Quick Look at Creating Referrals

Use this Quick Look Guide to learn how to send referrals
Referrals are asks for help, sent to an organization to request their resources for a resident.

**Consent is not required to create a referral in kynect resources.**

This guide will review creating a referral from the Client Search function, the Resident Detail Screen, and from My Favorites.
To begin, 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.
Creating Referrals

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**.

The referral is sent to the receiving organization's Referral Inbox.

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.)
The sent referral is displayed in the sending organization’s Referral Outbox and is captured for Dashboard metrics.
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** in **My Workspace**, upon log in, navigate to the **kynect resources** home screen.
Creating Referrals:

Note: Success banner will display that the resources has been added successfully to the My Favorites list.

Searching 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.
Creating Referrals

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)**.

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### Favorites

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>XY Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gateway Community Action - Statewide Expansion</td>
<td>Leominster Fayette Urban County Government Rent Payment Assistance</td>
</tr>
<tr>
<td>Meridian Street Presbyterian Church Gas Money</td>
<td></td>
</tr>
<tr>
<td>Mountain Comprehensive Care Center - Statewide Expansion</td>
<td></td>
</tr>
<tr>
<td>Perinatal/Postpartum Depression Counseling</td>
<td></td>
</tr>
<tr>
<td>The Next - Center for Women, Children and Families Diapers</td>
<td></td>
</tr>
<tr>
<td>NORTHERN KENTUCKY COMMUNITY ACTION COMMISSION</td>
<td></td>
</tr>
</tbody>
</table>
| **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

With the Resident’s name populated, click Submit. This sends a referral to each organization.

Click Select next to the resident name in the search results.
Next, 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.

Client Search

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>DOB</th>
<th>Email Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexis</td>
<td>Dale</td>
<td>01/01/1990</td>
<td><a href="mailto:alexis.dale@dispotable.com">alexis.dale@dispotable.com</a></td>
<td>(707) 261-9958</td>
</tr>
<tr>
<td>Amy</td>
<td>Brenda</td>
<td>01/01/1990</td>
<td><a href="mailto:amy.brend@meilinator.com">amy.brend@meilinator.com</a></td>
<td>(707) 244-9955</td>
</tr>
</tbody>
</table>
Creating Referrals

Clicking View from the previous screen, navigates to the Resident Detail or OneView screen.

Click the Create Referral action button to navigate to the Create Referral screen.
Next, let’s look at how to create a referral for residents in the **Referral Inbox**. Retuning to the **Referral Inbox** in **My Workspace**, referrals may also 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 blue **Resident** name.
Creating Referrals

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