

NEW Receiving Referral Process

Steps to Receiving Referrals

1. Reports > Referrals Report
2. Referral Type > Incoming referrals to provider
3. Referral Status > Outstanding
 - a. Closed – if searching for referral previously closed
 - b. All – if searching for referrals that are both outstanding / closed
4. Referral Date Range > reflects that date the referral was sent
5. Sort Order (*Recommendations*): (Each end users can be customized to fit their agency needs)
 - a. Referral Date
 - b. Name
 - c. Need Type
 - d. Referred By
 - e. Needs Notes
 - i. If you see Notepad icon, hover over it to see the note
 - f. Referral Outcome

Report Options

Provider* General - The Community Outreach (12) Search My Provider Clear

This provider AND its subordinates This provider ONLY

Referral Type* Incoming referrals to provider

Referral Status Outstanding Closed ALL

Referral Outcome -All-

Referral Date Range 10/01/2016 01/13/2017

Sort Order Please Select a Sort Order Select Clear

Export Report Build Report Clear

Report Results

Referral Date	Name	Group ID	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 01/12/2017 12:56:34 PM	(4599) Dean, Gloria		Rental Deposit Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/12/2017 9:52:52 AM	(4573) Williams, Roehelle		Rental Deposit Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/12/2017 9:49:56 AM	(4573) Williams, Roehelle		Rent Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/09/2017 4:46:17 PM	(1784) Brill, Heather Lashae		Rent Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/09/2017 4:44:50 PM	(3600) Hult, Stormy Launie		Utility Service Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/09/2017 8:53:46 AM	(4376) Gortmaker, Dawn Michele		Rent Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/05/2017 10:07:44 AM	(3790) Ducheneaux, Alvina Doretta		Rental Deposit Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/05/2017 10:05:00 AM	(3892) Holder, Jeremy Alan		Rent Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/04/2017 9:24:32 AM	(4130) Dunn, Christina		Utility Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/04/2017 9:23:46 AM	(4130) Dunn, Christina		Rent Payment Assistance	Helpline Center - 2-1-1	General - The Community Outreach		
<input type="checkbox"/> 01/03/2017 1:35:04 PM	(4080) Fisher, David C		Automotive Repair and Maintenance	Helpline Center - 2-1-1	General - The Community Outreach		Also seeking help with Rent Deposit, Gas Money, and Utility Service Payment

Select ALL Clear Showing 1-11 of 11

Update Referral Outcome

Note: If Select ALL option is used for Canceled / Declined Need Status the **Outcome** will still need to be completed in the Referral Data area.

From Referral Report-

Option 1: To close / complete out a referral

1. Click Need Type
2. Go To: Referral Data area
3. Select Referral Outcome
4. If Canceled or Declined, Reason (choose from the dropdown list)
5. Need Status and Outcome area
 - a. Need Status: Closed
 - b. Select Outcome
 - c. Select Reason

Referral Data Send Summary

Referred-To Provider: General - The Community Outreach (12)

Needs Referral Date* 01/12/2017 9:49:56 AM

Referral Outcome: Declined

If Canceled or Declined, Reason: Client Refused Service

Follow Up Information

Projected Follow Up Date: []/[]/[]

Follow Up User: Helpline Center - 2-1-1 (2) Search My Provider Clear

Follow Up Made: -Select-

Completed Follow Up Date: []/[]/[]

Need Status and Outcome

Need Status*: Open

Outcome of Need: -Select-

If Need is Not Met, Reason: -Select-

Service Information

Provide Service i A Service has not yet been provided for this Referral.

Save Save & Exit Exit

Option 2: To ACCEPT a referral

1. Click Need Type
2. Go To: Referral Data Area
3. Select Referral Outcome (Accepted)
4. Need Status and Outcome area
 - a. Need Status: Closed
 - b. Select Outcome

From **Service Transactions** –

1. Service Transactions > Entire Service History (or Referrals)
2. Locate pending referral
 - a. Click the Service icon next to the Need
 - b. Add Service to Need
 - c. Click hyperlink: Make Service same as Need
 - i. Use Drop dropdown list to change need (*if applicable*)
 - ii. **Do NOT** use the Look Up button
 - d. Save & Continue
 - e. Complete Service Transaction as normal for your agency.
 - f. Complete Need Status / Outcome

In Service Transaction you should now see a Need, Service, and Referral for that original referral request.

The screenshot displays the 'Service Transactions' section of a software interface. At the top, there are tabs for 'Needs', 'Services', 'Referrals', 'Shelter Stays', and 'Entire Service History'. Below these is a search area with 'Select Dates', 'Start Date', and 'End Date' fields, each with a calendar icon, and a 'Search' button. The main area contains a table titled 'All Service Transactions' with the following data:

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	01/13/2017	Helpline Center - 2-1-1	General Clothing Provision	Closed / Fully Met	
Service	01/13/2017	Helpline Center - 2-1-1	General Clothing Provision		
Referral	01/13/2017	General - Center of Hope	General Clothing Provision		

Below the table, it says 'Showing 1-1 of 1'. At the bottom right, there are 'Back to Dashboard' and 'Exit' buttons.