Partner Agency

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

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

**Note:** Only use keywords when searching

5. 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**