# Client Referral Screen

*Updated on February 2018*

**Home** > **Client Management (Search Client)** > **Referral** > New Referral/Update

## Business Purpose:

The Client Management – Referral (New Referral) allows the user to create a new or update an existing Referral.

## How to:

1. Select the From Program* from a dropdown. Note that this field must be selected first to display the Search in the **Program*** box.
2. Click Search in the **Program*** box to open up a pop-up for Program Search. Use any of the six criteria to narrow your search for a Program that you want to refer the Client to. The following Program Information fields are displayed in a tabular listing: **Name**, **Type**, **Vacancy**, **Incoming & Holds** and **Capacity**.
3. Select the Program from the search results list by clicking on the Program **Name**.
4. Enter text for the Reason for referral up to a maximum of 4000 characters.
5. Enter Notes regarding this Referral to a maximum of 4000 characters.
6. Click the icon Save action button to save the new Referral or updates.

## Important Notes:

1. Once a Referral is accepted or rejected by the receiving Program, then it will not be updateable any more.
2. Referrals can be made in SMIS between any Bed or Service to any other Bed or Service Programs.
3. A Client can have multiple pending referrals at any one time.
4. A Client can have only one pending Referral between any two particular Programs at any one time.