



# Operations Manual

<b>Governed By:</b> Operations	<b>Effective Date:</b> 4/15/2014
<b>Procedure:</b> #4 CAP 60 Referral Procedure	<b>Updated Last:</b> July 2015
<b>Purpose:</b> To provide instruction for required documentation of referrals in CAP60.	

## Summary:

Each Program at CEO is responsible for tracking all referrals provided to their customers. (See “Internal Referral Procedure” for more information) For programs that utilize CAP60, the referral must be entered following the instruction provided below for tracking and monitoring purposes.

## Referral Entry Procedure:



1. Open Customer Case under the CAP tab.
2. Once customer case is selected there is a list of blue links on the left hand side, you'll want to click on the very last link available, 'Referrals'.
3. Once you choose the referral link, you will need to click the 'Add' button to add a referral.



4. Once you are on the 'Add' page, make sure you enter in a date, and select options in all of the dropdowns that read 'Select One'. Once you select the community resource that you are referring your client to, the services that that community resource provides will appear at the bottom of the page, make sure to select which services your client will need, once all data is accurately entered, click save.




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**Referrals**  



Save Save & New Cancel

Family ID/No.	Head of Household	Household Income + P.A.	No. in Household	No. of Families
623	Adams, Jacob	\$13600.00	2	1

**Referral**

Date		Year	2013
Applies to	Select One	County Filter	All
Status	Select One	Referred By	Select One
Title		Referred To	External: Dr. Gregory Martin
Contact Type	Not Assigned	CC Email To	Not Assigned
Case Worker	Admin , Admin	Referral Reason <a href="#">Edit</a>	Not Assigned
Comment			

**Appointment**

Schedule Event	No		
Start Date		End Date	
Start Time	Not Assigned	End Time	Not Assigned

**Please select all of the services the resource is expected to provide**

<- Select All

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- When a customer notifies their case worker that they completed a referral previously provided, enter the applicable customer referral link and click the edit pencil.

**Referrals**  

Add Cancel

Referrals											Export To: Select One	Total = 1
	Date	Family Member	Status	Achieved	Title	Referred By	Referred To	Contact Type	Case Worker	Added From		
 	08/12/2013	Adams, Marlyn	Completed	X		Head Start	Dr. Gregory Martin	Email	Dighero, Britanni	Family Page		

- Once case worker chooses the edit pencil for the specified referral, they should enter the date achieved, as well as the "completed" choice in the status box.



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**Referrals**

Save Cancel

Family ID/No.	Head of Household	Household Income + P.A.	No. in Household	No. of Families
623	Adams, Jacob	\$13600.00	2	1

**Referral**

Date	8/12/2013	Date Achieved	
Year	2013	Referred By	Internal: HeadStart
Status	Completed	Referred To	External: Dr. Gregory Martin
Title		CC Email To	Not Assigned
Contact Type	Email	Referral Reason	Not Assigned
Case Worker	Dighero , Britanni		
Comment			

Please select all of the services the resource provided

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7. When you return to the referral list, the applicable referral will now be listed as achieved.

**Referrals**

Add Cancel

Referrals Export To: Select One Total = 1

	Date	Family Member	Status	Achieved	Title	Referred By	Referred To	Contact Type	Case Worker	Added From
	08/12/2013	Adams, Marlyn	Completed	✓		Head Start	Dr. Gregory Martin	Email	Dighero , Britanni	Family Page



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If a customer is being referred to an internal program and would like the program to initiate contact, then the follow the steps outlined below.

1. Have the customer sign a "Consent to Release Information" form and keep it on file for your records.
2. Re-open the completed referral through the edit pencil.



3. Click the email icon at the top. A separate tab will open that will ask if you would like to email this page.

Family ID/No.	Head of Household	Household Income	No. in Household	No. of Families
043			9	3

Referral			
Date	2/23/2015	Date Achieved	2/23/2015
Applies to	County Filter	Referred By	Internal: VITA
Status	Completed	Referred To	Internal: Weatherization
Title		CC Email To	Not Assigned
Contact Type	Not Assigned	Referral Reason	Housing
Case Worker	Gwozdz, Renata		
Comment	Contact this customer by phone. 888-888-8888		
Characters Remaining:	400		

Appointment			
Schedule Event	No	End Date	
Start Date	Not Assigned	End Time	Not Assigned

Family ID/No.	Head of Household	Household Income	No. in Household	No. of Families
043			9	3

Referral			
Date	2/23/2015	Date Achieved	2/23/2015
Status	Completed	Referred By	Internal: VITA
Title		Referred To	Internal: Weatherization
Contact Type	Not Assigned	CC Email To	Not Assigned
Case Worker	Gwozdz, Renata	Referral Reason	Housing
Comment	Contact this customer by phone. 888-888-8888		
Characters Remaining:	385		

Poverty Guideline Percent: 40.40% Update Percentage

4. Fill out the "From" and "To" sections with the appropriate proxy email addresses, i.e. CEO\_FSS@ceoempowers.org. Add a subject and click "Email this Page". A screen capture will be sent to the email address input.

Referral			
Date	2/23/2015	Date Achieved	2/23/2015
Status	Completed	Referred By	Internal: VITA
Title		Referred To	Internal: Weatherization
Contact Type	Not Assigned	CC Email To	Not Assigned
Case Worker	Gwozdz, Renata	Referral Reason	Housing
Comment	Contact this customer by phone. 888-888-8888		
Characters Remaining:	400		

Appointment			
Schedule Event	No	End Date	
Start Date	Not Assigned	End Time	Not Assigned

From: rgwozdz@ceoempowers.org  
To: CEO\_weatherization@ceoempowers.org  
Subject: Internal Referral

For programs that have received a referral, please follow the steps outlined in the "Internal Referral Procedure".