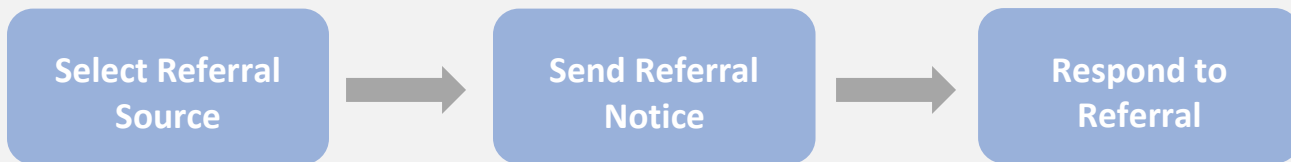




Summary

Use the Referral page to record Referrals for your Client; Outgoing and Incoming referrals are available for both Internal and External organizations. Select the referral source, then send the referral for your client. After the Referral is sent, you may also respond to and forward the referral. A client must be active to use Referrals.



Create Referral Record:

- Click **ADD REFERRAL** on the **Referral Outgoing** page
 - Client Account must already be selected
- **Add Referral** popup window will open for use of both External and Internal Referrals
 - Look-Up Search is available on both External and Internal tabs

Select Outgoing Referral Source: On Add Referral popup window

For External Referral:

- Select **External** tab
- Select Category, Service, Agency Name and/or County or leave blank to search all
 - Favorites checkbox will display only your favorites
 - Active checkbox will only display Active Service Providers
- Click **SEARCH**
Matching Referral Sources will be displayed
- Select Referral Source



For Internal Referral:

- Select **Internal** tab
- Select Program Category and Service or leave blank to search all
 - Favorites checkbox will display only your favorites



- Click **SEARCH**
- Matching Referral Sources will be displayed
- Select Referral Source

Create Referral Notice: On Add Referral popup window

For both Internal and External Referrals:

- In bottom section, select Referral Type
 - This is the Domain you are sending FROM
- Select Client in Reference To
- Enter Subject and Note
- Click **SEND**

View Referrals for a Client:

- Make sure client is active
- Referral history will be listed on the Outgoing Referral Page
 - Display of all referrals made for the client
- Each Referral record will Agency, Domain, and Services being referred to, the Subject and Message of each Record
- Click on  to delete referral
- Click on  to Print
- Click on **RESPONSE** to respond
 - In the Referral Response popup window, select Status, Date, enter Notes
 - Click **SAVE**

• **Employment 3/8/2021** Andrew Smith [ADD REFERRAL](#)



Setup Internal Referral Sources: On Organization Program page

For referral TO an Internal Program:

- Program:
 - Must have values selected or entered for Category
 - This may be used for Search when creating client referral
- Domain:
 - Standard name = displayed with Domain name after Referral Source search; if no value is selected Referral Source will display NULL
 - Must have value for Contact; this is who Referral will be sent to

To make a referral FROM an Internal Program

- Domain:
 - Domain name will be displayed in Referral Type dropdown as long as a Referral Service exists in Domain
- Service
 - Activity Type = Referral

You may want to create a Domain called Generic Referral with one Service = Referral

Edit Program

BASIC INFO HUD Bed Active Coordinate Outreach

Module * Program Name Standard Name

Contact **Category** Grace Period Day(s)

Start Date * End Date * Method of tracking

Edit Domain

Domain Info Required Active Archived

Domain Name * Standard Name **Contact**

Edit Domain

Domain Info Required Active Archived

Domain Name * Standard Name Contact

Service Definition

BASIC INFO

Activity * **Activity Type**

Standard Name Units Unit Type *

Setup External Referral Sources: On Add Referral popup

- Click **ADD REFERRAL** to open Add Referral window, External tab
- Open External tab
- Click **ADD** next to **SERVICE PROVIDERS**
- In Add Agency popup window, enter Agency information
 - Enter Contact information at top
 - For each Category used, enter Name, contact information and check Services provided
 - This allows search in Category
- Click **SAVE**

Click on **EDIT** next to Service Provider to make edits

Click on **DELETE** next to Service Provider to Delete

Add Referral


External Internal

Look-Up

Category Service Agency Name County

SERVICE PROVIDERS




Click on **SET TO FAVORITE**  to add a Service Provider to Favorites

Note: ADD button can be made available to Administrators only

Add Agency

Favorite Active

AGENCY INFORMATION

Agency Name * Hours Email 

ADDRESS

Address County * Unit Type Unit Number

SERVICES

Health Care and Medical Services

Housing

First Name Last Name Phone Email

Shelter Transitional Housing Emergency Shelter

Income


First Name Last Name Phone Email


Financial Assistance Credit/Financial Counseling



Independent Living Program

First Name Last Name Phone Email

View Incoming Referrals:


- Click on **Referral Incoming** page to view incoming referrals
 - Filter results by Customer, Program or Case Manager
- Select **Responded** or **Not Responded** to view results
- Click on colored Checkmark to view Referral details
 - Green = Responded
 - Yellow = Not Responded
- Click on **RESPONSE** to respond
 - the Referral Response popup window, select Status, Date, enter Notes
 - Click **SAVE**
- Click Refresh  to Refresh page



INCOMING  Responded Not Responded

 Select  to show referral details. Select to provide a response.

Customer Program Case Manager

| | | | |
|---|----------|---------------|---------------------|
| <input checked="" type="checkbox"/> | 3/8/2021 | Arnold Howard | Supportive Services |
| <p>Referral From Program: KHOEmployment Referral To Program: KHOEmployment Referral From Agency: Kingsley House Refer Contact Person: Brandon Rives</p> <p>Referral Note: This is a new referral</p> <p>Response Info <input type="button" value="Response"/></p> <p>Response By: KHOAloia Response Date: 3/8/2021 Status: Incomplete</p> <p>Response Note: Responded</p> | | | |
| <input checked="" type="checkbox"/> | 3/8/2021 | Suzan Howard | Emergency Services |

INCOMING  Responded Not Responded

 Select  to show referral details. Select to provide a response.

Customer Program Case Manager

| | | | |
|-------------------------------------|----------|---------------|----------------------|
| <input checked="" type="checkbox"/> | 3/8/2021 | Martha Howard | Emergency Services |
| <input checked="" type="checkbox"/> | 3/8/2021 | Andrew Smith | Emergency Employment |

Note: Refer Contact Person is the person who sent referral