Making a Referral

Start by opening your client's profile in ClientPoint. Navigate to the Service Transactions tab. Verify that you have an active ROI for this client by checking that you see a green date in the top left corner. If you do not, add an ROI before adding your referral.

Click on "Add Referrals"

Check the household box for the household you are referring. Verify that all referred household members are selected.

Click on the need/s for which you are submitting a referral and click "Add Terms." Select the provider to which you are sending the referral from the dropdown and click "Add Provider."

Scroll down until you see the heading "Referrals." Check the boxes for the appropriate combination of people, services needed, and referral providers. In this example, Jill and Test are both being referred to the Share House, but Jill is being referred for both Worm Farming Support AND Laughter Therapy, while Test is only being referred for Laughter Therapy.

Do not change anything in the "Need" section.

Click "Save ALL." You have made a referral!