

# Referral

## Finding Referrals

### Notification of referrals assigned to VR Counselor

When a referral is completed, the Vocational Rehabilitation Counselor (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. This will show all referrals (not specific to user or program)

### Search referral list by counselor

You can search your referrals specific to VRC by doing the following:

- Go to Search
- Standard Search
- Client
- Check client
- Client equal to Yes/No – choose no
- Case manager – drop down box – choose VRC name
- Search

This will bring a list of the referrals that are assigned to the specific VRC that are required to be contacted (attempt minimum 3 times using different methods of communication – call/text/email/letter) within 14 days.

## Closing a referral

### Not interested in services:

- After contacting a referral and they state they are no longer interested in pursuing services, the VRC creates a client note with the description of the conversation.
- Go to the client page
- Case manager – empty drop-down box to no case manager

### Interested in services:

- Create client note with description of conversation and date/time of meeting set up. The meeting is to be no longer than 21 days from date of referral

### Creating referral in CMS

- Go to Intake (+ sign)
- New referral
- Enter in all required information
- Do not convert to client