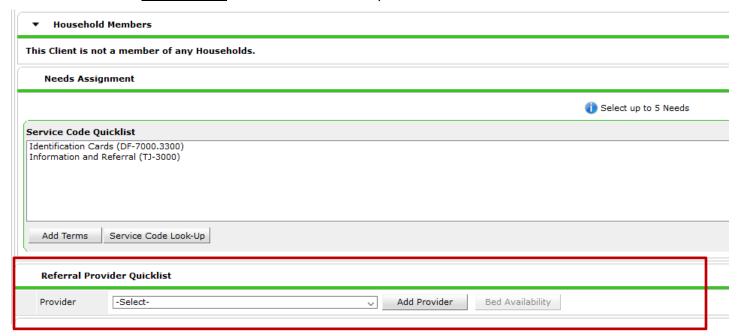
NEW Referral Process

Steps to adding a Referral

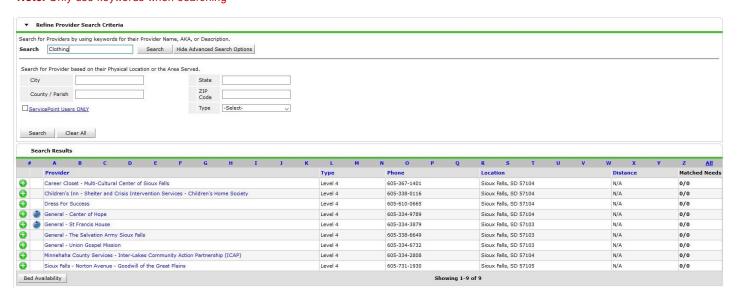
- 1. Service Transactions
- 2. Add Referrals
- 3. Referral Provider Quicklist
 - a. Use the drop down quicklist to select a Partner Agency (Add Provider)
 - b. Do not use Service Code Look-Up or Add Terms & Go To Search Results

{Effective: 01/13/2017}



4. If the referral or provider is **not listed** in the Quicklist. Use Search tool.

Note: Only use keywords when searching



- Click the hyperlinked agency name in the Selected Providers area
- **6.** Select from the list of referral options for that agency.
 - **a.** If Add Referral is **red** that agency is currently not receiving referrals for that service.

- 7. Please click box: Check to notify ServicePoint Providers by Email.
 - a. this will send an email to the receiving agency to notify them of an incoming referral
- 8. If applicable- Add Notes to the referral for the receiving agency
- 9. Change Need Status to OPEN do not complete Outcome

