Quick Look at Closing Referrals

Use this Quick Look Guide to learn how to close referrals from your **kynect resources** inbox

Closing Referrals

Upon log in, **kynect resources** opens to the **Referral Inbox** screen.

The **Referral Inbox** displays incoming referrals made to your organization.

These referrals, or asks for help, are managed from the **Referral Inbox**.

Closing Referrals

The **Referral Inbox** screen allows a variety of functions to manage referrals.

The referral may be assigned a new **Status**, may be **assigned** to a specific staff member, or **closed** once services have been provided.

Closing Referrals

A referral should be closed after contact with the resident and services, or the resource has been provided.

To close a referral, click the arrow button next to the referral, and click **Edit**.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Inbox

Client	Location	Resource
Search	1 items selected	0 items selected

Status	Created	Days Open
3 items selected		None

Search   Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Sta...	
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	Edit
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	

Closing Referrals

You are navigated to the **Referral Details** screen.

On this screen, change the **Referral Status** to **Closed** then click **Save.**

Referral Details: REF-2462

Save

Referral Source Information
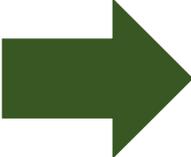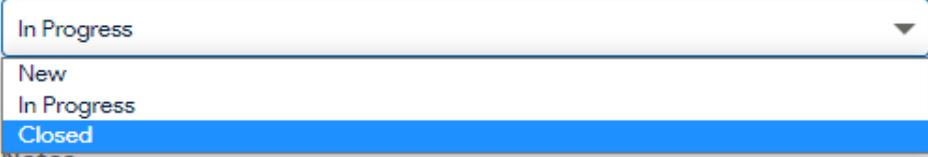
Resident
Amy Brand

Phone Number
(707) 244-9958

Email Address
amy.brand@mailinator.com

Referral Date
6/2/22   56 days ago

Referral Source
Albany, Tri-County Animal Shelter

Referral Made By
Julie Macaron

Referral Information

Resource Name
Animal Shelters

Status
In Progress

New
In Progress
Closed

Assigned to
Julie Macaron

Notes

Add Note

Closing Referrals

After clicking Save, a **Tell us about your experience** window will appear. Enter a response for the two required fields.

Additional Comments are not required to close the referral.

Tell us about your experience

*How was your experience with the resident?

[👍] [👎]

*Was the resource provided?

None ▼

Additional Comments

[   ]

Cancel   Submit

How was your experience with this resident?
This information is not shared with the resident or other community partners.
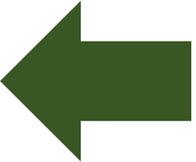
Was the resources provided?
This is a **Yes** or **No** drop down to select if the resources requested has been provided to the resident.
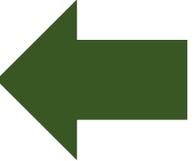
Additional Comments
Though not a required field, Community Partners may add additional comments relevant to the Yes or No response above.
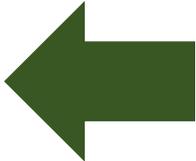
Closing Referrals

Tell us about your experience

* How was your experience with the resident?

[👍] [👎]

* Was the resource provided?

Yes ▼

Additional Comments

[   ]

Cancel   **Submit**

If the resource was provided to the resident, select **Yes** in the **Was the resource provided** field.

Next, click **Submit**.

This closes the referral.

Closing Referrals

Tell us about your experience

*How was your experience with the resident?

[👍] [👎]

*Was the resource provided?

No ▼

*Reason it was not provided

None ▼

| None |
| Cancelled by Client |
| Didn't meet eligibility criteria |
| Client didn't come to appointment |
| Client refused plan |
| Funding not available |
| Unable to reach client |
| Services available didn't fit the client's need |
| Other |

Assign

If the referral was **not** provided, select **No** in the **Was the resource provided?** field.

Next, select a **Reason it was not provided** from the drop-down menu**.**

Tell us about your experience

* How was your experience with the resident?

👍   👎

* Was the resource provided?

No

* Reason it was not provided

Client didn't come to appointment

Additional Comments

Cancel   Submit

After entering the **Reason it was not provided** answer, click **Submit.**

This will close the referral in kynect resources.

Additional Comments Section:
When closing a referral, additional comments may be added before clicking **Submit**.

This is most used when a referral is not provided and **Other** is the selected reason.

Closing Referrals

Once the referral has been closed, you are navigated back to the **Referral Inbox.**

All referrals may be viewed and sorted by **Status** by selecting all or one status from the drop-down menu. Next, click **Search**.

To view only Closed referrals, select only **Closed** and click **Search**.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

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My Favorites

Organization

Resources

Staff

Referral Inbox

Client

| Search 🔍 |

Location

| 1 items selected ▼ |

Resource

| 0 items selected ▼ |

Status

| 1 items selected ▼ |

Created

| 📅 |

Days Open

| None ▼ | |

New

In Progress

Org Not in System

✓ Closed

				Referral Date	**Created**	**Resource Re...**	**Location**	**Status**	**Edit**
				6/2/2022	56 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand		6/2/2022	56 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand		6/2/2022	56 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Search   Reset

Closing Referrals

All referrals that have been **Closed**, will display in the **Referral Inbox**.

Referral Inbox

Client	**Location**	**Resource**
Search 🔍	1 items selected ▼	0 items selected ▼
Status	**Created**	**Days Open**
1 items selected ▼	📅	None ▼	

Search **Reset**

| ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2461	Amy	Brand	6/2/2022	56 days ago	Animal Adoption	Albany, Tri-Count...	Closed	▼
REF-2434	Alexis	Dale	5/20/2022	69 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼
REF-2367	Alexis	Dale	1/4/2022	205 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼

Closing Referrals

Closed referral metrics specific to your organization may be found in the **Referral Dashboard**.

Among the other measures and metrics available on the Dashboard, **Referral Statistics** and **Referrals Closed** graphic are displayed.
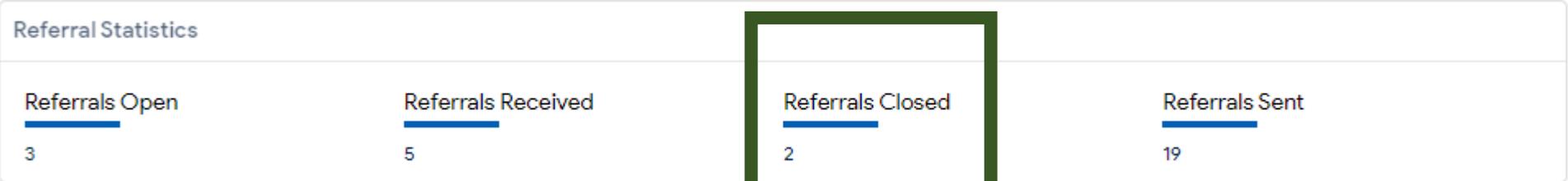
Thank you

For additional support, please use the Help section in **kynect resources,** visit our Support Materials Page or email kynectresources@ky.gov