

## Referrals: Folder

Referrals in ClientTrack allow users to refer and track referrals for clients to applicable agencies/organizations. Referrals include creating new referrals\*, accepting referrals\*\*, and recording accepted referrals\*\*\*.

*\* For instructions on creating new referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals – Referrer – Creating New Referrals](#) in the “HMIS Basic User 2025 Manual”.*

*\*\* For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals - Service Provider – Accepting Referrals](#) in the “HMIS Basic User 2025 Manual”.*

*\*\*\* For instructions on recording referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals – Referrer - Recording Accepted Referral](#) in the “HMIS Basic User 2025 Manual”.*

## Referrals – Referrer – Creating New Referrals

This section is section 1 of 3 regarding creating referrals, accepting referrals\*, and recording accepted referrals\*\*.

*\* For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals - Service Provider – Accepting Referrals](#) in the “HMIS Basic User 2025 Manual”.*

*\*\* For instructions on recording accepted referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals – Referrer - Recording Accepted Referral](#) in the “HMIS Basic User 2025 Manual”.*

### **Steps to Creating New Referrals via the Referrals Folder**

**Step 1:** Select the appropriate client profile via Quick Search\*, Find Client: Folder\*\*, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.\*\*\*

*\* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*\*\* For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

*\*\*\* To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

**Step 2:** Select the “Referrals” secondary sidebar menu option. ClientTrack will navigate to the “Client Referrals” workspace container, and a dropdown menu will appear under the “Referrals” folder.

*\*For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

**Step 3:** Click, “Add New Referral” from the referral container space. ClientTrack will navigate to the “Referral” workspace container.

The screenshot shows the 'Client Referrals' page for a client named Frank Green. The left sidebar contains a navigation menu with 'Referrals' highlighted. The main content area shows a 'Client Referrals' section with a '+ Add New Referral' button and a table with columns: Service, Referral Date, To Provider, Status, and Result. A callout box points to the '+ Add New Referral' button with the text 'Select, "Add New Referral"'. A 'Cancel' button is located at the bottom right.

**Client Referrals**

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

**+ Add New Referral** Quick Referrals Housing Referral Referral Eligibility Add CE Event Referral In

No records found.

Service	Referral Date	To Provider	Status	Result
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Cancel

*Add New Referral*

**Step 4:** Select a Referral Date, Referral Service.

**Step 5:** Search and select a "Refer to Provider"

## Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: \*



Leave the space blank  
and click the search icon

*Adding New Referrals – Search “Refer to Provider”*

**Search**

**Find Provider**

Locate a provider by using the selection criteria below. To get a list of all providers, leave the selection criteria blank and select search. To change your search, change the selection criteria and select search.

Provider:

Address:

City:

State:

Zip Code:

Provider Type:

**Search**

2 results found.

Provider	Address	City	State	Zip Code
Provider House	123 Provider Way	Jacksonville	FL	
Collab Help, Inc.				

Cancel

Leave the space blank and click the search button to populate a list of providers

Click anywhere in the row of the provider to select

*Find Referral Provider*

**Step 6:** Select a “Refer from Provider” and a “Status”

**Step 7:** Fill out any additional information if applicable. Required elements are marked with a (\*). Click “Next” if the information is complete and correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” workspace container.

## Referral

Referral Voucher and Information Release Referral Outcome

Select a referral service. For example,

Referral to RRH project resource opening

on below to identify the service and the provider being referred to.

Referral Date: 09/13/2024

Referral Service: -- SELECT --

Select a Referral Provider

### Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider:

Select Referrer from Provider

Source

Agency referral source as the Refer from Provider.

Refer from Provider: Ability Housing

Refer from User: training trainer

Location: Ability Housing - Main Office

Status: Referral Made

Comments:

Enrollment: -- SELECT --

Associated Need/Barrier: -- SELECT --

Select a Status



» Next

Cancel

select next

Filling Referral Form

**Step 8:** “Voucher and Information Release”. Fill out any additional information if applicable. Select the “Previous” button to make changes on previous pages if applicable. Click “Next” to proceed to the next page or click “Cancel” to exit without saving. ClientTrack will navigate to the “Referral Outcome” step in the “Referral” workspace container.



### Tips and Tricks - Email Authorized Clients to Referring Agency



- Select "Email Authorized" on the "Voucher and Information Release" referral form step for ClientTrack to automatically draft an email to send to a provider to alert them of the new referral.

Clients / Referral to RRH project resource opening / Referral

Lebron James 4/4/1994 -- 904-555-8458 --

**Referral**

Referral Voucher and Information Release Referral Outcome

**Voucher and Information Release**

**Voucher Information**

Please complete the following information if your organization has authorized a voucher for this service.

Voucher is Authorized: ☐

**Information Release**

If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

→ Email Authorized: ☒

- After the last step of the referral forms is completed, a pop-up window will appear with an editable automated message. Many any applicable changes if necessary and click "Send" to sent

**E-mail**

To: [Redacted]

Subject: Incoming Referral

Reply To: training trainer (training@eshc.org)

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, Text Color, Background Color, Font Family, Font Size, Indent, Outdent, Undo, Redo, etc.

This email is to inform you that client 624 has been referred to your organization.

Send

tion project or services 03/19/2024 Community Practice Collab

**Step 9:** “Referral”. Fill out any additional information if applicable. Select the “Previous” button to make changes on previous pages if applicable. Click “Finish” if the information is complete and correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Referrals” workspace container. The created referral will be visible in the “Client Referrals” workspace container.

## Referrals - Service Provider – Accepting Referrals

This section is section 2 of 3 regarding creating referrals\*, accepting referrals, and recording accepted referrals\*\*.

*\* For instructions on creating new referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals – Referrer – Creating New Referrals](#) in the “HMIS Basic User 2025 Manual”.*

*\*\* For instructions on recording accepted referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals – Referrer - Recording Accepted Referral](#) in the “HMIS Basic User 2025 Manual”.*

### **Steps to Accepting Referrals via the Referrals Folder**

**Step 1:** Select the appropriate client profile via Quick Search\*, Find Client: Folder\*\*, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.\*\*\*

*\* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*\*\* For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

*\*\*\* To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

**Step 2:** Select the “Referrals” secondary sidebar menu option. ClientTrack will navigate to the “Client Referrals” workspace container, and a dropdown menu will appear under the “Referrals” folder.

*\* For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

**Step 3:** Click the “Referral Outcome” check mark icon next to appropriate referral. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” workspace container.











*\* To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

## Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

[+ Add New Referral](#)[Quick Referrals](#)[Housing Referral](#)[Referral Eligibility](#)[Add CE Event](#)[Referral](#)

16 results found.

	Service	Referral Date 	To Provider 	Status	Result
 	Referral to RRH project resource opening	09/13/2024	<a href="#">Community Practice Collaborative</a>	Referral Made	Service Provided
 	Referral to Housing Navigation project or services	05/13/2024	<a href="#">Community Practice Collaborative</a>	Referral Made	Service Provided
 	Referral to Housing Navigation project or services	05/01/2024	<a href="#">Community Practice Collaborative</a>	Referral Made	Service Provided
 	Referral to Housing Navigation project or services	03/19/2024	<a href="#">Community Practice Collaborative</a>	Accepted	Service Provided

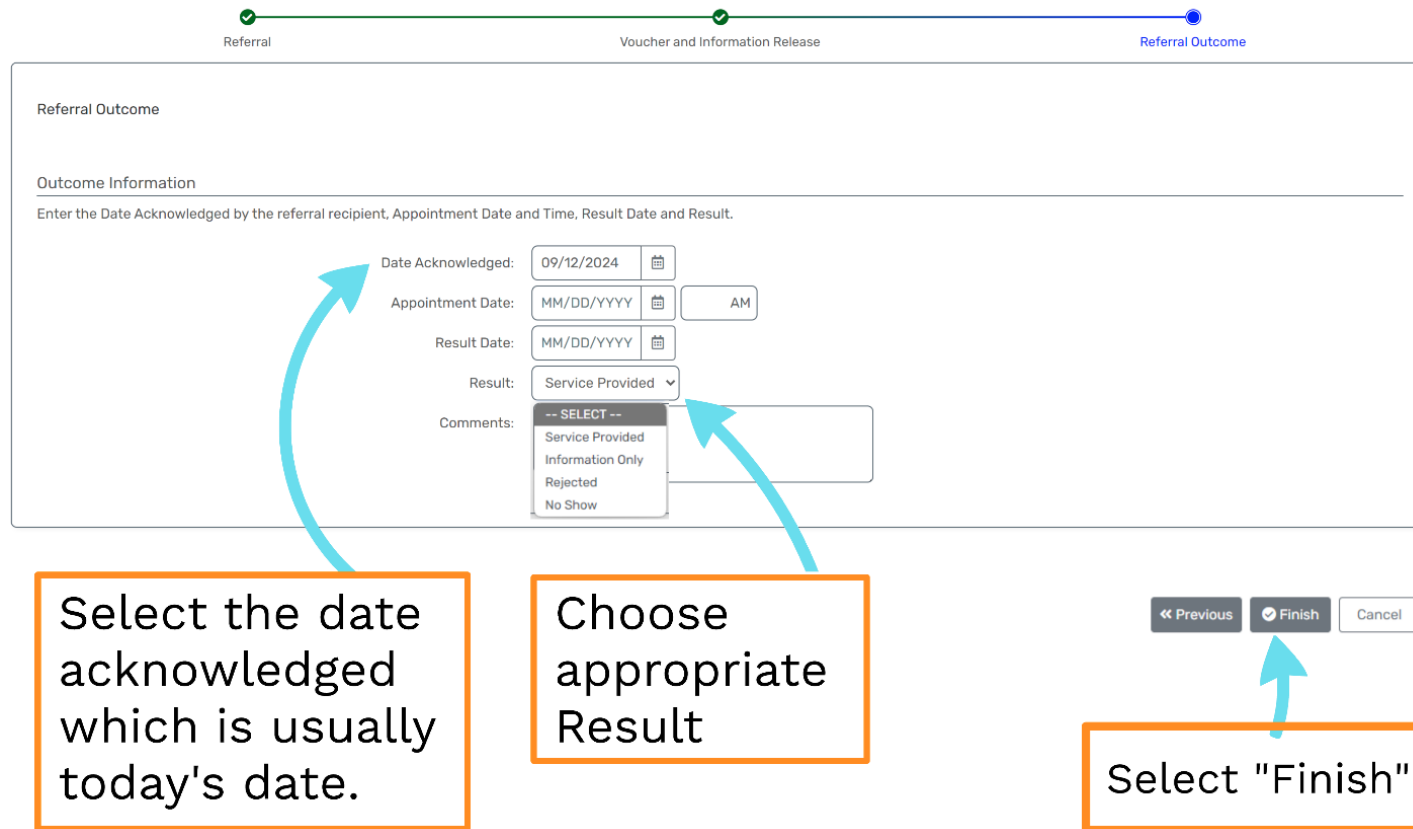
Select Referral Outcome

*Selecting Referral Outcome*

**Step 4:** Select the date acknowledged (usually the current date) and select a result (Ex. "Service Provided").

**Step 5:** Fill out any additional information if applicable. Click "Previous" to return and edit/verify information from the previous page. Click "Finish" if the information is correct or click "Cancel" to exit without saving. ClientTrack will navigate to the "Client Referrals" workspace container.

## Referral



The image shows a 'Referral Outcome' form with a progress bar at the top. The progress bar has three steps: 'Referral' (completed, green checkmark), 'Voucher and Information Release' (completed, green checkmark), and 'Referral Outcome' (current step, blue dot). The form is titled 'Referral Outcome' and has a section 'Outcome Information' with the instruction 'Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.' The form fields are: 'Date Acknowledged:' with a date picker showing '09/12/2024'; 'Appointment Date:' with a date picker showing 'MM/DD/YYYY' and a time selector set to 'AM'; 'Result Date:' with a date picker showing 'MM/DD/YYYY'; 'Result:' with a dropdown menu showing 'Service Provided'; and 'Comments:' with a text area. A dropdown menu is open for the 'Result' field, showing options: '-- SELECT --', 'Service Provided', 'Information Only', 'Rejected', and 'No Show'. Annotations with orange boxes and blue arrows point to the 'Date Acknowledged' field, the 'Result' dropdown, and the 'Finish' button. The 'Finish' button is part of a navigation bar at the bottom right with buttons for '<< Previous', 'Finish' (highlighted with a checkmark), and 'Cancel'.

Referral Outcome

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 09/12/2024

Appointment Date: MM/DD/YYYY AM

Result Date: MM/DD/YYYY

Result: Service Provided

Comments: -- SELECT --

Service Provided

Information Only

Rejected

No Show

<< Previous Finish Cancel

Select the date acknowledged which is usually today's date.

Choose appropriate Result

Select "Finish"

Referral Outcome Page

## Referrals – Referrer - Recording Accepted Referral

This section is section 3 of 3 regarding creating referrals\*, accepting referrals\*\*, and recording accepted referrals.

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*\*\* For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/[Referrals - Service Provider – Accepting Referrals](#) in the “HMIS Basic User 2025 Manual”.*

### **Steps to Recording Accepted Referrals via the Referrals Folder**

**Step 1:** Select the appropriate client profile via Quick Search\*, Find Client: Folder\*\*, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.\*\*\*

*\* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

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*\*\*\* To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

**Step 2:** Select the “Referrals” secondary sidebar menu option. ClientTrack will navigate to the “Client Referrals” workspace container, and a dropdown menu will appear under the “Referrals” folder.

*\* For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

**Step 3:** Click the edit icon next to appropriate referral. ClientTrack will navigate to the “Referral” workspace container.

*\* To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

## Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

[+ Add New Referral](#) [☰ Quick Referrals](#) [➡ Housing Referral](#) [➡ Referral Eligibility](#) [➡ Add CE Event](#) [➡ Referral](#)

16 results found.

	Service	Referral Date	To Provider	Status	Result
	Referral to RRH project resource opening	09/13/2024	<a href="#">Community Prattice Collaborative</a>	Referral Made	Service Provided
	Referral to Housing Navigation project or services	05/13/2024	<a href="#">Community Prattice Collaborative</a>	Referral Made	Service Provided
	Referral to Housing Navigation project or services	05/01/2024	<a href="#">Community Prattice Collaborative</a>	Referral Made	Service Provided
	Referral to Housing Navigation project or services	03/19/2024	<a href="#">Community Prattice Collaborative</a>	Accepted	Service Provided

Select "edit"


*Recording Accepted Referrals - Edit Referral*


**Step 4:** Under Referral Source, select “Accepted” as the status, fill any additional information. Required elements are marked with a (\*). Click “Next” to proceed to the next page or click “Cancel” to exit without saving. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” workspace container.

## Referral

Referral


Complete the information below to identify the service and the provider being referred to.

Referral Date: \* 03/19/2024 

Referral Service: \* Referral to Housing Navigation project or services 


Referral Recipient


Select the agency referral recipient as the Refer to Provider.


Refer to Provider: \* Community Practice Collaborati 


Referral Source

Select the agency referral source as the Refer from Provider.


Refer from Provider: \* Community Practice Collaborati 


Refer from User: training trainer 


Location: Option not in the list 

Status: \* Accepted 

Comments: -- SELECT --  
Referral Made  
Accepted

Enrollment: Turn Away Intake Navigation 

Associated Need/Barrier: -- SELECT -- 



Choose the appropriate option.

select next

» Next

Cancel

Recording Accepted Referrals - Referral Status Accepted



**Step 5:** Fill out any additional information if applicable. Select the “Previous” button to make changes on previous pages if applicable. Click “Next” to proceed to the next page or click “Cancel” to exit without saving. ClientTrack will navigate to the “Referral Outcome” step in the “Referral” workspace container.

**Step 6:** Select the “Previous” button to make changes on previous pages if applicable. Click “Finish” if the information is correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Referrals” workspace container.

Referral

Referral Outcome

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 09/12/2024

Appointment Date: MM/DD/YYYY AM

Result Date: MM/DD/YYYY

Result: Service Provided

Comments:

#mo1820

Select "Finish"

<< Previous Finish Cancel

Recording Accepted Referrals - Finish

	Service	Referral Date 	To Provider 	Status	Result
 	Referral to Housing Navigation project or services	03/19/2024	<a href="#">Community Praticce Collaborative</a>	Accepted	Service Provided

*Recording Accepted Referrals - Accepted Referral*