Add or close referrals

Adding a Referral

You should be in the EDA where the client is being referred from, have the client record open and be on the Summary Tab of the Head of Household (or Single) to make a referral.

1. In the Outstanding Outgoing Referrals dashlet, click on **Add Referral**. You can also access it from the Service Transactions Tab under the Referrals tab.

2. Do NOT select any additional household members.

3. Select the needed service from the Service Code Quick List and click **Add Terms**.

    a. Find the provider by using the Search click the first letter or your county or agency to shorten the Provider list. Use ⊕ to select the provider who will fulfill the service selected in Step 1.

4. Under "Refer to Providers", record the **Needs Referral Date** (Referral Date), choose the household type in Referral Ranking, select a VI-SPDAT score via Search if one is already entered. The Follow-Up section is optional.

5. Click **Save All**.

Closing a Referral

You should be in the EDA where the client is being referred to before proceeding.

1. Click on the Referral, either in the Follow-Up list, the Counts report, the Referrals report, the Outstanding Incoming Referrals report dashlet, or in the Service Transactions Tab by clicking on the pencil next to the referral.

2. Select a "Referral Outcome" to indicate if the referral was **Accepted**, Declined or Cancelled.

3. If Follow-Up was used, select a "Follow Up Made" status and enter a "Completed Follow Up Date" to indicate when and how the referral was followed up on.

4. Select a "Need Status", and "Outcome of Need" (Typically **Closed** and **Fully Met**).

5. Click on **Save & Exit**.