



REFERRALS -VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

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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.

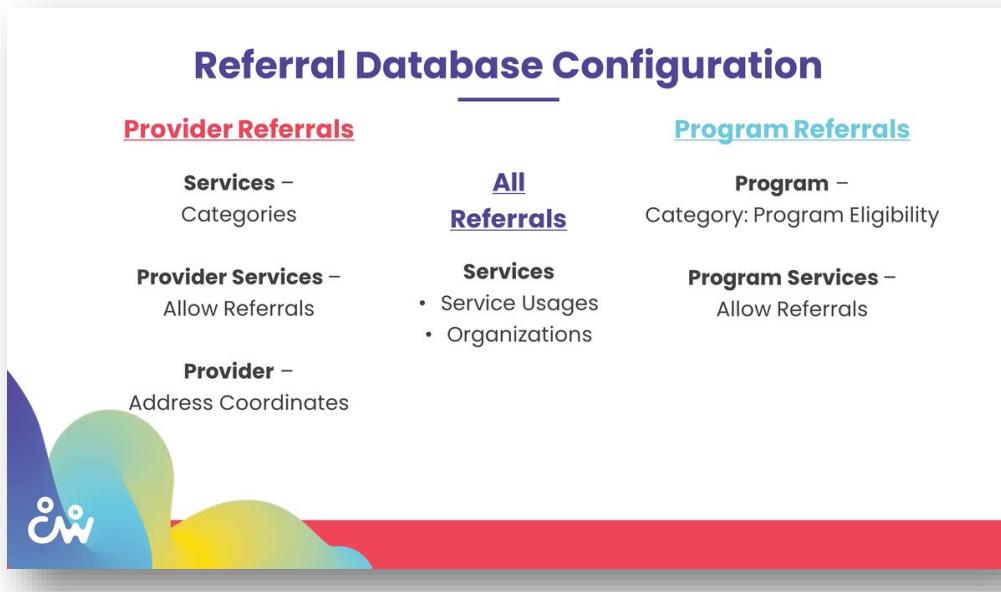
Providers who maintain a general case management program from which Case Managers then refer the Client to all necessary programs to meet their various needs.

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 multi-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.

The screenshot shows the 'Edit Service Type' configuration screen. It includes fields for Description (Adult Education), Effective Date (10/01/2021), Unit Of Measure (Each), Unit Value (1), Service Usage (Choose Options... showing Direct and Referral / Service Request), Categories (Choose Options... showing APFC Services, Case Management, Education, Family Services), Report Category (dropdown), and Organizations (All or None, Choose Options... showing A Place for Change and Alliance for Community Trust).

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.

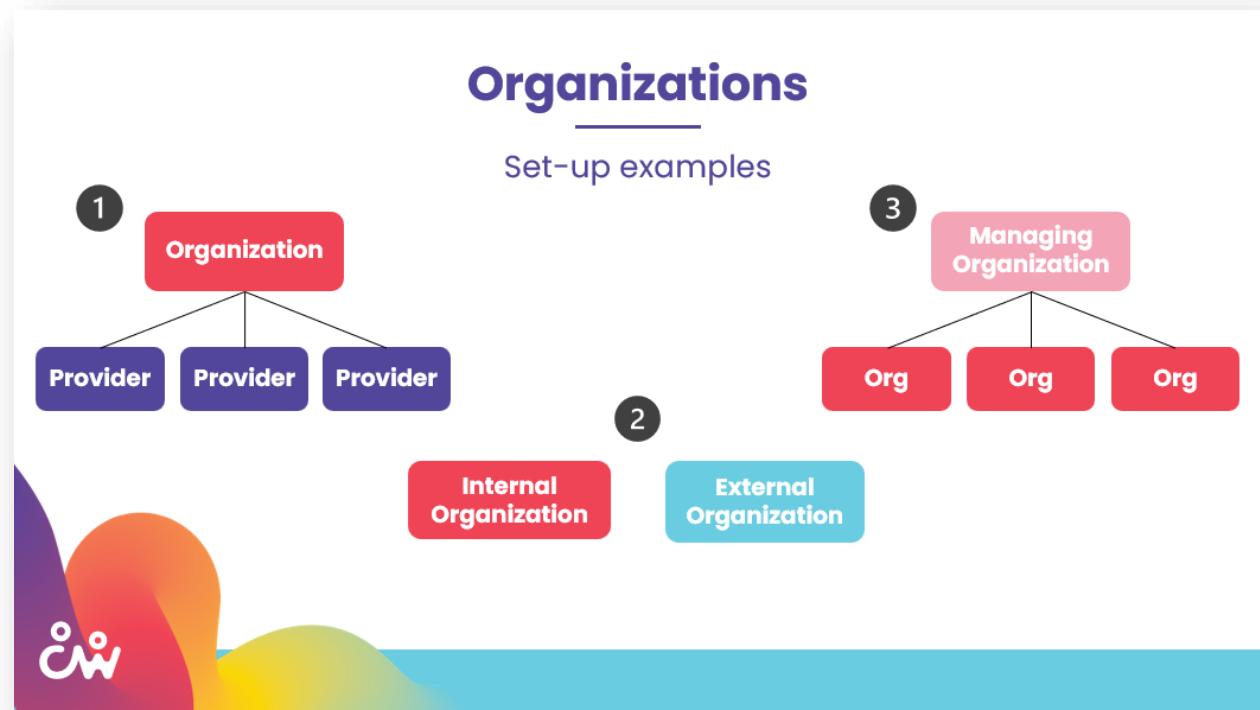
Categories are used for Provider Referrals when recording multiple referrals at once. The specific category does not matter, but all the services which could be included need to share the same category.

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**.

The screenshot shows a software interface for managing provider services. At the top, there's a breadcrumb navigation: 'Provider Services' > 'Mountain Heights'. On the right, there are buttons for '+ Add New' and a gear icon. Below this is a 'Filters' section with a dropdown menu labeled 'Category'. A message 'Total Rows: 9' is displayed above the main table. The table has columns: 'Referral Service Description', 'Allow Service Posting', 'Allow Referral', 'Approval Process', 'Post Service', 'Instructions', and 'Service Type ID' (with a secondary column 'ID'). Each row lists a service name, its posting and referral status, the approval process (e.g., 'Case Manager Approvals'), and other details. The last row shows a total of 50 results per page.

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 referable (**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	244II
Adult Education Daily	No	Yes		Redacted		734	244II
Even Start Family Literacy	No	Yes	Case Manager Approvals	Redacted		736	244II
Financial Services	No	Yes		Redacted		103	244II
Food Pantry	Yes	Yes	Food Bank	Food Pantry		105	244II
Housing Placement	No	Yes		Redacted		102	244II
Rental Assistance	No	Yes		Redacted		108	244II
Utility Assistance	No	Yes		Redacted		107	244II
Utility Deposit	No	Yes		Redacted		106	244II

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.

Referral Service Description	Allow Service Posting	Allow Referral	Post Service *	Approval Process	Service Type ID	Provider Service ID
Adult Education	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Adult Education	<input type="button" value="Search"/>	562	480
Instructions	Begin Date	11/03/2021	End Date	Open		

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						
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.

Add/Edit Provider

Provider Name and Category

Provider Name Make Default Provider

Categories Master Provider

Food Bank
Meals On Wheels
Provider
Utility

Provider Location

Google Address Lookup

Address Address 2

Zip Code Time Zone

City State

County Neighborhood

Country Use Physical Address as Mailing Address

Longitude Latitude

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

The screenshot shows the 'Add/Edit Program' interface. It includes fields for 'Program Name' (Adult Education), 'Organizations' (All), 'Categories' (highlighted with a red border), and 'Outcome Domains'. The 'Categories' section lists 'Accept Referrals' and 'Program Eligibility'. The 'Outcome Domains' section lists several items, with the first one highlighted.

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?**'

The screenshot shows the 'Program Services' table for the 'Adult Education' program. The table includes columns for Description, Unit of Measure, Effective Date, Billing Rate, Is Referable? (checkbox), Program Service ID, and Service Type ID. Several rows have the 'Is Referable?' checkbox checked, indicating they are set as referable services.

Description	Unit of Measure	Effective Date	Billing Rate	Is Referable?	Program Service ID	Service Type ID
Gift Card	Dollar		Billing Rate		2362	228
Life Skills (Outside of CM)	Each		Billing Rate		2348	128
Anger Management	1/4 Hours (15 Min Intervals)		Billing Rate		2347	119
Child Care	Dollar		Billing Rate	True	2346	118
Classroom Training	Hours		Billing Rate		2345	117
Education	Dollar		Billing Rate	True	2342	96
Adult Education	Each	10/01/2021	Billing Rate	<input checked="" type="checkbox"/>	2341	562

Only the referable 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.

Referral Date	Description	Provider Name
10/13/2022	Food Pantry	Helping Hearts

Referral Date	Description	Provider Name
09/01/2022	Rental Assistance	Family Resources

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.

Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User	Approval Status
10/13/2022	Mountain Heights, East OGDEN Canyon,	Food Pantry	Referral In - External Providers			Referred	Vega, Macy	
9/1/2022	Family Resources, 1511 South 40 East Street, Provo	Rental Assistance	Referral Out - External Providers			Accepted/Approved	Barrera, Macy	

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 REFERRAL 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.

The screenshot shows a software interface titled "Enter Provider Referral". It contains several input fields: "Enrollment" (a dropdown menu), "Refer To" (a dropdown menu with a magnifying glass icon for search), "Refer to Person" (a dropdown menu), "Referral Date" (a date and time picker set to 10/10/2022 at 4:38 PM), and two dropdown menus for "Referral Status" and "Referral Outcome", both currently set to "Unknown".

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.

Provider Referral with Service Filter Lookup

Provider Referral with Service Filter

Filters

Service:

Distance In Miles:

Provider Name:

Map

Total Rows: 14

Provider	Service	Distance	P - Lat	P - Long	Email	Phone	EntityID
Family Resources, 1511 South 40 East Street, Provo	Food	25.05	40.213535	-111.657216	rgomez@gmail.com	801-458-7596	24416
Family Resources, 1511 South 40 East Street, Provo	Adult Education	25.05	40.213535	-111.657216	rgomez@gmail.com	801-458-7596	24416
Family Resources, 1511 South 40 East Street, Provo	Food Pantry	25.05	40.213535	-111.657216	rgomez@gmail.com	801-458-7596	24416
APFC Foster Care, 515 950 south, Salt Lake City	Adult Education	14.91	40.7490256	-111.9350051	ljones@gmail.com	801-325-8457	24415
APFC Foster Care, 515 950 south, Salt Lake City	Adult Education Daily	14.91	40.7490256	-111.9350051	ljones@gmail.com	801-325-8457	24415
Mountain Heights, East OGDEN Canyon,	Adult Education	48.99	41.2490008	-111.8881035	jwallister@mheights.com	801-385-2582	24411

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'.

Provider Referral with Service Filter

Filters

Service:

Distance In Miles:

Provider Name:

Map

--Nothing--

- Adult Counseling Service
- Adult Education
- Adult Education Daily
- Education
- Energy Assistance
- Even Start Family Literacy

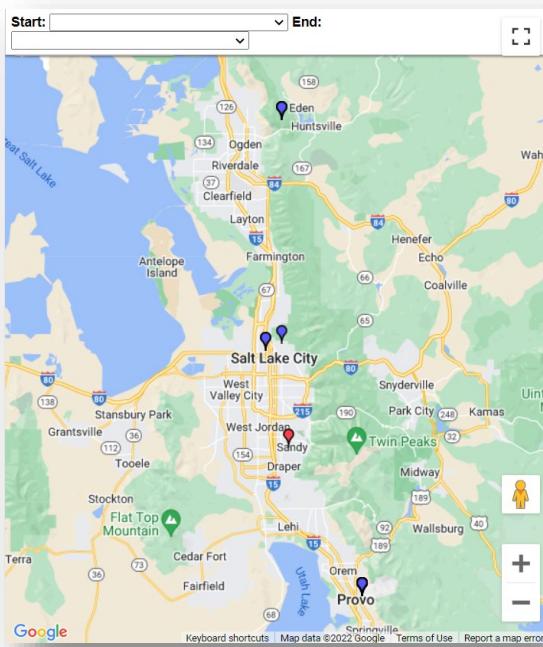
The **Distance in Miles** filters the list by the entered distance between the Provider and the Client according to the addresses entered for each. For example, if you enter 5 and SEARCH, the list will display all Providers that are located within a 5-mile radius of the Client's address.

The screenshot shows a web-based application for provider referrals. At the top, there is a header bar with the title "Provider Referral with Service Filter". Below the header is a "Filters" section containing three input fields: "Service" (dropdown menu), "Distance in Miles" (text input set to 5), and "Provider Name" (text input). A "Map" button is also present. The main content area displays a table of search results with the following columns: Provider, Service, Distance, P - Lat, P - Long, Email, Phone, and EntityID. The table contains three rows of data. At the bottom right of the table is a "Search" button. A large "Total Rows: 3" message is displayed above the table.

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	-111.8864356			24499

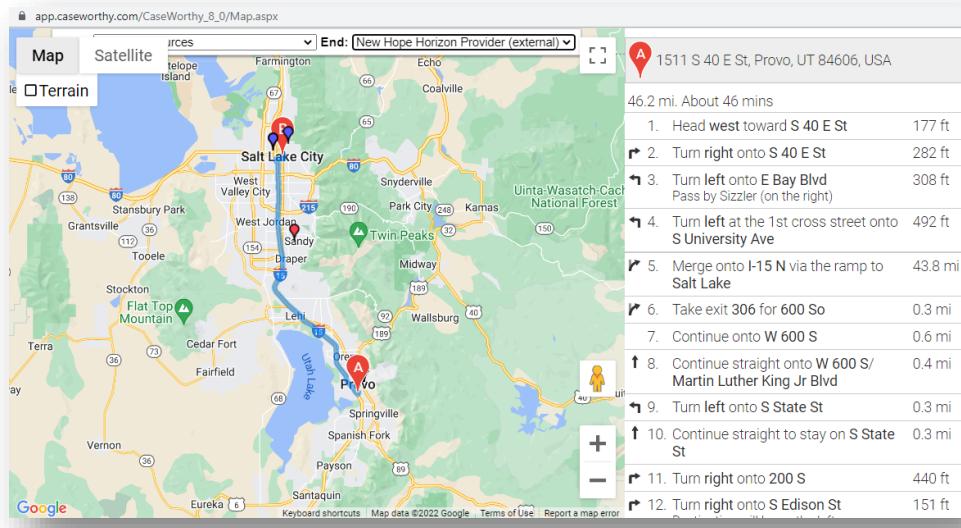
Provider Name filters the list by the portion of the name entered.

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.

The screenshot shows the 'Enter Provider Referral' interface. It includes fields for Enrollment (set to 'Home Assistance'), Refer To (set to 'New Hope Horizon Provider'), Service (set to 'Housing Placement'), Referral Date (set to 10/11/2022 at 11:25 AM), and Referral to Person (a dropdown menu).

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 screenshot shows the 'Referral Status and Outcome (if known)' section. It includes dropdown menus for Referral Status (set to 'Referred') and Referral Outcome (set to 'Unknown').

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

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

The screenshot shows the 'Referral Voucher Information' section. It includes fields for Provider Voucher to Client (checkbox checked), Reference Date (set to 10/10/2022), Reference Number (set to 'RA1525'), Authorized Amount (set to '1200'), and Authorized By (set to 'Saba').

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.

A screenshot of the "Case Note (Add)" form. The form includes fields for "Reference Date" (set to 10/12/2022), "Template" (dropdown), "Type" (set to "Referral"), and "Summary" (set to "Referral"). Below these, there is a "Voice To Text" button. The "Note Description" section contains a rich text editor toolbar and a text area containing the text "I am referring Lindon to New Hope Horizons for Housing Placement services." At the bottom right, there are "Save" and "Cancel" buttons.

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.

Text Provider

Text Message	A referral has been entered for LB.	Cell Phone Number	801-315-4588
--------------	-------------------------------------	-------------------	--------------

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

Create Email

To * mrio@NHH.org

Subject * Referral Email

Your Email * svega@caseworthy.com

Email Template Referral Email

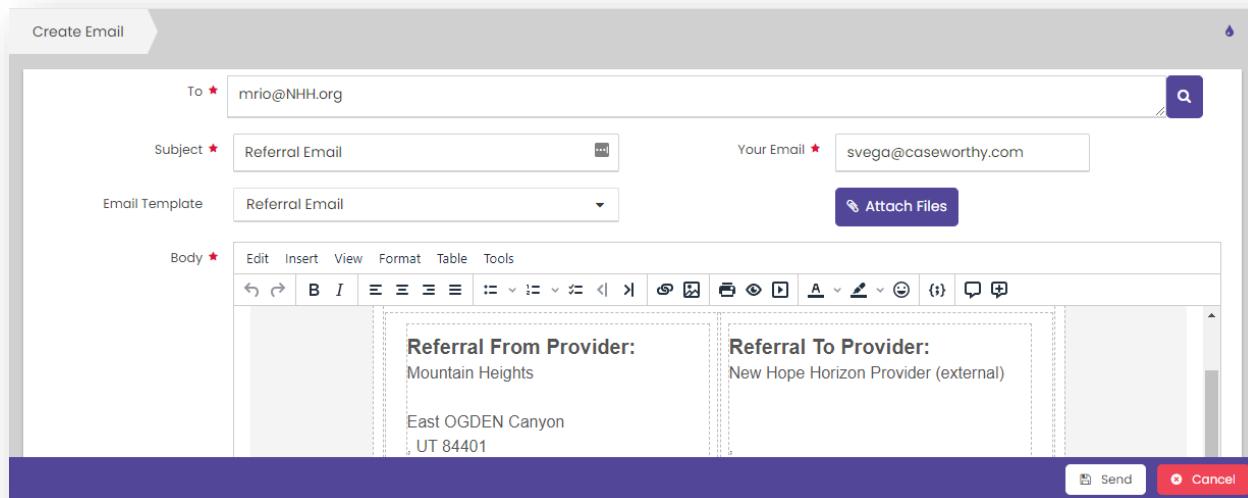
Body *

Referral From Provider:
Mountain Heights

East OGDEN Canyon
UT 84401

Referral To Provider:
New Hope Horizon Provider (external)

Send Cancel



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.

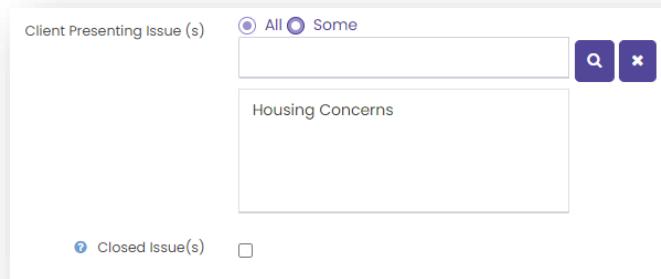
Use **Client Presenting Issue(s)** to record any presenting issues which pertain to the referral.

Client Presenting Issue(s)

All Some

Housing Concerns

Closed Issue(s)

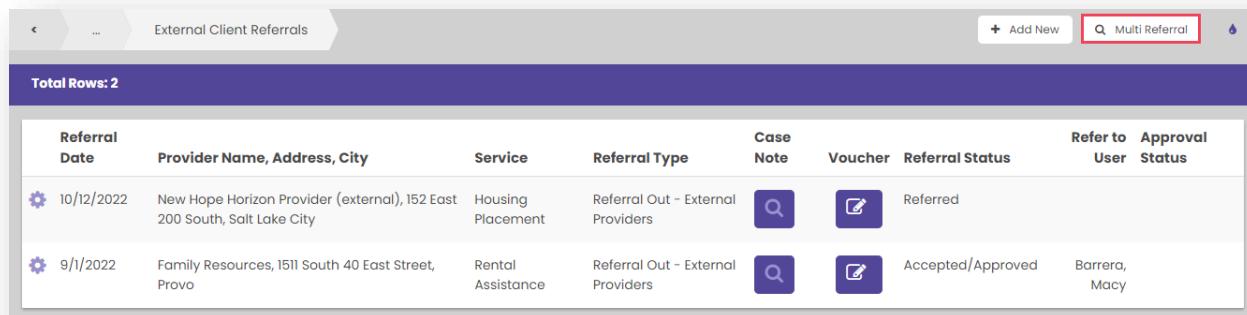


If selected, additional options display allowing you to select presenting issues as well as the option to edit the referral to close concerns that have been resolved due to this referral.

SAVE the new referral.

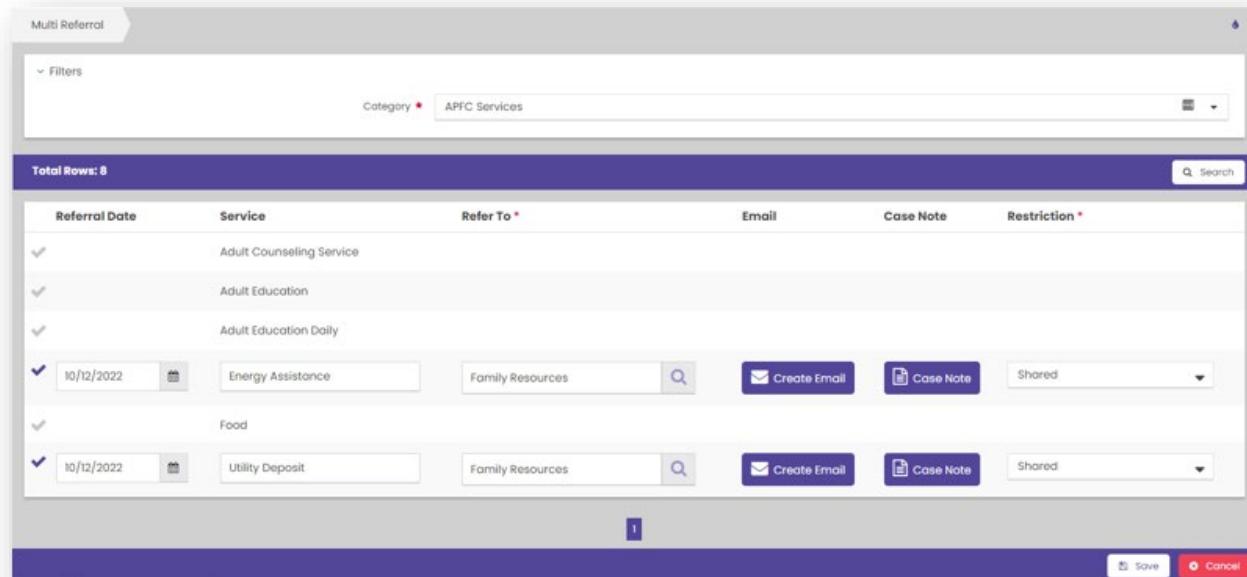
Add Multiple Referrals

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



Total Rows: 2							
Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User Approval Status
10/12/2022	New Hope Horizon Provider (external), 152 East 200 South, Salt Lake City	Housing Placement	Referral Out - External Providers			Referred	
9/1/2022	Family Resources, 1511 South 40 East Street, Provo	Rental Assistance	Referral Out - External Providers			Accepted/Approved	Barrera, Macy

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.



The screenshot shows the 'Multi Referral' creation form. At the top, there's a 'Filters' section with a dropdown set to 'Category * APFC Services'. Below it, a table lists 8 rows of referrals:

Referral Date	Service	Refer To *	Email	Case Note	Restriction *
	Adult Counseling Service				
	Adult Education				
	Adult Education Daily				
10/12/2022	Energy Assistance	Family Resources			
	Food				
10/12/2022	Utility Deposit	Family Resources			

At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

Provider Name	Address	City	Zip Code	Email
Family Resources	1511 South 40 East Street	Provo	84606	

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.

External Client Referrals								
Total Rows: 4								
Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User	Approval Status
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Energy Assistance	Referral Out - External Providers			Referred		
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Utility Deposit	Referral Out - External Providers			Referred		
10/12/2022	New Hope Horizon Provider (external), 152 East 200 South, Salt Lake City	Housing Placement	Referral Out - External Providers			Referred		
9/1/2022	Family Resources, 1511 South 40 East Street, Provo	Rental Assistance	Referral Out - External Providers			Accepted/Approved	Barrera, Macy	

1

Results Per Page: 50

Done

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.

The screenshot shows a web browser window titled "CaseWorthy Report Viewer - Google Chrome". The URL is "app.caseworthy.com/CASEWORTHY_8_0/ReportViewer.aspx?FormID=286&URLID=15805". The page displays a "Referral Report" for a referral made on "10/7/2022". The report includes fields for "Referring Provider" (Mountain Heights), "Address" (East OGDEN Canyon), "Phone", "E-Mail", "Refer to Provider" (Family Resources), "Address" (1511 South 40 East Street, Provo, UT 84606), "Phone", and "E-Mail". Below the report, there is a note about a voucher being authorized for Adult Education services. At the bottom, it says "Report run date: 10/7/2022" and "Page 1 of 1".

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 screenshot shows the 'Referrals' section of the CaseWorthy interface. On the left, there are three main categories: 'Referrals to Providers' (selected), 'Internal Referrals', and 'My Provider Referrals'. Below these are two program-related buttons: 'Program Referral' and 'Program Referrals to Me'. To the right, a table titled 'Referrals to External Providers (4)' lists four entries with columns for 'Referral Date', 'Description', and 'Provider Name'. The data is as follows:

Referral Date	Description	Provider Name
10/12/2022 11:01 AM	Housing Placement	New Hope Horizon Provider (external)
10/12/2022	Utility Deposit	Family Resources
10/12/2022	Energy Assistance	Family Resources
09/01/2022	Rental Assistance	Family Resources

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.

The screenshot shows the 'Referral In Summary' page. At the top, there are buttons for 'Add New' and 'Multi Referral In'. Below is a table with one row, indicated by 'Total Rows: 1'. The columns are 'Referral Date', 'Refer From Provider', and 'Referral Service'. The data is as follows:

Referral Date	Refer From Provider	Referral Service
10/13/2022 12:00:00 AM	Helping Hearts	Food Pantry

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 screenshot shows the 'Referral In' section of a software application. It includes fields for 'Referral Date' (set to 10/11/2022), 'Service' (dropdown menu), 'Refer From Provider' (lookup field with search icon), and sections for 'Case Note and Restriction Information'. The 'Case Note' section contains a button labeled 'Case Note' and a dropdown for 'Restriction' (set to 'Shared'). At the bottom are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Multiple Referral In' screen. It features a filter section for 'Service Category' (set to 'Education') and a table displaying three rows of referral data. Each row includes fields for 'Service' (with a dropdown menu and checkmark), 'Referral Date' (set to 10/10/2022), 'Referral From' (dropdown menu with search icon), 'Restriction' (dropdown set to 'Shared'), and a 'Case Note' button. The table header includes columns for Service, Referral Date, Referral From, Restriction, and Case Note.

Service *	Referral Date	Referral From *	Restriction *	Case Note
Adult Education	10/10/2022	New Hope Horizon Provide	Shared	<input type="button" value="Case Note"/>
Education				
Even Start Family Literacy	10/10/2022	APFC Provider	Shared	<input type="button" value="Case Note"/>

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.

Referral In Summary		
Total Rows: 2		
Referral Details	Refer From Provider	Referral Service
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Edit Delete 9/11/2022 12:00:00 AM</div>	New Hope Horizon Provider (external)	
	New Hope Horizon Provider (external)	

This concludes *Entering Provider Referrals*.

Next in the series, we will explore [Entering Program Referrals](#).

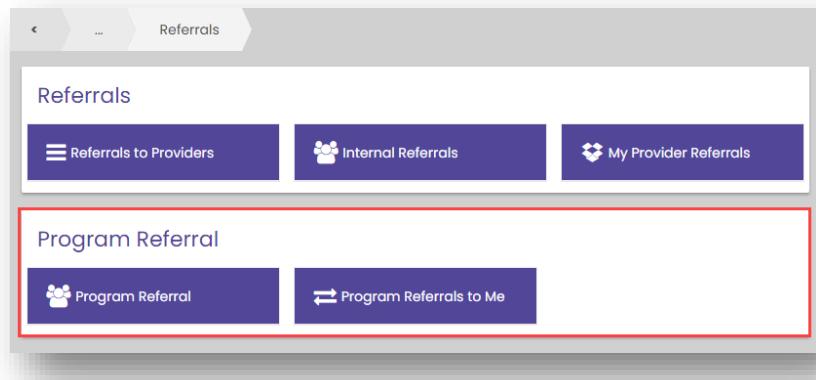
Entering Program Referrals

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.

Master Program Referral Summary							
	Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
	10/10/2022	Family Services	1	0	1	25508	3
Results Per Page: 50							

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**.

Master Program Referral Summary							
	Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
	10/10/2022	Family Services	1	0	1	25508	3
Results Per Page: 50							

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

Program Referrals

Active vs. Closed

Active

- The final result has yet to be determined
- Status:
 - Referred
 - Pending

Closed

- The final result has occurred
- Status:
 - Accepted/Approved
 - Turned Away
 - Ineligible
 - Reassigned
 - Client Rejected
 - Client Didn't Follow Up



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 screenshot shows a software application window titled "Master Referral". At the top left is a purple button labeled "Master Referral". Below it is another button with a lock icon and the text "Add New Program Referra...". The main form area has a light gray background. It contains several input fields and dropdown menus:

- "Referral Type": A dropdown menu set to "Program Referral".
- "Enrollment": A dropdown menu set to "Family Services [Counseling Ser...]".
- "Preferred Start Date": A date input field showing "10/17/2022" with a calendar icon.
- "Case Note": A purple button with a document icon and the text "Case Note".
- "Restriction *": A dropdown menu set to "Shared".

At the bottom right of the form are two buttons: "Save" (with a blue icon) and "Cancel" (with a red icon).

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.

Program Referral Add New

Referred to Program	Referred Date	Status	Is Eligible	Not Eligible Reason	Refer to User
<input checked="" type="checkbox"/> Adult Education			True		
<input checked="" type="checkbox"/> Energy Assistance			True		
<input checked="" type="checkbox"/> Veteran Outreach & Assistance			False	VeteranStatus == 1	

1

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

Program Referral Add New

Referred to Program	Referred Date	Status	Is Eligible	Not Eligible Reason	Refer to User
<input checked="" type="checkbox"/> Adult Education	10/13/2022	Referred	<input checked="" type="checkbox"/>		Mindy - Mindy Cottrell
Case Note Case Note Restriction * Shared					
<input checked="" type="checkbox"/> Energy Assistance			True		
<input checked="" type="checkbox"/> Veteran Outreach & Assistance	10/13/2022	Referred	<input checked="" type="checkbox"/>	VeteranStatus == 1	Reina - Reina Klousberg
Case Note Case Note Restriction * Shared					

1

[Save](#) [Cancel](#)

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**.

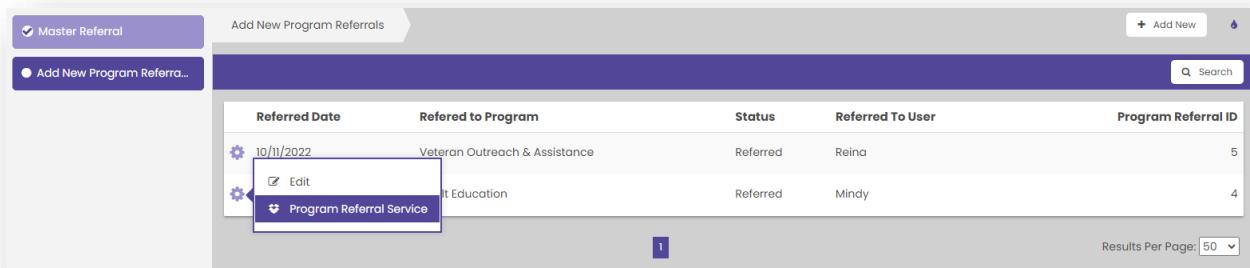
The **Restriction** sets how this record should be accessible to Users in accordance with Organization-level data sharing configuration.

Here a Program Referral CASE NOTE can be recorded.

(SAVE)

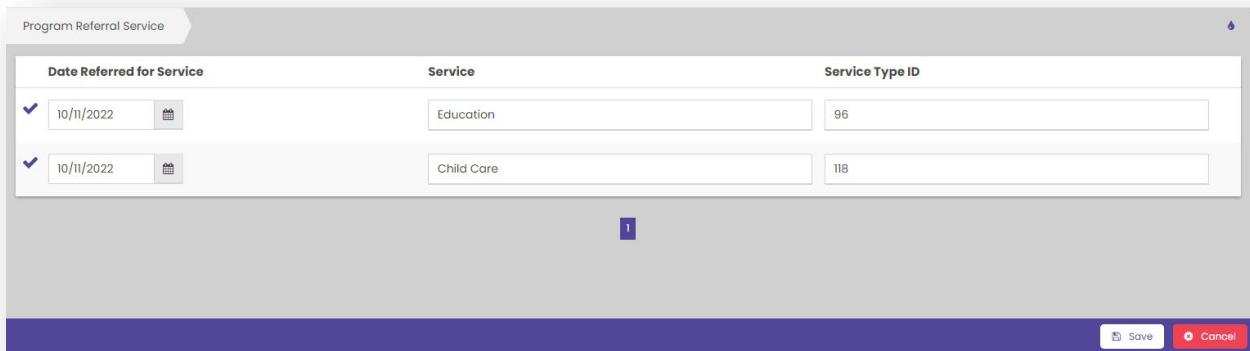
Include Program Services

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**.



Referred Date	Referred to Program	Status	Referred To User	Program Referral ID
10/11/2022	Veteran Outreach & Assistance	Referred	Reina	5
10/11/2022	Adult Education	Referred	Mindy	4

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



Date Referred for Service	Service	Service Type ID
10/11/2022	Education	96
10/11/2022	Child Care	118

Repeat as necessary for each program.

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

Program Referral Add/Edit

Referred Date	10/11/2022	Case Note	Status	Referred
Referred From Program	Home Assistance		Referred To User	Mindy - Mindy Cottrell
Referred To Program	Adult Education			
Restriction *	Shared			

Click **DONE** to complete the workflow.

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

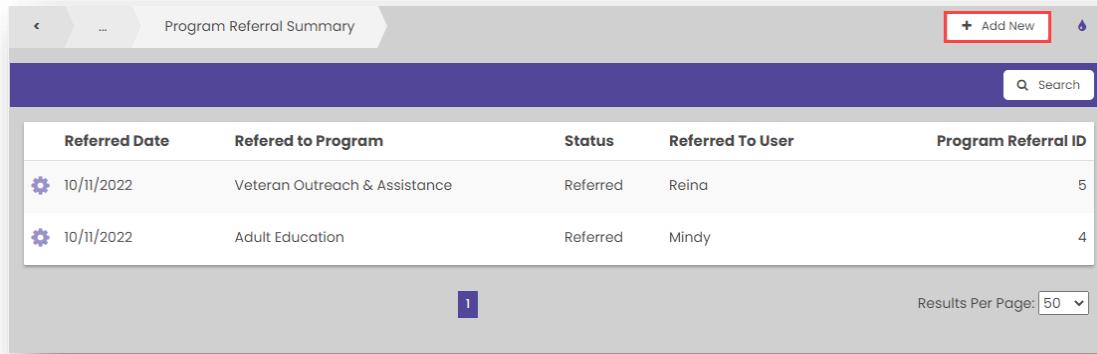
Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
10/11/2022	Home Assistance	2	2	0	25566	8
10/10/2022	Family Services	1	0	1	25508	3

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.

Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
10/11/2022	Home Assistance	2	2	0	25566	8
10/10/2022	Family Services	1	0	1	25508	3

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.



The screenshot shows a software interface titled "Program Referral Summary". At the top right, there is a red-bordered button labeled "+ Add New". Below it is a search bar with a magnifying glass icon and the word "Search". A table lists two program referrals:

Referred Date	Referred to Program	Status	Referred To User	Program Referral ID
10/11/2022	Veteran Outreach & Assistance	Referred	Reina	5
10/11/2022	Adult Education	Referred	Mindy	4

At the bottom center of the table is a small blue square containing the number "1". To the right, there is a "Results Per Page:" dropdown set to "50".

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.

Managing Referrals

Case Management Tab –

All referrals for the active Client

My CaseWorthy Tab –

All referrals entered by the User, referred to the User and referred to the User's programs

Organization Tab –

Provider Referrals for all Clients



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**.

Total Rows: 4								
Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User	Approval Status
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Energy Assistance	Referral Out - External Providers			Referred		
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Utility Deposit	Referral Out - External Providers			Referred		
10/12/2022	Hope Horizon Provider (external), 152 East 200 South, Salt Lake City	Housing Placement	Referral Out - External Providers				Referred	
9/1/2022	Family Resources, 1511 South 40 East Street, Provo	Rental Assistance	Referral Out - External Providers				Accepted/Approved	Barrera, Macy

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.

Service: Housing Placement

Referral Status: Accepted/Approved

Referral Outcome: Attained

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.

A screenshot of a web-based application interface titled "External Client Referrals". At the top right are buttons for "+ Add New" and "Multi Referral". Below the title, it says "Total Rows: 4". A table follows with columns: "Referral Date", "Provider Name, Address, City", "Service", "Referral Type", "Case Note", "Voucher", "Referral Status", "Refer to User", and "Approval Status". The fourth row, which corresponds to the row highlighted in the previous screenshot, has a red border around it. This row contains the following data: Referral Date 10/12/2022, Provider Name, Address, City New Hope Horizon Provider (external), 152 East 200 South, Salt Lake City, Service Housing Placement, Referral Type Referral Out - External Providers, Case Note Accepted/Approved, Voucher (with icons for search and edit), Referral Status Accepted/Approved, Refer to User Barrera, Macy, and Approval Status Approved. The bottom right corner shows "Results Per Page: 50".

Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Voucher	Referral Status	Refer to User	Approval Status
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Energy Assistance	Referral Out - External Providers			Referred		
10/12/2022	Family Resources, 1511 South 40 East Street, Provo	Utility Deposit	Referral Out - External Providers			Referred		
10/12/2022	New Hope Horizon Provider (external), 152 East 200 South, Salt Lake City	Housing Placement	Referral Out - External Providers	Accepted/Approved				
9/1/2022	Family Resources, 1511 South 40 East Street, Provo	Rental Assistance	Referral Out - External Providers	Accepted/Approved			Barrera, Macy	Approved

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**.

A screenshot of a web-based application interface titled "Master Program Referral Summary". At the top right are buttons for "+ Add New" and "Multi Referral". Below the title, it says "Total Rows: 2". A table follows with columns: "Created Date", "Refer From Program", "Total Referrals", "Active Referrals", "Closed Referrals", "Enrollment ID", and "Master Referral ID". The second row, which corresponds to the row highlighted in the previous screenshot, has a red border around it. This row contains the following data: Created Date 11/4/2022, Refer From Program Home Assistance, Total Referrals 2, Active Referrals 2, Closed Referrals 0, Enrollment ID 25566, and Master Referral ID 45. The first row contains: Created Date 10/10/2022, Refer From Program Family Services, Total Referrals 1, Active Referrals 0, Closed Referrals 1, Enrollment ID 25508, and Master Referral ID 3.

Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
11/4/2022	Home Assistance	2	2	0	25566	45
10/10/2022	Family Services	1	0	1	25508	3

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**.

From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
Assistance	2	2	0	25566	15
Services	1	0	1	25508	3

Results Per Page: 50

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

Referred Date	Referred to Program	Status	Referred To User	Program Referral ID
10/12/2022	Veteran Outreach & Assistance	Referred	Reina	21
10/12/2022	Adult Education	Referred	Mindy	20

Results Per Page: 50

Update the **Status** and **SAVE**.

Referred Date	10/12/2022	<input type="button" value=""/>
Referred From Program	Home Assistance	
Referred to Program	Adult Education	
Case Note	<input type="button" value="Case Note"/>	
Restriction *	Shared	

Status: Accepted/Approved

--Nothing--
Referred
Acknowledged
Pending Approval
Accepted/Approved
Turned Away
Ineligible

Save Cancel

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

Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
10/12/2022	Home Assistance	2	1	1	25566	15
10/10/2022	Family Services	1	0	1	25508	3

1 Results Per Page: 50

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.

Client Program Referral To Me		
Filters		
Referred to Program	Choose Options...	Referred Date 10/05/2022 through 10/12/2022
Status		
<input type="button" value="Search"/>		
Referred To Program	Referred Date	Status
Energy Assistance	10/12/2022 12:00 AM	Referred
Family Literacy	10/12/2022 12:00 AM	Referred
1		Results Per Page: 50
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

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

Referred To Program	Referred Date	Status
<input checked="" type="checkbox"/> Edit	10/12/2022 12:00 AM	Referred
<input type="checkbox"/> Accept and Enroll	10/12/2022 12:00 AM	Referred

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

Edit Program Referral To User

Referred Date	10/12/2022 <input type="button" value="..."/>
Program Referred From	Emergency Shelter
Program Referred To	Energy Assistance
Referral Sent By	Saba
Status	<input type="button" value="Referred"/> <input type="button" value="--Nothing--"/> <input type="button" value="Accepted"/> <input type="button" value="Pending Approval"/> <input type="button" value="Accepted/Approved"/> <input type="button" value="Turned Away"/> <input type="button" value="Ineligible"/>

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.

The screenshot shows the 'Identifying Info' tab of the 'Add Client' form. The form contains the following data:

- Last Name: Bryce
- First Name: Lindon
- Gender: A gender that is not singularly Female or Male
- SSN: 878-66-4676
- DOB: 08/05/1982
- Race: White
- Ethnicity: Non-Hispanic/Non-Latin(o)(o)(x)
- Pronouns: (dropdown menu)
- Citizenship Status: U.S. Citizen
- Primary Language: English
- Veteran Status: No
- Name Change: (checkbox)

Buttons at the bottom right include 'Save' and 'Cancel'.

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.

Enrollment Add/Edit

Family Name: Brycee,Lindon-1982-08-05

Enrollment Entry Date: 10/12/2022

Enrollment Exit Date: Open

Program: Energy Assistance

Provider: Mountain Heights

Account: Veteran's Assistance 2022

Family or Individual

Pick "Family" to indicate the enrollment reflects data for the whole family. Pick "Individual" to indicate the enrollment is specific to each enrolled member.

Family Or Individual: Individual

Assign Case Manager: Yates, Lois

Schedule Follow Up:

To assign a Case Manager for the "Enrolled Program", select the option below.

Upon saving the enrollment record, CaseWorthy will create a "Case Manager Assignment" for the client based on the selected Case Manager starting as of the enrollment date.

Case Manager: Yates, Lois

Email / Notify Case Manager:

Restriction Information

Restriction: Shared

Here enrollment members are selected.

Enrollment Members

Filters: Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HoH.

Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Begin Date *	End Date	Relation To HoH	Restriction *
Bryce, Lindon	Mountain Heights	10/12/2022	Open	Self	Shared

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

This screenshot shows the configuration interface for 'Income And Expenses' under 'Assessment' for client 'Lindon Bryceee'. The left sidebar includes buttons for 'Add Client', 'Quick Add Family Member...', 'Enrollment Add/Edit', 'Enrollment Members', 'Assessment', 'Lindon Bryceee', 'Income And Expenses', 'Program Non Assessment', and 'Presenting Issues (Summary)'. The main area displays filters for 'Assessment' (set to '10/12/2022 - Energy Assistance - At Entry'), 'Area Median Income' (set to 'Beaver Utah'), and 'Income from Any Source' (set to 'Yes'). A table header is shown with columns: 'Income or Expense Type *', 'Category', 'Interval', 'Amount per Interval *', 'Intervals Per Month *', and 'Monthly Amount'. A single row is listed: 'Salary' under 'Income' with a monthly interval of '1200' and a monthly amount of '\$1,200.00'. Buttons at the bottom include 'Save' and 'Cancel'.

Presenting Issues can be recorded.

This screenshot shows the configuration interface for 'Presenting Issues (Summary)' under 'Assessment'. The left sidebar includes buttons for 'Add Client', 'Quick Add Family Member...', 'Enrollment Add/Edit', 'Enrollment Members', 'Assessment', 'Lindon Bryceee', 'Income And Expenses', 'Program Non Assessment', and 'Presenting Issues (Summary)'. The main area displays a table with 'Total Rows: 3'. The columns are: 'Issue Description', 'Identified - End Date', 'Evaluation Level', 'Case Note', and 'Restriction'. The rows show categories like 'HC - Risk Assessment', 'Counseling', 'Employment', and 'Transportation', each with specific details and a 'Shared' restriction. A dropdown for 'Results Per Page' is set to '50'. Buttons at the bottom include 'Done'.

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

Created Date	Refer From Program	Total Referrals	Active Referrals	Closed Referrals	Enrollment ID	Master Referral ID
10/12/2022	Emergency Shelter	2	1	1	25570	25

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

Referred Date	Referred to Program	Status	Referred To User	Program Referral ID
10/12/2022	Family Literacy	Referred	Iyates	29
10/12/2022	Energy Assistance	Accepted/Approved	Iyates	28

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.

The Referrals section contains four items:

- Referrals to my Programs (Icon: envelope)
- Program Referrals from Me (Icon: airplane)
- Program Referrals to Me (Icon: airplane)
- Provider Referrals From Me (Icon: folder)

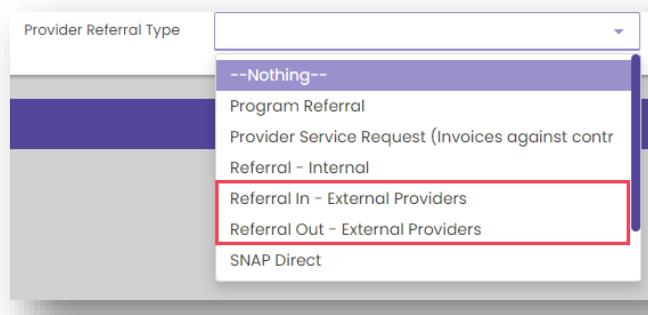
Let's start with Provider Referrals.

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**.

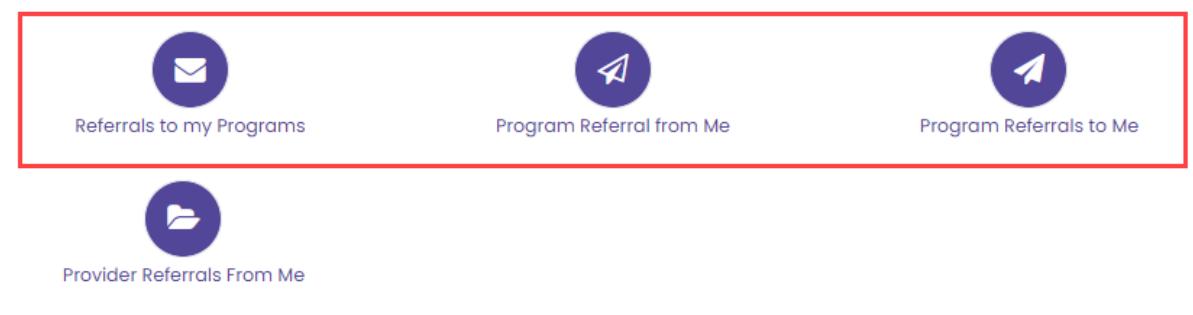


Like on the *External Client Referrals Summary* form, each referral's action gear provides the ability to **Edit** the referral which would be used to update the Referral Status and Outcome. **Delete** is used if the referral was entered in error. And **Referral Report** is available to generate and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

Program Referrals

The other links pertain to Program Referrals.

Referrals



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.

Program Referral Summary				
Referred Date	Referred to Program	Status	Referred To User	Program Referral ID
10/11/2022	Home Assistance	Referred	Saba	16
10/11/2022	Adult Education	Accepted/Approved	Saba	15

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.

Referred Date	Client	Program Name	Status	Referred to User
✓ 10/12/2022	Brycee, Lindon	Veteran Outreach & Assistance	Referred	Reina
✓ 10/12/2022	Brycee, Lindon	Family Literacy	Referred	Iyates
✓ 10/12/2022	Flores, Sandra	Adult Education	Accepted/Approved	Saba
✓ 10/12/2022	Flores, Sandra	Home Assistance	--Nothing--	Mindy
✓ 10/12/2022	Clarkson, Trevor	Adult Education	Referred	
✓ 10/12/2022	Clarkson, Trevor	Veteran Outreach & Assistance	Acknowledged	
			Pending Approval	
			Accepted/Approved	
			Turned Away	
			Ineligible	

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.

The screenshot shows the 'Program Referral Add/Edit' form for Trevor Clarkson. The form fields are as follows:

- Referred Date: 10/12/2022
- Status: Referred
- Referred From Program: Family Services
- Referred To Program: Adult Education
- Case Note: Case Note
- Referred To User: (dropdown menu)

The sidebar on the left displays Trevor Clarkson's profile information and navigation links for Case Management, Assessments, Health Management, Calendars, and Specialty Items.

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.

Program Referral From User

Filters

Referred Date	Program	Status	Client	Referred To User
✓ 10/12/2022	Family Literacy	Referred	Clarkson, Trevor	Mindy
✓ 10/12/2022	Adult Education	Referred	Brinkman, Nelly	Isabella.Zion
✓ 10/12/2022	Energy Assistance	Referred	Brinkman, Nelly	Saba
✓ 10/12/2022	Veteran Outreach & Assistance	Referred	Brinkman, Nelly	Saba
✓ 10/12/2022	Home Assistance	Referred	Peters, Jeffrey	Reina
✓ 10/12/2022	Adult Education	Referred	Peters, Jeffrey	Isabella.Zion

Save Cancel

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

Referred Date	Program	Status	Client	Referred To User
✓ 10/12/2022	Family Literacy	Client Did Not Follow up	Clarkson, Trevor	Mindy
✓ 10/12/2022	Adult Education	Pending Approval	Brinkman, Nelly	Isabella.Zion
✓ 10/12/2022	Energy Assistance	Accepted/Approved	Brinkman, Nelly	Saba
✓ 10/12/2022	Veteran Outreach & Assistance	Turned Away	Brinkman, Nelly	Saba
✓ 10/12/2022	Home Assistance	Ineligible	Peters, Jeffrey	Reina
✓ 10/12/2022	Adult Education	Reassigned	Peters, Jeffrey	Isabella.Zion
		Client Turned Down Referral		
		Client Did Not Follow up		

Save Cancel

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.

The screenshot shows the 'Program Referrals To Me' dashboard. At the top, there are filters for 'Refer To Program' (with a dropdown menu 'Choose Options...'), 'Referred Date' (set to 10/05/2022 through 10/12/2022), and 'Status' (set to 'Referred'). Below the filters is a table with four columns: 'Referred Date', 'Program Name', 'Status', and 'Client'. The table contains four rows of data:

Referred Date	Program Name	Status	Client
10/12/2022	Energy Assistance	Referred	Bryce, Lindon
10/12/2022	Family Literacy	Referred	Bryce, Lindon
10/11/2022	Adult Education	Referred	Brown, Trevor
10/11/2022	Home Assistance	Referred	Brown, Trevor

At the bottom right of the table, there are buttons for 'Save' and 'Cancel'. Above the table, there is a search bar with the placeholder 'Search' and a results per page dropdown set to 50.

Select a Client's name

The screenshot shows the CaseWorthy software interface. At the top, there is a navigation bar with tabs for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, and REPORTS, along with a MY CASEWORTHY link. On the far right, a user profile for Lois Yates is shown with a "All Features" dropdown. The main content area is titled "Client Program Referral To Me". On the left, a sidebar displays client information for Trevor Brown, including his name, birth date (04/28/1978), gender (Male), and client ID (24400). Below this are links for Find Client, Add Client, Previous Clients, Case Management, Client Information, Family, Assessments, Health Management, Calendars, and Specialty Items. The main panel has a "Filters" section with dropdowns for "Referred to Program" and "Status". It also includes a date range selector for "Referred Date" from 10/05/2022 to 10/12/2022. A search bar and a "Results Per Page" dropdown (set to 50) are at the bottom of the main panel. The results table lists two referrals:

Referred To Program	Referred Date	Status
Home Assistance	10/11/2022 12:00 AM	Referred
Home Assistance	10/11/2022 12:00 AM	Referred

At the bottom right of the main panel are "Save" and "Cancel" buttons.

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.

The screenshot shows the CaseWorthy application interface. At the top, there's a navigation bar with links for CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, and MY CASEWORTHY. On the far right, a user profile for 'Saba Vega' is shown with a dropdown menu labeled 'All Features'. Below the navigation, the title 'Organization Dashboard' is displayed. To the left, a sidebar titled 'Find Organization' lists various categories: Providers, Resources, Approvals, Randomizers, Volunteers, Donors, Other, and Batch Data Entry. Under 'Find Organization', the entry 'Alliance for Community Trust' is highlighted with a red box. The main content area is titled 'Resource Usages (2)' and contains a table with two rows:

Resource	Category	Usage	Capacity
Housing	Housing Emergency	Emergency Housing	10
ACT Resource	Housing Emergency	ACT Usage	5

At the bottom left of the sidebar, it says 'CaseWorthy Version: 8.0.69.3'.

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.

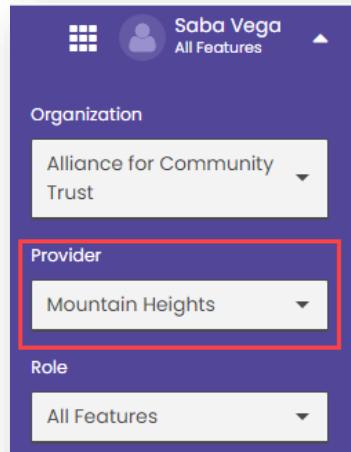
This screenshot shows the 'Find Organization' search results page. The sidebar on the left has a purple background and lists the same categories as the previous screenshot. The main area shows a search interface with a 'Find Organization' button and a 'Filters' section. Below that is a table with the header 'Total Rows: 4'. The table lists four organizations with columns for 'Organization Name' and 'Org ID':

Organization Name	Org ID
CaseWorthy	12
Alliance for Community Trust	24410
A Place for Change	24428
New Hope Horizons	24453

At the bottom right of the table, there's a 'Results Per Page:' dropdown set to 50. The bottom of the sidebar also says 'CaseWorthy Version: 8.0.69.3'.

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.

A screenshot of the "Referrals To Provider" list page. The header includes a back arrow, a search bar, and a "Filters" section with a dropdown set to "Referred". Below the header is a table with the following data:

Date	Service Description	Client Name	Referring Provider	Status
10/10/2022	Adult Education	Brycee, Lindon	Helping Hearts	Referred
10/10/2022	Even Start Family Literacy	Mitchell, Lucy	APFC Provider	Referred
10/10/2022	Adult Education	Mitchell, Lucy	New Hope Horizon Provider (external)	Referred
1/15/2022	Food Pantry	Flores, Edward	Helping Hearts	Referred

Total Rows: 4 Results Per Page: 50

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

	Description	Client Name	Referring Provider	Status
	Adult Education	Brycee, Lindon	Helping Hearts	Referred
	Part Family Literacy	Mitchell, Lucy	APFC Provider	Referred
	10/10/2022 Adult Education	Mitchell, Lucy	New Hope Horizon Provider (external)	Referred
	1/15/2022 Food Pantry	Flores, Edward	Helping Hearts	Referred

1

Results Per Page: ▾

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**.

Provider Name: Helping Hearts
Address: 471 West 500 South
City: Salt Lake City
Email: info@helpinghearts.org
Phone: 210-989-4544
State: UT

Referral Date: 10/10/2022
Referral Service: Adult Education
Voucher Number: 0801
Authorized By: Reina

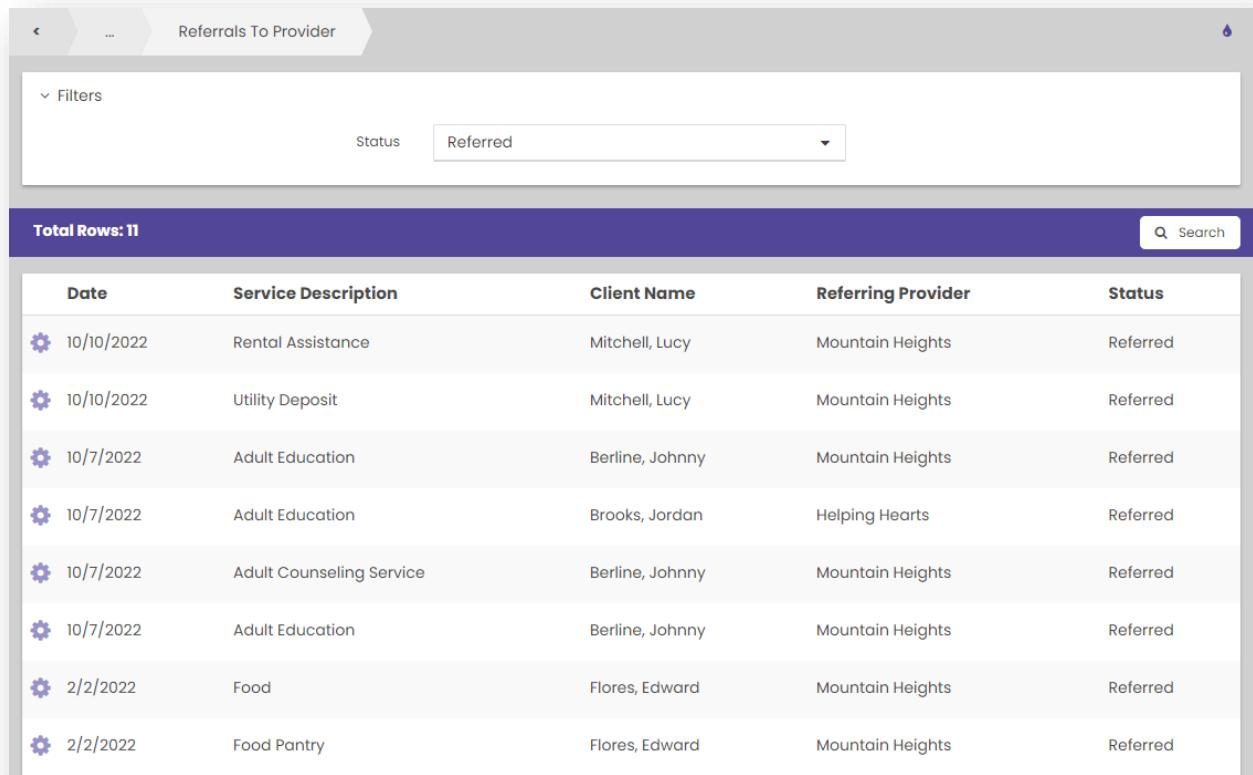
Referral Status: **Referred** (highlighted)
Referral Type: **Referred** (highlighted)
Voucher Amount:

Client Name: Bryce, Lindon
Gender: A gender that is not singularly 'Female' or 'Male'

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**.



The screenshot shows a software interface titled "Referrals To Provider". At the top, there is a filter section labeled "Filters" with a dropdown menu set to "Referred". Below this, a purple header bar displays "Total Rows: 11" and a search bar with a magnifying glass icon. The main area is a table with the following columns: Date, Service Description, Client Name, Referring Provider, and Status. The data is as follows:

Date	Service Description	Client Name	Referring Provider	Status
10/10/2022	Rental Assistance	Mitchell, Lucy	Mountain Heights	Referred
10/10/2022	Utility Deposit	Mitchell, Lucy	Mountain Heights	Referred
10/7/2022	Adult Education	Berline, Johnny	Mountain Heights	Referred
10/7/2022	Adult Education	Brooks, Jordan	Helping Hearts	Referred
10/7/2022	Adult Counseling Service	Berline, Johnny	Mountain Heights	Referred
10/7/2022	Adult Education	Berline, Johnny	Mountain Heights	Referred
2/2/2022	Food	Flores, Edward	Mountain Heights	Referred
2/2/2022	Food Pantry	Flores, Edward	Mountain Heights	Referred

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

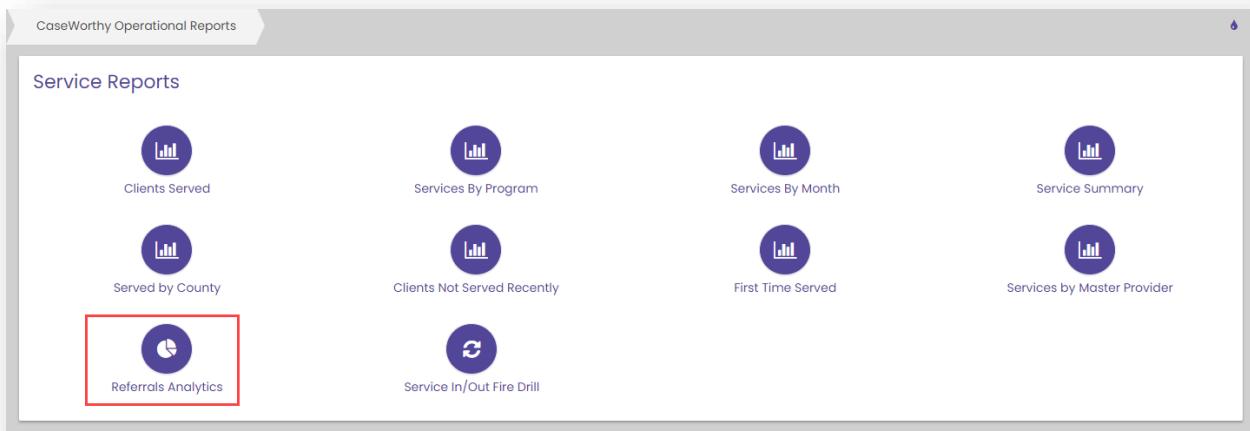
This final video of the CaseWorthy *Referrals* video series provides details about the analytic report available for referrals.

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.

Last Updated: 10/12/2022 10:21:19 AM

Views Grid Charts Format Options Collapse Expand Export

Referral Provider Services										
1	2	3	4	5	6	7	8	9	10	11
1 PROVIDER TO		Total Count of Provider From								
2 ▶ Mountain Heights		18								
3 ▶ Family Resources		18								
4 ▶ New Hope Horizon Provider (external)		3								
5 Grand Total		39								
6										
7										

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.

Last Updated: 10/12/2022 10:21:19 AM

Views Grid Charts Format Options Collapse Expand Export

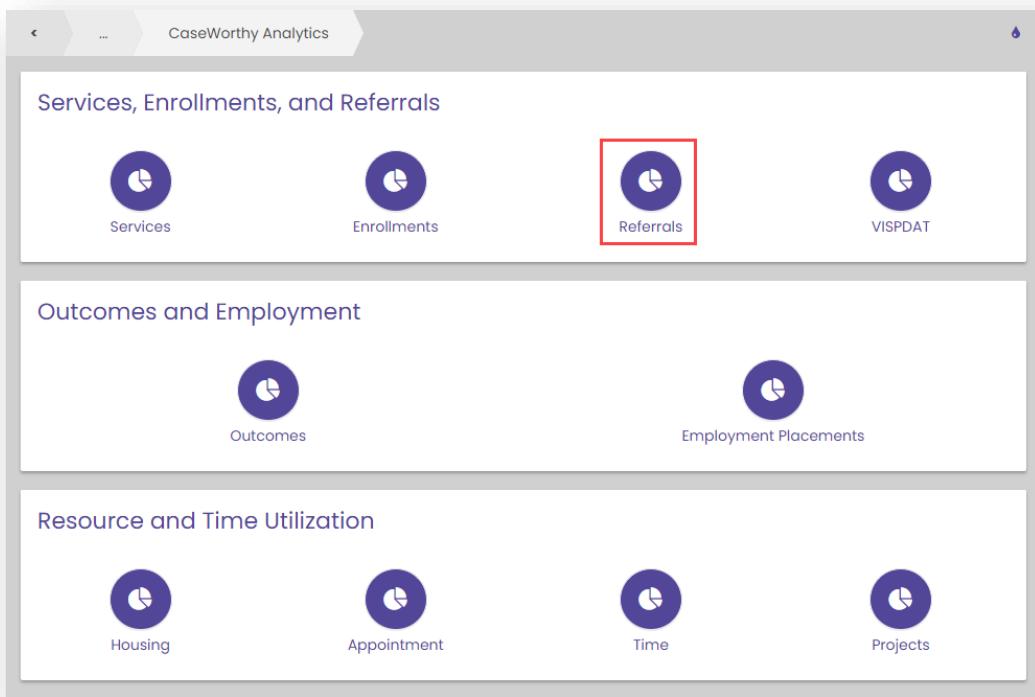
1	2	3	4	5	6	7	8	9	10	11
1 PROVIDER TO	SERVICE	Total Count of Provider From								
2 ▼ Mountain Heights	Adult Counseling Service	1								
3	Adult Education	3								
4	Anger Management	1								
5	Energy Assistance	2								
6	Even Start Family Literacy	2								
7	Food	1								
8	Food Pantry	3								
9	Utility Deposit	5								
10 Mountain Heights Total		18								
11 ▼ Family Resources	Adult Counseling Service	2								
12	Adult Education	6								
13	Energy Assistance	3								
14	Food	2								
15	Food Pantry	2								
16	Rental Assistance	1								
17	Utility Deposit	2								
18 Family Resources Total		18								
19 ▶ New Hope Horizon Provider (external)		3								

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.