



Quick Look at **Creating Referrals**

Use this Quick Look Guide to learn how to send referrals

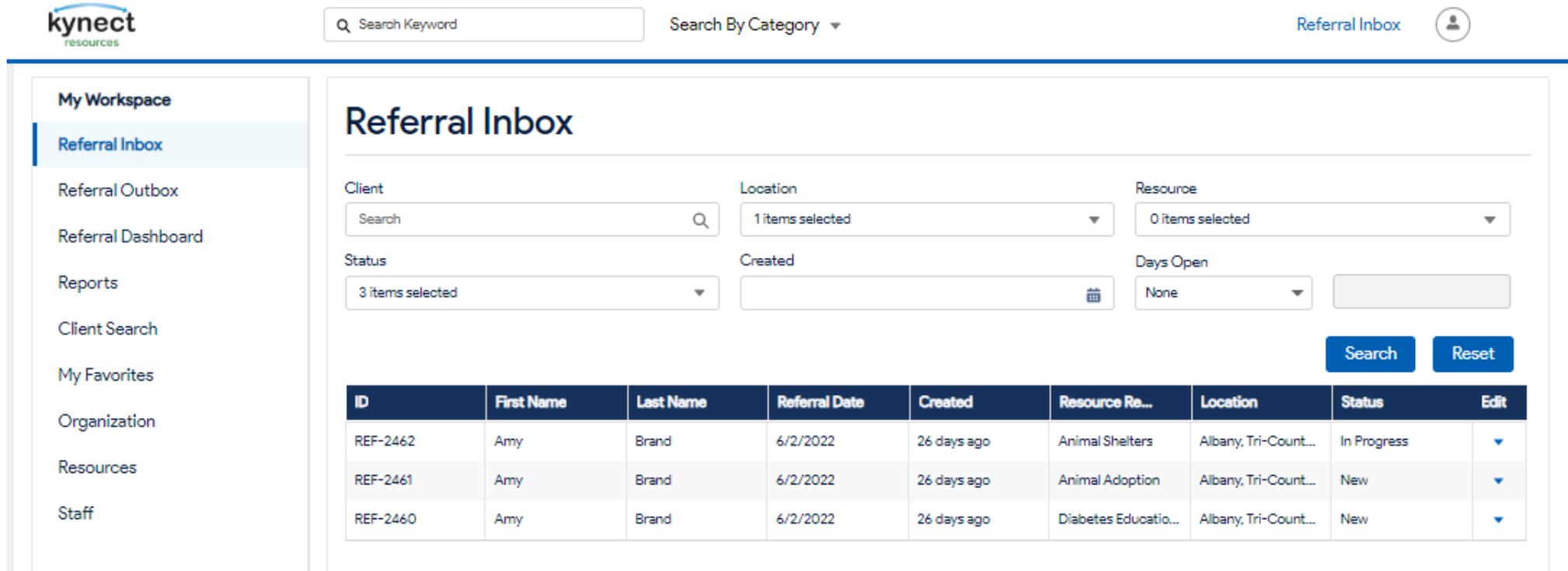
Creating Referrals



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.



The screenshot shows the 'Referral Inbox' page in the Kynect Resources application. The interface includes a search bar, filters for Client, Location, Resource, Status, Created, and Days Open, and a table of referrals.

Referral Inbox

Client: Search [Q] Location: 1 items selected Resource: 0 items selected

Status: 3 items selected Created: [Calendar Icon] Days Open: None

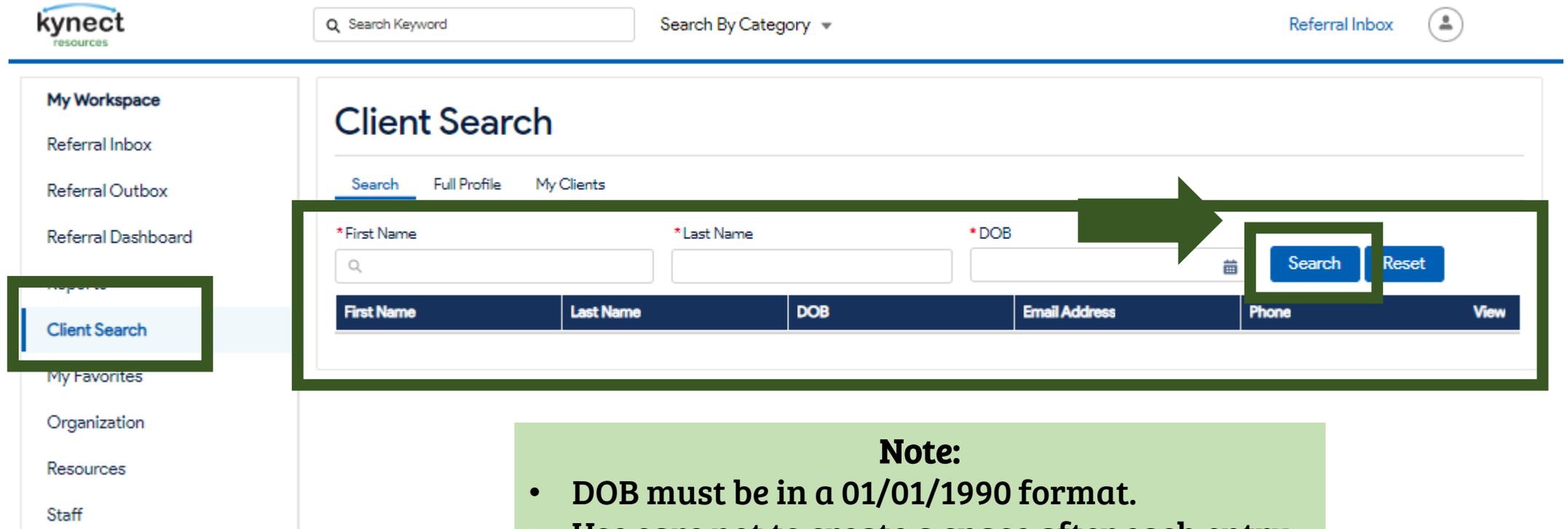
[Search] [Reset]

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

Creating Referrals



To begin, click the **Client Search** link in **My Workspace**.
Enter the resident's **First Name**, **Last Name** and **Date of Birth**.
Click Search



The screenshot shows the Kynect Client Search interface. On the left, a sidebar menu has 'Client Search' highlighted with a green box and a green arrow pointing to it. The main content area is titled 'Client Search' and has three tabs: 'Search', 'Full Profile', and 'My Clients'. The 'Search' tab is active. Below the tabs are three input fields: '* First Name', '* Last Name', and '* DOB'. A green arrow points from the 'DOB' field to the 'Search' button. The 'Search' button is also highlighted with a green box. Below the input fields is a table with columns: 'First Name', 'Last Name', 'DOB', 'Email Address', 'Phone', and 'View'.

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.

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search**
- My Favorites
- Organization
- Resources
- Staff

Client Search

Search Full Profile My Clients

* First Name: * Last Name: * DOB:

First Name ↑	Last Name	DOB	Email Address	Phone	View
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958	▼

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.

Client Search

[Search](#) [Full Profile](#) [My Clients](#)

* First Name

Q Amy

* Last Name

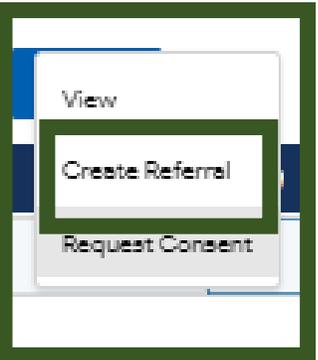
Brand

* DOB

01/01/1990

Search

First Name ↑	Last Name	DOB	Email Address	Phone
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958



- View
- Create Referral
- Request Consent

Note:

Consent may be initiated from the **View** option to request access to the **Resident Detail Screen**.

Creating Referrals



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.

The screenshot shows the 'Create Referral' form. On the left is a sidebar with navigation options: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff. The main form area has a title 'Create Referral' and 'Cancel' and 'Submit' buttons. Below the title, there is a 'Resident Name' field with the value 'Amy Brand'. To the right of this field is a dropdown menu labeled 'Select from your favorites'. Below the resident name, there are two dropdown menus: 'Organization' (with 'None' selected) and 'Resource' (with 'None' selected). A search box is positioned above the 'Organization' dropdown, and a list of search results is displayed below it. The search results list includes: RE CP Account, CP Organization, Kentucky Educational Television, Estill County Community Food Bank, Clark County Homeless Coalition, Jessamine County Food Pantry, Manchester Fire Department, A Brighter Future, Lewis County Health Department, and Harlan Housing Authority. A green box highlights the search results area, and a large green arrow points from the right towards this area.

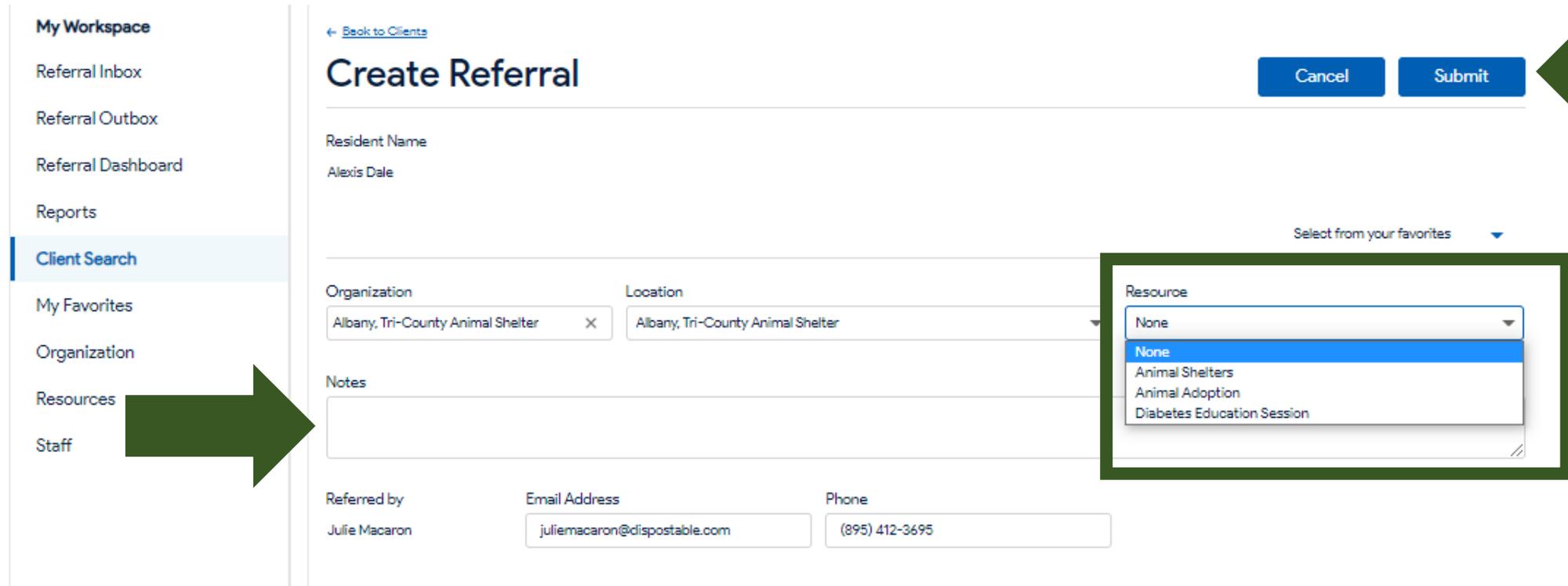
Creating Referrals



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.



The screenshot shows the 'Create Referral' form in a web application. On the left is a sidebar with navigation options: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff. A green arrow points from the 'Resources' option in the sidebar to the 'Resources' dropdown menu in the form. The form itself has a title 'Create Referral' and a 'Back to Clients' link. It contains several fields: 'Resident Name' (Alexis Dale), 'Organization' (Albany, Tri-County Animal Shelter), 'Location' (Albany, Tri-County Animal Shelter), 'Notes' (empty text area), 'Referred by' (Julie Macaron), 'Email Address' (juliemacaron@dispostable.com), and 'Phone' ((895) 412-3695). A 'Resource' dropdown menu is open, showing options: None, Animal Shelters, Animal Adoption, and Diabetes Education Session. A green box highlights this dropdown menu. At the top right of the form are 'Cancel' and 'Submit' buttons, with a large green arrow pointing towards them from the right side of the image.

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.)

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search**
- My Favorites
- Organization
- Resources
- Staff

[← Back to Clients](#)

Create Referral

Resident Name
Alexis Dale

Organization Select from your favorites

- Rent Payment Assistance, 23 Cedar Creek Drive, Gateway Community Action - Statewide Expansion
- Rent Payment Assistance, 498 Georgetown Street, Lexington Fayette Urban County Government
- Gas Money, 180 East Maxwell Street, Maxwell Street Presbyterian Church
- Families/Friends of Individuals With an Alcohol Use Disorder Support Groups, 845 Lane Allen Road, Al-Anon/Alateen
- Perinatal/Postpartum Depression Counseling, 1410 Royalton Road, Mountain Comprehensive Care Center - Statewide Expansion
- Bereaved Parent Support Groups, 2200 29th Street, Two Hearts Pregnancy Care Center
- Diapers, 530 North Limestone, The Nest - Center for Women, Children and Families
- Personal/Grooming Supplies, 166 Market Street, Christ Church Cathedral
- (LIHEAP) HOME ENERGY ASSISTANCE - 2021 - SPRING SUBSIDY PROGRAM, 109 South Madison Street, NORTHERN KENTUCKY COMMUNITY ACTION COMMISSION
- Transportation Expense Assistance, 1206 North Limestone Street, Independent Transportation Network Bluegrass
- Family Support Centers/Outreach, 161 Bruce Street, Fayette County Public Schools
- Prescription Expense Assistance, 275 East Main Street, Kentucky Prescription Assistance Program

Notes

Referred by
Julie Macaron

Creating Referrals



The sent referral is displayed in the sending organization's Referral Outbox and is captured for Dashboard metrics.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Sent

Client

Search



Organization

Resource

Status

3 items selected



Created



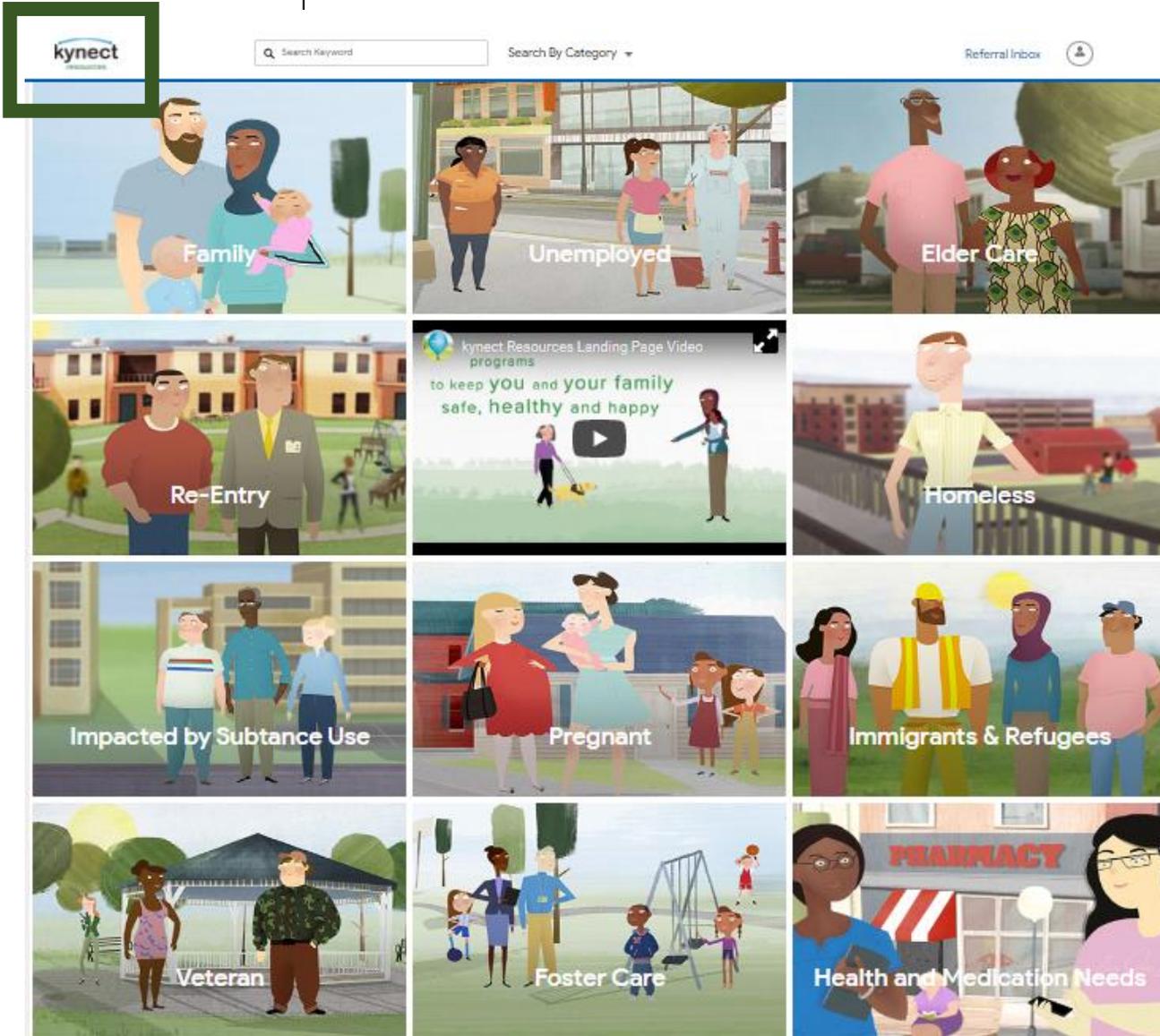
Days Open

None

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	View
REF-2471	Amy	Brand	6/29/2022	0 days ago	Supportive Housing	One Parent Schol...	New	▼
REF-2470	Amy	Brand	6/21/2022	8 days ago	Bereaved Parent S...	Two Hearts Pregn...	Org Not in System	▼
REF-2469	Amy	Brand	6/21/2022	8 days ago	Families/Friends o...	Al-Anon/Alateen	New	▼



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 in My Workspace**, upon log in, navigate to the **kynect resources** home screen.

Creating Referrals:

The screenshot shows the Kynect website interface. At the top, there is a search bar and a "Referral Inbox" link. A green success banner at the top reads: "Success You have successfully added resource Supportive Housing at One Parent Scholar House to your favorites list." Below this, a list of resources is displayed. Each resource entry includes the name of the organization, the type of assistance, the distance, and a "Refer" button. A green box highlights the "Supportive Housing" resource, with a green arrow pointing to its heart icon. A map on the right side of the page shows the location of the resources in the Lexington area.

Success
You have successfully added resource Supportive Housing at One Parent Scholar House to your favorites list.

Displaying 30 results

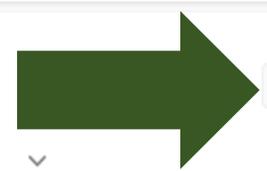
- Maxwell Street Presbyterian Church
Rent Payment Assistance
0.3 Miles
- Foundation for Affordable Housing
Low Income/Subsidized Rental Housing
0.8 Miles
- KY Partner
Lexington, Salvation Army
Rent Payment Assistance
0.9 Miles
- KY Partner
New Beginnings Bluegrass
Rapid Re-Housing Programs
1.2 Miles
- KY Partner
One Parent Scholar House
Supportive Housing
1.4 Miles
- KY Partner
Lexington Fayette Urban County Government
Rent Payment Assistance

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

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.



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)**.

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search
- My Favorites**
- Organization
- Resources
- Staff

Favorites

Create Referral(s)

Gateway Community Action - Statewide Expansion Rent Payment Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KY Partner Lexington Fayette Urban County Government Rent Payment Assistance	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Maxwell Street Presbyterian Church Gas Money	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KY Partner Al-Anon/Alateen Families/Friends of Individuals With an Alcohol Use Disorder Support Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mountain Comprehensive Care Center - Statewide Expansion Perinatal/Postpartum Depression Counseling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Two Hearts Pregnancy Care Center Bereaved Parent Support Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>
KY Partner The Nest - Center for Women, Children and Families Diapers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Christ Church Cathedral Personal/Grooming Supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NORTHERN KENTUCKY COMMUNITY ACTION COMMISSION (LIHEAP) HOME ENERGY ASSISTANCE - 2021 - SPRING SUBSIDY PROGRAM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Independent Transportation Network Bluegrass Transportation Expense Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>

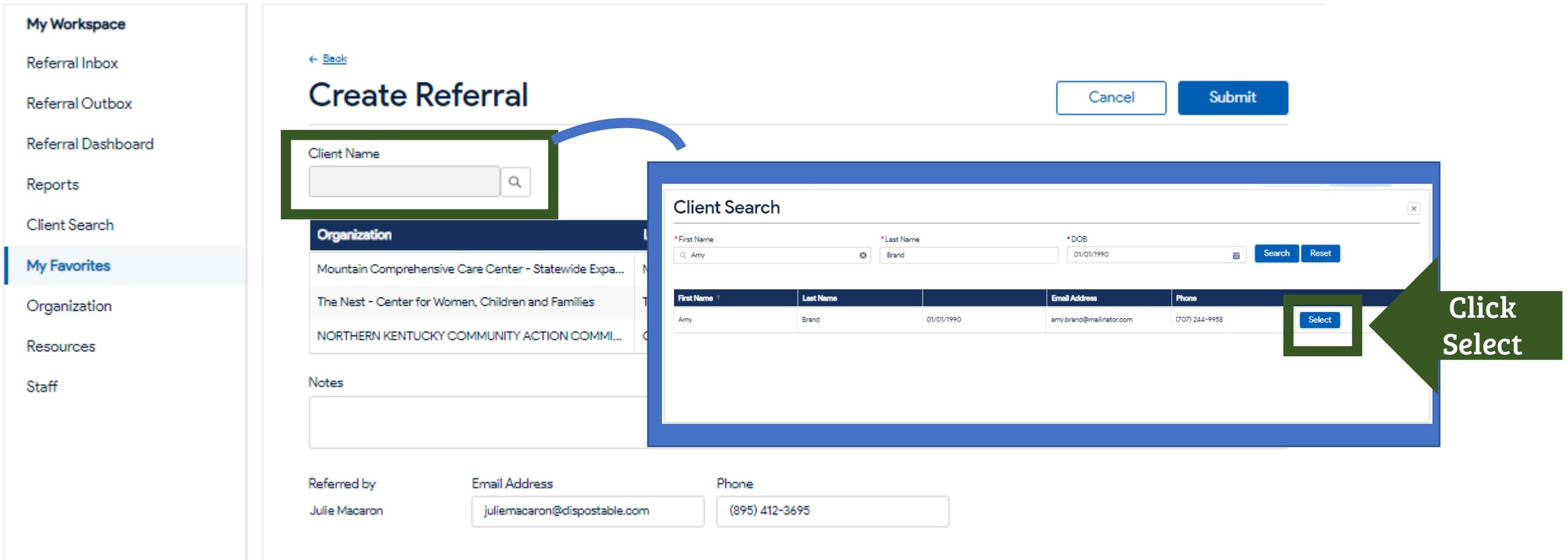
Tip:
To remove a favorite, simply click the heart icon. The icon will gray out and the resources will be removed from the My Favorites list.

Creating Referrals



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.



My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search

My Favorites

- Organization
- Resources
- Staff

[← Back](#)

Create Referral

Client Name

Client Search

*First Name *Last Name *DOB

First Name	Last Name	DOB	Email Address	Phone
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958

Click Select

Organization

- Mountain Comprehensive Care Center - Statewide Expa...
- The Nest - Center for Women, Children and Families
- NORTHERN KENTUCKY COMMUNITY ACTION COMMILI...

Notes

Referred by: Julie Macaron

Email Address:

Phone:

Creating Referrals



Client Search

*First Name: Amy
*Last Name: Brand
*DOB: 01/01/1990

Search Reset

First Name	Last Name	DOB	Email Address	Phone	Select
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958	Select

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.

← Back

Create Referral

Cancel Submit

Client Name: Amy Brand

Organization	Location	Resource
Mountain Comprehensive Care Center - Statewide Expa...	Magoffin County Complex, Mountain Comprehensive Ca...	Perinatal/Postpartum Depression Counseling
The Nest - Center for Women, Children and Families	The Nest - Center for Women, Children and Families	Diapers
NORTHERN KENTUCKY COMMUNITY ACTION COMMIL...	OWEN COUNTY NEIGHBORHOOD CENTER	(LIHEAP) HOME ENERGY ASSISTANCE - 2021 - SPRING ...

Notes

Referred by: Julie Macaron
Email Address: juliemacaron@dispostable.com
Phone: (895) 412-3695

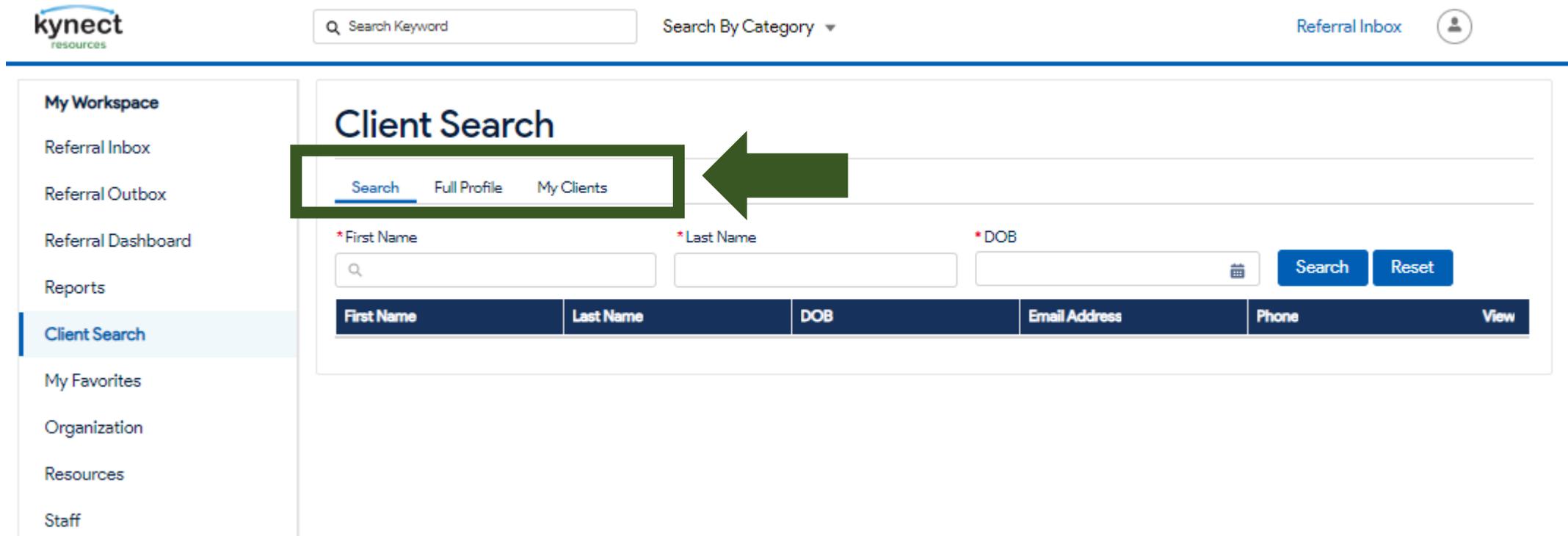
Creating Referrals



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.



The screenshot shows the 'Client Search' interface. At the top, there is a search bar with 'Search Keyword' and a 'Search By Category' dropdown. The 'Referral Inbox' link is visible in the top right. On the left, a sidebar menu lists 'My Workspace', 'Referral Inbox', 'Referral Outbox', 'Referral Dashboard', 'Reports', 'Client Search' (highlighted), 'My Favorites', 'Organization', 'Resources', and 'Staff'. The main content area is titled 'Client Search' and features three tabs: 'Search', 'Full Profile', and 'My Clients'. The 'Search' tab is active and highlighted with a green box and a green arrow pointing to it. Below the tabs are three input fields: '*First Name', '*Last Name', and '*DOB'. The 'Search' and 'Reset' buttons are to the right of these fields. At the bottom, a table header is visible with columns: 'First Name', 'Last Name', 'DOB', 'Email Address', 'Phone', and 'View'.

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

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Client Search

Search Full Profile My Clients

First Name	Last Name	DOB	Email Address	Phone
Alexis	Dale	01/01/1990	alexisdale@dispostable.com	(707) 244-9958
Amy	Brand	01/01/1990	amy.brand@mailinator.com	(707) 244-9958

View

View

Create Referral

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.

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports

Client Search

- My Favorites
- Organization
- Resources
- Staff

[← Back to Clients](#)

Amy Brand

[Send Email](#)
[Add Note](#)
[Create Referral](#)
[Assessments](#)
[Remove from My Clients](#)

Client Information

Client ID	Gender	Email Address	Contact Preference
	Female	amy.brand@mailinator.com	Email

DOB: 01/01/1990

Contact

Mobile Phone	Address
(707) 244-9958	

Household

Client	Age	Relationship
There are no records to display		

Enrolled Programs

Program	Start	Renewal
There are no records to display		

Assessments [View All](#)

Date	Name	Taken By	View
3/15/2022	Needs Asses...	Henry Case	▼
2/21/2022	Needs Asses...	Henry Case	▼
6/28/2021	Needs Asses...	Chris Mathew	▼
5/6/2021	Needs Asses...	Indie Mason	▼

Notes [View All](#)

Subject	Created Date	Create...	View
Language Pr...	5/18/2021	Indie Mason	▼

Referrals [View My Plan](#)

New	In Progress	Closed
5	11	29

Needs - SDOH [View All](#)

- Adult Education
- Employment
- Income
- Mental Health
- Mobility
- Community Involvement
- Food
- Housing
- Legal
- Parenting Skills

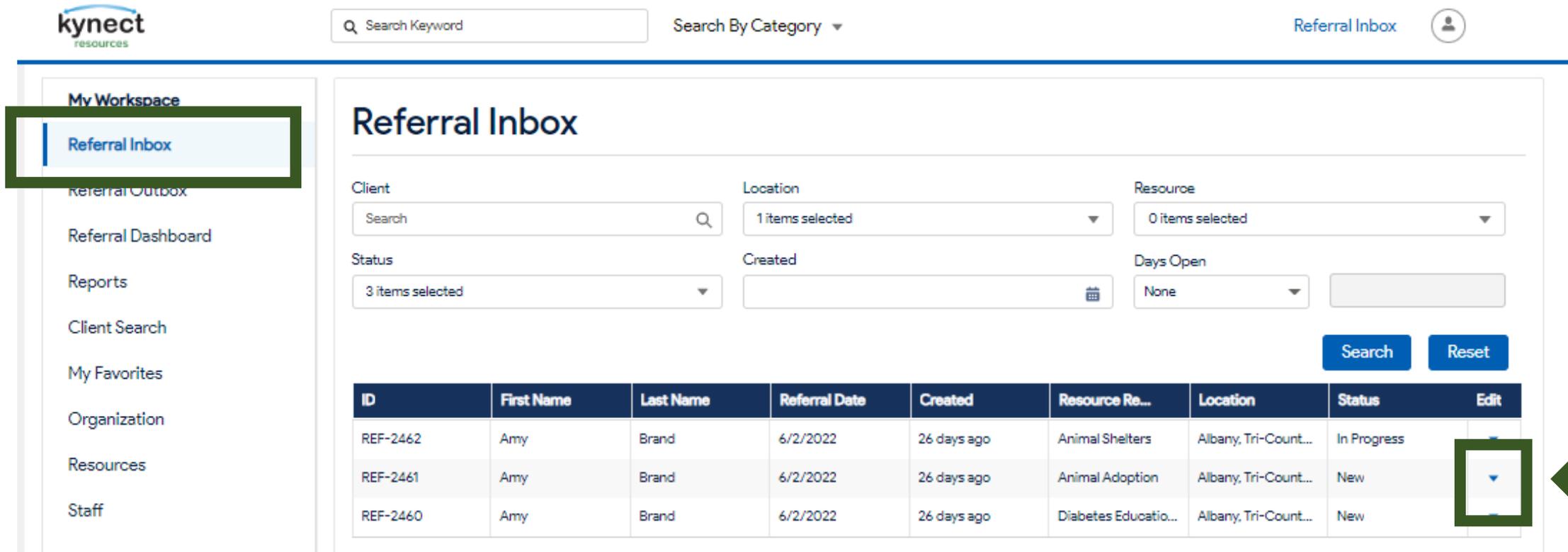
Creating Referrals



Next, let's look at how to create a referral for residents in the **Referral Inbox**.

Returning 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**.



The screenshot shows the Kynect Referral Inbox interface. On the left is a navigation menu with 'My Workspace' at the top, followed by 'Referral Inbox' (highlighted with a green box), 'Referral Outbox', 'Referral Dashboard', 'Reports', 'Client Search', 'My Favorites', 'Organization', 'Resources', and 'Staff'. The main area is titled 'Referral Inbox' and contains several filter fields: 'Client' (Search), 'Location' (1 items selected), 'Resource' (0 items selected), 'Status' (3 items selected), 'Created' (calendar icon), and 'Days Open' (None). There are 'Search' and 'Reset' buttons. Below the filters is a table with the following data:

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	
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	

The 'Edit' column contains dropdown arrows for each row. The arrow for the second row (REF-2461) is highlighted with a green box, and a large green arrow points to it from the right side of the image.

Creating Referrals



Click the blue Resident name.

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search
- My Favorites
- Organization
- Resources
- Staff

[← Back to Referral Inbox](#)

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 27 days ago	 Referral Source Albany, Tri-County Animal Shelter	 Referral Made By Julie Macaron

Referral Information

Resource Name
Animal Shelters

Status: Assigned to:

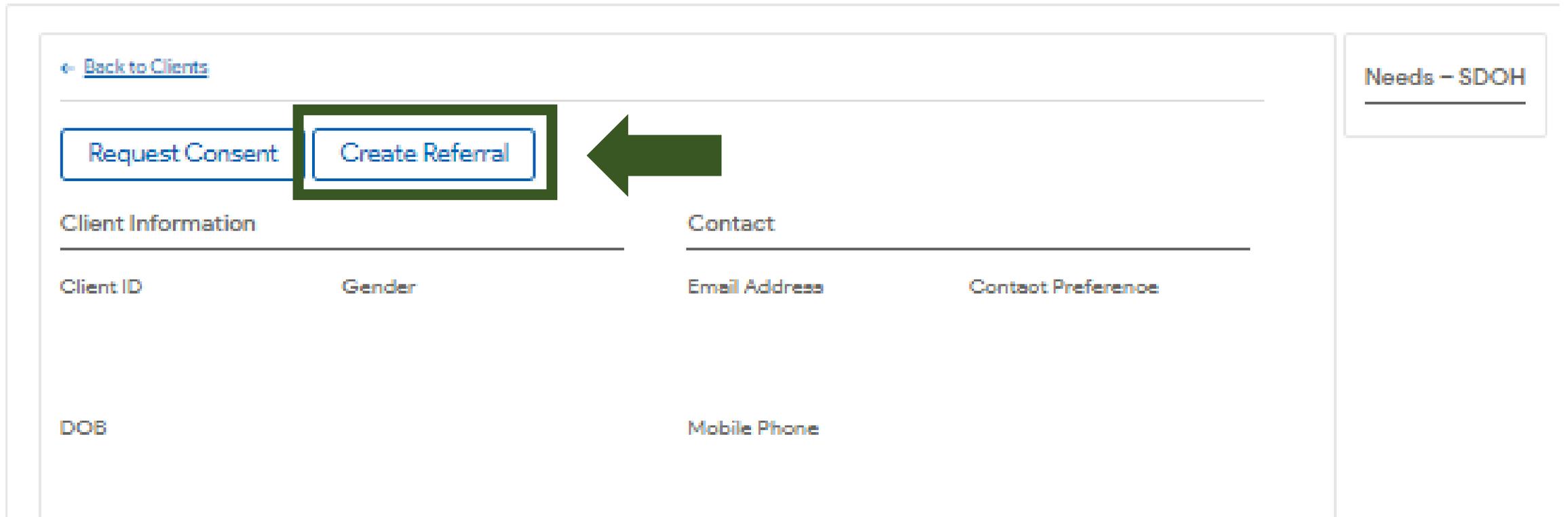
[Add Note](#)

Subject ↑	Description	Created By	Created Date	Modified Date
Disease Management	Amy is in need of support for Di...	Julie Macaron	6/28/2022	6/28/2022
Referral Created		Julie Macaron	6/2/2022	6/2/2022

Creating Referrals



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



← [Back to Clients](#)

[Request Consent](#) [Create Referral](#)

Needs – SDOH

Client Information **Contact**

Client ID	Gender	Email Address	Contact Preference
DOB		Mobile Phone	

Creating Referrals



As a reminder, all created referrals are sent to the Referral Outbox. Metrics for sent referrals may be viewed in the Referral Dashboard.

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search
- My Favorites
- Organization
- Resources
- Staff

Referral Sent

Client

Organization

Resource

Status

Created

Days Open

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	View
REF-2471	Amy	Brand	6/29/2022	0 days ago	Supportive Housing	One Parent Schol...	New	▼
REF-2470	Amy	Brand	6/21/2022	8 days ago	Bereaved Parent S...	Two Hearts Preg...	Org Not in System	▼
REF-2469	Amy	Brand	6/21/2022	8 days ago	Families/Friends o...	Al-Anon/Alateen	New	▼



Thank you

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