

Referral

When a referral is completed, the Vocational Rehabilitation VRC (VRC) will receive an email with the subject line – New Client Has Been Assigned.

The email will state the referral's name along with a link that will go directly to the client's record.

In the CMS, the first Queue is called Referral Deadline Approaching. In this Queue, it lists the referral's name, date of intake, case manager, support staff, and the 21-day deadline to convert the referral to a client.

VRC contacts referral to set up initial meeting to complete application. VRC documents the contact

- Go to client page in CMS
- Click on Client Note
- +New client note
- General Note
- Description: summary of contact – meeting scheduled for date/time/place.