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.

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

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: Provider

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

🔍 Search

2 results found.

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

Cancel

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

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

Referral Date: * 09/13/2024

Referral Service: * -- SELECT --

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Select a Referral Provider

Refer to Provider: *

...urce

Select Referer from Provider

...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:

Select a Status

Enrollment: -- SELECT --

Associated Need/Barrier: -- SELECT --

» 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.

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

Tips and Tricks – Referrals – Emailing Authorized Clients to Referring Agency

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".

<u>Steps to Accepting Referrals via the Referrals Folder</u>

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** **→ Refer...**

16 results found.

|		Service	Referral Date ↓≈	To Provider ⓘ	Status	Result
🖉	✓	Referral to RRH project resource opening	09/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
🖉	✓	Referral to Housing Navigation project or services	05/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
🖉	✓	Referral to Housing Navigation project or services	05/01/2024	Community Pratice Collaborative	Referral Made	Service Provided
🖉	✓	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	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.
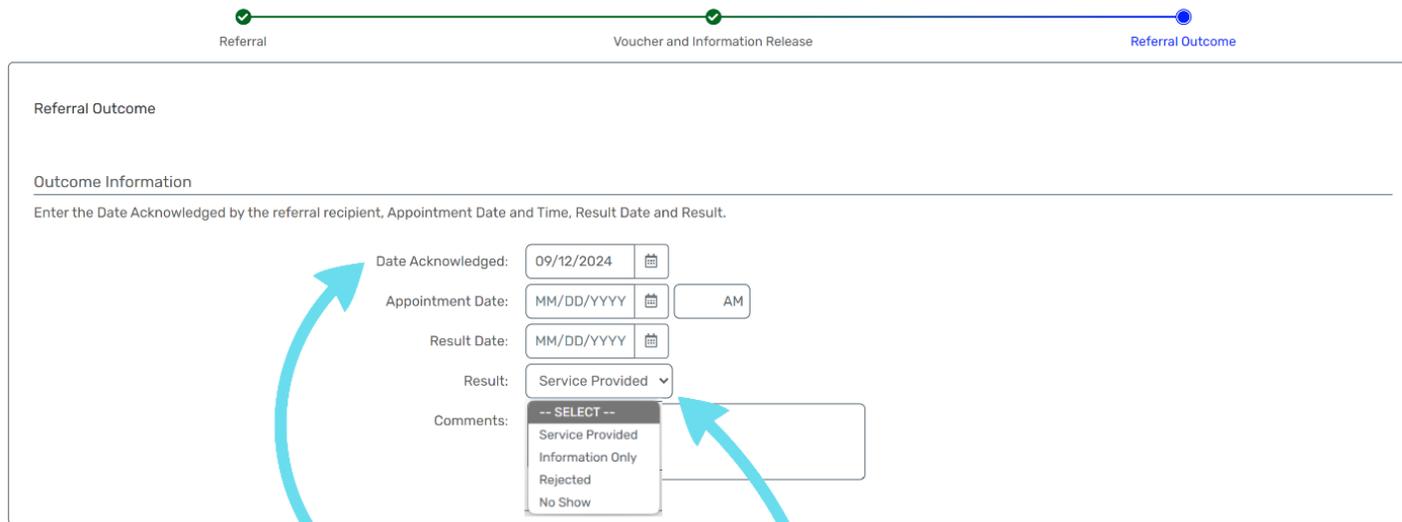
Referral

Referral ——————— Voucher and Information Release ——————— Referral Outcome

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 ▾

  -- SELECT --
  Service Provided
  Information Only
  Rejected
  No Show

Comments:

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

Choose appropriate Result

« Previous   ✔ Finish   Cancel

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.

*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".

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".

** *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 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** **↦ Referr**

16 results found.

		Service	Referral Date ⬇	To Provider ⓘ	Status	Result
✎	✓	Referral to RRH project resource opening	09/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	05/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	05/01/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	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 ——————————— Voucher and Information Release ——————————— Referral Outcome

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 Pratice Collaborati` 🔍

Referral Source

Select the agency referral source as the Refer from Provider.

Refer from Provider: * `Community Pratice Collaborati` 🔍

Refer from User: `training trainer` 🔍

Location: `Option not in the list` ▾

Status: * `Accepted` ▾

- -- SELECT --
- Referral Made
- **Accepted**
- Turn Away

Comments:

Enrollment: `...ntake 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.

Recording Accepted Referrals - Finish

		Service	Referral Date ↓↑	To Provider ⓘ	Status	Result
✎	✔	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	Accepted	Service Provided

Recording Accepted Referrals - Accepted Referral