

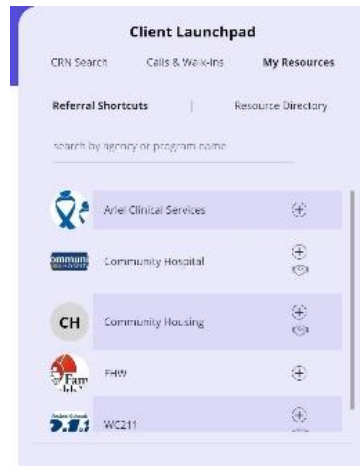


Referrals

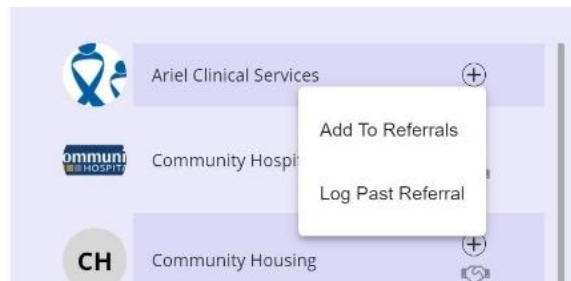
Log a Referral from the Launch Pad

Pro Tip: In order to log a referral from the Launchpad you must have selected agencies and added them to your favorites list. This function is only available for Care Team clients as well as clients you entered in the system.

1. From the Client Launch Pad, click on My Resources. You will then see your list of favorite agencies.



2. Click on the + next to the agency in which you wish to refer to



3. You will have 2 options:

- a. Add to Referrals - For adding multiple agencies to a referral



- i. Once all agencies are selected you can click on any of labels “Go to referrals”
- ii. This will bring you to the resource directory to send the client the referral package and prepare any forms for electronic and express referrals.
- b. Log Referral – This allows you to quickly log a referral for anyone in your client list.
 - i. Select the Client in which you made the referral for and the agency that you referred the client to.
 - ii. Fill in the required information and any notes you wish to add and click Save

Log or Make Express Referral

Smith James

Referral Received to
Food Bank of the Rockies

Referral From *
QHN

Date
2021-01-20

Service Categories
Food Insecurity

Method *
 Hand Off Phone Call Email Fax Client Lead Others

Notes
James needs a Food Box.

