# REFERRALS –VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

# Contents

# Video Companion Guide Overview

The purpose of this Video Companion Guide is to assist Users in their understanding of the material which is covered in the Video Resource Guides for System Administrators. This is NOT a standalone Guide.

These guides are different than the System Administrator's Resource Guide series. That series does not include step-by-step processes, but rather should be used as a resource for how the system works.

This guide is largely the script which was created for the video. Please know that the examples used in the guide are *parallel* to those in the video, but the process is the same. *For example*, the video might show Cynthia Brown receiving a service while the guide shows screenshots for Claire Davis. The recording of the service for Claire will follow the same procedure as Cynthia.

Each guide correlates with an entire video series. Each section of the guide corresponds with an individual video in the series.

This guide may be used:

- while watching the videos
- for reference while taking the class independently
- for reference after the implementation process
- as a reference when documenting custom configuration

As CaseWorthy is continually growing and expanding, the Video Companion Guides for System Administrators will be updated to show changes before the videos. Information, which is not included in the video, but is current in the CaseWorthy application will appear similar to the text below:

UPDATE: Text that follows this icon will be updates to the material that are not yet available in video format.

# Referrals

The CaseWorthy *Referrals* video series includes information about the following topics:

- Overview
- Database Configuration
- Entering Provider Referrals
- Entering Program Referrals
- Viewing and Managing Referrals
- Referral Analytics

This first video of the *Referrals* video series provides an overview of types of referral functionalities which are available within the CaseWorthy application.

**Provider Referrals** are used when a Provider needs to send a Client to another Provider to receive services. The other Provider may:

- Belong to a different Organization that uses the same CaseWorthy database.
- Belong to a different Organization that doesn't use the CaseWorthy database.

**Program Referrals** are used to refer Clients to programs.

This is beneficial for:

Providers who currently use an initial program to perform needs-based assessments to determine the interventions and services Clients require offered by other programs.

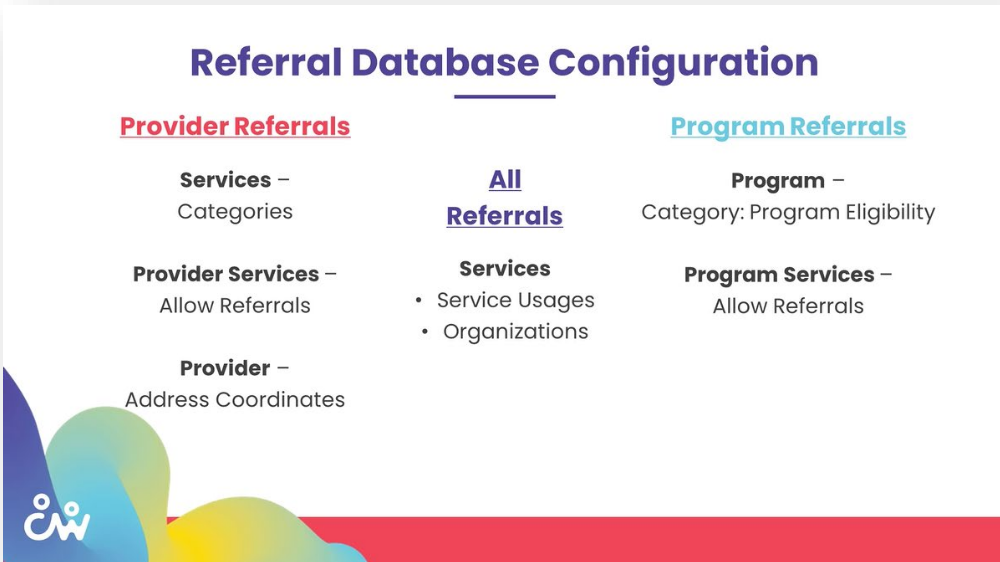
Providers who maintain a general case management program from which Case Managers then refer the Client to all necessary programs to meet their various needs.

Lastly, this functionality is helpful for Providers whose Case Managers regularly refer their Clients to other programs within their agency to obtain services.

In the next video of the *Referrals* series, we will explore the database configuration required for referral functionality.

# Database Configuration

This 2nd video of the CaseWorthy *Referrals* video series provides details on how to configure all necessary set up for Provider and Program Referral functionalities.




Database configuration is slightly different for Provider and Program Referrals with some overlap.

**Both** require services to be configured with Service Usages and made available to the necessary Organizations.

**Provider Referrals** also need the services to belong to a category for muti-referral entry.

The Providers must include addresses with latitude and longitude coordinates.

And services must be associated with Providers and allow for referrals.

**Program Referrals** require the program to include the Program Eligibility category.

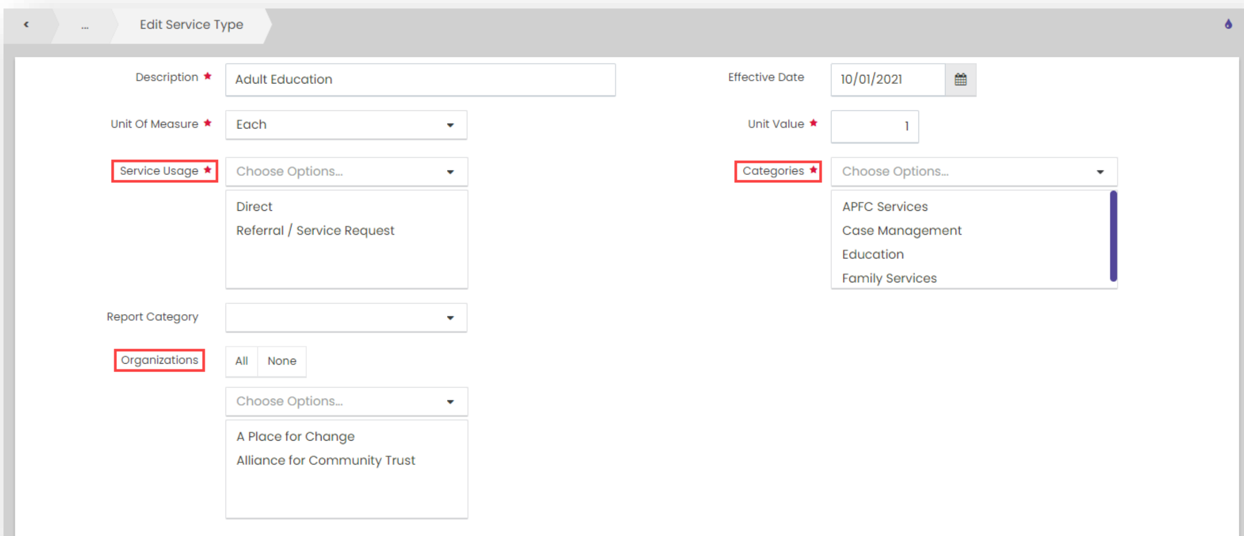
 

And the services must be associated with the programs and allow for referrals.

## Service Configuration

We'll start with the service configuration that is necessary for both Provider and Program Referrals.

On the Administration tab, select Setup, and then select Services.
Select the service from the summary form.




For services to appear for either referral functionality, the service must include both **Service Usages** 'Direct' and 'Referral/Service Request'.

Next, the service must also be associated to the necessary **Organizations**. If not, the Users of the Organizations will not have access to use the service.

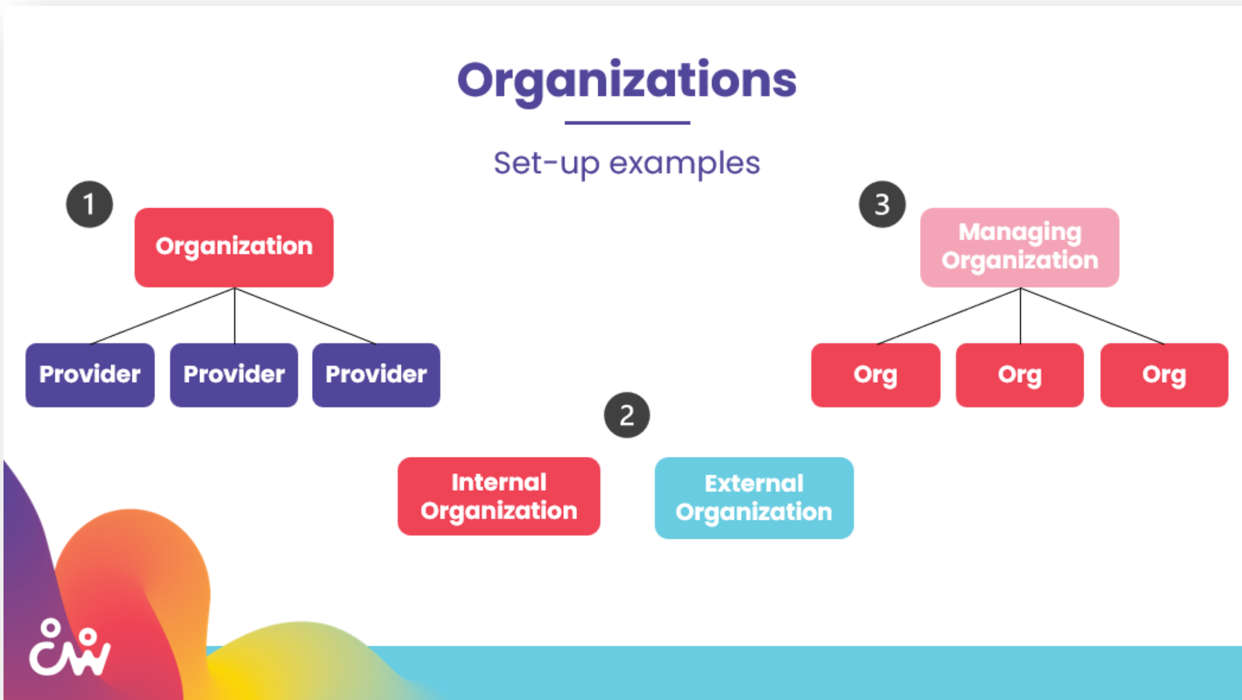
**Categories** are used for Provider Referrals when recording multiple referrals at once. The specific category does not matter, but all the services which could be included need to share the same category.

Generally speaking categories are helpful for filtering on forms and reports.

# Provider Referral Configuration

Next, I'll cover what is necessary specifically for Provider Referrals.

In the *Organization* video series, External Organizations were described to be used for Provider Referral purposes. External Organizations are set up so that external Providers can be created to which Clients can be referred for services.

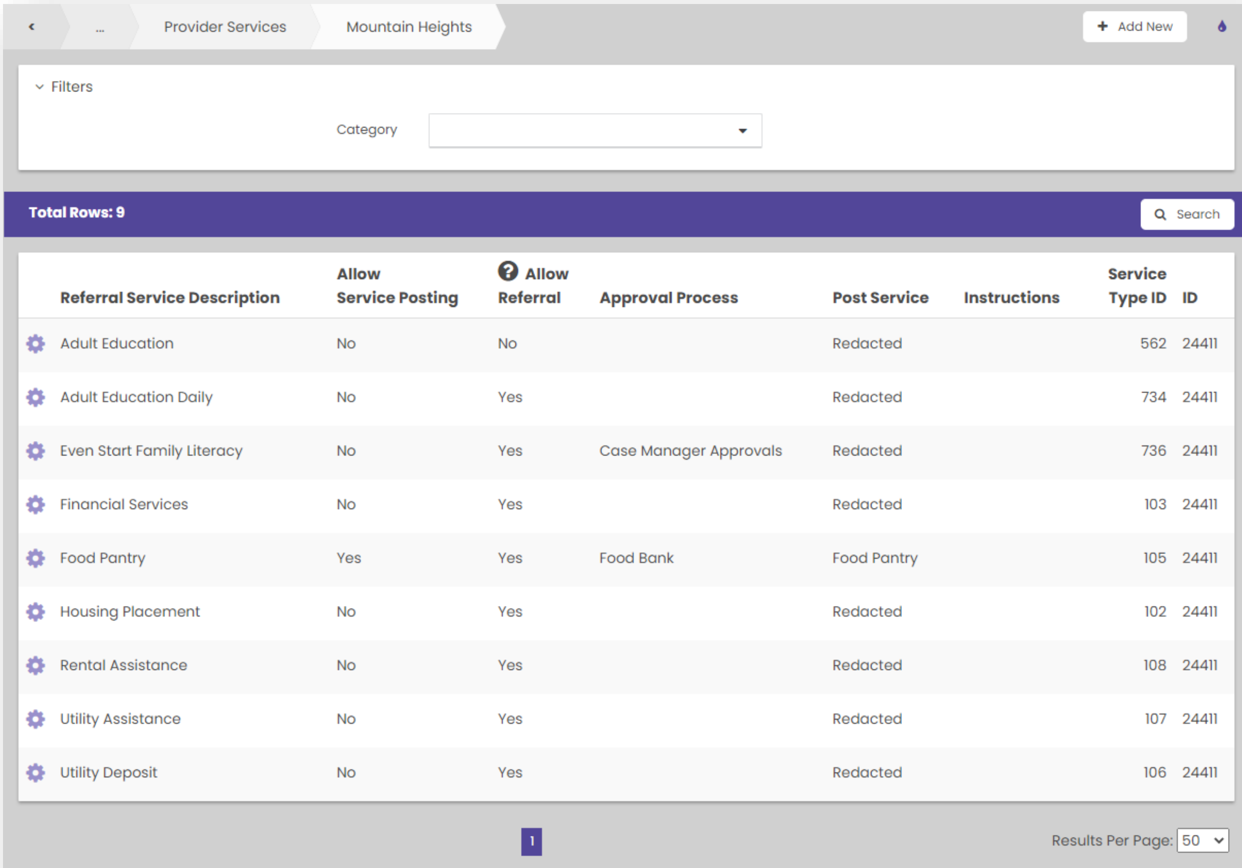



Client data is not actually captured by external Providers in CaseWorthy. Using the external Organization and Provider setup helps with the management of your Organization's own Providers while also keeping the two separated.

Once all necessary Providers are created for referral purposes, navigate on the Administration tab, to Setup, Organizations and Providers (via the Organization action gear).

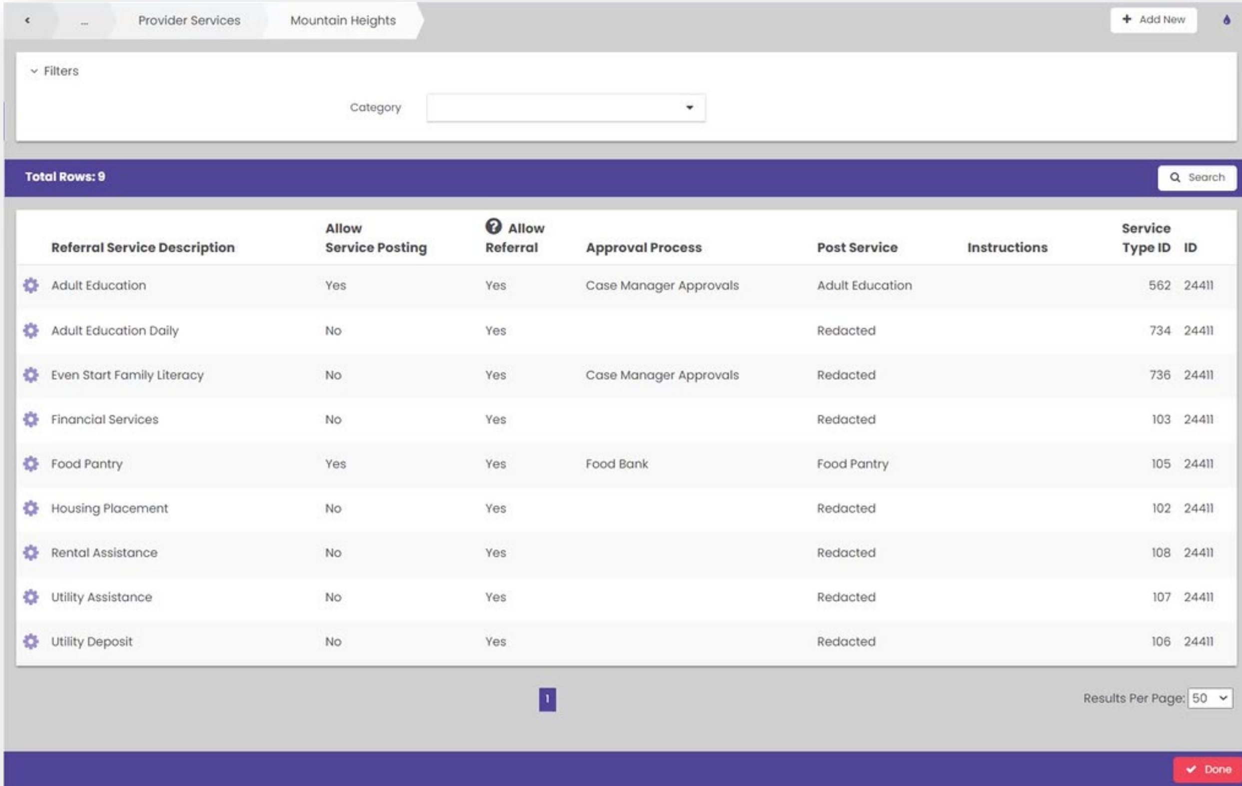
## Provider Services

Provider Referrals require services to be associated to the Provider and to be set to allow referrals. From the action gear of the Provider select **Provider Services**.




| Referral Service Description | Allow Service Posting | Allow Referral | Approval Process | Post Service | Instructions | Service Type ID | ID |
|---|---|---|---|---|---|---|---|
| Adult Education | No | No | | Redacted | | 562 | 24411 |
| Adult Education Daily | No | Yes | | Redacted | | 734 | 24411 |
| Even Start Family Literacy | No | Yes | Case Manager Approvals | Redacted | | 736 | 24411 |
| Financial Services | No | Yes | | Redacted | | 103 | 24411 |
| Food Pantry | Yes | Yes | Food Bank | Food Pantry | | 105 | 24411 |
| Housing Placement | No | Yes | | Redacted | | 102 | 24411 |
| Rental Assistance | No | Yes | | Redacted | | 108 | 24411 |
| Utility Assistance | No | Yes | | Redacted | | 107 | 24411 |
| Utility Deposit | No | Yes | | Redacted | | 106 | 24411 |

The form displays all services that are associated with the Provider along with other details including if the service is referrable (**Allow Referral**).




| Referral Service Description | Allow Service Posting | Allow Referral | Approval Process | Post Service | Instructions | Service Type ID | ID |
|---|---|---|---|---|---|---|---|
| Adult Education | Yes | Yes | Case Manager Approvals | Adult Education | | 562 | 24411 |
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| Financial Services | No | Yes | | Redacted | | 103 | 24411 |
| Food Pantry | Yes | Yes | Food Bank | Food Pantry | | 105 | 24411 |
| Housing Placement | No | Yes | | Redacted | | 102 | 24411 |
| Rental Assistance | No | Yes | | Redacted | | 108 | 24411 |
| Utility Assistance | No | Yes | | Redacted | | 107 | 24411 |
| Utility Deposit | No | Yes | | Redacted | | 106 | 24411 |



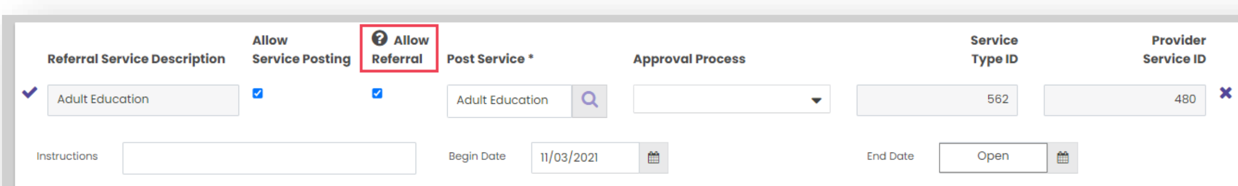
A list of all services which are associated with the Provider's Organization are displayed.

Provider Service configuration is also used for Service Request functionality. See the *Service Request and Authorization* video series for full details.

Use **ADD NEW** to associate a new Provider service or edit an existing record.

Here all Provider services can be managed, and new services can be added.

For Provider Referrals, the service must be selected, and the **Allow Referral** option selected.



Ensure the **Begin** and **End Dates** are correct in terms of when the service is available.

Click SAVE to update.

## Provider Location

The Provider's address, which is managed on the *Add/Edit Provider* form, is important for Provider Referral Functionality.

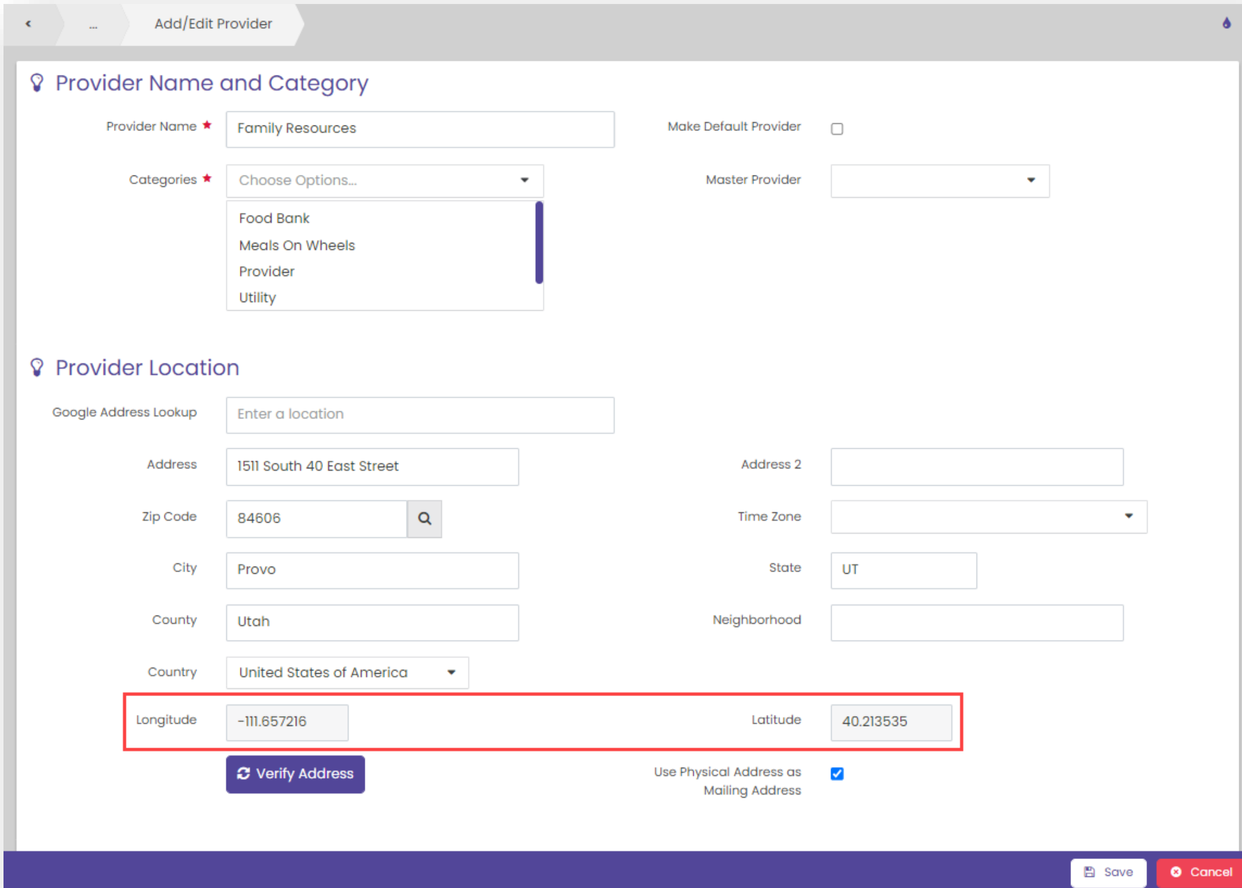
Still on the Administration tab, navigate to Setup, Organizations, and Providers (via the Organization's action gear).

Total Rows: 13 Search

| Provider | Provider Type | Address, City, State & Zip | Latitude | Longitude | Provider ID | Org ID |
|---|---|---|---|---|---|---|
| APFC Foster Care | Provider | 515 950 south Salt Lake City, UT, 84104 | 40.7490256 | -111.9350051 | 24415 | 24410 |
| APFC Foster Care | Foster Care | 515 950 south Salt Lake City, UT, 84104 | 40.7490256 | -111.9350051 | 24415 | 24410 |
| APFC Foster Care | Adult Foster | 515 950 south Salt Lake City, UT, 84104 | 40.7490256 | -111.9350051 | 24415 | 24410 |
| Family Resources | Meals On Wheels | 1511 South 40 East Street Provo, UT, 84606 | 40.213535 | -111.657216 | 24416 | 24410 |
| Family Resources | Provider | 1511 South 40 East Street Provo, UT, 84606 | 40.213535 | -111.657216 | 24416 | 24410 |
| Family Resources | Utility | 1511 South 40 East Street Provo, UT, 84606 | 40.213535 | -111.657216 | 24416 | 24410 |

The **Latitude** and **Longitude** coordinates are used by the application to calculate the distance between the Provider and the Client.

These coordinates will display when using the recommended **Google Address Lookup** field. If entering an address manually, use VERIFY ADDRESS to obtain the coordinates.



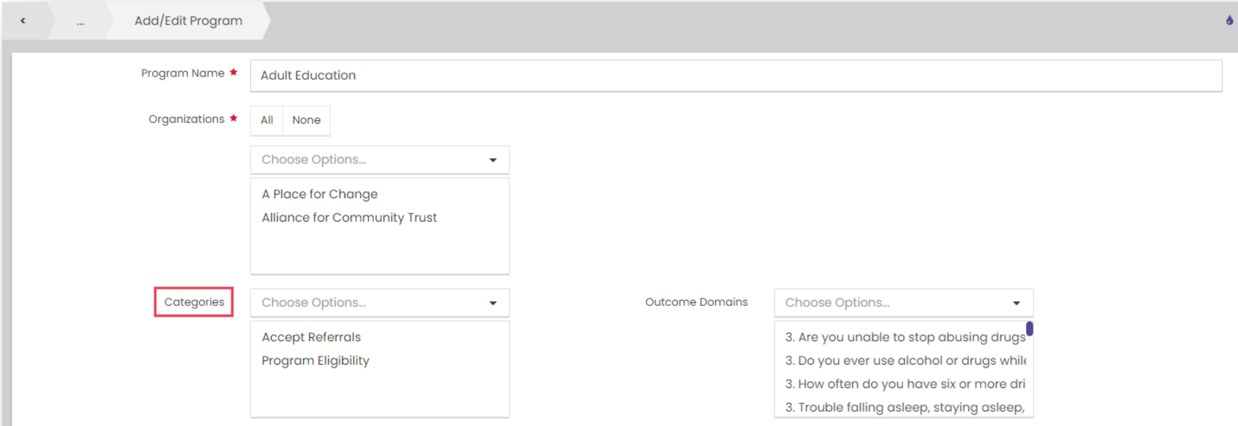

# Program Referral Configuration

Next, let's cover what is necessary for Program Referral functionality.

## Program Categories

Programs which are able to receive referrals must include two program categories.

Navigation: All Features role – Administration tab: Setup > Programs and Accounts > Programs



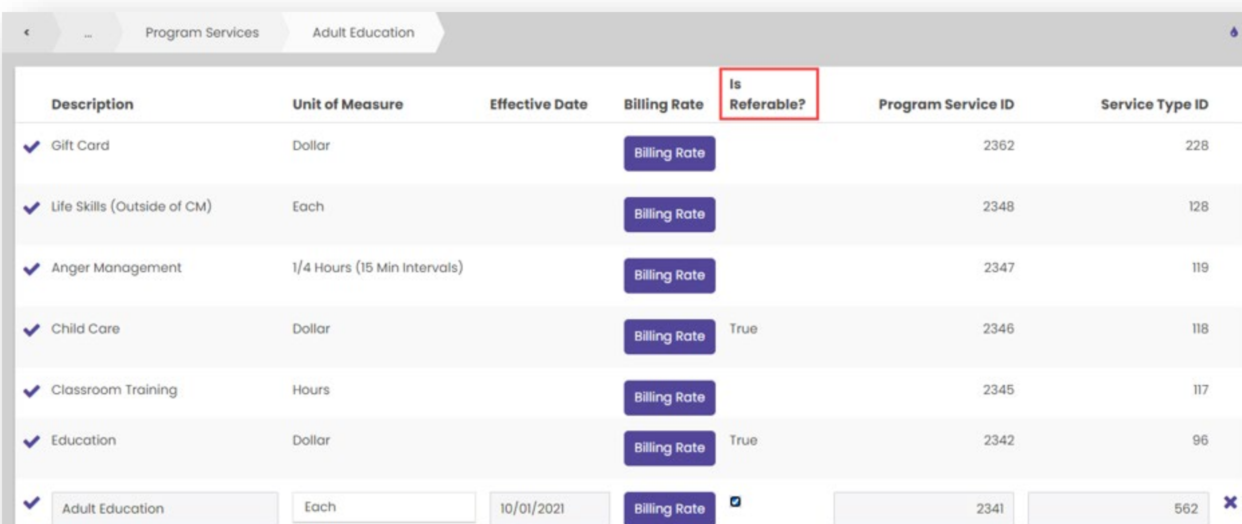

Be sure to edit all necessary programs with the **Category** 'Accept Referrals' and 'Program Eligibility'.

## Program Services

The Program Referral process includes identifying the services which the Client should receive while enrolled in the program

This is done on the Programs summary form, from the Program's action gear, select Program Service.

In addition to being associated to the program, they must also be set as '**Is Referable?**'



Only the referrable services will be available when entering Program Referrals.

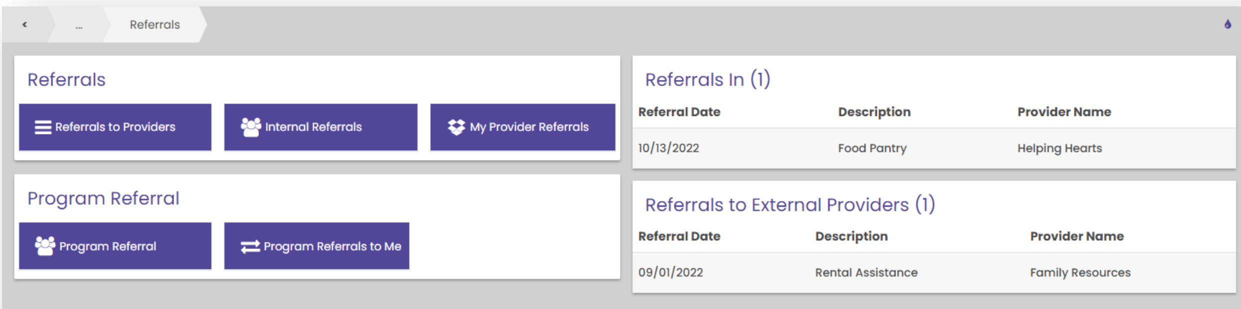
This concludes our coverage of the necessary database configuration for both Provider and Program Referral functionality.

Next in the series, we will explore entering Provider Referrals.

# Entering Provider Referrals

This 3rd video of the CaseWorthy *Referrals* video series explores recording Provider Referrals as well as recording referrals which were received from another Provider which doesn't use CaseWorthy.

Referrals are entered on the Case Management tab through Case Management, and then select Referrals.

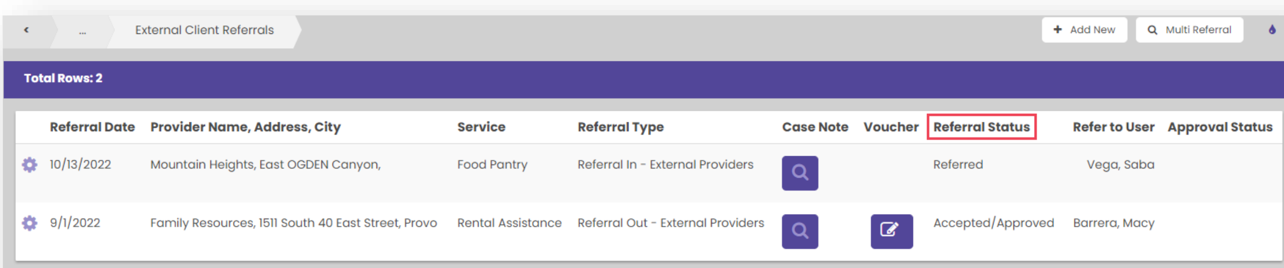



The Referrals menu links are used for Provider Referrals while the second set of menu links are for Program Referrals.

The dashboard also displays query widgets which display recent Provider referrals.

## Referrals to Providers

**Referrals to Providers** is used to record referrals that are being made to other Providers which may belong to Organizations which use your CaseWorthy database as well as those who belong to External Organizations.



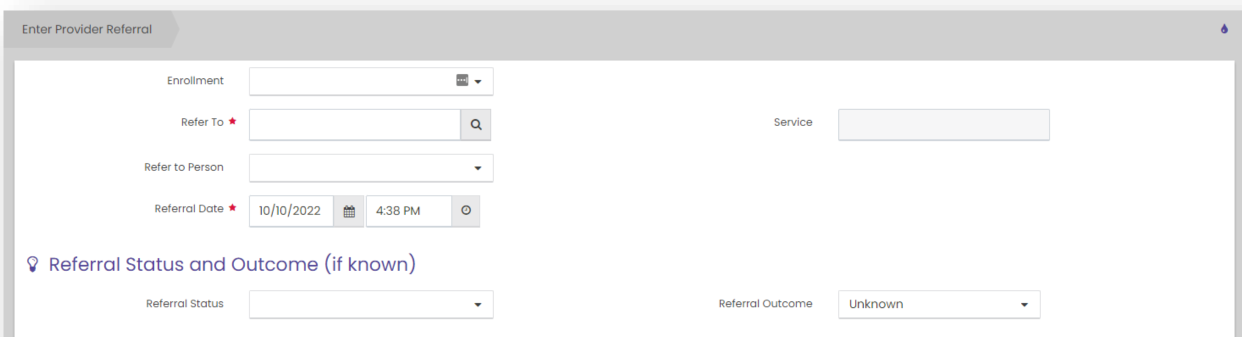
The summary form displays all Provider Referrals made on behalf of the Client, including those which are manually recorded for referrals received by the Provider themselves

The **Referral Status** indicates in what part of the process the referral is currently. If the referral is made to a Provider which uses the same CaseWorthy database, the status will reflect updates made by the receiving Provider, otherwise, manual updates can be made.

ADD NEW is used to enter a single Provider Referral while MULTI REFRERRAL is used to enter multiple referrals for services to the same or multiple Providers.

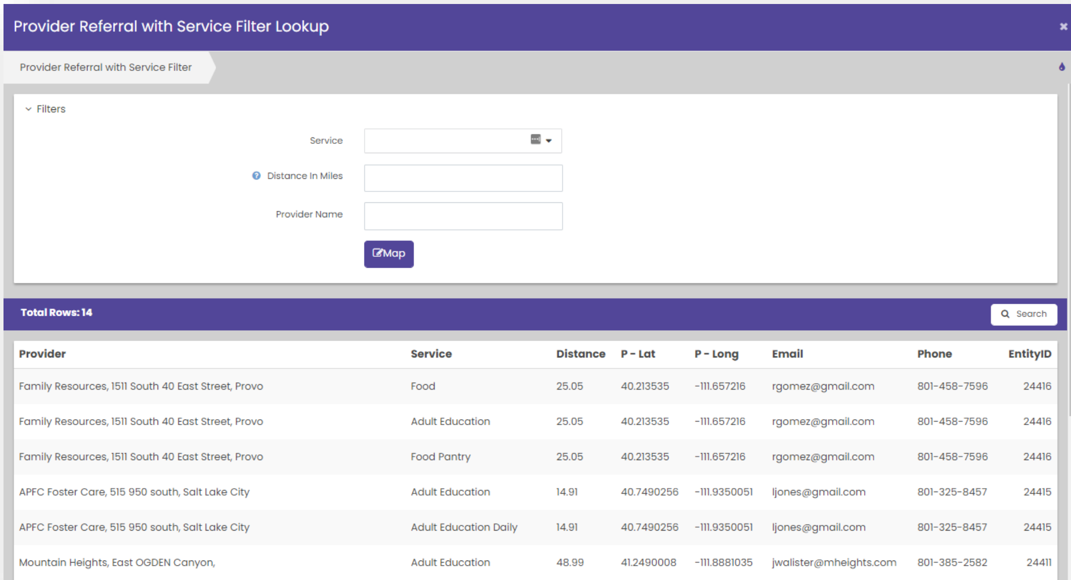
## Add a Single Referral

To record a single referral, click ADD NEW.




Select the Client's **Enrollment** to which the referral pertains. If linked to a program, the referral will be viewable according to data sharing rules set up at Organization and program levels.

In the **Refer To** field, use the **lookup icon** to select a Provider to where the Client is being sent.

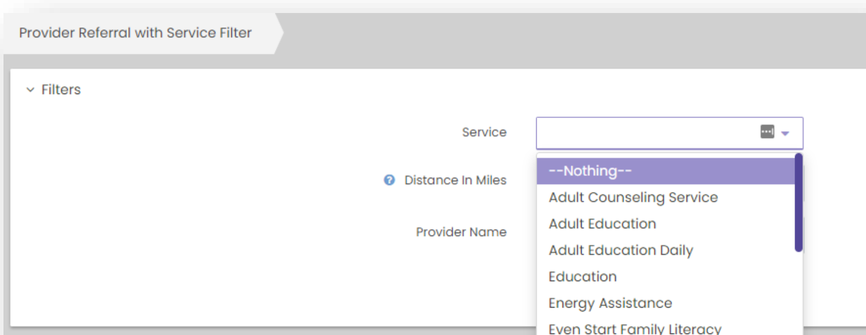



The *Provider Referral with Service Filter Lookup* form displays all Provider's services are marked as 'Allow Referral'. If a Provider is not listed here, review [Provider Services](#) to ensure system configuration was performed correctly.

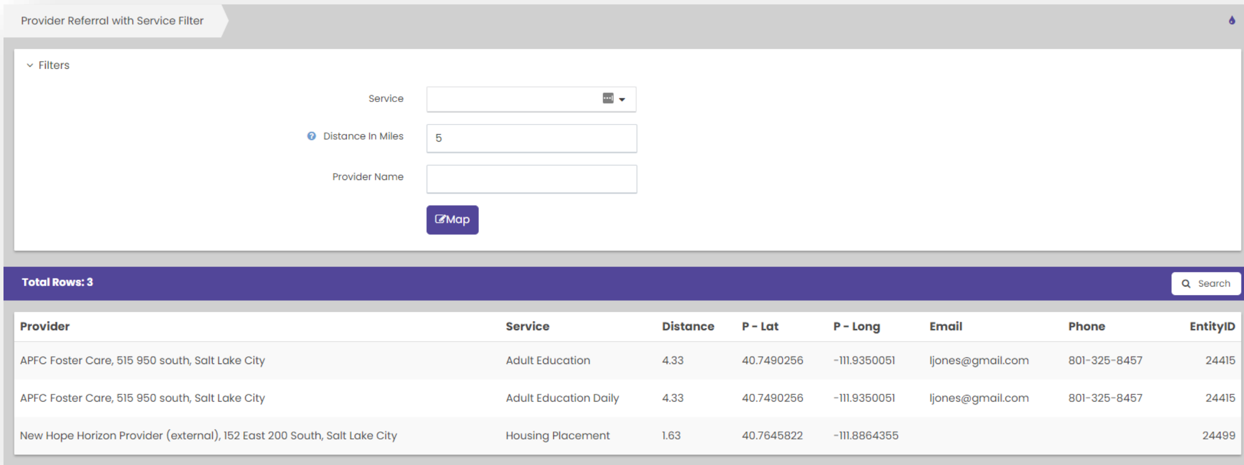
Other details about the Provider display which are managed on the *Add/Edit Provider* form.

Filters are available to search for the Provider.

**Services** lists all those which have been associated to Providers and marked as 'Allow Referral'.



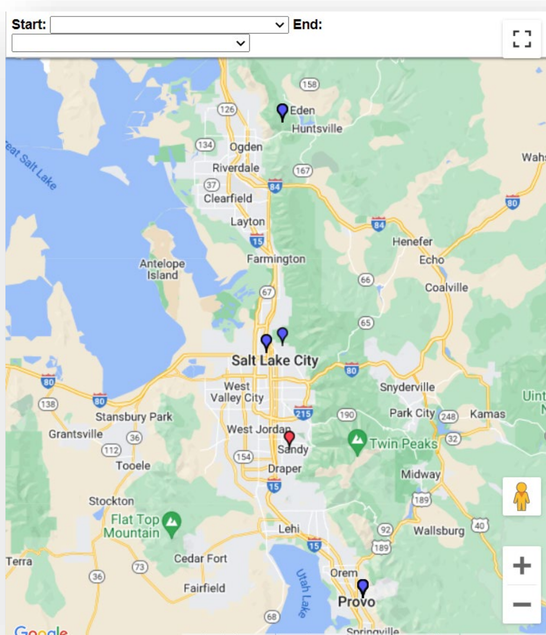
The **Distance in Miles** filters the list by the entered distance between the Provider and the Client according to the addresses entered for each. For example, if you enter 5 and SEARCH, the list will display all Providers that are located within a 5-mile radius of the Client's address.




| Provider | Service | Distance | P - Lat | P - Long | Email | Phone | EntityID |
|---|---|---|---|---|---|---|---|
| APFC Foster Care, 515 950 south, Salt Lake City | Adult Education | 4.33 | 40.7490256 | -111.9350051 | ljones@gmail.com | 801-325-8457 | 24415 |
| APFC Foster Care, 515 950 south, Salt Lake City | Adult Education Daily | 4.33 | 40.7490256 | -111.9350051 | ljones@gmail.com | 801-325-8457 | 24415 |
| New Hope Horizon Provider (external), 152 East 200 South, Salt Lake City | Housing Placement | 1.63 | 40.7645822 | -111.8864355 | | | 24499 |

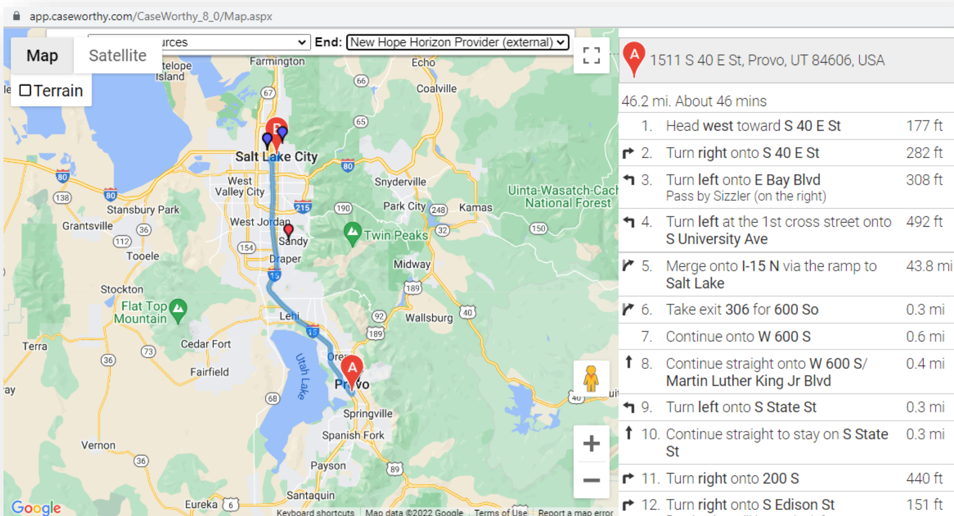
**Provider Name** filters the list by the portion of the name entered.

MAP is also available to view the list of Providers on a map.



The red pin indicates the Client address. The blue pins indicate Provider locations.

The **Start** and **End** fields on the map allow for selecting locations and calculating distances. Directions are also provided.



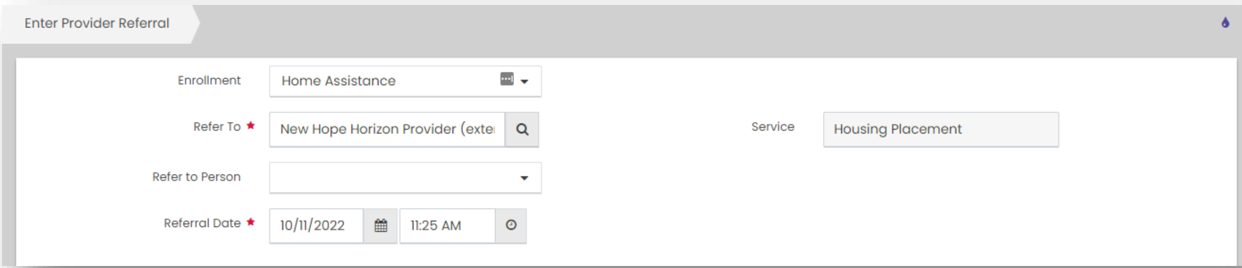

It is important to note a few items about distance.

The latitude and longitude coordinates for the Provider are calculated based on the address details entered for the Provider during setup.

The coordinates for the Client are based on the address entered on the *Client's Demographic* form.

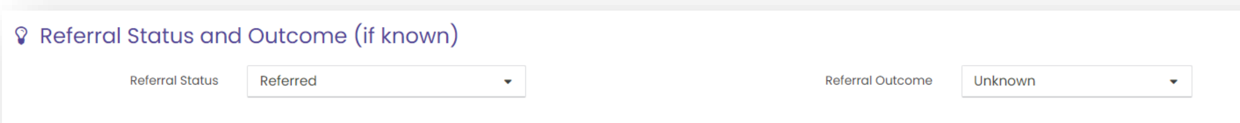
The distance between the Provider's location and the Client's address is calculated from point to point on the map.

Once a Provider is selected from the list, the Provider is populated in the **Refer To** field and the service offered by the Provider automatically populates the **Service** field.



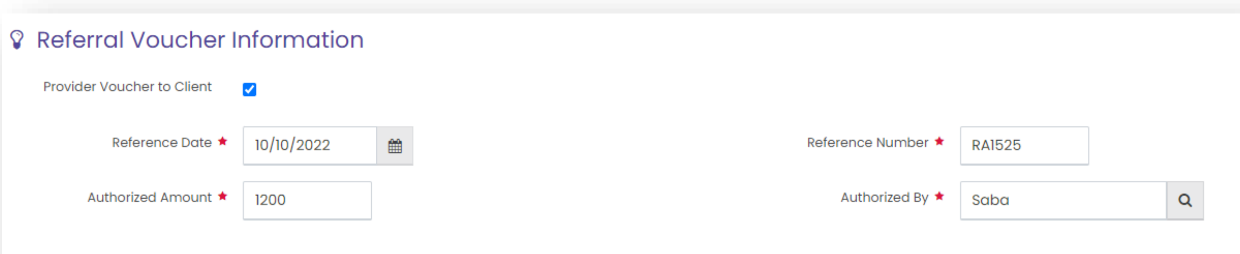

All the Provider's Users are available for selection in **Refer to Person**. Since this is an external organization, there aren't associated Users.

The **Referral Date** defaults to the current date but can be changed as needed.




The **Referral Status** will default to 'Referred.'

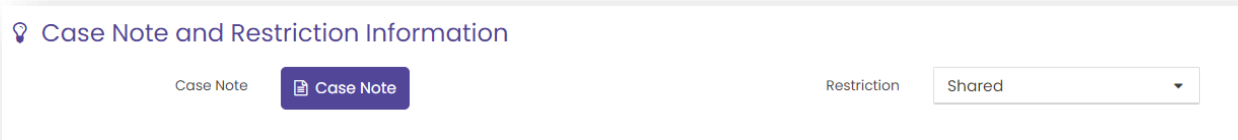
The **Referral Outcome** will be entered later to indicate the result of the referral.



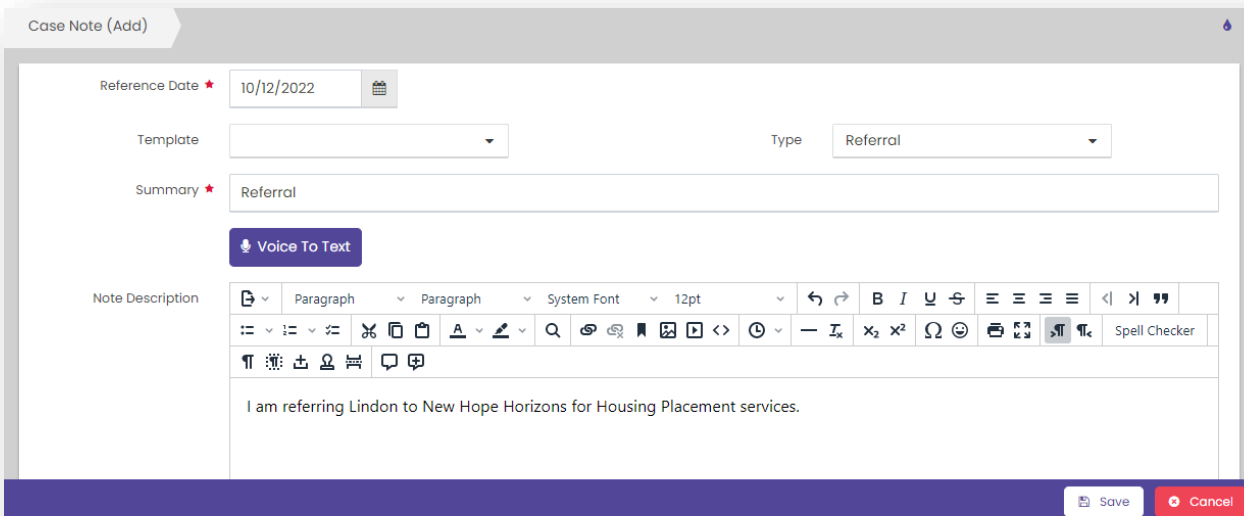

 

Vouchers are used when payment will be made to the receiving Provider for the amount that will be provided so they can send an invoice for the services rendered.

When **Provider Voucher to Client** is selected, additional required fields display to capture the **Reference Date**, **Reference Number**, **Authorized Amount**, and who the voucher is **Authorized By**.



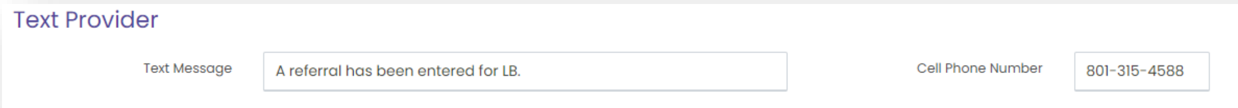

A referral related CASE NOTE can be recorded.



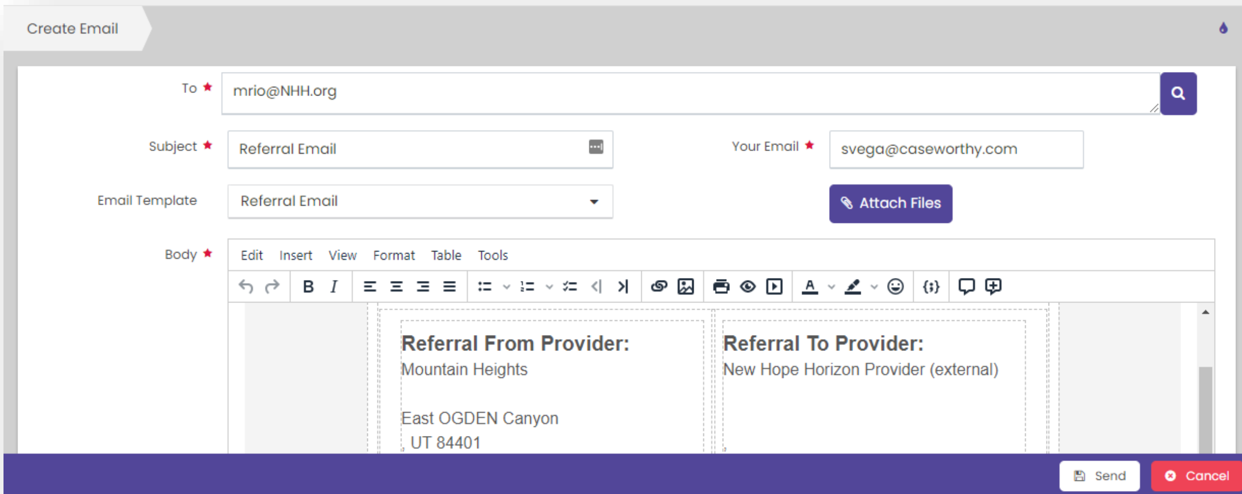

The **Restriction** sets if this record should adhere to Organization's data sharing rules.

Both Texting and Emailing functionality require subscription services and necessary configuration if they are available for your database.

To send a text message about the referral, enter the message and cell phone number for the recipient.



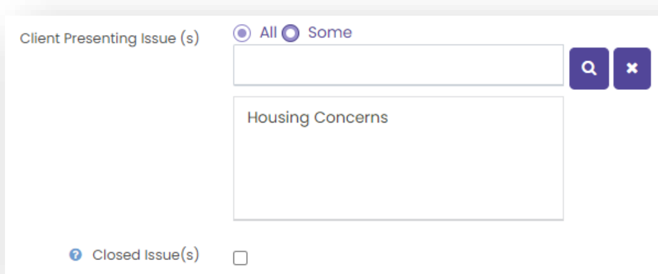

Click CREATE EMAIL to generate and send the details of the referral.




The ‘Referral Email’ template includes the same information that appears when generating the *Referral Report* from the referral’s action gear on the summary form.

If a User is selected as the **Refer to Person**, their email address defaults in the **To** field. Otherwise email addresses can be manually entered.

Use **Client Presenting Issue(s)** to record any presenting issues which pertain to the referral.

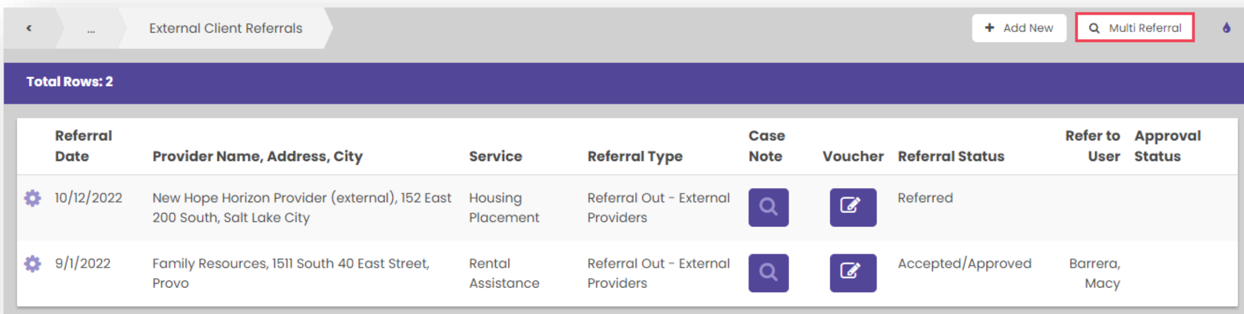


If selected, additional options display allowing you to select presenting issues as well as the option to edit the referral to close concerns that have been resolved due to this referral.

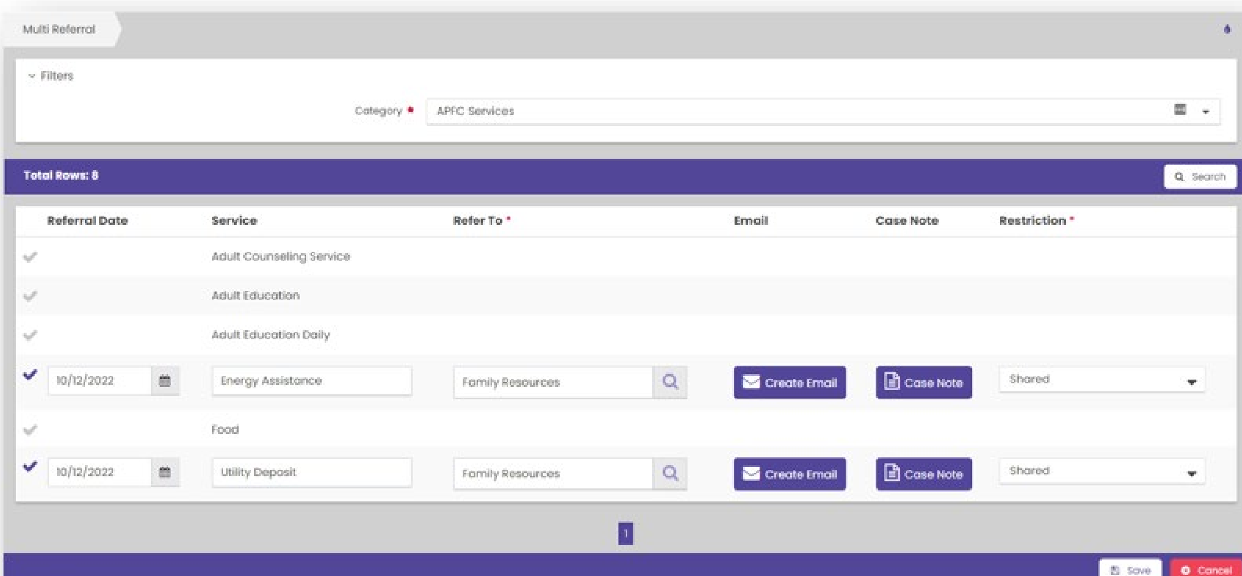
SAVE the new referral.

## Add Multiple Referrals

MULTI REFERRAL is used to record multiple provider referrals at one time. This can be used to refer to multiple providers.



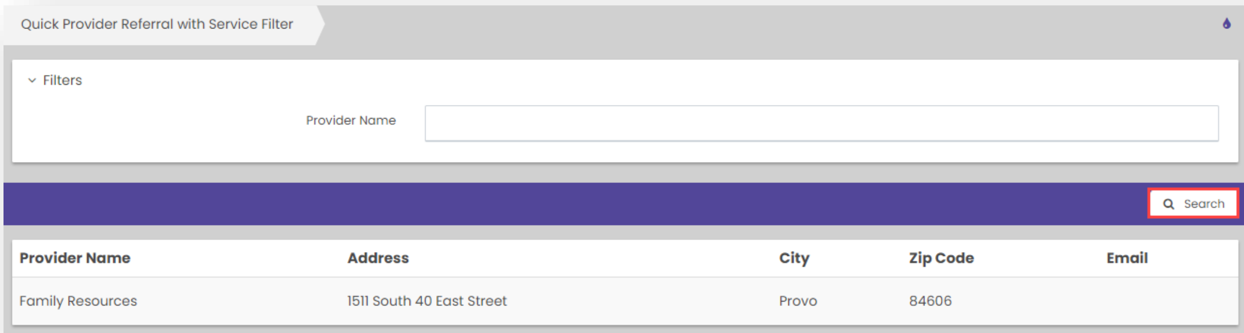

In order to utilize this functionality, all the services must include the same category. Select the service category in the dropdown and click SEARCH to display the available services of that category for referrals.



Select each service for which the Client is being referred.

Use the **Refer To** lookup to select the Provider to which the referral is being sent.

Click SEARCH without entering a Provider to review all those which provide the necessary service.




The list is based on the Provider Service configuration which is covered in the *Database Configuration* video of this series. Select the Provider record.

Use CREATE EMAIL to generate and send the details for each referral for the Client via email. This does require an emailing service.

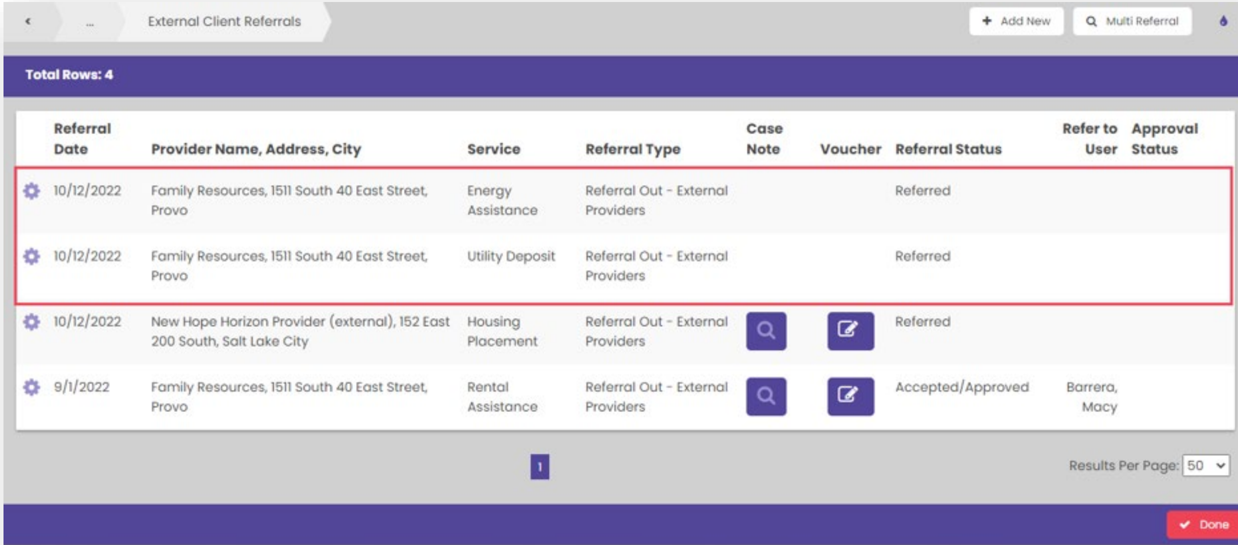
A referral CASE NOTE can also be recorded to the Client's record here for each referral.

**Restriction** sets if this record should adhere to Organization's data sharing rules.

SAVE the referrals.

## External Client Referrals Summary

Each referral will appear on the *External Client Referrals* summary form separately.

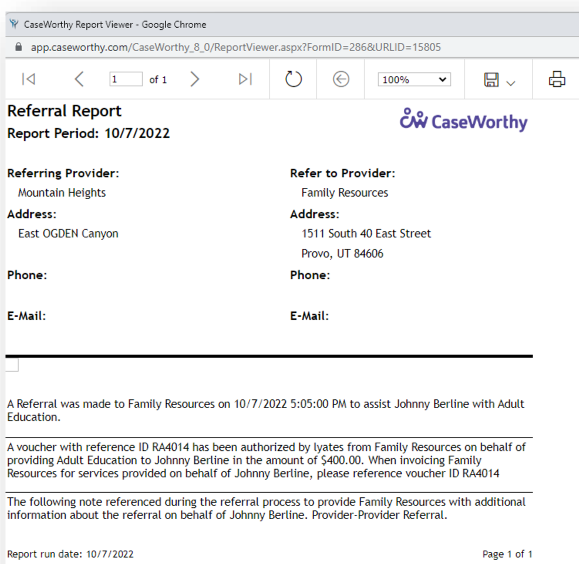



**Case Notes** and **Vouchers** can be accessed from the record.

The action gear provides the ability to **Edit** the referral which would be used to update the **Referral Status** and Outcome. See the *Viewing and Managing Referrals* video of this series for full details.

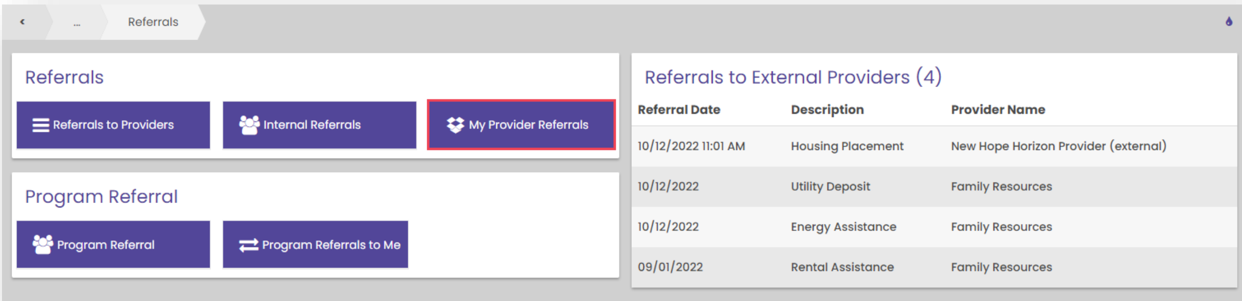
**Delete** is used if the referral was entered in error.

A **Referral Report** is available to generate and print the details of the referral.

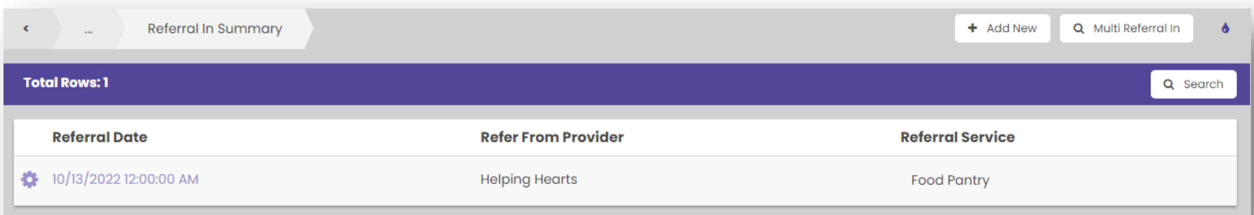


# Received Referrals

**My Provider Referrals** is used to record the details of incoming referrals for a Client, typically during intake. This is used when the referral is being sent by a Provider who doesn't use the same CaseWorthy database.



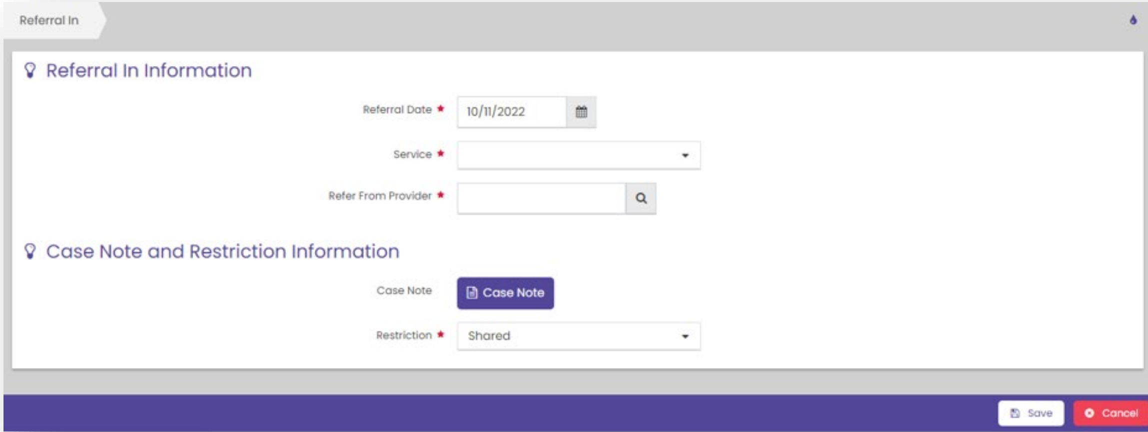

The form displays a list of records which were recorded for received referrals, including the date of the referral, the referring Provider, and for what service.




## Add a Single Referral

Like when entering referrals to Providers, you can record the details of a single received referral (ADD NEW) or multiple received referrals (MULTI REFERRAL IN) from this form.

Click ADD NEW to record the details for one received Provider referral.




The **Referral Date** defaults to the current date.

Select the **Service** for which the Client was referred to your Provider. These are Provider services which allow referrals.

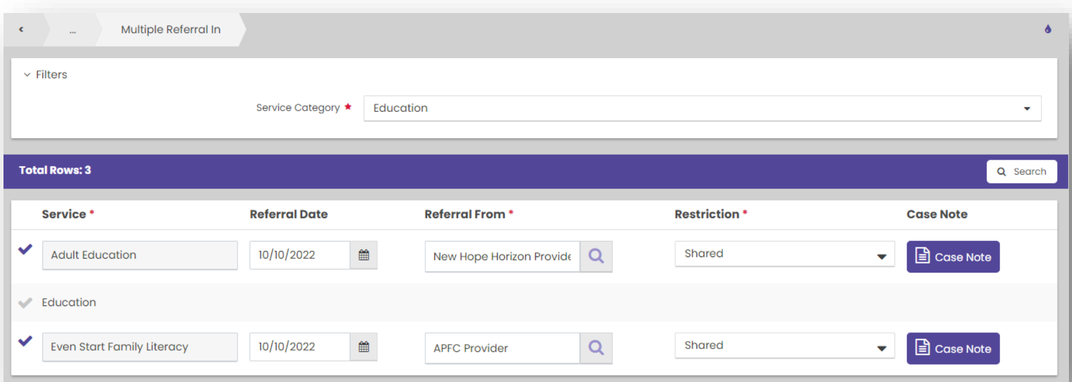
Use the **Refer from Provider** lookup to select from where the Client was referred.

A Referral CASE NOTE can also be recorded here as well.

The **Restriction** sets if this record should adhere to Organization data sharing rules. Click SAVE to record the referral.

## Add Multiple Referrals

You can also record the details of multiple incoming referrals at one time using MULTI REFERRAL IN.



Again, to use this functionality, all the services must include the same category.

Select each service for which you would like to record the received referral along with the other details.

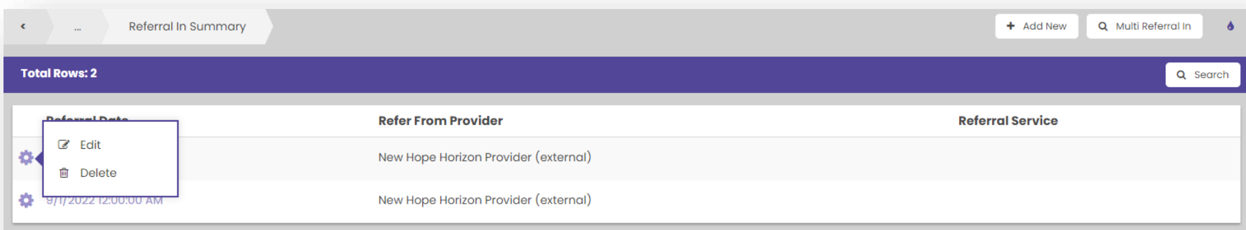
A referral CASE NOTE can also be recorded for each referral.

SAVE the details of the incoming referrals.

## Referral In Summary

The *Referral In Summary* form displays records for each referral that was recorded by the Provider for Clients which they received from other Providers who didn't use CaseWorthy.

Each incoming referral record will appear on the summary form separately. The action gear provides the ability to **Edit** and **Delete** the record.




This concludes *Entering Provider Referrals*.

Next in the series, we will explore *Entering Program Referrals*.

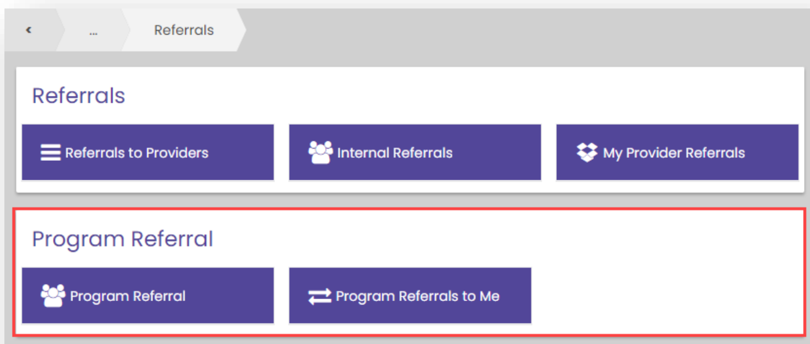
# Entering Program Referrals

This 4th video of the CaseWorthy *Referrals* video series explores *Entering Program Referrals*.

Rather than referring Clients to specific Providers, the Program Referral functionality allows for Clients to be referred to Programs.

Program Referral functionality is different in that there may be one Master Program Referral record with multiple associated program referrals.

The Program Referral menu links are used for this functionality.



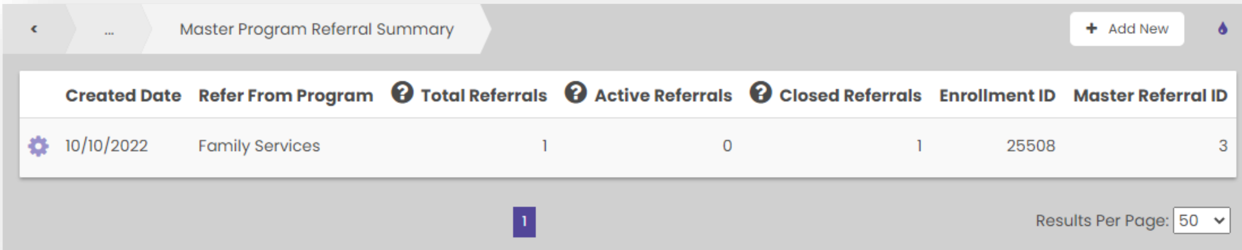

**Program Referral** is used to add new referrals and manage existing ones.

**Program Referrals to Me** displays existing referrals that were made to the User. The status can be managed here and the referral can be processed by completing the enrollment intake.

## The Master Program Referral Summary Form

Let's start with **Program Referral**.

This form displays records for existing master program referrals.



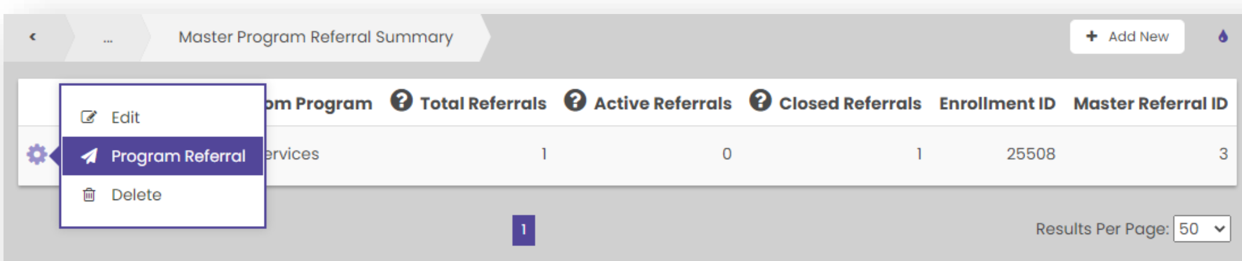

Program Referrals use a parent/child relationship. The parent record is referred to as the Master Referral which displays here.

The master referral could have a single program referral record associated or could have several referrals for the Client to several programs. This is indicated in the **Total Referrals** column.

This parent/child data relationship helps the User track:

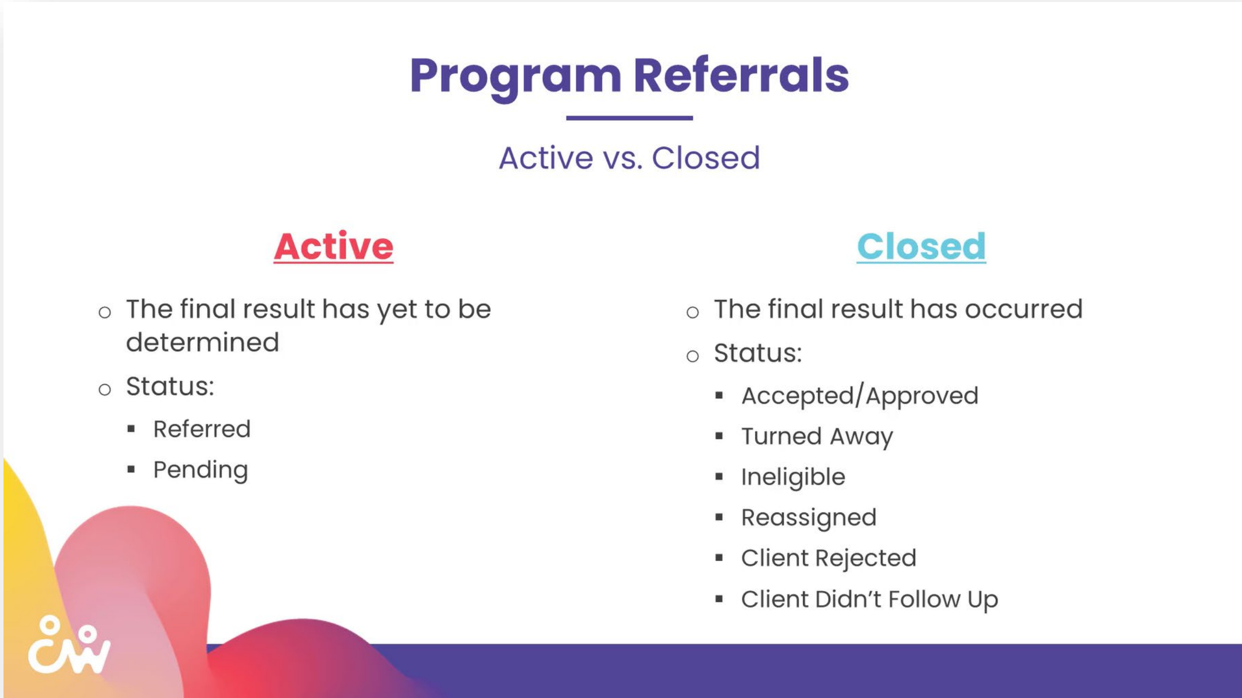
- The progress of a single referral that may move from program to program
- Or track the progress as the Client is referred to multiple programs.

The associated referrals are accessible from the action gear via **Program Referral**.




Each master referral also includes the number of associated referrals which are active and closed




A Referral is 'Active' if the final result has yet to be determined. Active referrals will have a status of 'Referred' or 'Pending'.

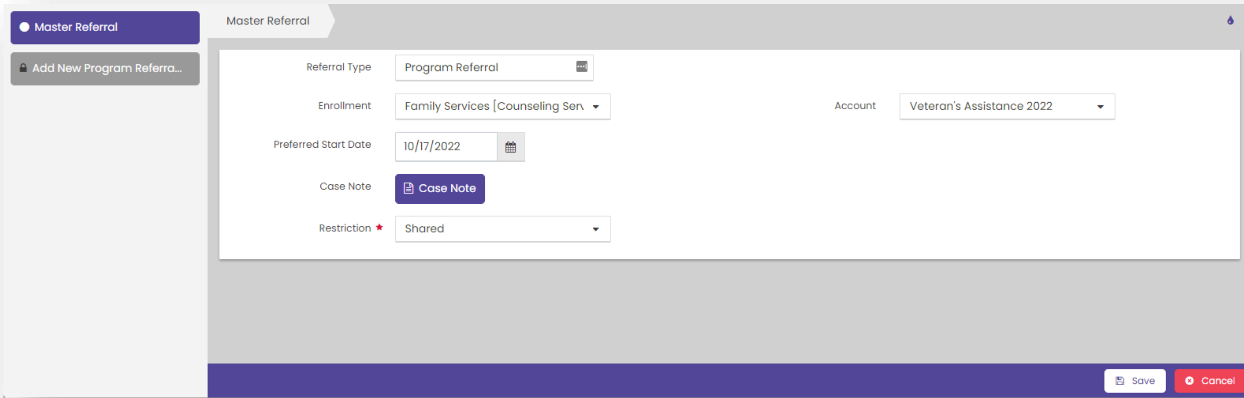
A Referral is 'Closed' once the final result has occurred. Closed referrals will have a status of Accepted/Approved, Turned Away, Ineligible, Reassigned, Client Rejected or Client Didn't Follow Up.

## New Master Referral

A workflow is used to create a new master referral with its associated program referrals, click ADD NEW which launches the two-step workflow.

### Add New Master Referral

The first step creates the master referral record.




The **Referral Type** defaults to 'Program Referral'.

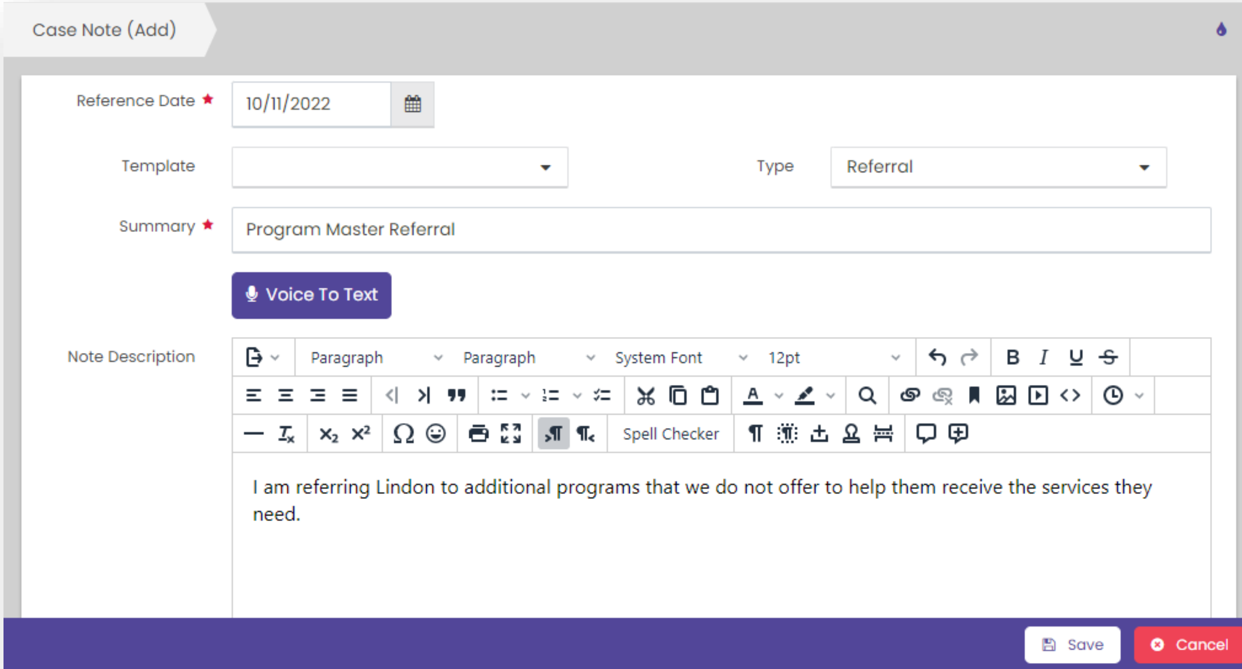
If the Client is currently enrolled in a program to which the referral pertains, the **Enrollment** can be selected here.

**Accounts** list all those which are configured for the database. If an account is selected, the next only displays programs which are associated to this account and are configured to accept referrals. If left blank, the next step shows all programs with the configuration.

The User can enter a **Preferred Start Date** so as to communicate this information to the receiving Provider, but this date doesn't affect functionality.

More information can be captured in a CASE NOTE.

The **Type** 'Referral' and **Summary** of 'Program Master Referral 'default.




The **Restriction** sets how this record should be accessible to Users in accordance with Organization-level data sharing configuration.

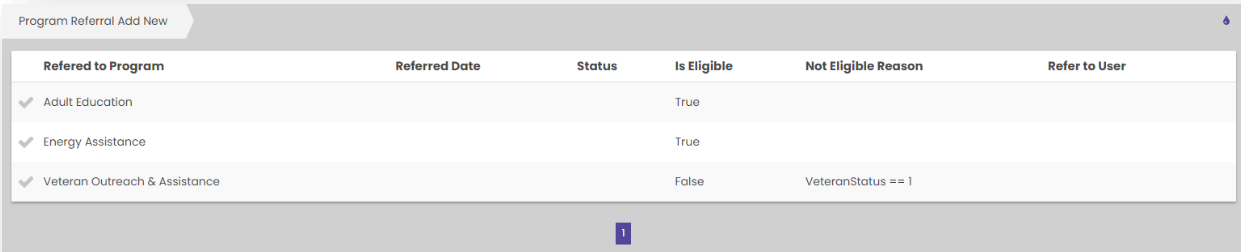
Click SAVE to move to the next step.

## Add New Program Referrals

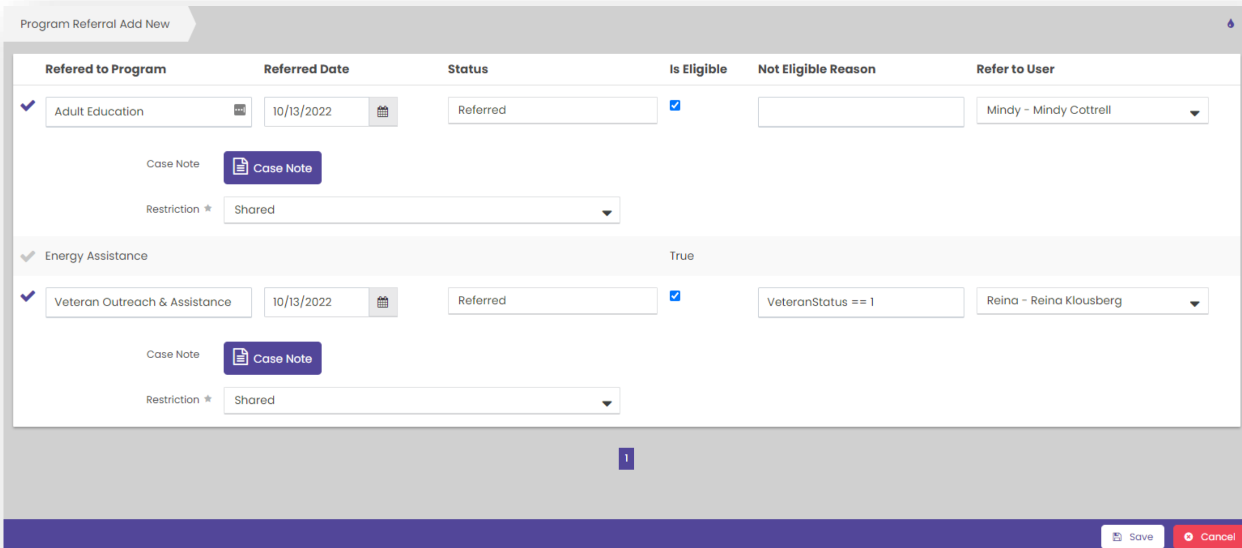
This step is used to select the specific programs to which the Client should be referred as well as identify the services. These are the 'child' referral records to the 'parent' master referral.

Click ADD NEW.

The programs listed are those which include the Program Category 'Accepts Referrals' and have end dates set in the future. If a **Preferred Start Date** is selected, the list is also filtered to only display programs that are open as of the Preferred Start Date. If an account was selected on the first step, this list is further filtered to only display programs associated to that account.




Each program will display if the Client **Is Eligible**. If they are not eligible, the reason will display.




To override their ineligibility, simply select the checkbox.

Keep in mind that overriding eligibility for the referral does not override their eligibility when enrolling them into the program. For example, I know this Client is a veteran. After completing the referral, I will update their *Client Demographics* form to reflect that fact.

**Referred to User** shows all Users which are primarily associated with the Organizations which have access to the program. If a User is selected, this record will land on their My CaseWorthy tab – **Program Referrals to Me**.

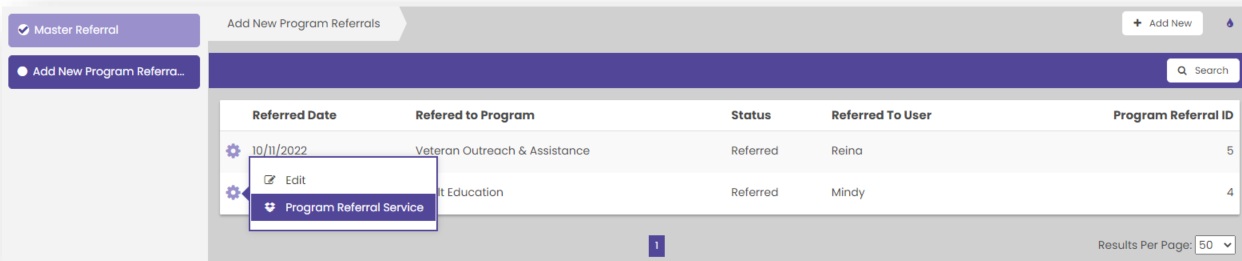
The **Restriction** sets how this record should be accessible to Users in accordance with Organization-level data sharing configuration.

Here a Program Referral CASE NOTE can be recorded.

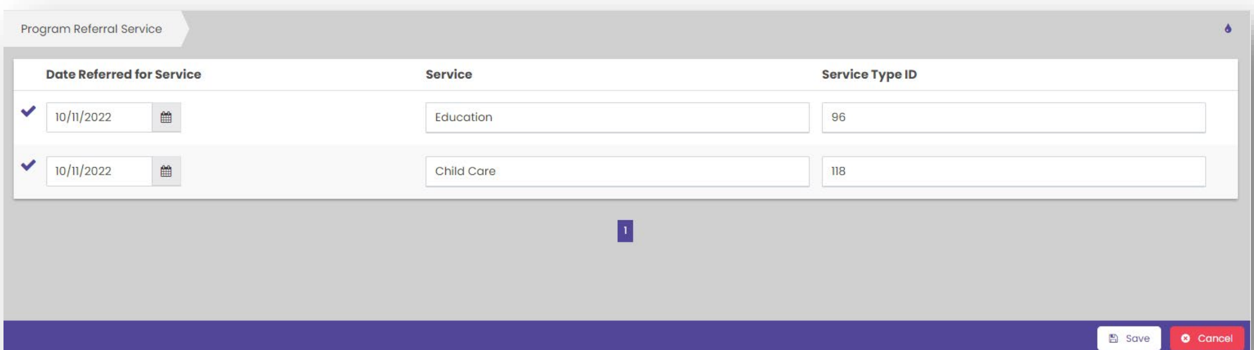
(SAVE)

## Include Program Services

Lastly, services can be identified for each program referral. Selecting services is optional and may depend on your business process. From the record's action gear select **Program Referral Service**.

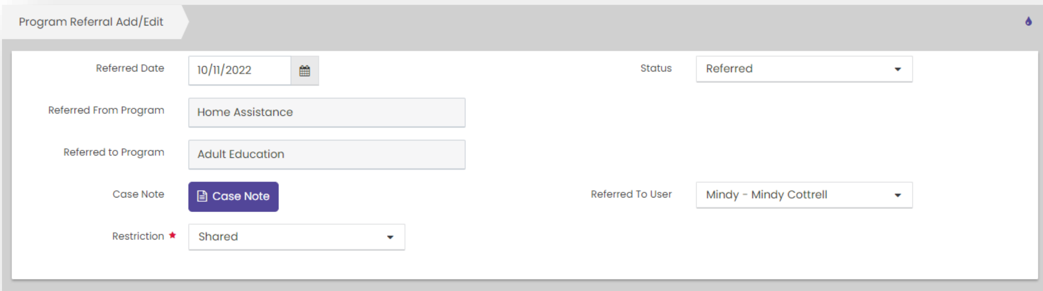



The services which appear here are associated to the Program and are noted as being referrable.



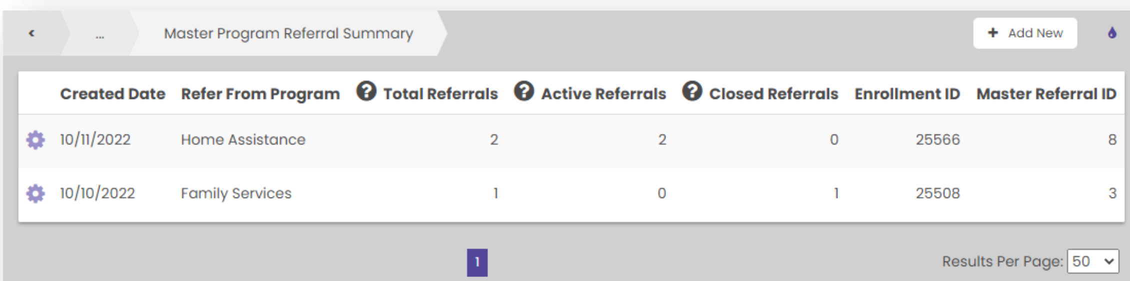

Repeat as necessary for each program.

The action gear also provides the ability to **Edit** aspects of the record.

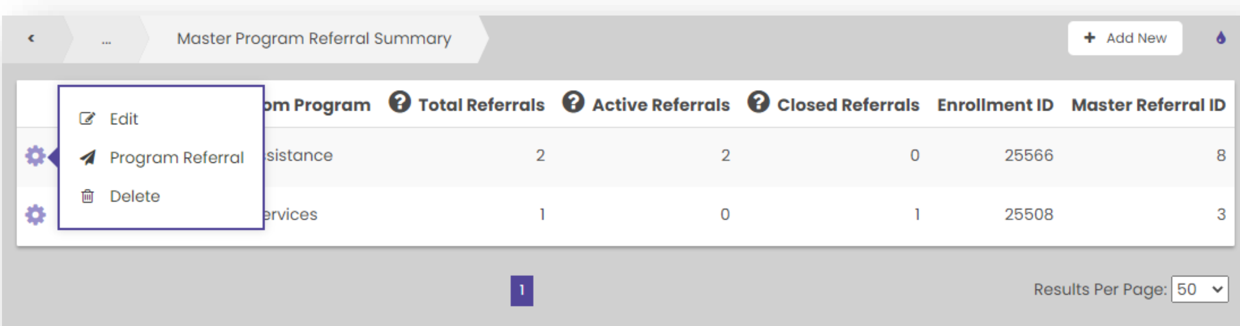



Click DONE to complete the workflow.

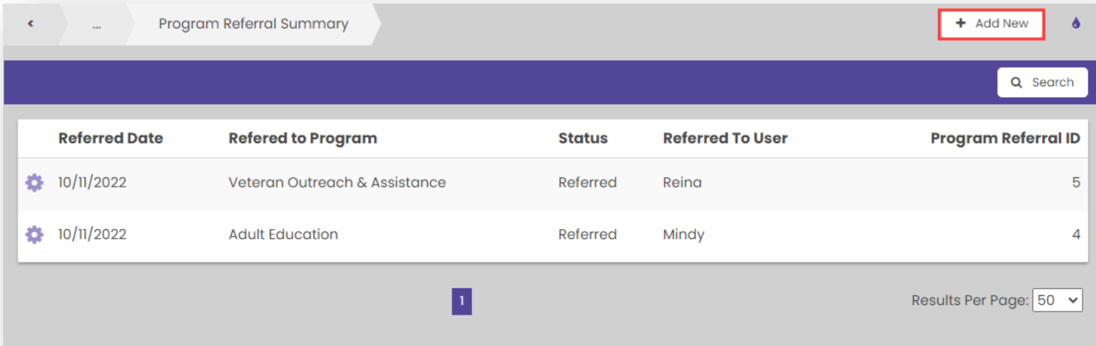
The summary form displays the new master referral as well as the two assoicated Active program Referrals.




The action gear provides the ability to **Edit** and **Delete** the master referral. See the *Viewing and Managing Referrals* video of this series for full details. Deleting the master referral will also delete the associated program referrals.



Use **Program Referral** to view the list of associated referrals, like the second step of the workflow. Additional referrals can also be made using ADD NEW.



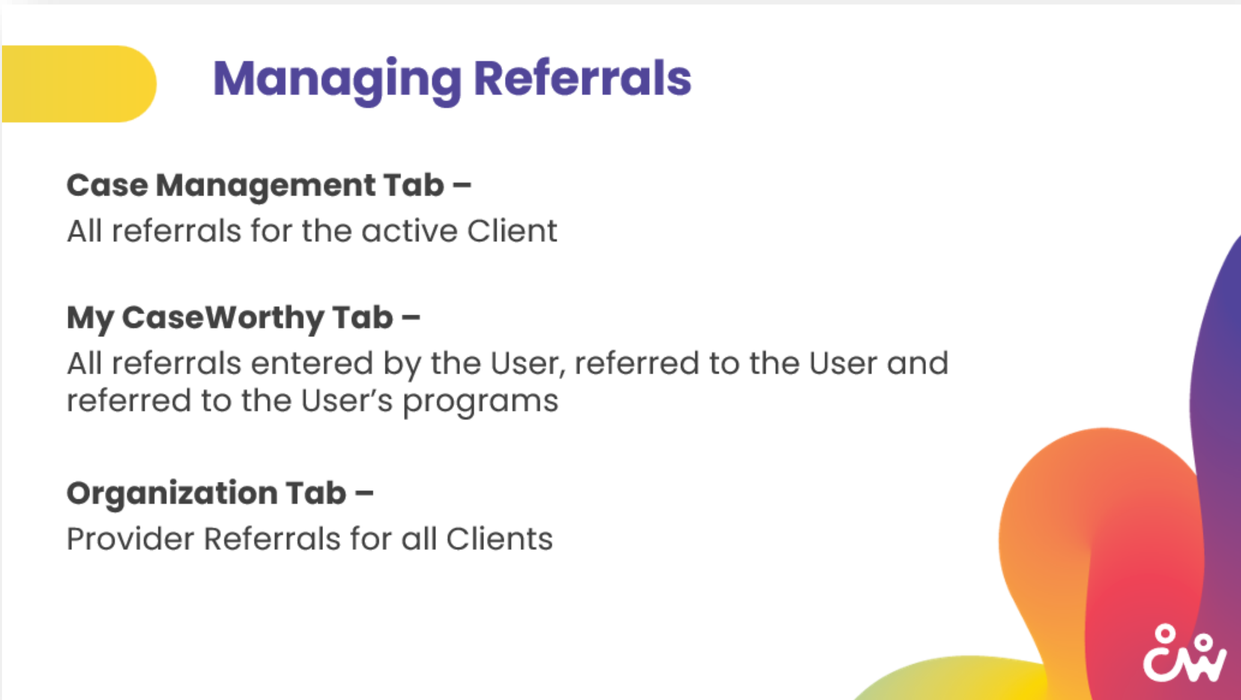

This concludes *Entering Program Referrals*.

Next in the series, we will explore how to view and manage Provider and Program referrals.

# Viewing and Managing Referrals

This 5th video of the CaseWorthy *Referrals* video series details how to view and manage Provider and Program Referrals.

Referrals are managed in a few different places.




The Case Management tab's *Referrals* dashboard provides the ability to manage all referrals for the active Client.

The My CaseWorthy tab is used to manage all referrals which were entered by the User, referred to the User and referred to the User's programs.

The Organization tab is used to manage all Provider referrals sent to a specific Provider.

## Client Referrals Dashboard

First, let's review updating a referral from the Client's *Referrals* dashboard.

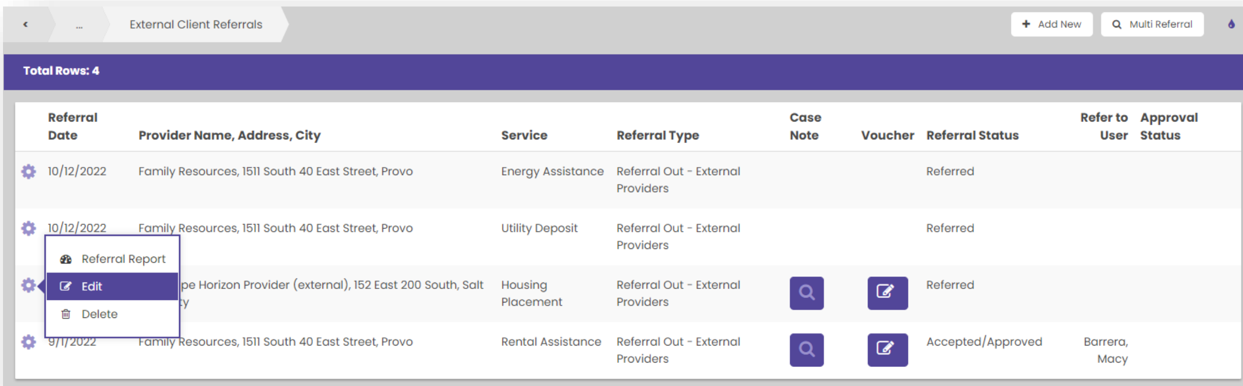
[Navigation](#) All Features role – Case Management tab: Case Management > Referrals

## Provider Referral Management

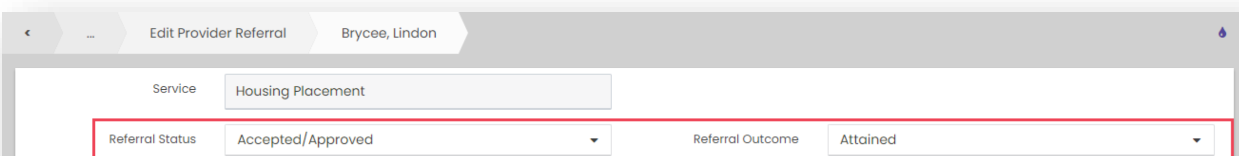
Use **Referrals to Providers** to update Provider Referrals.

Referrals made to Providers who uses the same CaseWorthy database should have the status updated upon their processing of the referral.

Since this referral was made to an External Provider, I need to manually update the status. From the referral's action gear, select **Edit**.



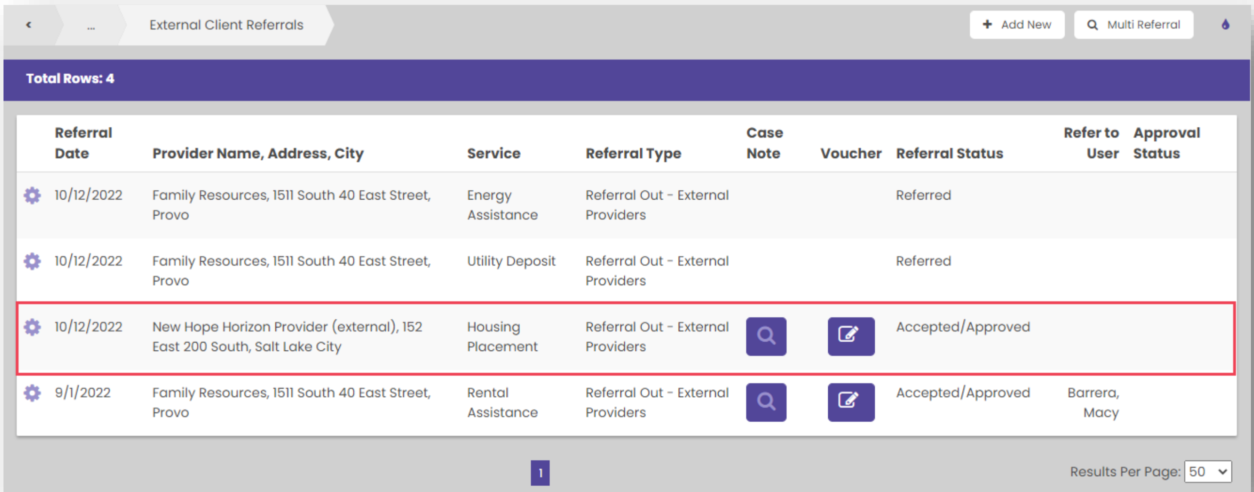

Here we see the details that we entered for the referral. The fields which are typically updated are located at the top of the form.




I was informed that the External Provider did accept my referral so I'm updating the status to 'Accepted/Approved'.

Outcomes can also be recorded for the referral.

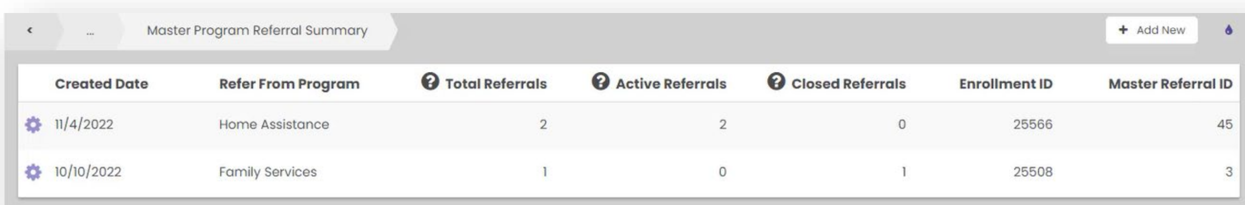
The updated status will appear here.




## Program Referral Management

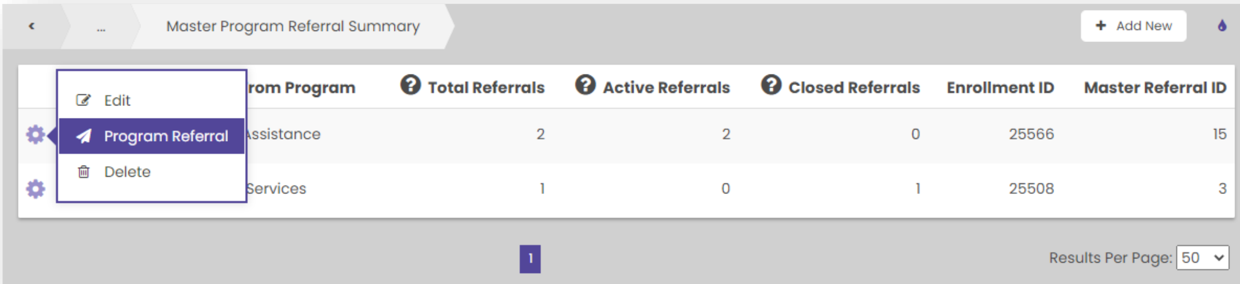
Program referral statuses can also be manually updated in cases where the accepting Users do not perform the update.

From the dashboard, select **Program Referral**.

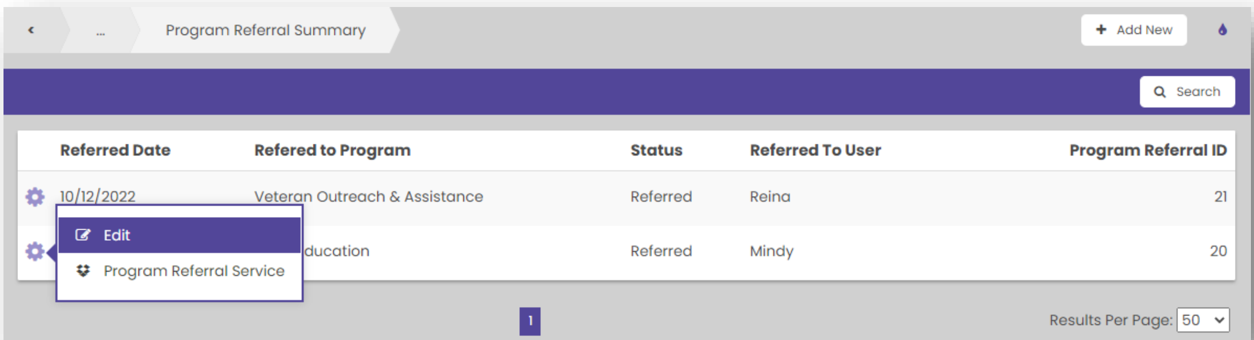



Remember, the master referral record does not itself have a status. It instead notes if its related child referrals are either active or closed.

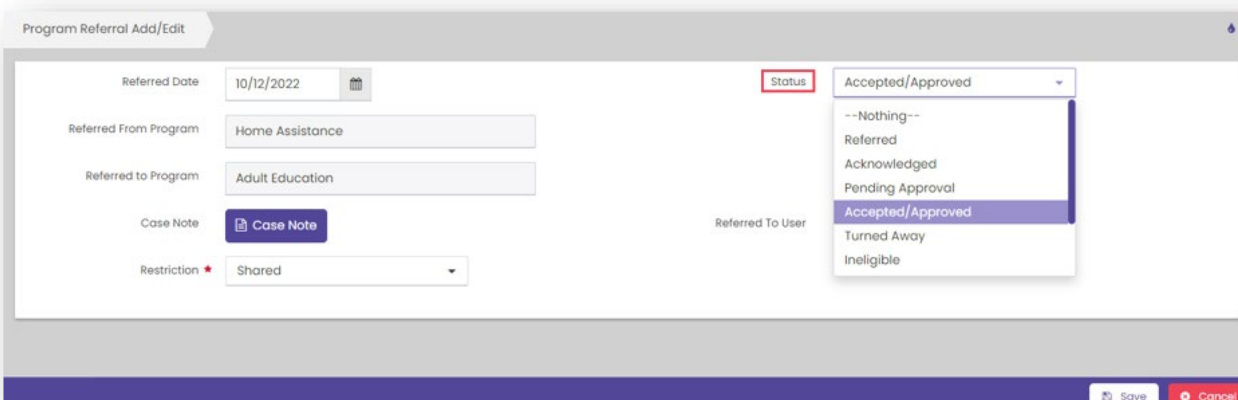
From the master referral's action gear, select **Program Referral**.



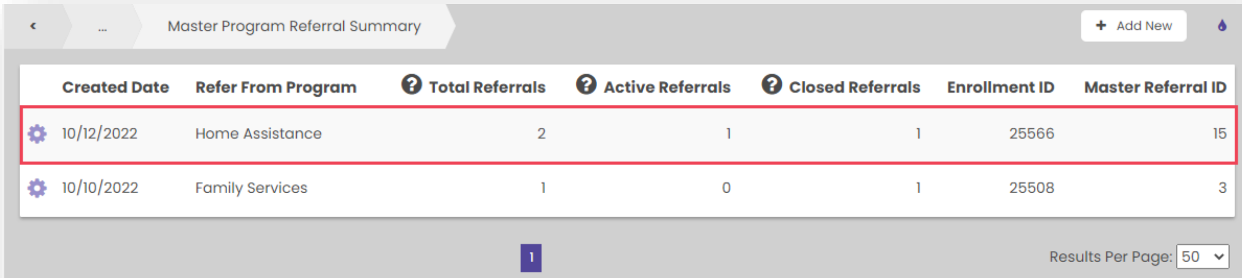

Then access **Edit** from the program referral's record.




Update the **Status** and SAVE.



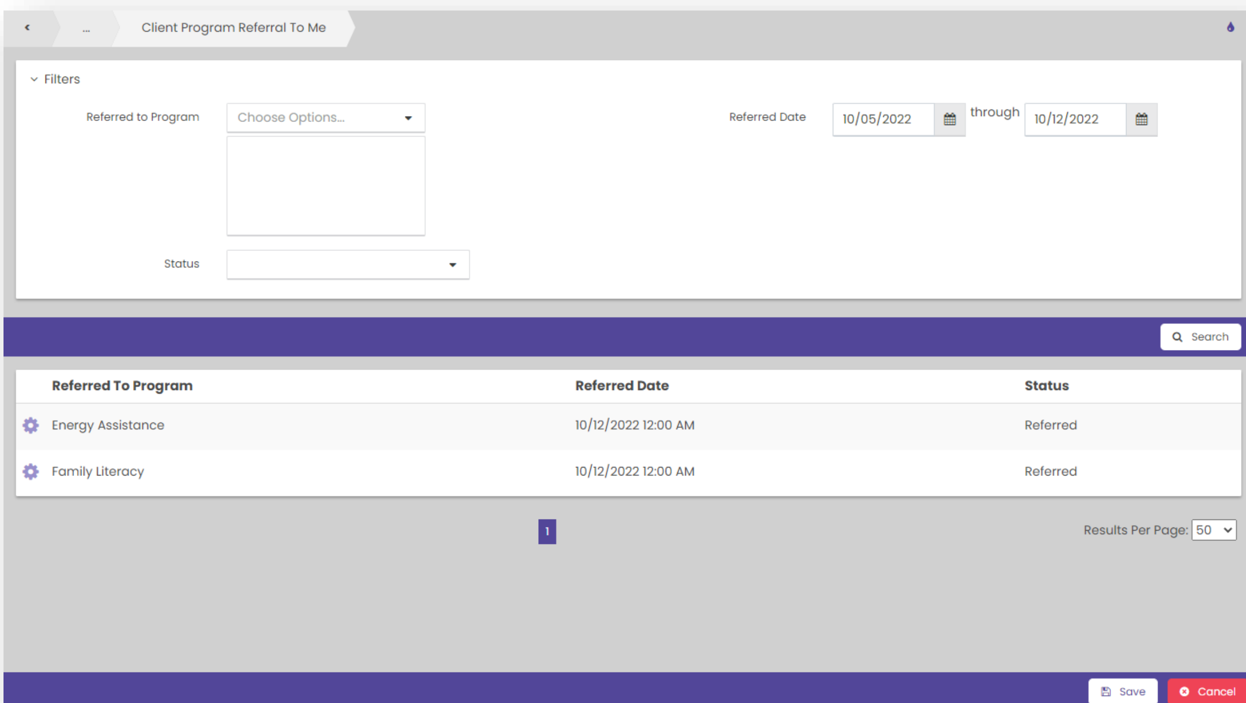

Here we see that the Master Referral has one **Closed Referral(s)**.



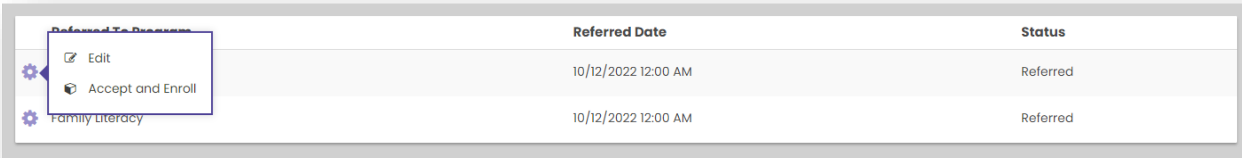

## Program Referrals to Me

The *Referrals* dashboard also includes the **Program Referrals to Me** link.

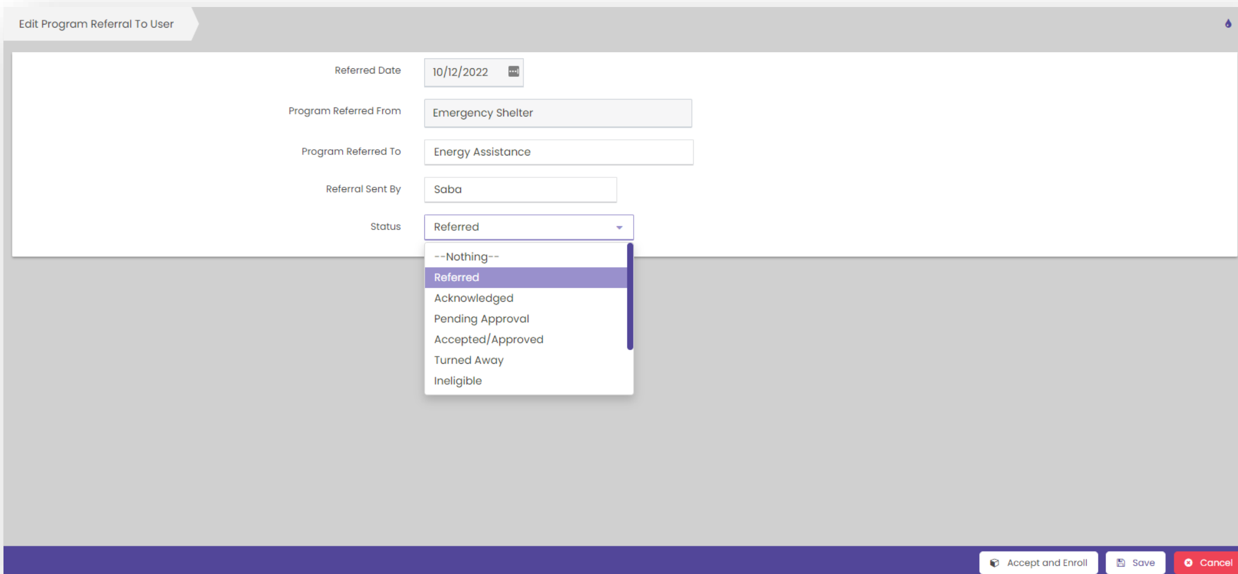
This displays the list of referrals for the active Client where the User was recorded as the 'Refer To User'. Note that the date defaults to show the previous week.



If the referral has an active status of 'Referred' or 'Pending', an action gear is available providing options to **Edit** and **Accept and Enroll**.



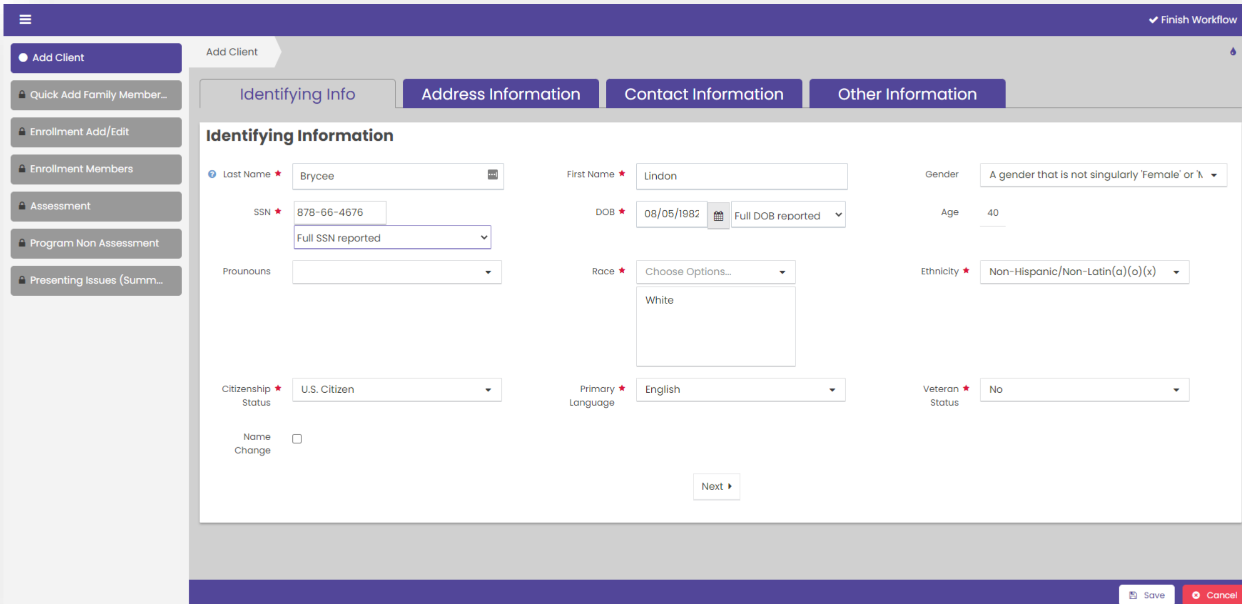

Selecting **Edit** allows for the status to be updated.




SAVE will save the new status.

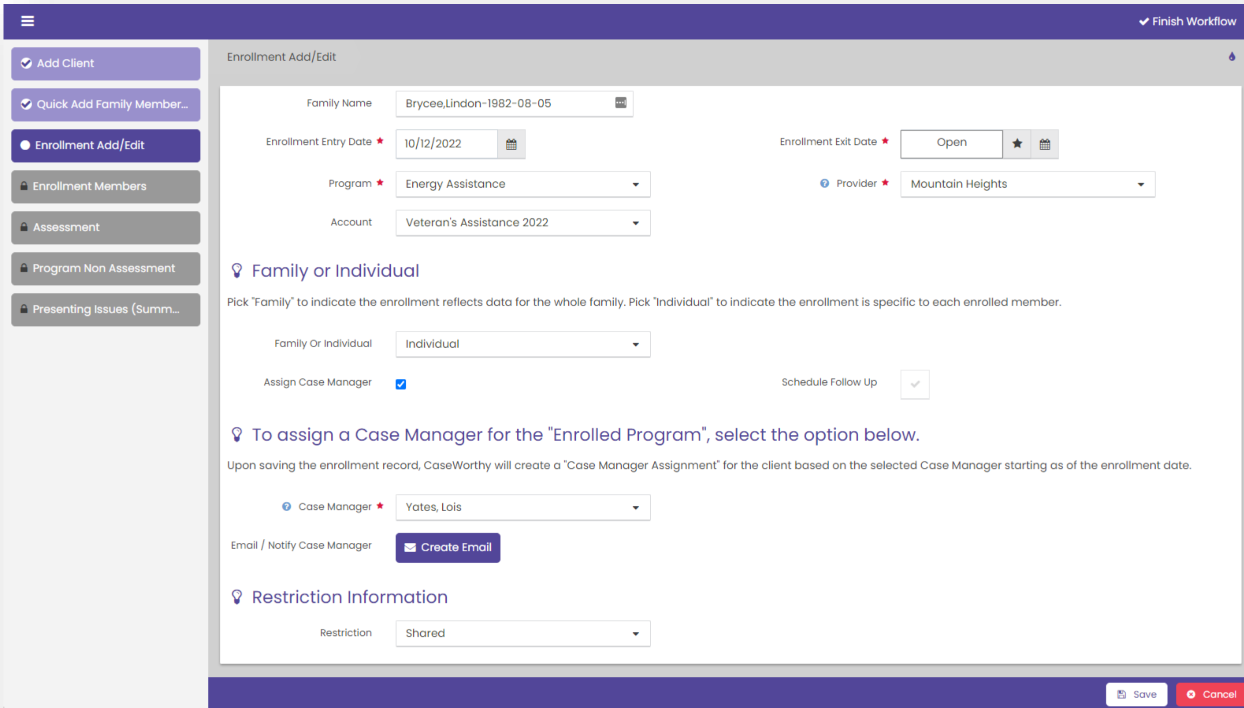
ACCEPT AND ENROLL launches an enrollment workflow for the selected program.

Selecting **Accept and Enroll** from the action gear also launches the enrollment workflow for the selected program.

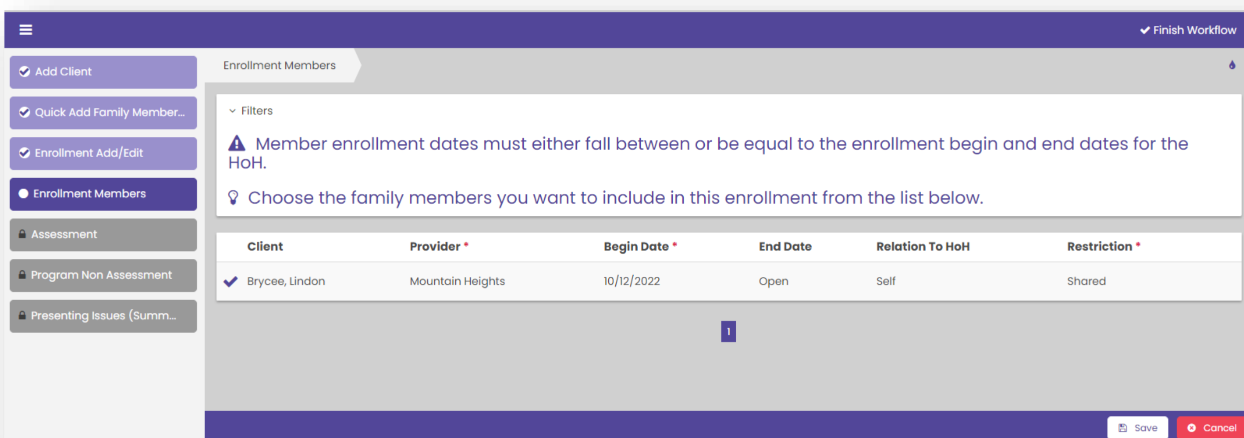



Information defaults for the Client and the program helping to streamline the process.

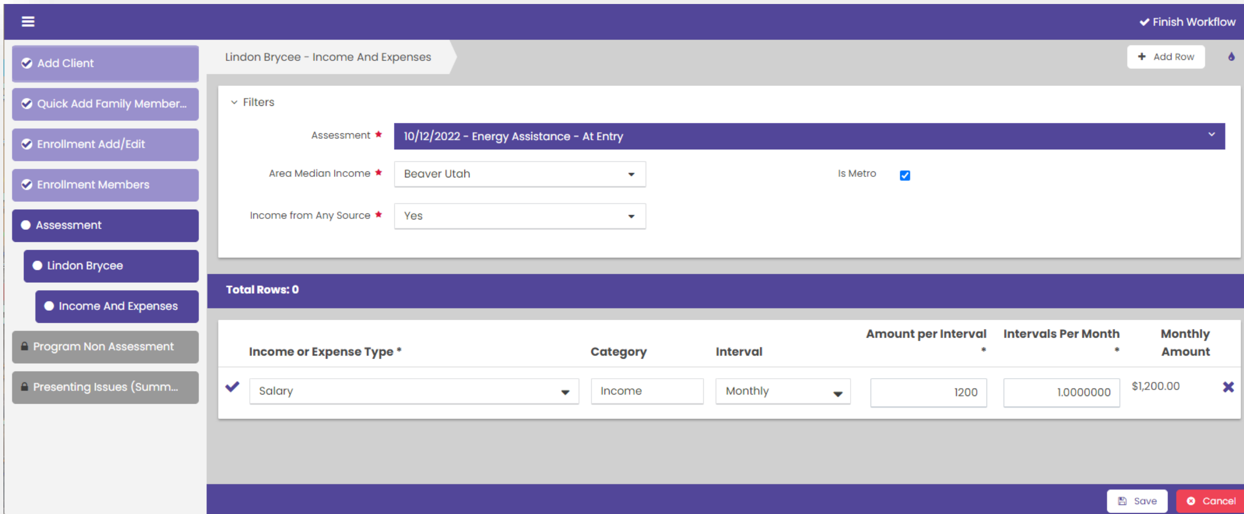
On the Enrollment step, the **Program** for which the Client was referred displays, but can be changed if necessary.



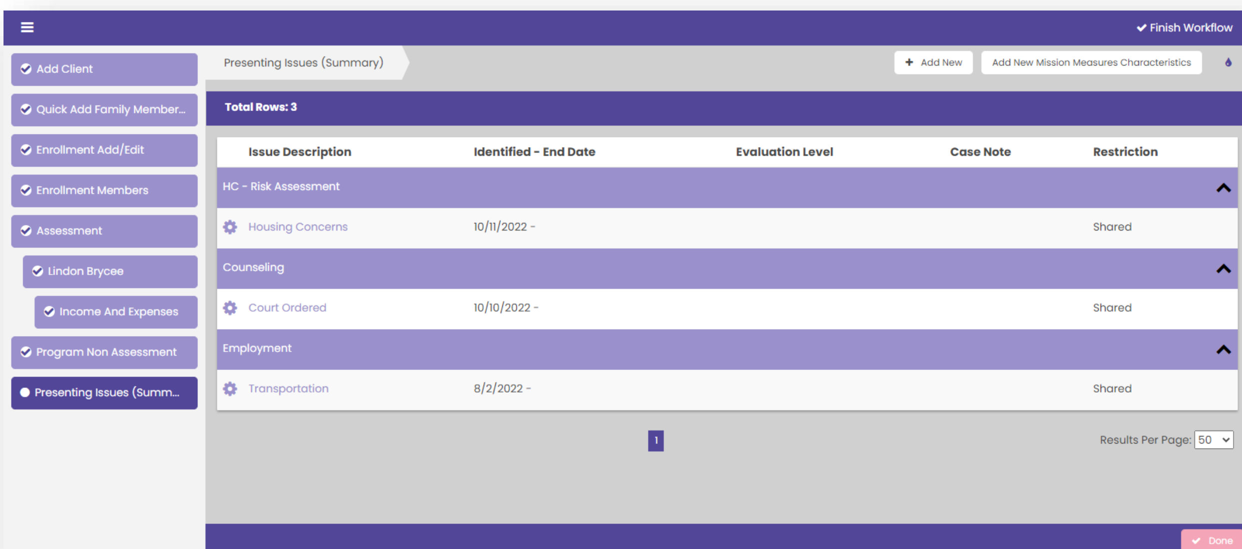

Here enrollment members are selected.



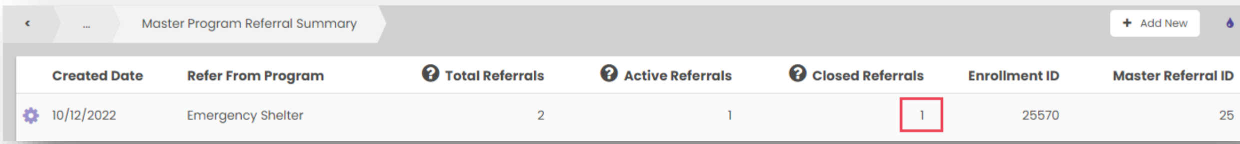
The program's assessments will present according to how they are configured.



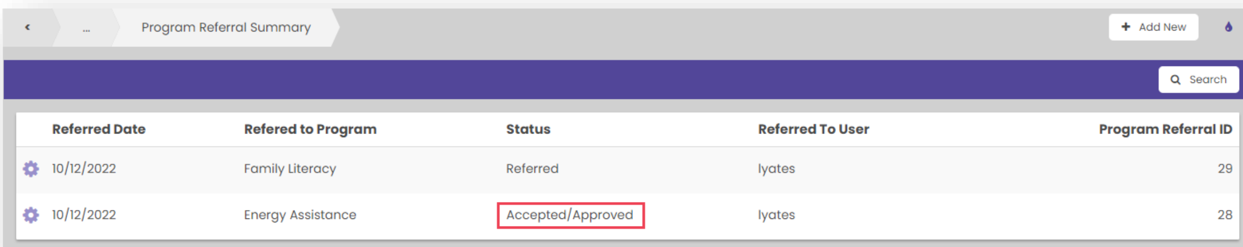

Presenting Issues can be recorded.



Let's navigate back to the *Referrals* dashboard. Here you can see the record now has a **Closed Referral(s)**.



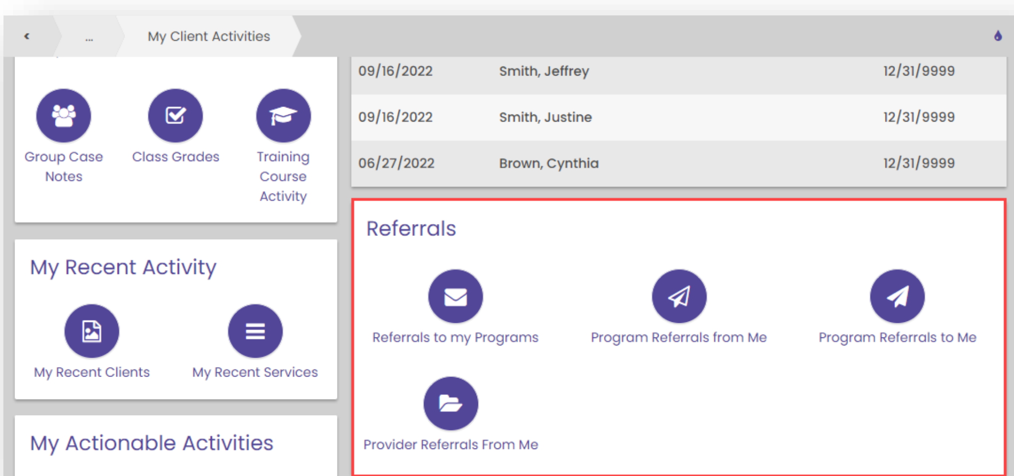

And the **Status** has been automatically updated to 'Accepted/Approved'.




## My CaseWorthy Tab

The My CaseWorthy tab is used to manage various tasks associated with the User.

Client Activities includes the *Referrals* menu widget where Provider and Program Referrals can be managed.



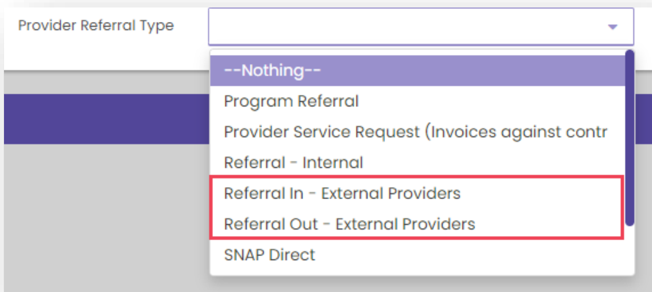
Let's start with Provider Referrals.

## Provider Referrals

**Provider Referrals From Me** is used to view Provider referrals that only the current User has entered for all Clients.

This list of referrals is similar to that on the *External Client Referrals Summary* form which we just reviewed on the Client's *Referral* dashboard. Each record includes additional information pertaining to the Client's provider referral.

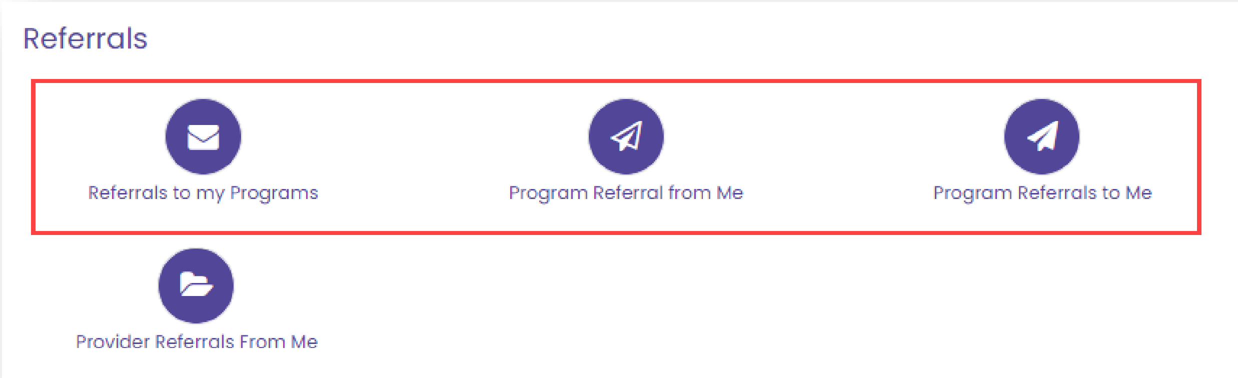
The list of referrals can be filtered by **Provider**, **Referral Status**, and **Provider Referral Type**.




Like on the *External Client Referrals Summary* form, each referral's action gear provides the ability to **Edit** the referral which would be used to update the Referral Status and Outcome. **Delete** is used if the referral was entered in error. And **Referral Report** is available to generate and print to print the details of the referral.

## Program Referrals

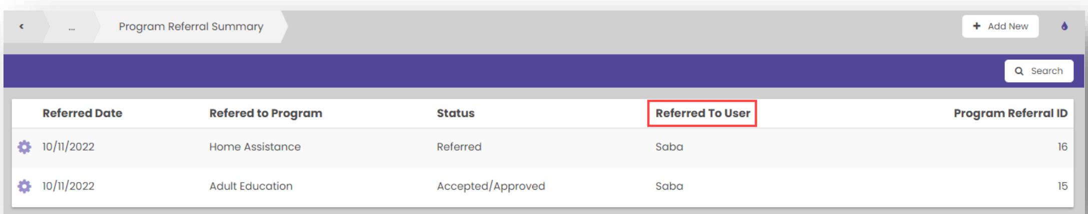
The other links pertain to Program Referrals.




**Referrals to my Programs** displays referrals made to programs which are associated with the User's primary Organization.

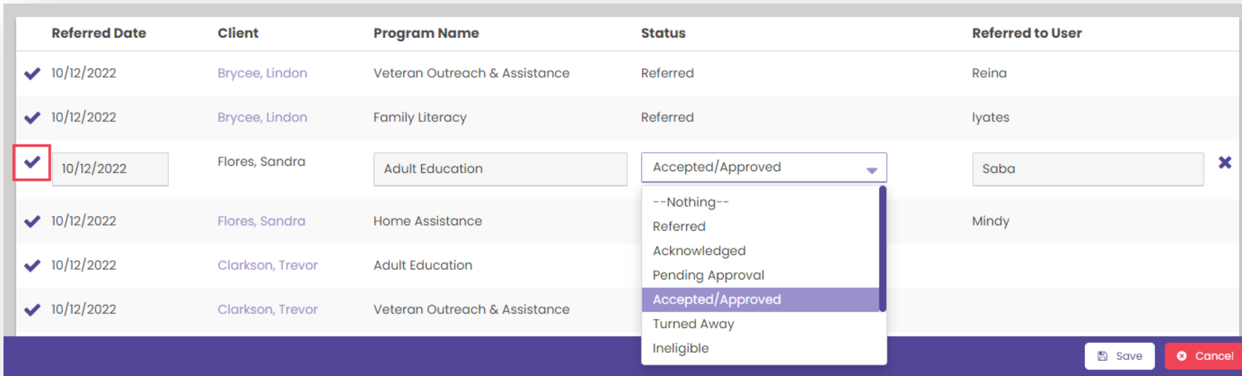
**Program Referrals from Me** displays all referrals the User has created. Unlike within the Client record, this displays for all Clients.

**Program Referrals to Me** displays referrals that were made directly to the User, meaning that the User was selected as the 'Refer to User' on the *Program Referral Add/Edit* form.




## *Referrals to my Programs*

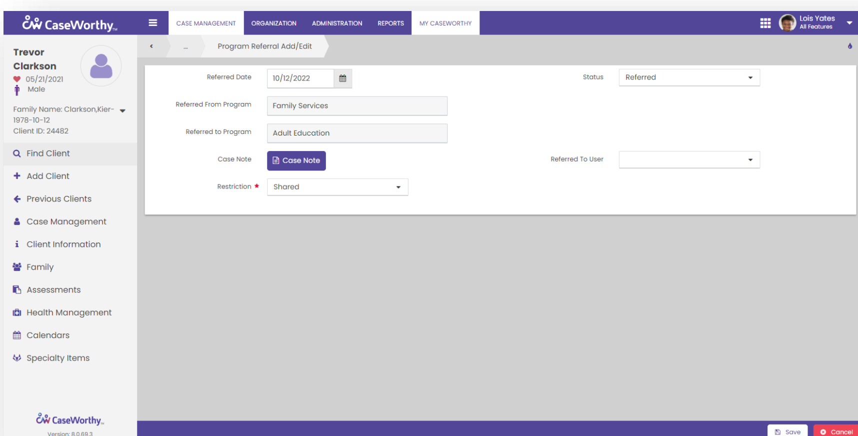
Again, this is a list of all the referrals that were made to a program which is associated with the User's primary Organization. Here statuses can be easily updated for multiple Clients.




All three Program Referral menu item's forms include the ability to filter the lists by **Dates**, **Programs**, **Referred to User** and referral **Status**.

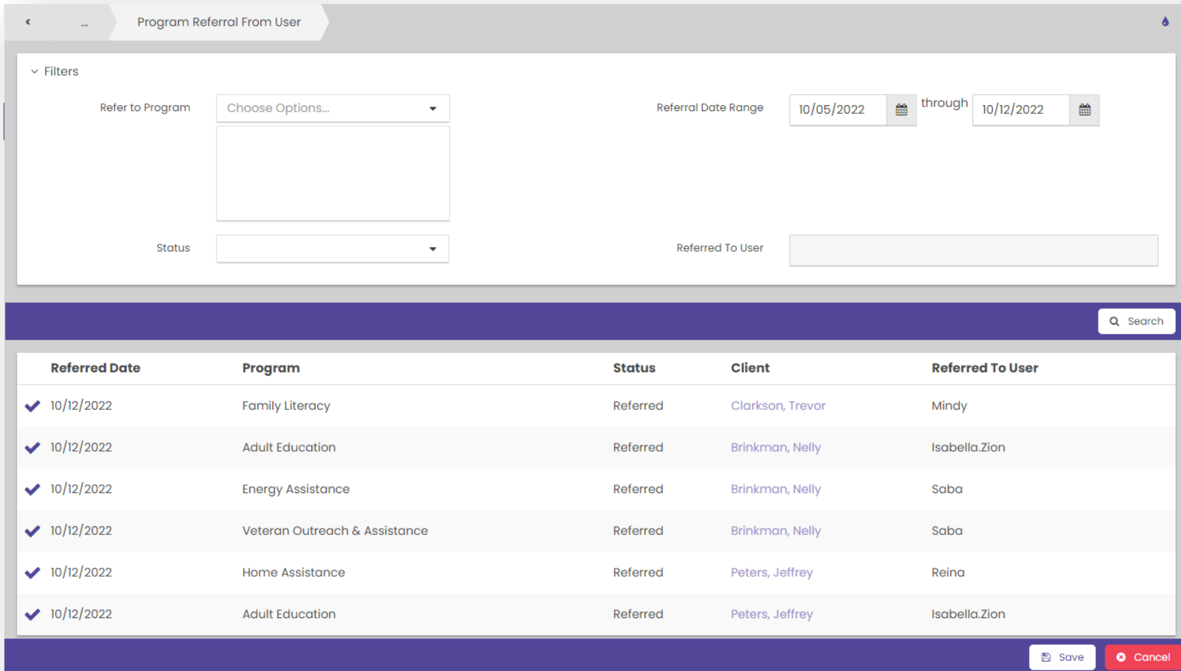
Select a record to update the referral **Status**.

The Client's name links to the *Program Referral Add/Edit* form on the Client's Case Management tab where the status can be updated and the referred to User can be edited.

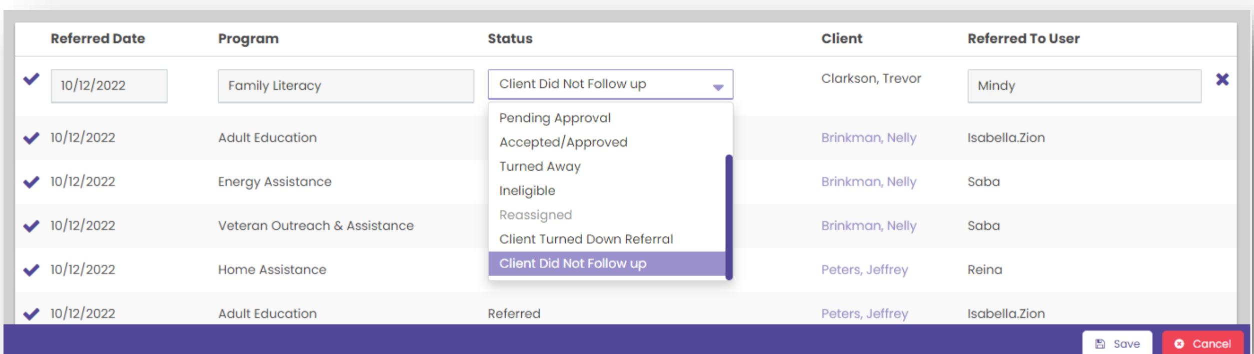



## *Program Referrals from Me*

**Program Referrals from Me** lists all the program referrals records the User has created themselves for all Clients within the date range.




By selecting a record, the User can update the **Status** if necessary.

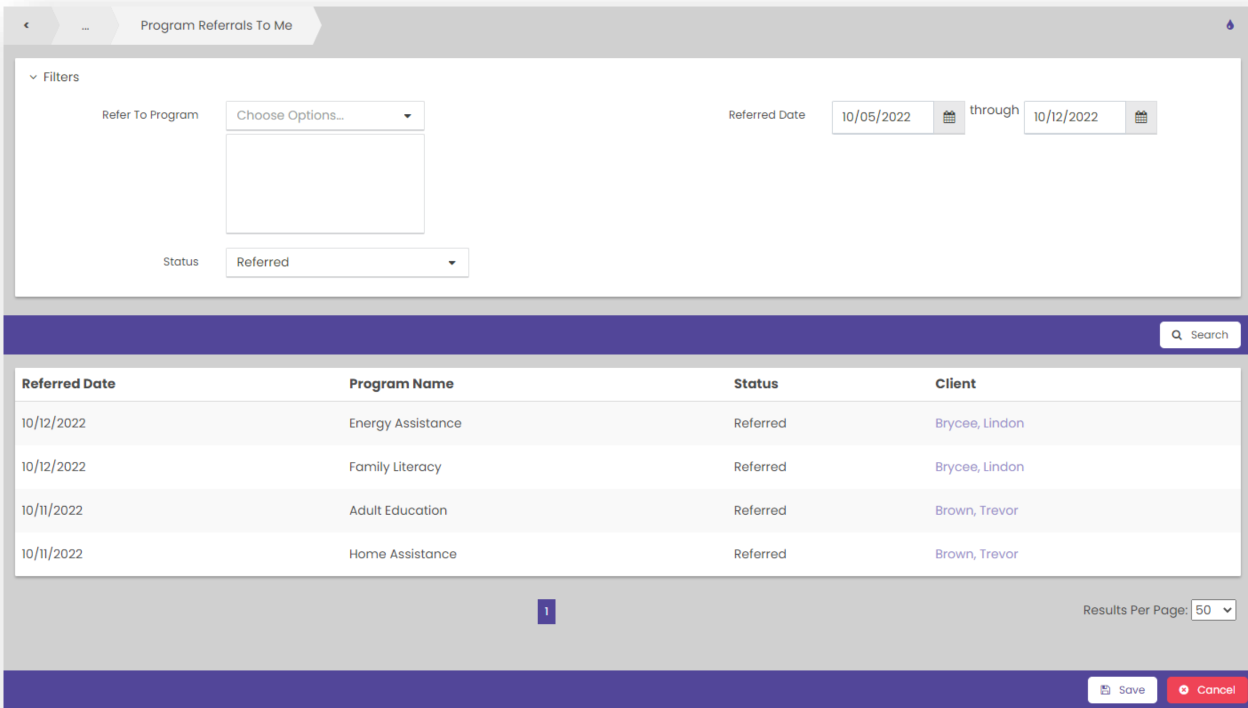



When the form is saved, the status will be updated.

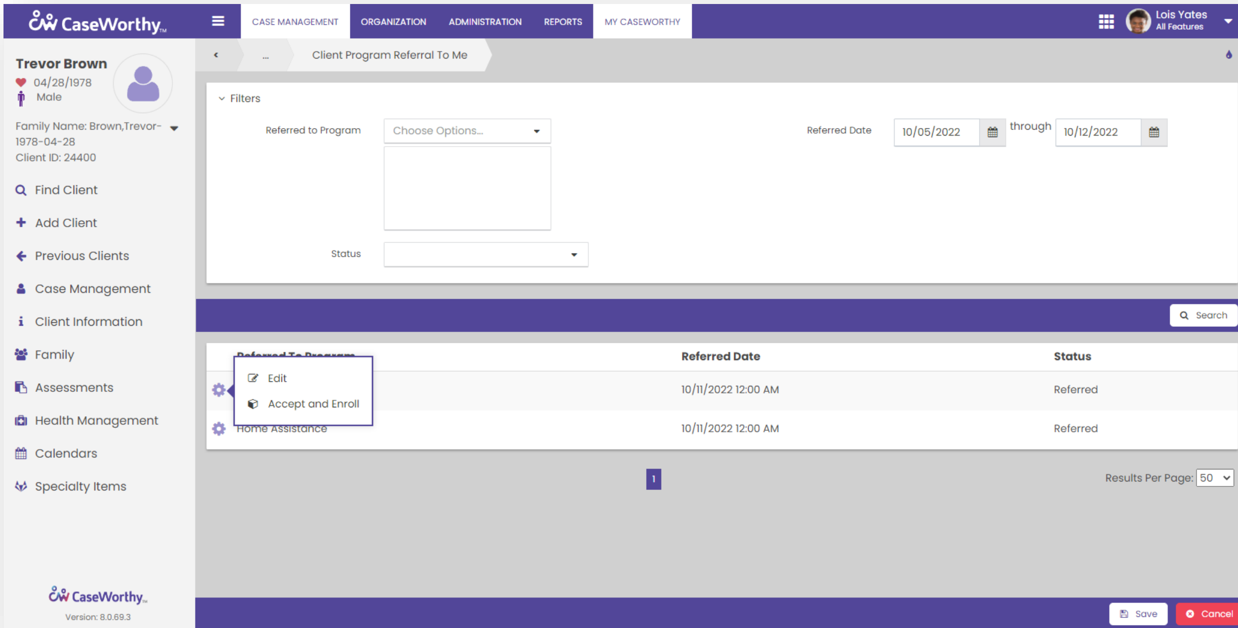
The **Client's name** links to the *Program Referral Add/Edit* form on the Client's Case Management tab where the status can be updated and the referred to User can be edited.

## *Program Referrals to Me*

The last menu item is **Program Referrals to Me.** This is similar to what we reviewed on the Client's Case Management tab's *Referral* dashboard, but here the User sees all Clients who have been referred to them specifically rather than just the active Client.



Select a Client's name

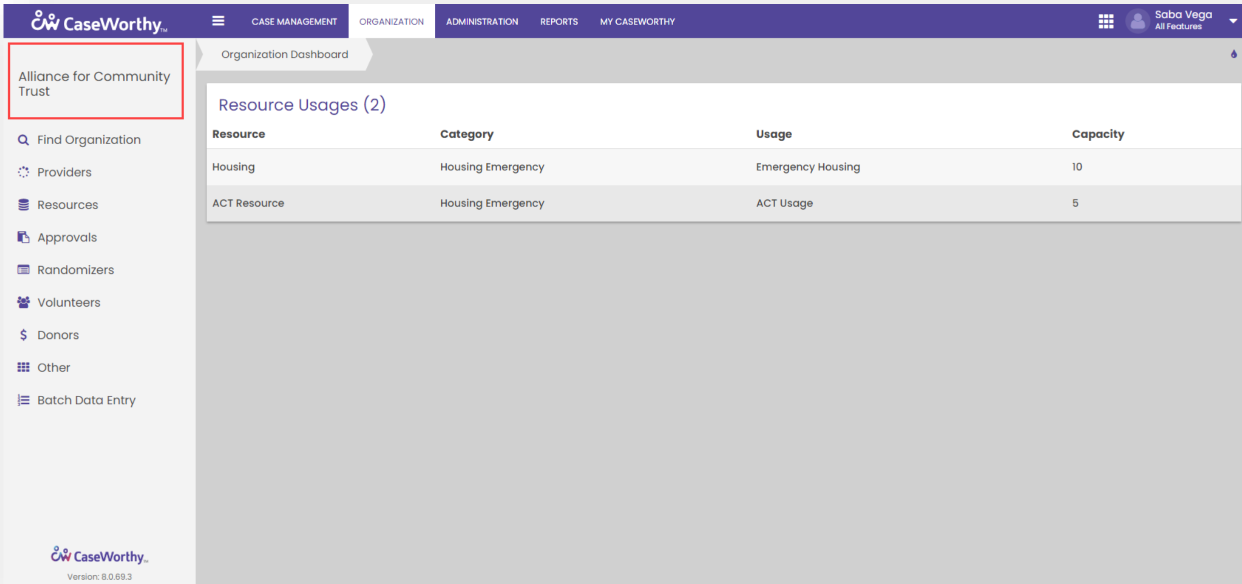



From the program's action gear use **Edit** to update the received referrals status or **Accept and Enroll** to launch the intake workflow. See *Program Referrals to Me* within the Client *Referrals* dashboard earlier in this video for full details.

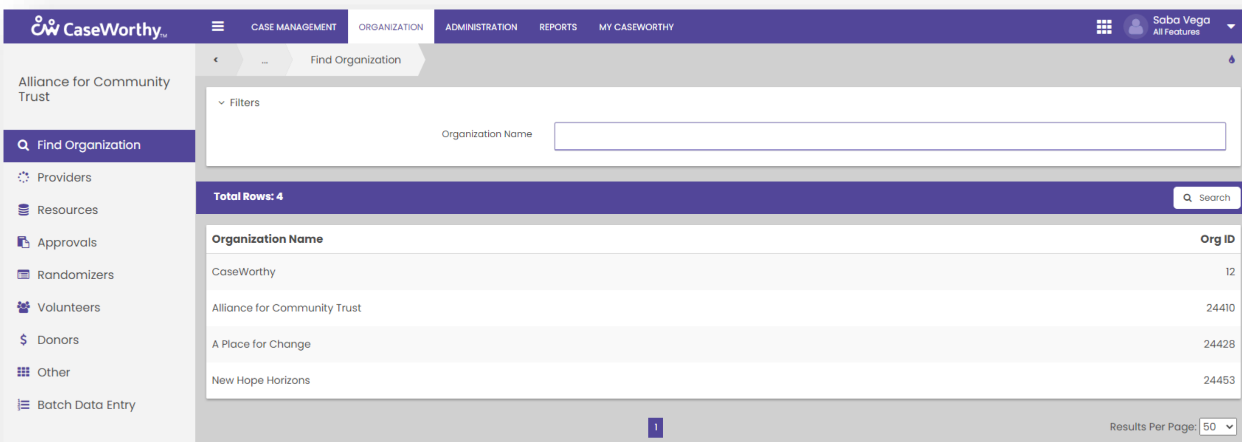
## Organization Tab

Lastly, the Organization tab provides the ability to view and manage all Provider referrals.

The Organization tab is similar to the Case Management tab in that the menu links displays information based on the Organization that displays in the Entity Corner.

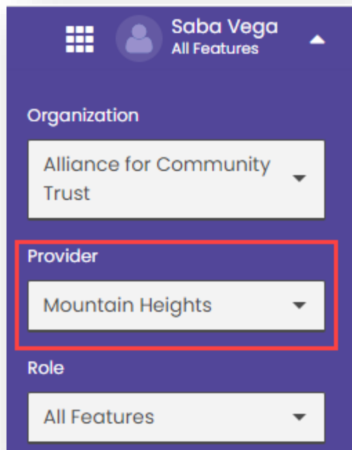


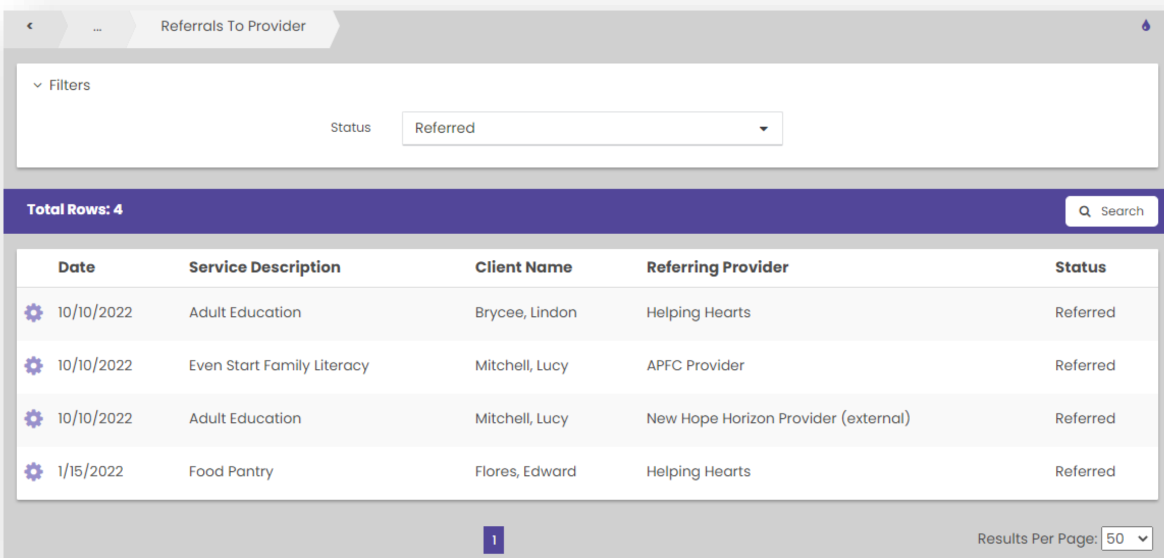

You want to make sure that the necessary Provider's Organization displays here in order to process referrals made to the Provider. Use Find Organization to change if necessary.



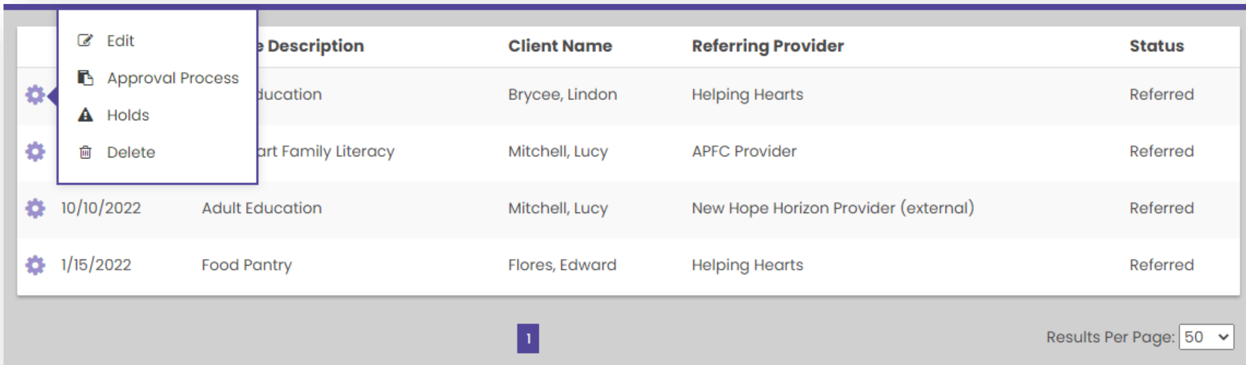
Within the correct Organization, from the Navigation Menu select Resources and My Provider Resources.

I am currently working in the Mountain Heights Provider, so this form is displaying all referrals which were made to the Mountain Heights Provider.

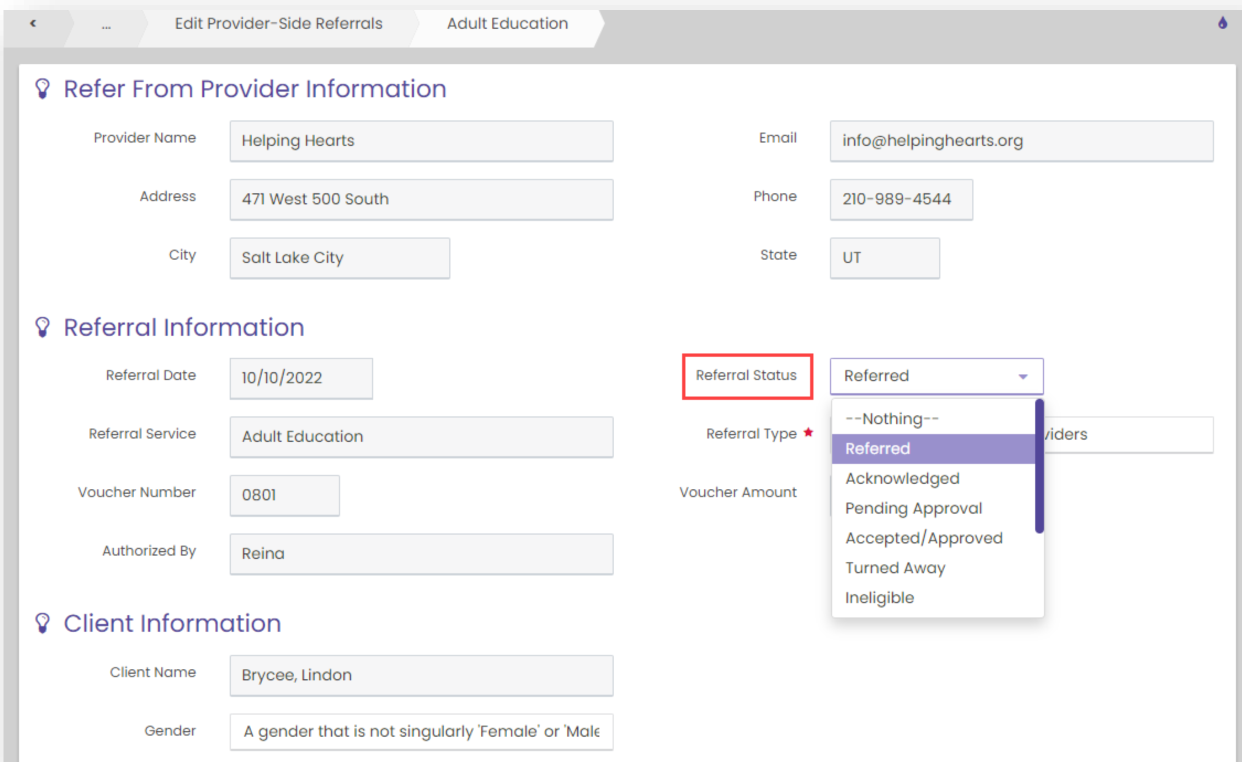



By default, the form is filtered to only show received Provider referrals with a **Status** of 'Referred' but can be changed.



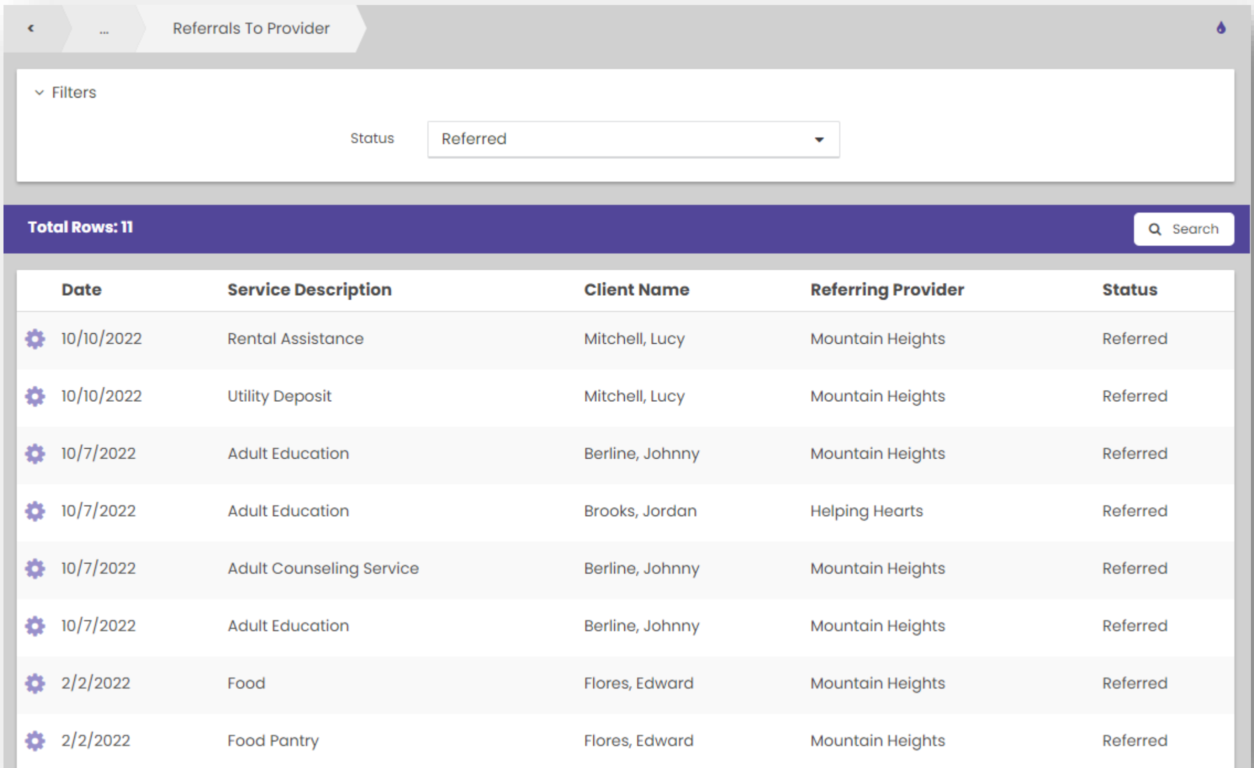

From the referral's action gear, **Edit** is available to review the details of the referral as well as the ability to update the **Status**.




**Approval Process** details the steps of the approval process if one is in place for referrals while referrals which are noted as hold during an approval process appear here (**Holds**).

**Delete** is used if the referral was entered in error.

To view a list of all referrals to any Provider, on the Organization tab navigate to Providers and Providers. From a Provider's action gear select **Referrals to Provider**.




This form functions the same as the one which was specific to only the User's Provider and displays the details of the referral. The action gear provides the same options.

This concludes *Viewing and Managing Referrals*.

Next in the series, we will dive into the analytics report available for referrals.

# Referral Analytics

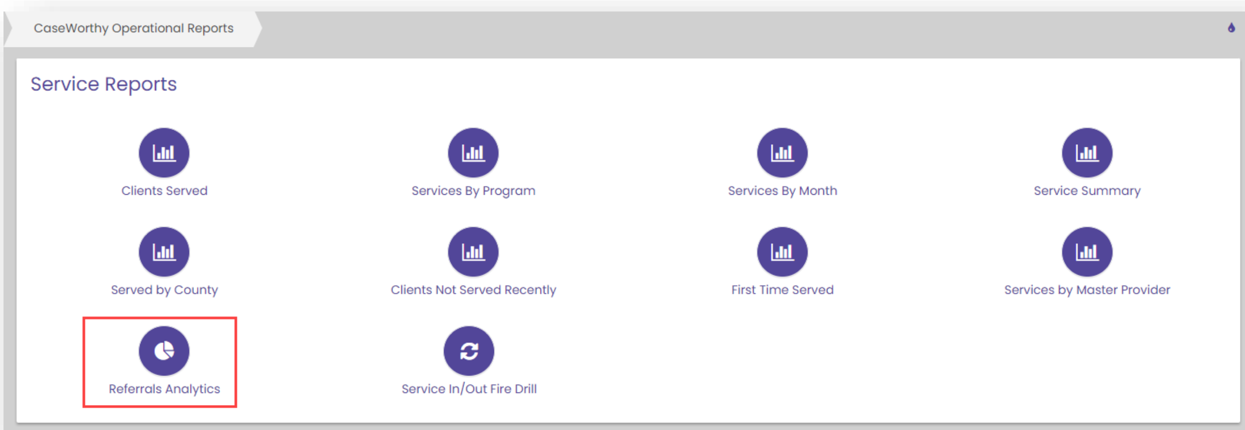
This final video of the CaseWorthy *Referrals* video series provides details about the analytic report available for referrals.

There are two baseline referral reports within the CaseWorthy application, but both options are very similar.

Both are analytic reports, which are essentially pivot tables of data that can be filtered by the User.

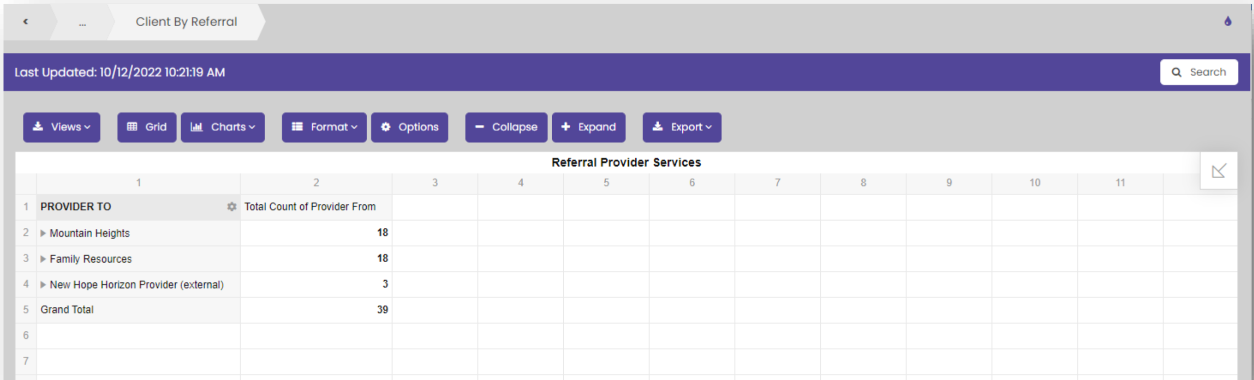
## Client by Referral Analytic

The Reporting tab's dashboard includes a variety of operational reports sorted by topic. Let's start with **Referrals Analytics**.

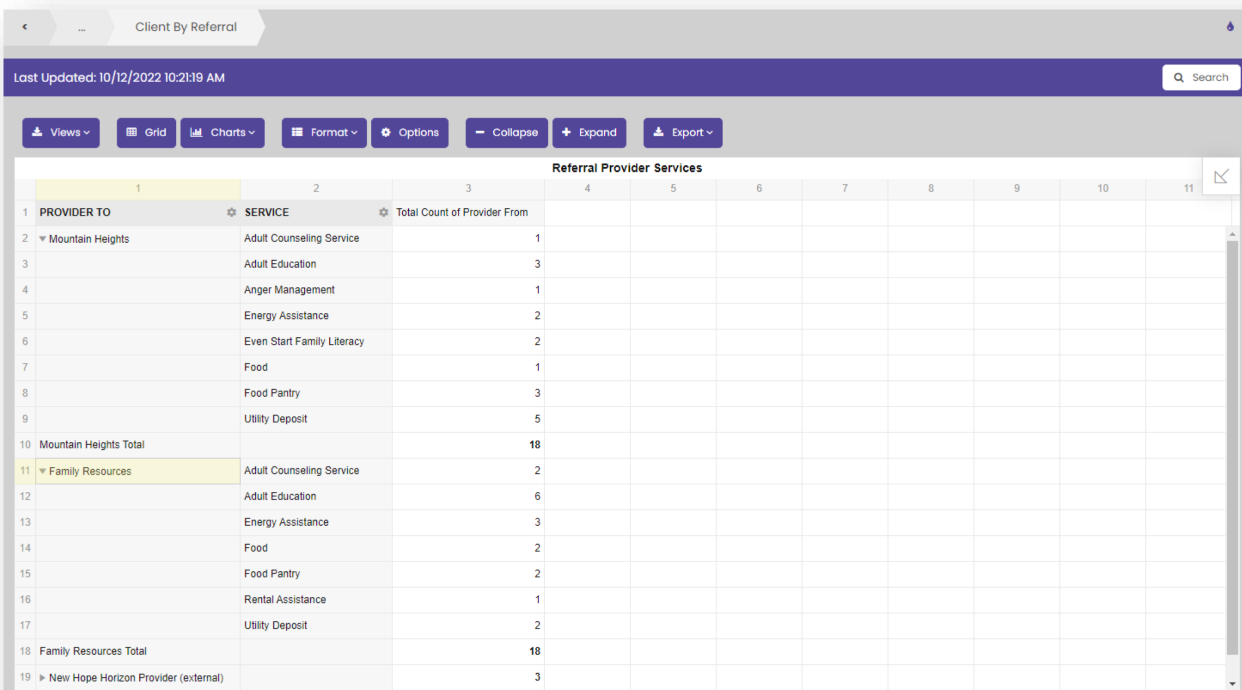



Begin by clicking SEARCH.

The report can be filtered by multiple fields, which are columns of the tables related to referrals.



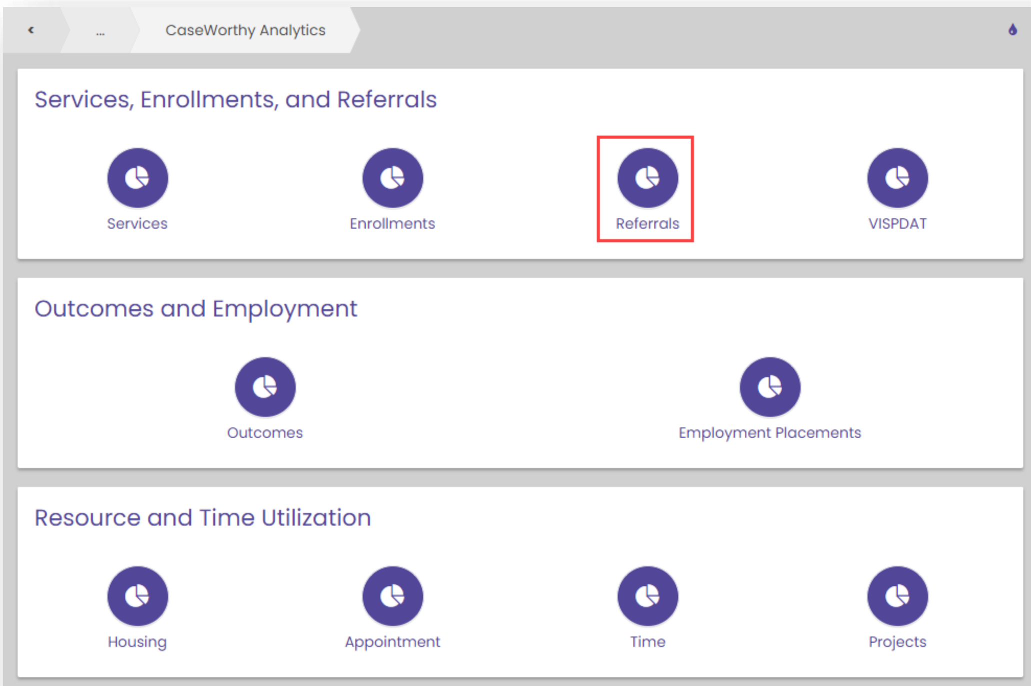

This analytic displays data similar to that found on the multiple referral forms and is essentially a search form that provides additional flexibility by utilizing the tools available. Data available to include on the report includes Provider, referral, Client, service, and program information.



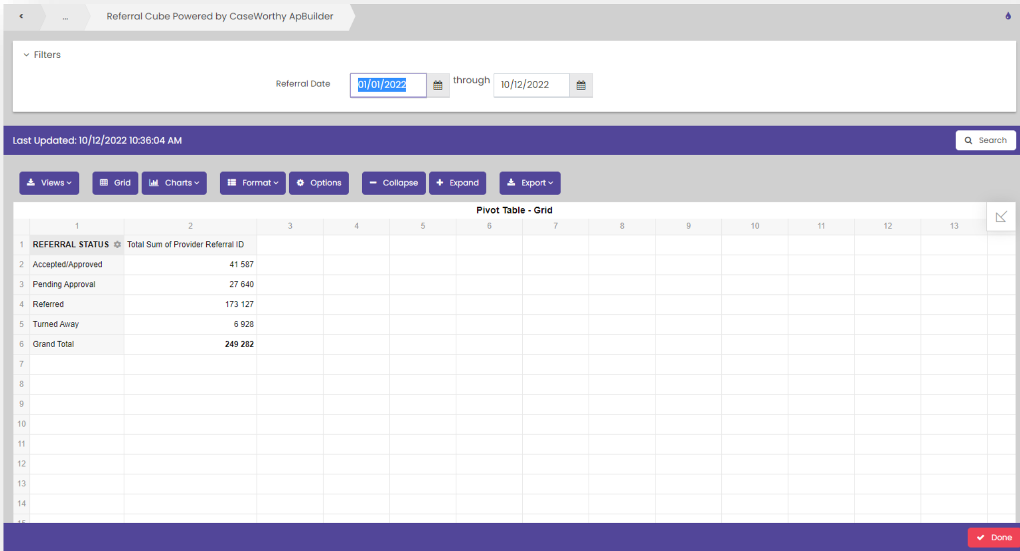

You can utilize the toolbox to determine which fields should display (Views), in what order, as well as with what specific filters and values. You can display the information as a grid or chart, as well as save, print, and export to multiple file formats.

## Referrals by Date Analytic

**CaseWorthy Analytics** provides access to more reports. Here Referrals is available. Another option is the Referrals by Data Analytic. Navigate on the Reports tab to CaseWorthy Analytics, and then select **Referrals**.

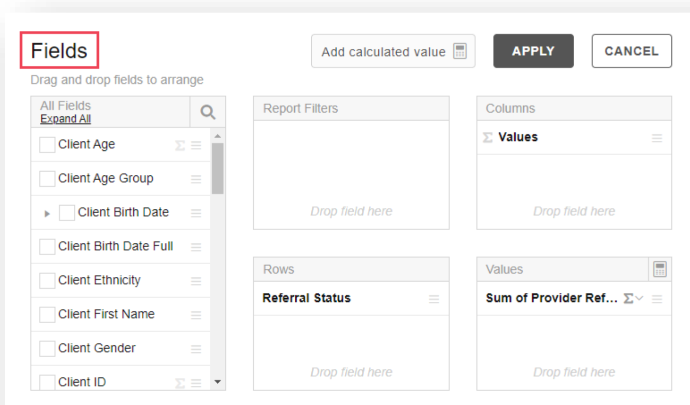



This report presents referral data based on the referral date filter and displays counts of referrals by status.




This analytic also displays data similar to data found on the multiple referral forms and acts like a search form, while also providing additional tools for customization.

This report includes more helpful columns of the tables related to referrals which can be used to create a custom view that best suits your business needs.




This concludes the CaseWorthy *Referral* video series.