Client Referral Screen

Updated on February 2018

Home > Client Management (Search Client) > Referral

Business Purpose:

The Client Management – Referral page displays a tabular listing of the client's referral history records for both service and bed programs.

How to:

1. For each client referral history record, the referral **Program Name**, **Created On**, **Staff**, **From Program**, **Notes**, **Status** and **Actions** are displayed.

2. Other than the **Actions** column on the table, each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Created On**, the history records are then sorted in ascending order, the referral record with the oldest created date first.)

3. The Actions column shows whether the referral record is **View** only (non-active or expired) or can be **Updated**, and can be clicked to go to the detailed referral screen.

4. A new referral can also be started here by clicking on the 

action button.

Important Notes:

1. The total number of records is shown at the bottom of every page.

2. A referral with the **Status** of pending means that it has not been accepted or rejected by the referred to Program.

3. A referral with the **Status** of accepted means that it has been accepted by the referred to Program.

4. A referral with the **Status** of rejected means that it has been rejected by the referred to Program.