Quick Look at the **Referral Inbox**

Use this Quick Look Guide to learn about the Referral Inbox
Upon log in, kynect resources opens to the Referral Inbox screen. The Referral Inbox displays referrals made to the Community Partner’s organization. These referrals, or asks for help, are managed from the Referral Inbox.
The Referral Inbox screen displays the referral ID, the Name of the resident being referred, the Date of the referral, the Resource Requested, the Location of the resource and the referral Status.
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.
Community Partners are also able to navigate to other functions using the links in My Workspace from the Referral Inbox screen. The Client search is also available from the Referral Inbox screen.
To open a referral, click the arrow button next to the referral, and click **Edit**.
The resident **Name** is a blue hyperlink. When clicked, this will navigate to the resident detail screen. The Resident must provide consent to view their information.

The Community Partner may use the **Phone Number** or **Email Address** to conduct outreach to the resident to respond to the referral and serve their need.

The Referral Details screen displays the resident name and contact information.
The status of the referral may be set to **New**, **In Progress**, or **Closed**.

- **In Progress** means the Community Partner is taking steps to contact the resident and provide services.
- **Closed** indicates the referral has been completed, meaning the resident either received the services or the referral was closed for another reason.
The referral can be **Assigned to** specific staff member within the organization or remain Unassigned.

Click **Save** after making any changes on the Referral Details screen.
Referral Inbox

Notes are a helpful tool that allows organizations to collaborate and coordinate support for residents. Notes can be viewed and added from the Referral Details screen.

To View a previous note, click the down arrow next to the Note.

Click Add Note to create new Note.
On the **Add Note** screen, enter a **Subject** and a **Description** then click **Save**. Remember, the purpose of the **Note** is to help facilitate understanding of the residents needs and collaboration with other organizations who may work with the resident.

After a **Note** has been added, it can be viewed in the **Notes** section, with the **Subject** and **Description** fields as entered.
From the **Referral Details** screen, click **Back to Referral Inbox** to return to the Inbox.
The **Referral Inbox** provides several search functions that allow users to quickly find specific groups of referrals.

These options include searching by **Name**, the organization **Location**, when there are multiple locations, by **Resources** being requested, by the referral **Status** or **Created** date.
To search by Client, enter a client Name in the Search field. This will search the referrals in the inbox for the entered name. The results will display in the inbox with all referrals to the organization for that resident.
Community Partners can search the **Referral Inbox** by **Location**.

Many organizations offer resources at multiple locations. To display referrals for a specific location, click the **arrow** in the **Location** field and select from the listed **Locations**.

Referrals made to the Location selected will be displayed.

Referral Inbox

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Referral Date</th>
<th>Created</th>
<th>Resource</th>
<th>Status</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF-2442</td>
<td>Amy</td>
<td>Brand</td>
<td>6/2/2022</td>
<td>26 days ago</td>
<td>Animal Shelters</td>
<td>In Progress</td>
<td>Albany, Tri-County Animal Shelter</td>
</tr>
<tr>
<td>REF-2441</td>
<td>Amy</td>
<td>Brand</td>
<td>6/2/2022</td>
<td>26 days ago</td>
<td>Animal Adoption</td>
<td>New</td>
<td>Albany, Tri-County</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>New</td>
<td>Albany, Tri-County</td>
</tr>
</tbody>
</table>
To search the Referral Inbox by Resource, click the down arrow, select the Resource name to search, then click Search.

The results will populate with all referrals to the organization for that Resource.

The search can be conducted for a specific resident or for a broad search for all Referrals received for a specific Resource.
Referral Inbox

To Search by Status, select from the Status drop down menu. More than one Status may be selected.

The results will display all referrals from the Inbox with the selected status.
The Referral Inbox screen helps organizations manage incoming requests by offering search functions, status management, Staff assignments and more.

As a reminder, Community Partners can also navigate to other kynect resources tools using the links in My Workspace.
Thank you

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