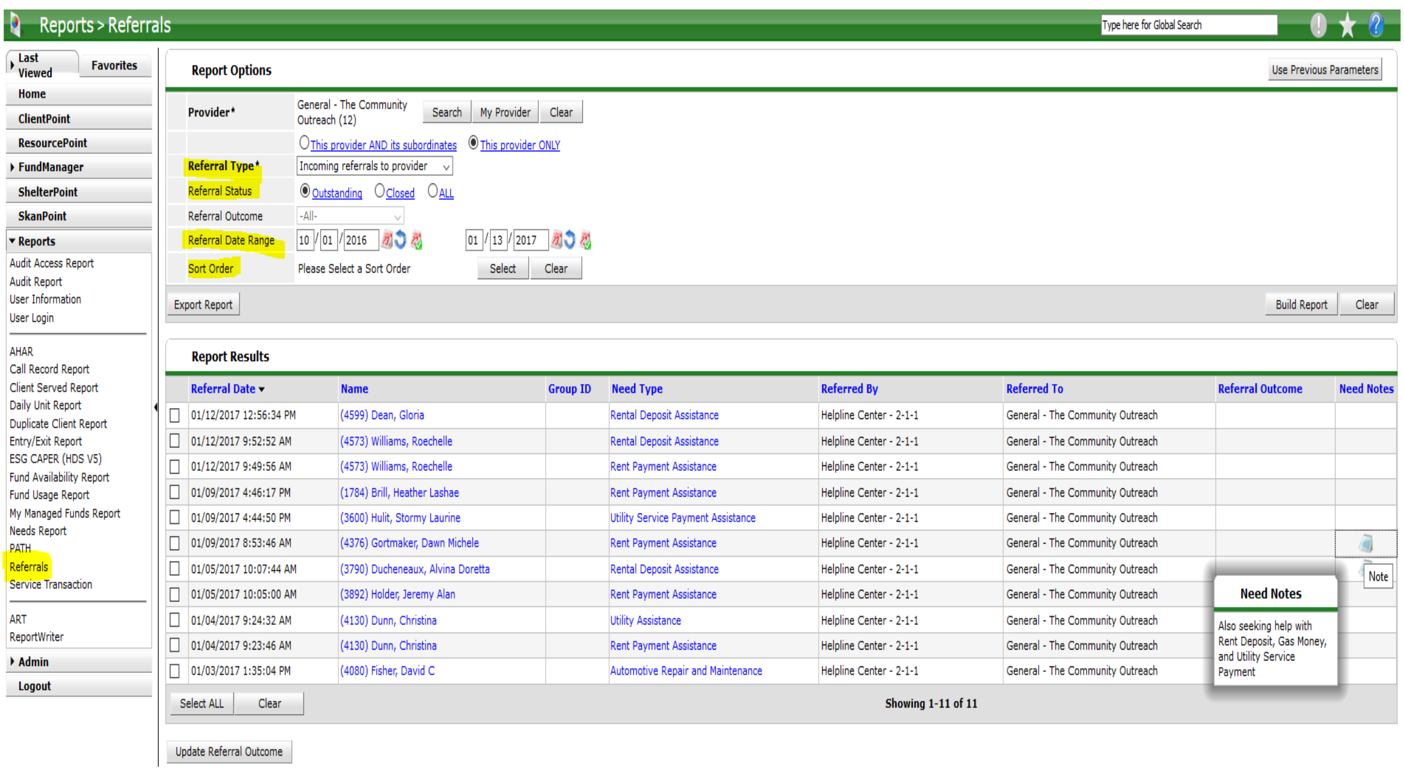
Partner Agency

{Effective: 01/13/2017}

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

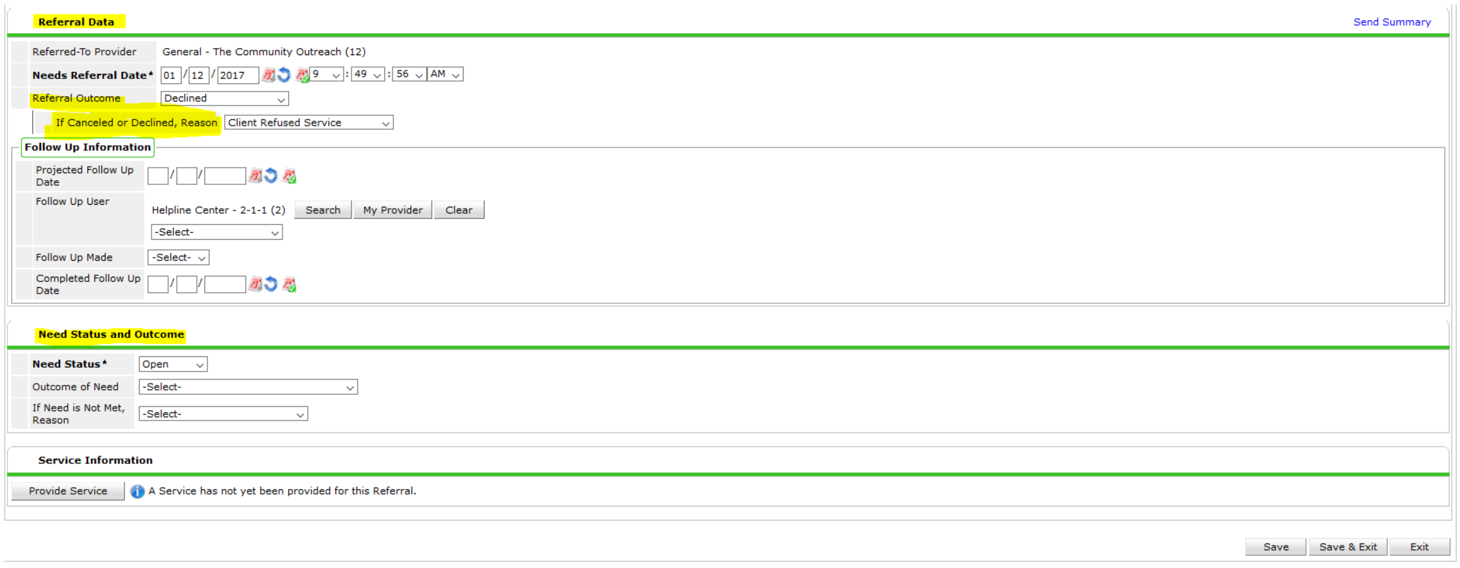


Note: If Select ALL option is used for Canceled / Declined Need Status the **Outcome** will still need to be completed in the Referral Data area.

From **<u>Referral Report</u>**-

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



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 **<u>Service Transactions</u>** –

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. **<u>Do NOT</u>** 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.