Quick Look at Creating Referrals

Use this Quick Look Guide to learn how to create referrals in kynect resources.
Creating Referrals

Referrals are sent to an organization to request their resources for a resident. Consent is **not** required to create a referral in **kynect resources** and may be made from several screens in **kynect resources**.

This guide will review creating a referral from a **resource listing**, the **Client Search** function, the **Resident Detail Screen**, and from **My Favorites**.

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**Referral Inbox**

<table>
<thead>
<tr>
<th>Client</th>
<th>Location</th>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>1 items selected</td>
<td>0 items selected</td>
</tr>
</tbody>
</table>

**Status**

- Created
- Days Open: None
- Days Open: None

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Referral Date</th>
<th>Created</th>
<th>Resource Resource</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF-2462</td>
<td>Amy</td>
<td>Brand</td>
<td>6/2/2022</td>
<td>26 days ago</td>
<td>Animal Shelters</td>
<td>Albany, NY</td>
<td>In Progress</td>
</tr>
<tr>
<td>REF-2461</td>
<td>Amy</td>
<td>Brand</td>
<td>6/2/2022</td>
<td>26 days ago</td>
<td>Animal Adoption</td>
<td>Albany, NY</td>
<td>Now</td>
</tr>
<tr>
<td>REF-2460</td>
<td>Amy</td>
<td>Brand</td>
<td>6/2/2022</td>
<td>26 days ago</td>
<td>Diabetes Education</td>
<td>Albany, NY</td>
<td>Now</td>
</tr>
</tbody>
</table>
Creating Referrals

To create a referral directly from a resource listing, navigate to the kynect resources homepage.

Upon log in to kynect resources you arrive at the Referral Inbox. Simply click the kynect resources logo in the top left corner to navigate to the homepage.
Creating Referrals

Search for the resource by **keyword**, **Category**, or using one of the **archetype tiles** that match the situation.

The Archetype Tile will list resources specific for the situation in title.
Creating Referrals

Enter a **Zip Code**, county, or address to populate resources for the correct location.

Next, click **Submit**
Creating Referrals

Search results will generate based on the keyword, category or archetype selected. Use the down arrow at the bottom of a listing to view more information.

To create a referral for a resident from this screen, click Refer.
Creating Referrals

The **Create Referral** screen will display with the Organization, Location and Resource information populated.

Click the magnifying glass next to the **Client Name** field to search for the resident for whom a referral is being made.
Creating Referrals

Enter the **First Name**, **Last Name** and **Date of Birth (DOB)** of the resident. All three fields are required.

Remember, some names may be shortened. For a likely match, it is best to enter the name as it appears on official documents such as Social Security card or driver’s license.

Use care not to add a space after the name or date of birth as this may cause an error message.

Click **Search**.
Creating Referrals

The resident name from the search will populate in the field below. Confirm the email address and phone number matches the resident for whom you are creating a referral.

Click Select.
Creating Referrals

The resident’s name is now populated in the **Client Name** field. If applicable, add any relevant information for the Organization receiving the referral in the **Notes** section. Click **Submit**.
Creating Referrals

A **Success banner** will appear to confirm the referral has been successfully created.

The referral will now display in your Referral Outbox.
Next, let’s look at how to create a referral from the Client Search function. Upon log in to kynect resources, you will land on the Referral Inbox. Click the **Client Search** link in **My Workspace**. Enter the resident’s **First Name, Last Name** and **Date of Birth**. Click **Search**

**Note:**
- DOB must be in a 01/01/1990 format.
- Use care not to create a space after each entry.
Confirm the correct resident is populated and select the drop-down arrow in the **View** column.

**Search Tips:**
- If no results populate, check spelling or try full spelling of First Name. (i.e. Search Thomas instead of Tom).
- Residents will only populate if they are known to kynect IEES system.
- If the resident is not currently in the kynect system, they must create a KOG account to be searchable in **kynect resources**.
Select **Create Referral** from the **View** options.

**Note:** Consent may be initiated from the **View** option to request access to the **Resident Detail** Screen.
On the **Create Referral** screen, enter the name of the Organization to receive the referral in the **Organization** field. Select the Organization from the dynamic search results.
Creating Referrals

Enter the **Location**, then select the **Resources** being sought. Some organizations offer many services and programs, while others may only offer a single resource.

If desired, add any relevant **Notes** that may be helpful for the receiving organization.

Next click **Submit**.
Creating Referrals

Organizations who have built a list of favorite organizations or resources, may select from their Favorites list rather than searching for the Organization each time. Click the Select from your Favorites link to display the list of Favorites. (This guide will cover Favorites in more detail after this section.) Highlight the resource and click Submit.
Creating Referrals

The sent referral is displayed in the **Referral Outbox** and is captured in the **Referral Dashboard** metrics.

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**Referral Sent**

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Referral Date</th>
<th>Created</th>
<th>Resource Re...</th>
<th>Location</th>
<th>Status</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF-2471</td>
<td>Amy</td>
<td>Brand</td>
<td>6/29/2022</td>
<td>0 days ago</td>
<td>Supportive Housing</td>
<td>One Parent Soho...</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>REF-2470</td>
<td>Amy</td>
<td>Brand</td>
<td>6/20/2022</td>
<td>8 days ago</td>
<td>Bereaved Parent S...</td>
<td>Two Hearts Pregnancy</td>
<td>Org Not in Syst...</td>
<td></td>
</tr>
<tr>
<td>REF-2469</td>
<td>Amy</td>
<td>Brand</td>
<td>6/21/2022</td>
<td>8 days ago</td>
<td>Families/Friends o...</td>
<td>Al-Anon/Alateen</td>
<td>New</td>
<td></td>
</tr>
</tbody>
</table>
Add Favorites

Creating a Favorites list is an excellent way to quickly create referrals, send several referrals at once, and reinforce community relationship between partners.

To add organizations to **My Favorites**, click the **kynect resources** logo on the top left of the **My Workspace** screen to navigate to the **kynect resources** homepage.
Creating Referrals

Search for resources by **archetype**, **Keyword** or **Category** to create search results.

Click the **Heart** icon next to the listed resource to add them to the **My Favorites** list.

There is no limit for number of favorites that may be added.

**Note:** Success banner will display that the resources has been added successfully to the My Favorite list.
To create referrals from My Favorites, click the My Favorites link in My Workspace. Check the box for each resource to send and click Create Referral(s).

Tip: To remove a favorite, simply click the heart icon. The icon will gray out and the resources will be removed from the My Favorites list.
After clicking **Create Referral** on previous screen, the **Create Referral** screen displays.

Click the **Client Name** search field to conduct a **Client Search** for the resident.
Creating Referrals

Click **Select** next to the resident name in the search results.

With the Resident’s name populated, click **Submit**.

This sends a referral to each organization.
Creating Referrals

Now, let’s look at another way to create referrals.

On the **Client Search** screen, Residents who have already provided **Consent** are found in the **Full Profile** section.

Residents who have been previously added to **My Clients**, may be easily searched from that screen.
Creating Referrals

Under either **Full Profile** or **My Clients**, the list of residents who have given previous **Consent** are displayed.

Users have the option to select **View** to navigate to the **Resident Details** screen, or select **Create Referral** to navigate to the **Create Referral** screen.
Creating Referrals

Clicking **View** from the previous screen, navigates to the **Resident Detail** sometimes called the **OneView** screen.

Click the **Create Referral** action button to navigate to the **Create Referral** screen.
Lastly, let’s look at how to create a referral for residents in the **Referral Inbox**.

From the **Referral Inbox** in **My Workspace**, referrals may be created for residents who have not provided consent to access their full detail screen.

To create a referral, click the **Edit** button and select **View**.
Creating Referrals

Click the **Resident** name which is a blue hyperlink.
Creating Referrals

The next screen will display the option to **Request Consent** or **Create Referral**. Select **Create Referral** and follow the create referral steps.

<table>
<thead>
<tr>
<th>Client Information</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID</td>
<td>Gender</td>
</tr>
<tr>
<td>Email Address</td>
<td>Contact Preference</td>
</tr>
<tr>
<td>DOB</td>
<td>Mobile Phone</td>
</tr>
</tbody>
</table>
As a reminder, all created referrals are sent to the **Referral Outbox**. Metrics for sent referrals may be viewed in the **Referral Dashboard**.
Thank you

For additional support, please use the Help section in kynect resources or email kynectresources@ky.gov