



Referrals

Receiving a Referral

At setup, an agency will identify a gatekeeper that will receive all incoming referrals. When a new referral comes in for your agency it will show in gatekeepers task feed as a bolded new task.

Pro Tip: An Agency can identify more than one individual to be the gatekeeper. This is recommended so if the main gatekeeper is on vacation or out of the office, the agency will still be able to work the referrals.

Client Name	Date	Task / Event	Status	Priority
QSTester Jules	10/27/2020	Referral: CRN Admin to BetaTest Health and Human Services	Requested Health And Human Services	Routine
Qstest Tommy	10/07/2020	Referral: CRN Admin to BetaTest Health and Human Services	Requested Health And Human Services	Routine

Clicking anywhere, other than the client’s name or profile picture, will open up the referral details panel. In the referral details panel, you have options to act on the referral.

Forward:

Forward the referral when you know that the referral is not appropriate for your entity but you know who could provide the service.

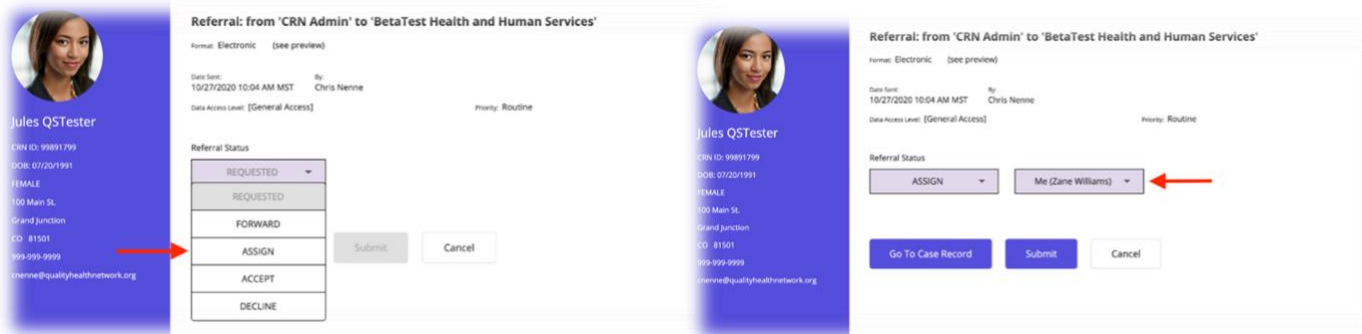
Select FORWARD from the dropdown menu. Another dropdown menu will appear where you can select the entity to forward the referral to. Once a selection has been made, click Submit to forward the referral.



Assign:

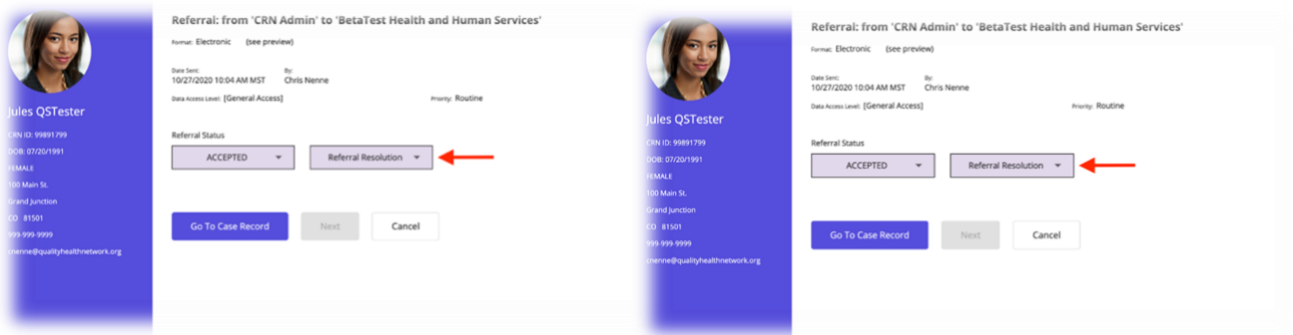
Assign the referral to yourself or a coworker when your agency is going to process the referral. This will allow you to assign the referral to anyone in your agency.

From the dropdown menu, select ASSIGN. Another dropdown menu will appear where you can select yourself or another user from your entity to assign the referral to. Once a selection has been made, click Submit to assign the referral.



Accept

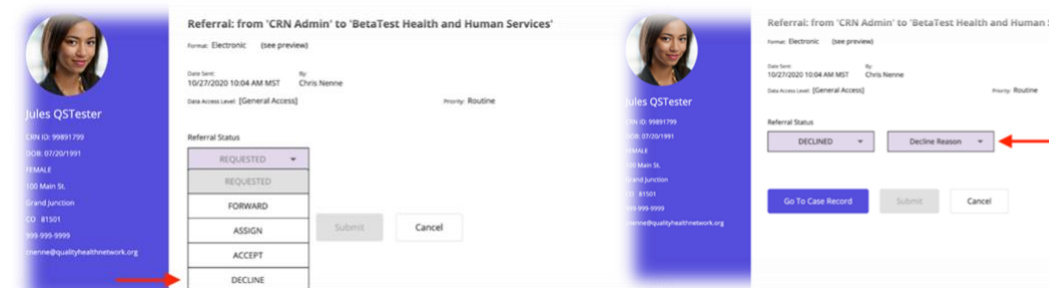
Accept is a way you can show you have received the referral and/or are in process of working the referral prior to or after assigning the referral to another user in your entity. Once selected, another dropdown will appear with a list of possible referral resolutions. Select from the from the drop down, then click Submit to Accept the referral.



Decline

Sometimes the requested services are not able to be provided to the client. If you are unable to serve the needs of the client for the referral choose Decline.

To decline a referral, select DECLINE from the dropdown menu. Once selected, another popup will appear with the option to select a decline reason. Select from the dropdown menu and click submit to decline the referral. Once the Referral is declined it is then sent back to the entity who sent the referral to you. They can then make additional determinations regarding the referral.



ProTip: Prior to forwarding, assigning, accepting or declining the referral, you can click Go To Case Record to navigate to the client's profile to aid in deciding how to proceed with the referral.

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REQUESTED

Go To Case Record

Submit

Cancel