

Referral

- From within the contact view, go to the "New Event" Dropdown menu. Choose "9) Referral" from the list of events. Click "New Event".

Contact View

Standard Summary | Print | History | Face Sheet

Contact Code: JX Contact #92880 Active Save Add Flag

Contact Info: Jane Doe, 123 Main St, Anytown, IL 11111

Work Phone: 111-111-1111
Home Phone: 222-222-2222
Cell Phone: 333-333-3333

Role: Mother
Email: j.doe@gmail.com

Source: Another agency
Assigned To: Demonstration
Type: Individual

Event Type Dropdown: 01) Personal Encounter, 02) Group Encounter, 03) Newborn Encounter, 04) Prenatal Encounter, 05) Personal Contact, 06) Screening (Dev. Health, Vision, etc), 07) Family Resource Assessment, 08) Family Service Plan, **09) Referral**, A) Screening for Eligibility, B) Child Enrollment, C) Child Transition, D) Child Exit, Notice, Update Contact

Buttons: Add an additional address, Modify, New Event

Navigation: More Contacts | Events | Sub Contact Info | Custom Fields | Forms/Surveys

More Contacts | Show Void | Attach

The system will open a new tab to a general information screen about the event:

NewOrg Management System

Event: [Blank] Type: 09) Referral Edit

Contact: Jane Doe (92880)

Date: 02/09/2018 Start Time: 10:00 AM End Time: 10:00 AM

Remind me: 0 days before this event.

Description: [Text Area]

Assigned To: User1

Status: Pending Open/Closed: Open Access: Public

Division: [Dropdown] Program: [Dropdown]

Referral Reason: [Text Area]

Referral Category: [Dropdown]

Referred to: [Dropdown]

Date of staff follow up: [Date Picker]

Action by Program Staff: [Text Area]

Accessed Services: [Dropdown]

Describe result of referral: [Text Area]

Buttons: Save, Save & New, Save & Close, Cancel, Copy Contacts, Copy Event

This is the view of the event you are creating.

Referral

Choose the contact you are referring using the “Contact” drop down.

(EI will be the child; Non-EI will be the Primary contact)

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Enter the following field values and click <Save>.

Field	Value
Event	A short description. Not used for reporting. Does appear on the calendar view on the Event tab.
Date	Date on which the event happened
Description	General notes
Status	Pending or Complete. Void is only used to eliminate errors or duplication.
Open/Closed	Open for referrals needing follow up. Closed for all others.
Division	“Home Visiting”
Program	Choose appropriate program for your agency.
Referral Reason	A short description.
Referral Category	Choose appropriate category.
Referred to	Choose appropriate referral for your agency.
Date of staff follow up	Date on which the staff plans to follow up.
Action by Family	A short description.
Action by Program Staff	A short description.
Accessed Services	Choose “Yes”, “No”, or “Other Outcome”
Describe result of referral	A short description.

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Click <Save>