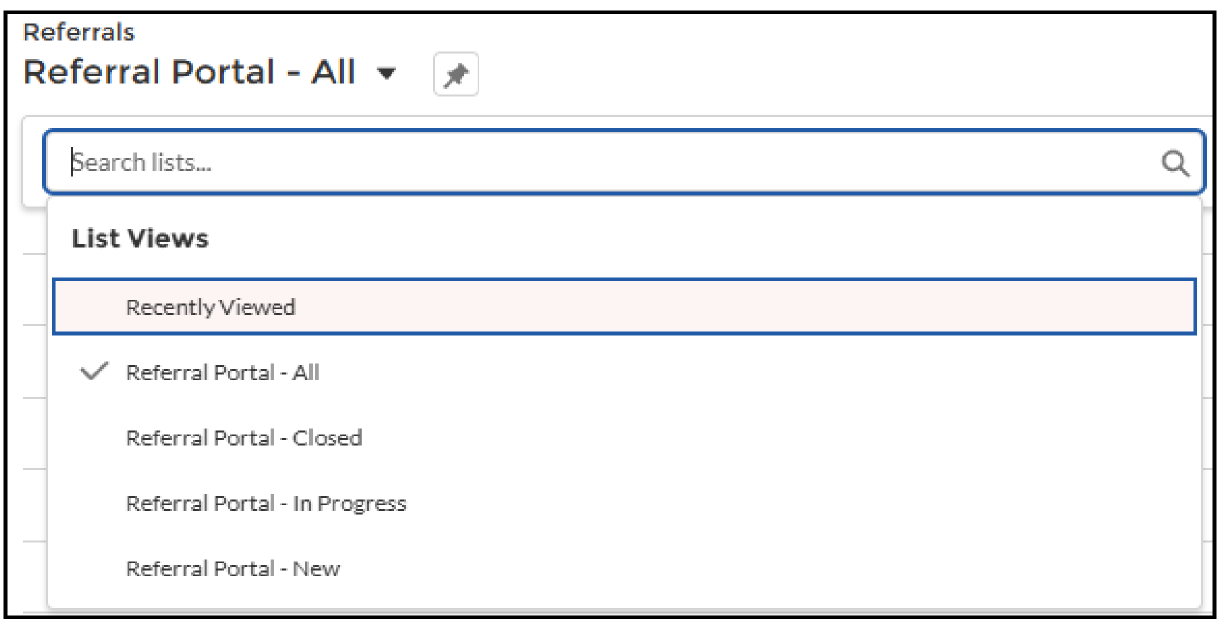
HELPFUL TIP: Please take note of your username given to you in the email – most believe it to be your work email address, but it is not. This is a username specific to your Salesforce account.

Main Interface Screen

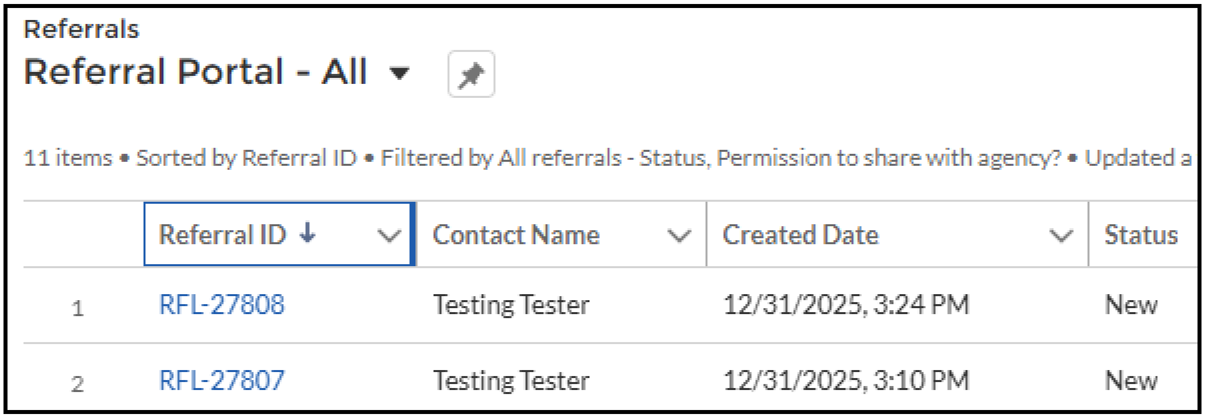
On the Main Interface Screen, you will see all new referrals for your specific agency. You will not see any referrals for other agencies, and they will not see your referrals.

On this screen, you may:

1. Re-sort columns by clicking on the headers
2. Search for a referral using the search box on the upper right
3. Change your view of referrals: the screen defaults to showing you "All" referrals for your agency. By selecting the next to "Referral Portal – All", you may choose to show only Closed Referrals or only New Referrals.



4. View the details of a referral. Open the referral details by selecting the link in the Referral ID field.



Referrals

Referral Portal - All

11 items • Sorted by Referral ID • Filtered by All referrals - Status, Permission to share with agency? • Updated a

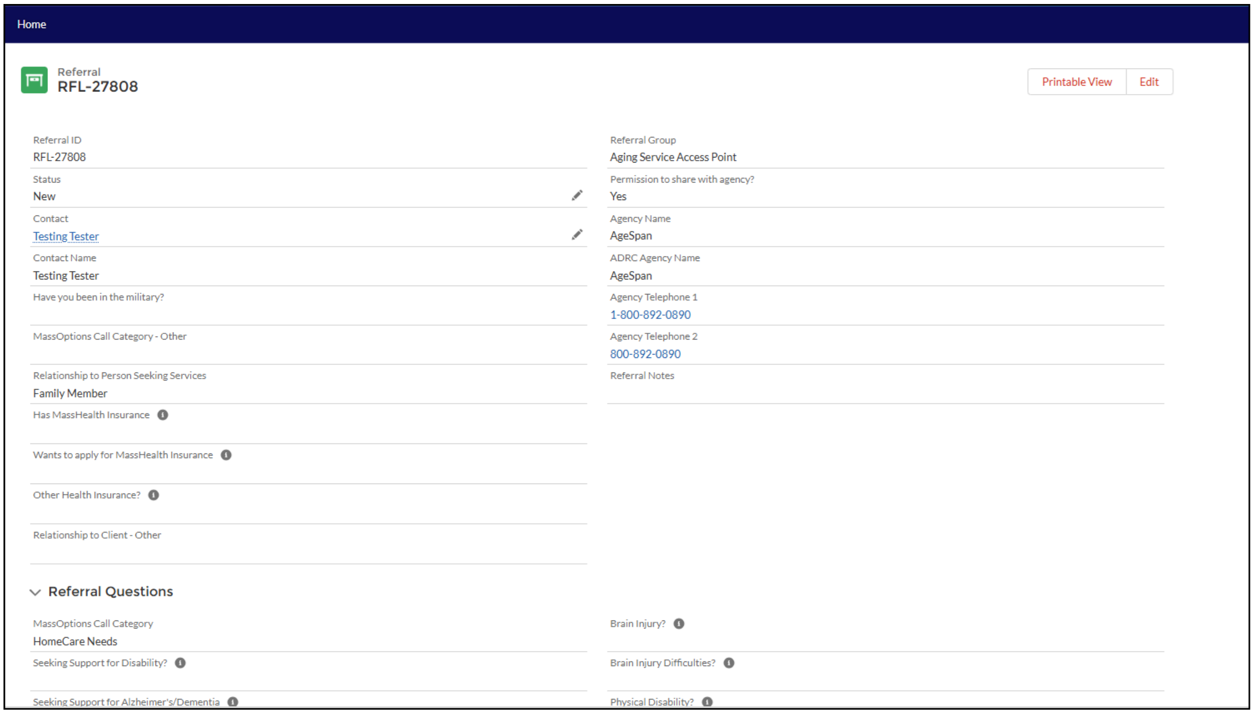
	Referral ID	Contact Name	Created Date	Status
1	RFL-27808	Testing Tester	12/31/2025, 3:24 PM	New
2	RFL-27807	Testing Tester	12/31/2025, 3:10 PM	New

5. Log out of the portal and select the white icon with a blue background on the top right of the screen.

6. If there are any system notifications, you will see them under this white bell with blue background con on the top right of the screen.

Referrals Details Screen

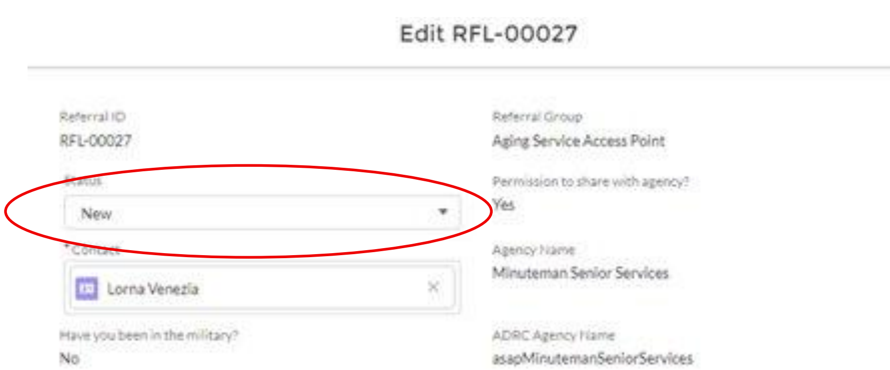
On the referral details screen, you will see all the information that MassOptions has provided regarding the referral.



On the top right of this screen, you may Print the referral or edit the referral.

Important! When editing a referral, the only information that can be changed is the Status of the referral. All referrals default to "New" when they are submitted.

- "In Progress" if the referral has been retrieved and is being worked on but is not yet complete.
- "Action Taken (Closed") if the referral has been completed.



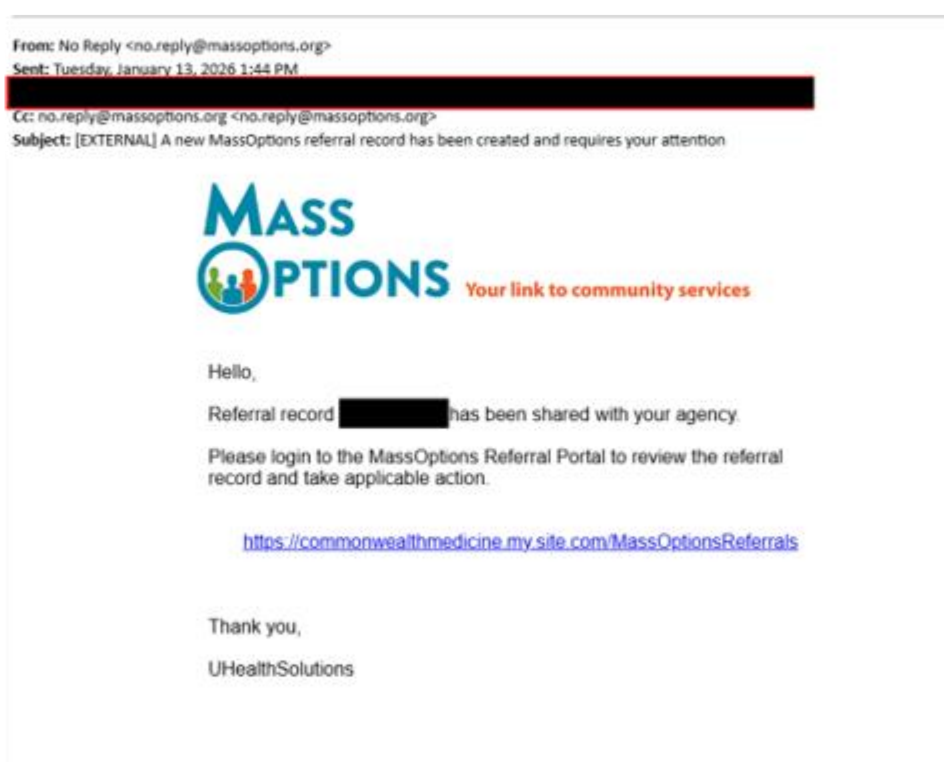
Individuals at the agency are asked to update the status and then select "Save" as each referral is reviewed. Your agency can determine how you would like to handle the inflow of referrals.

Frequently Asked Questions

1. Will I be notified when there is a new referral?

Yes! When a new referral is sent to your agency, an email will be generated to all the users at your agency who are registered. If you have a shared inbox on file with us, that email will also be alerted – however, please note that all users that need to login must have an individual account. So, while a shared inbox can help your agency to know when a referral has been sent, only those with an account under their name, can log in to retrieve the referral.

Your email notification will look like the image shown.



From: No Reply <no.reply@massoptions.org>
Sent: Tuesday, January 13, 2026 1:44 PM
[redacted]
Cc: no.reply@massoptions.org <no.reply@massoptions.org>
Subject: [EXTERNAL] A new MassOptions referral record has been created and requires your attention

Mass Options Your link to community services

Hello,

Referral record [redacted] has been shared with your agency.

Please login to the MassOptions Referral Portal to review the referral record and take applicable action.

https://commonwealthmedicine.my.site.com/MassOptionsReferrals

Thank you,

UHealthSolutions

2) How often should I check for referrals?

You do not need to check the site for referrals because you will be alerted via email when a new referral has been sent to you.

3) Who do I contact if I have issues logging in or processing a referral?

Richard Conway at rconway@uhealthsolutions.org and
Kerrie Topi at ktopi2@uhealthsolutions.org

4) What if I "Close" a referral by mistake?

You can still edit the referral and change the status back to "In Progress" or "New".

5) What if we need to grant access to a new user at our agency?

To request access for the portal. Please send an email to Annette Peele, Karyn Wylie, and Chantal Johnson :
annette.v.peele@mass.gov
karyn.wylie@mass.gov
chantal.johnson@mass.gov

Please also copy both Richard Conway at rconway@uhealthsolutions.org and Kerrie Topi at ktopi2@uhealthsolutions.org.
Once AGE has approved access, we can set up the account.

6) What if we need to remove access for a user at our agency?

Please email both Richard Conway at rconway@uhealthsolutions.org and Kerrie Topi at ktopi2@uhealthsolutions.org.

7) Why is the referral in the portal not filled out completely?

The referral form is designed to allow the consumer to answer as many questions as they would like. We encourage them to provide full responses and let them know that the referral will be more accurate if they do, but they do not always want to answer every question or may want to finish the call quicker. The information on the referral form is representative of the information that was provided to us.

8) Why did I get a referral that seems inappropriate and should have possibly gone elsewhere?

Currently, MassOptions' partners for receiving referral forms through our portal include ASAPs, ILCs, DMH, DDS, and MassAbility (also a handful of SHINE/COA's to support the behavioral health – BHOAP initiative). The questions that are asked on the referral form are designed to route someone to the most appropriate one of those partners based on the answers that they provided. Although not every referral may be a perfect fit for a particular agency, the intention is that agency partners will be able to assist the consumer in determining what programs and services are available in their specific communities.

9) Is the portal screen-reader friendly?

Our portal is hosted by Salesforce which is WCAG 2.1AA compliant.