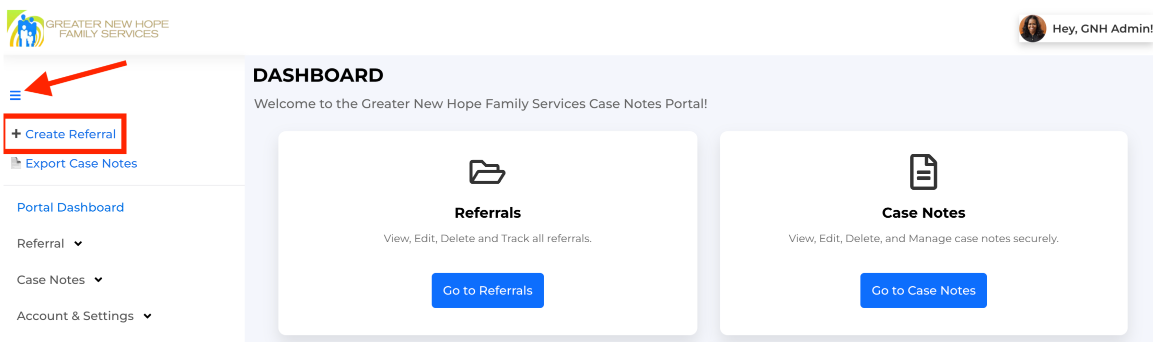
Creating Referrals in the Portal

Only users with the Admin role are allowed to create referrals.

1. Accessing the Referral Form

Only Admin users will see the hamburger icon (☰) in the upper-left navigation menu. From the left-hand menu, click “Create a Referral.” This opens the referral entry form.



2. Required Fields

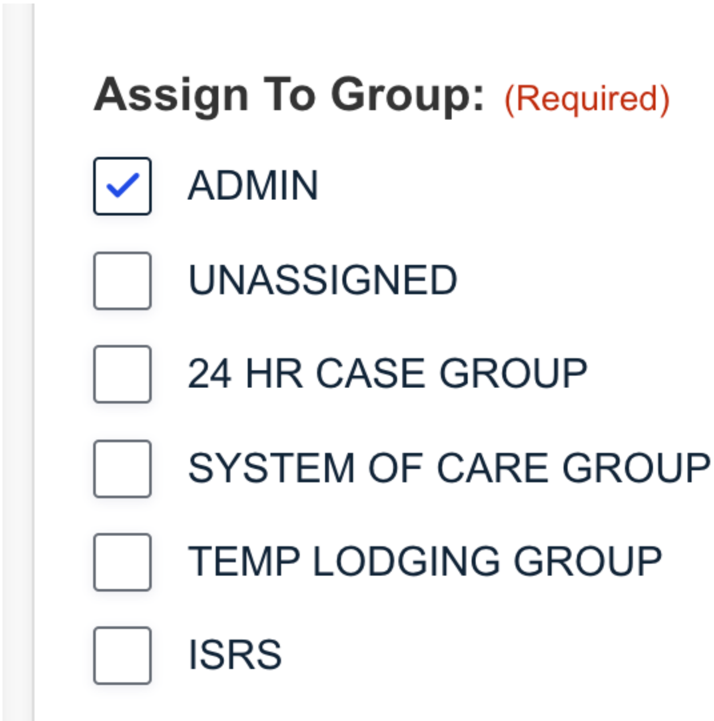
Some of the key required fields include:
- Case Name (e.g., LastName, FirstName)
- Case Number (Case #)
- Case Type (e.g., 24 Hour Case, ISRS, System of Care)
- Caseworker Name and Supervisor Name
- Primary Participant Name and Phone Number
- Participant Address
- Start Date of Referral/End Date of Referral
- Assign To Group

3. Assigning Provider Access

The “Assign to Group” field controls which providers are able to access and manage the referral.

Only providers who belong to the selected group will be able to view this case and submit case notes for it. Choose the appropriate group based on case type, program area, or service responsibility.

🔒 *Important:* Always leave the **Admin** group selected so administrators retain full visibility across all cases.


Assign To Group: (Required)

- [x] ADMIN
- [ ] UNASSIGNED
- [ ] 24 HR CASE GROUP
- [ ] SYSTEM OF CARE GROUP
- [ ] TEMP LODGING GROUP
- [ ] ISRS

4. Participant Details

You can add 1 or more participants to the referral depending on your selection in the “How many participants?” field.

For each participant, the form will prompt you to complete:
- Full Name
- Gender (includes “Other” with additional field)
- Date of Birth (Age is auto-calculated)
- Ethnicity (includes conditional “Other” field)
- Relationship to Case
- Address (Primary participant is required)

5. Dynamic Fields and Logic

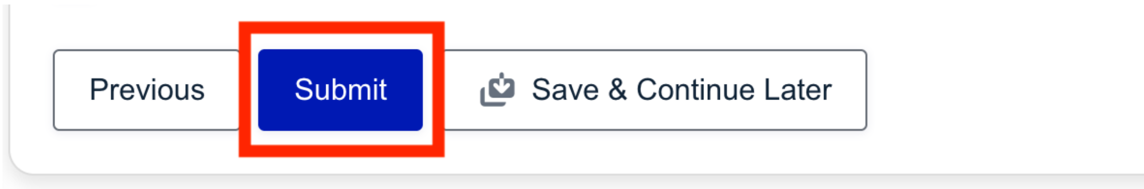
The referral form uses conditional logic to simplify the user experience:

- Choosing 2 or more participants reveals additional participant sections.
- Selecting “Other” for Gender or Ethnicity prompts a write-in field.
- Age is calculated automatically based on Date of Birth.

6. Submitting the Referral

After all required fields are completed, scroll to the bottom and click Submit.

The referral will be saved and a confirmation message will appear: *"Your referral has been successfully submitted! You will be redirected to the dashboard shortly."*



7. After Submission

Once submitted:
- The referral becomes accessible to providers in the assigned group.
- Admins can view, edit, or reassign referrals as needed by clicking the **"Go to Referrals"** card on the portal dashboard.