Operations Manual

Governed By: Operations	Effective Date: 4/15/2014
Procedure: #4 CAP 60 Referral Procedure	Updated Last: July 2015
Purpose: 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.

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 *Edit*	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
- ☐ Prenatal care

5. 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	✗		Head Start	Dr. Gregory Martin	Email	Dighero , Britanni	Family Page

6. 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.

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

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.

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.

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