Quick Look at the Referral Inbox

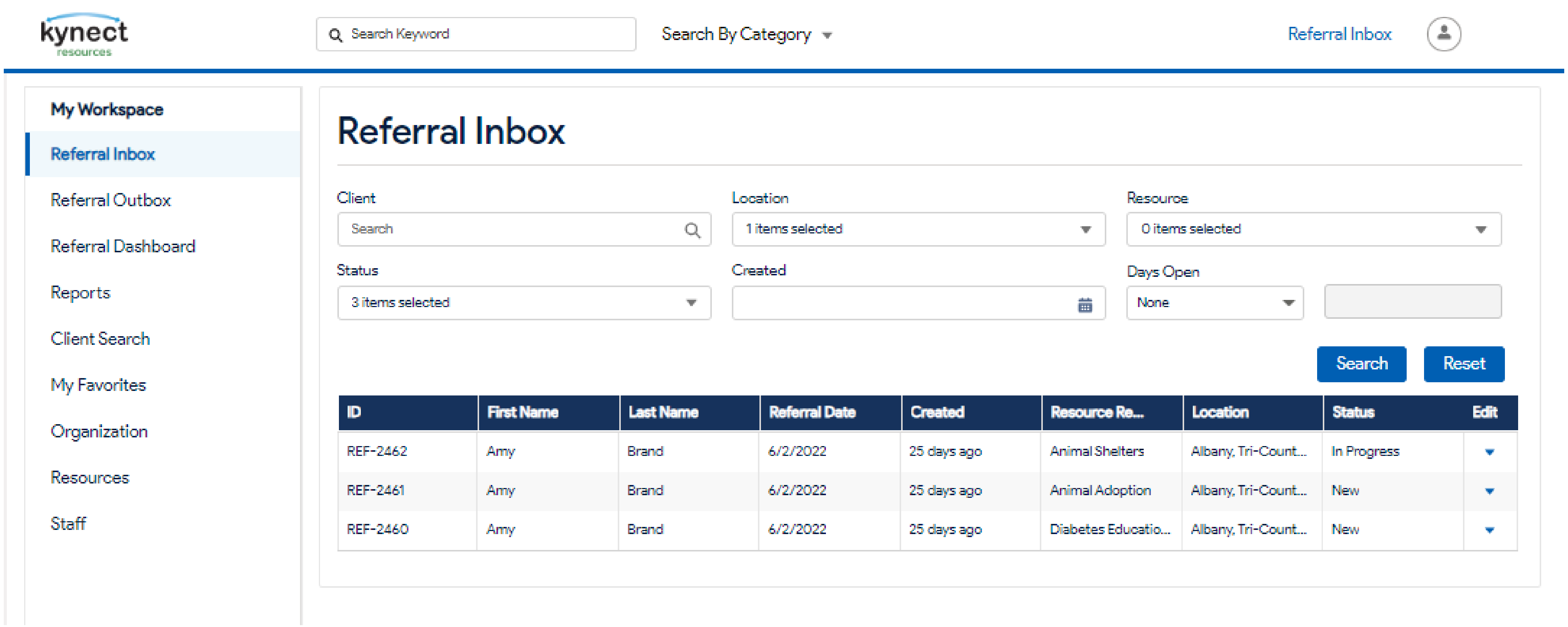
Use this Quick Look Guide to learn about the Referral Inbox

Referral Inbox

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

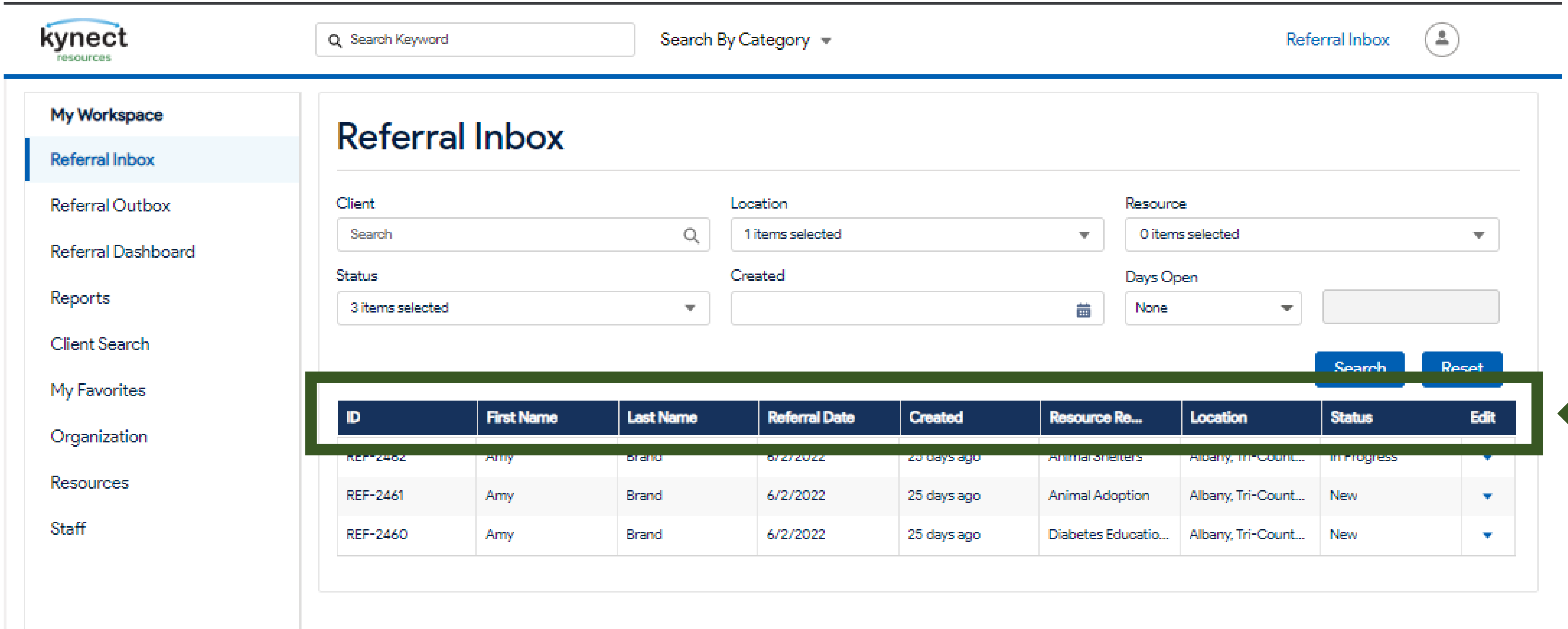
The **Referral Inbox** displays referrals made to the Community Partner's organization.

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



Referral Inbox

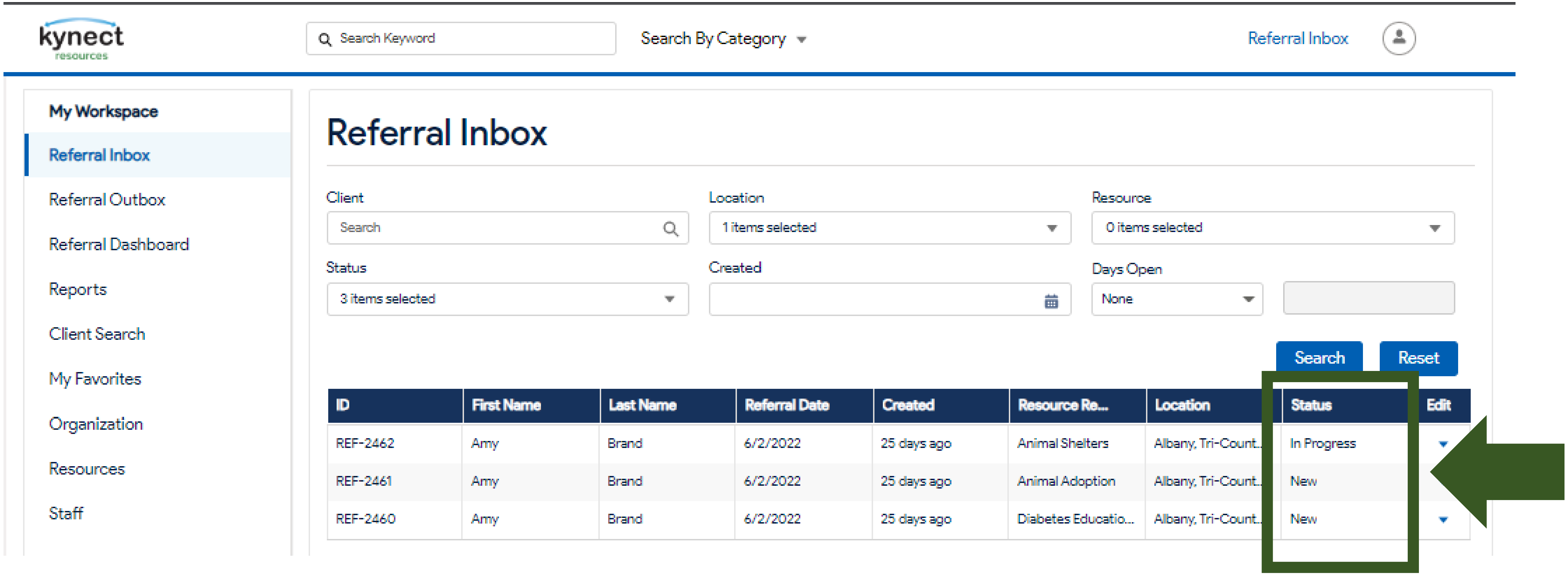
The Referral Inbox screen displays the referral **ID**, the **Name** of the resident being referred, the **Date** of the referral, the **Resource Requested**, the **Location** of the resource and the referral **Status**.



Referral Inbox

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

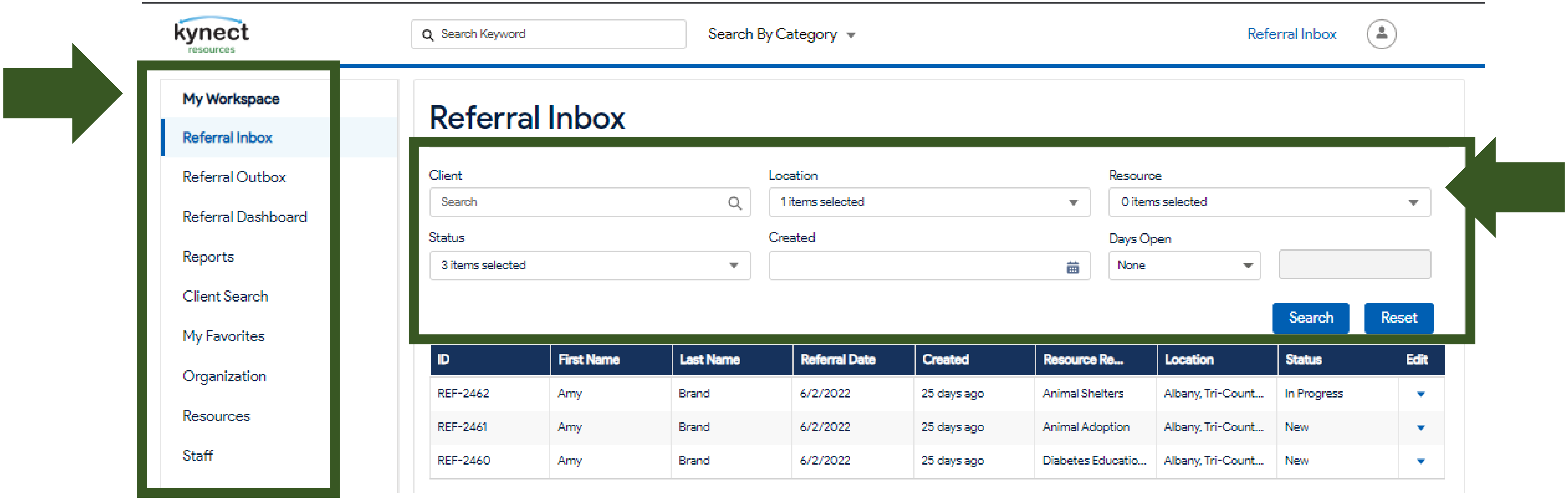
The referral may be assigned a new **Status**, may be assigned to a specific staff member, or closed once services have been provided.



Referral Inbox

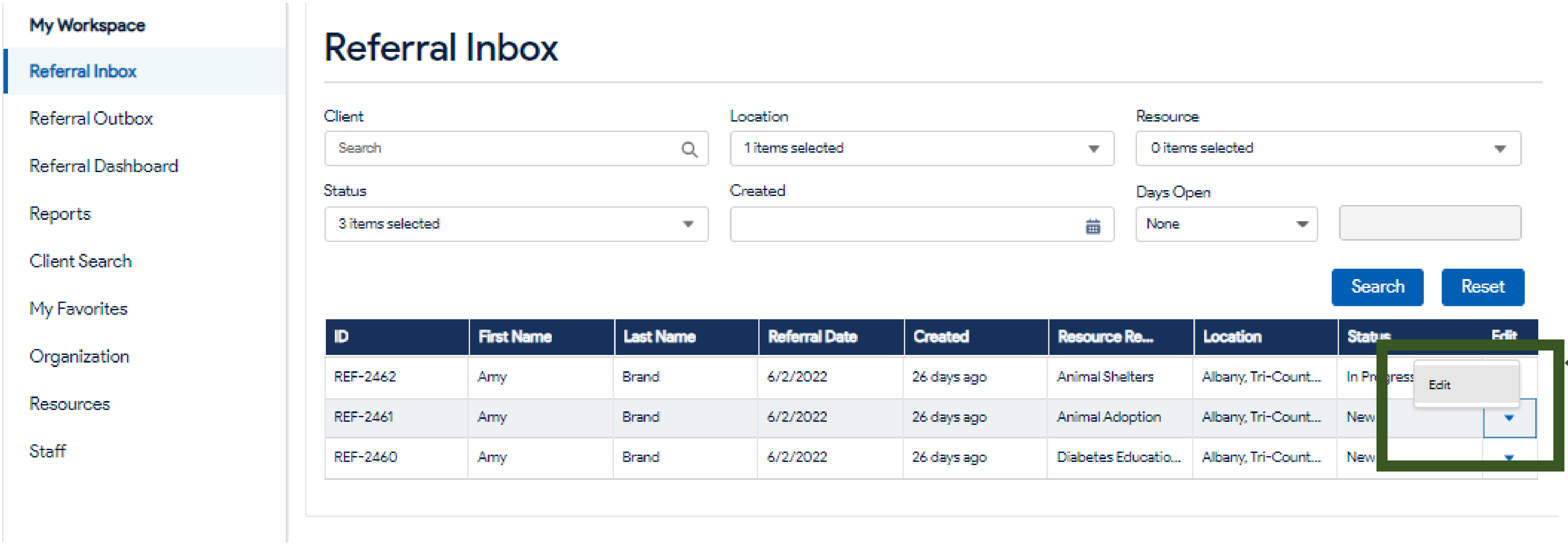
Community Partners are also able to navigate to other functions using the links in My Workspace from the Referral Inbox screen.

The Client search is also available from the Referral Inbox screen.



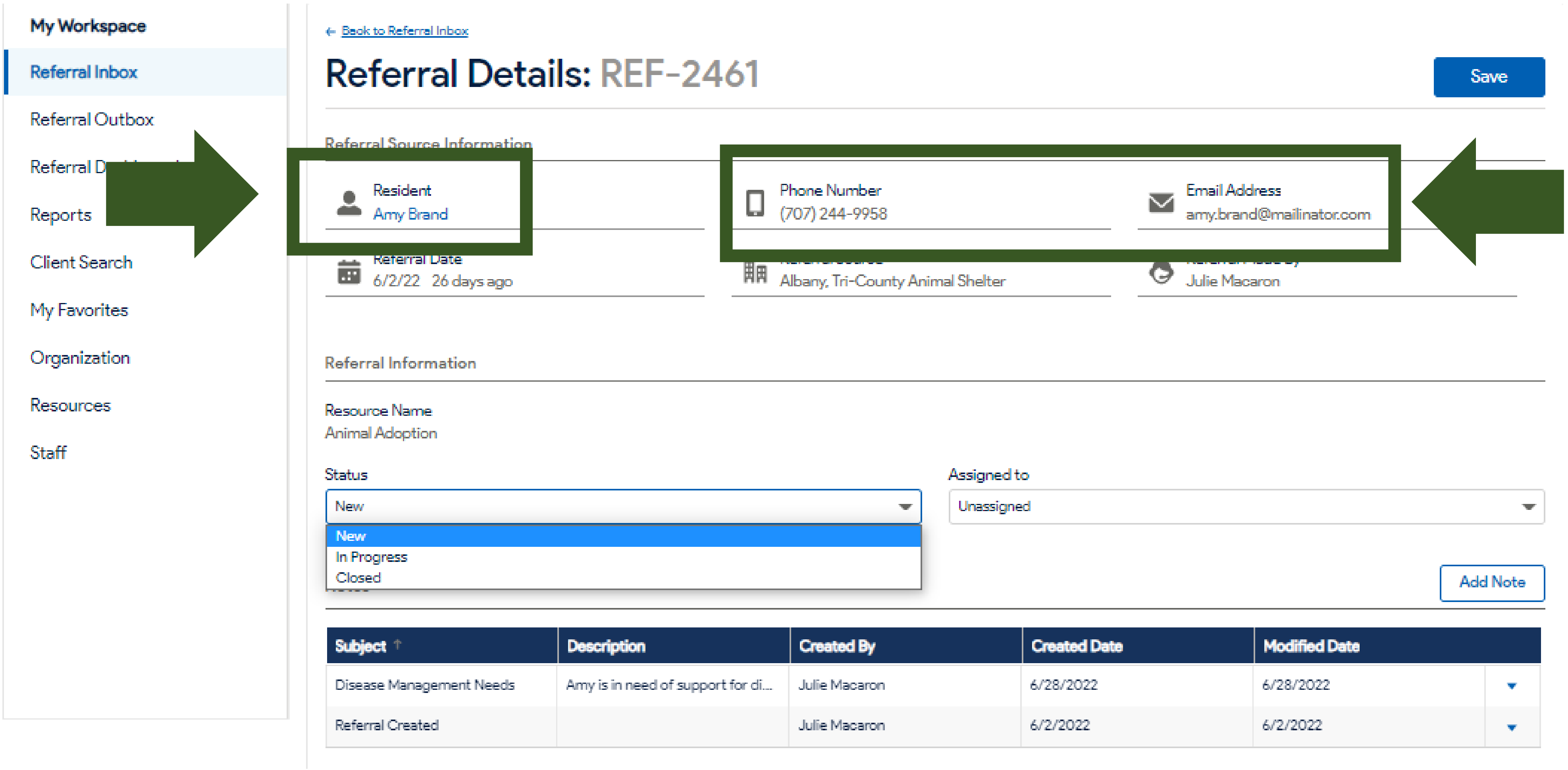
Referral Inbox

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



Referral Inbox

The Referral Details screen displays the resident name and contact information.

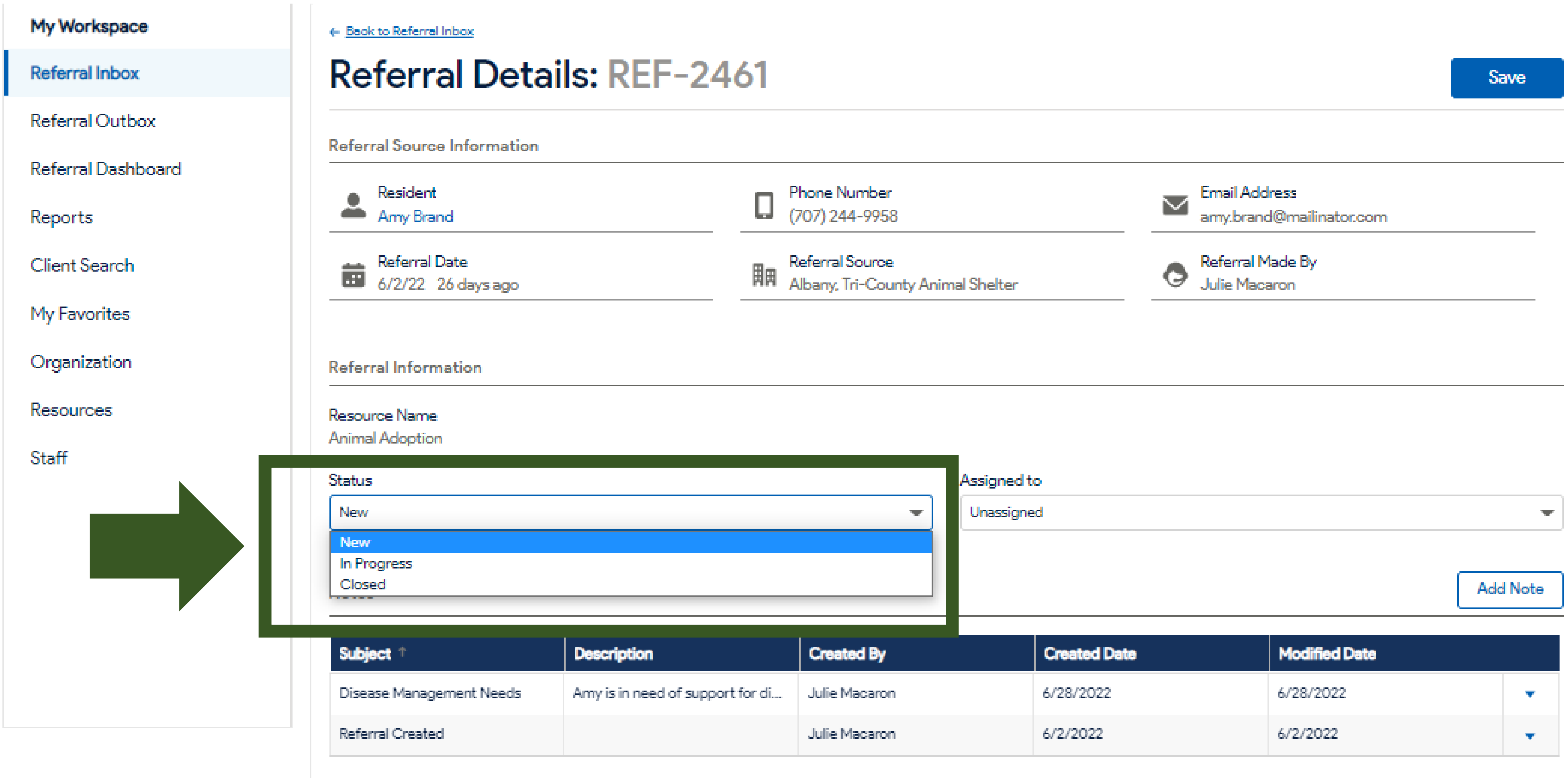


The resident **Name** is a blue hyperlink. When clicked, this will navigate to the resident detail screen. The Resident must provide consent to view their information.

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.

Referral Inbox

The **Status** of the referral may be set to **New**, **In Progress**, or **Closed**.

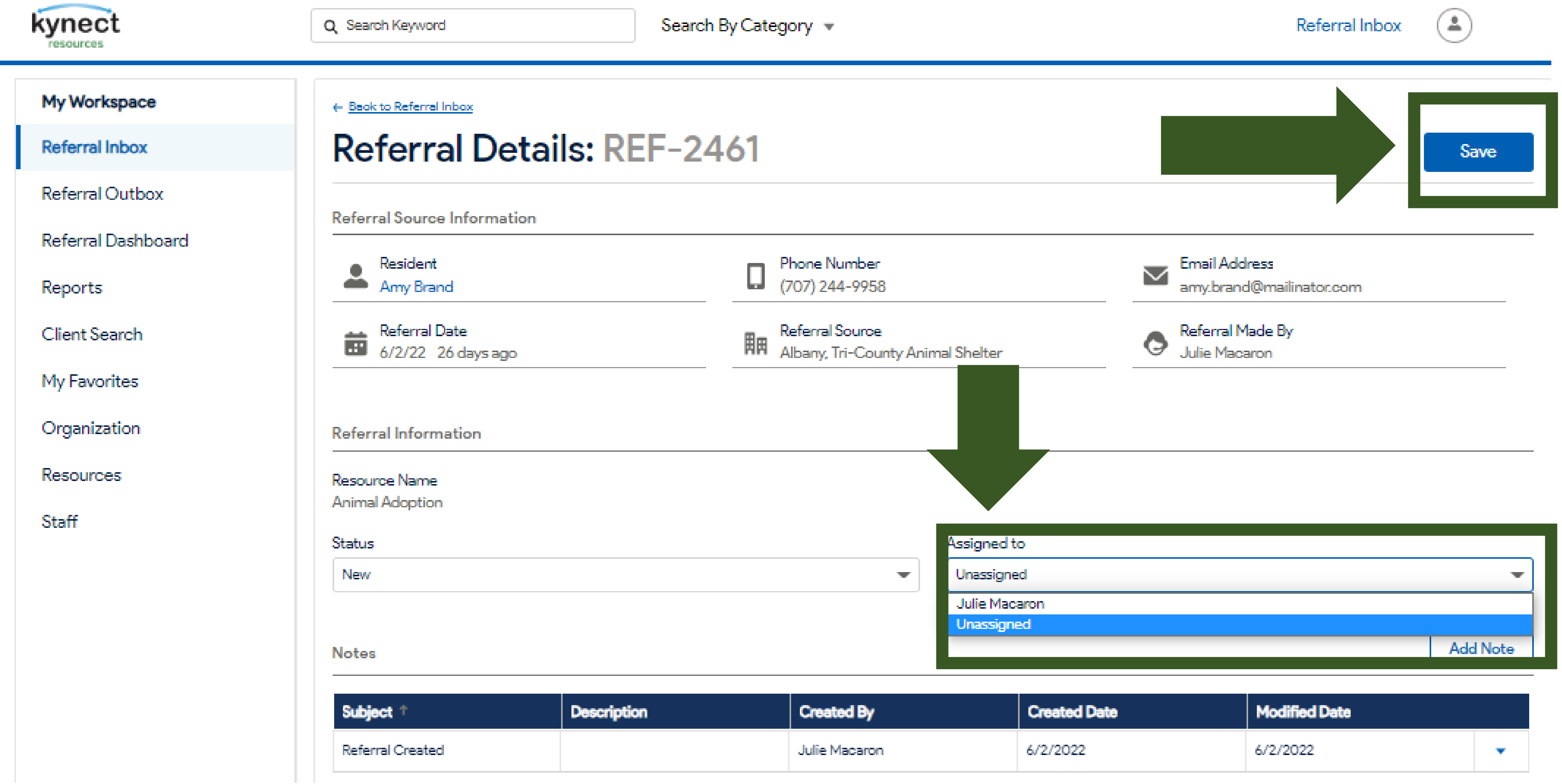


In Progress means the Community Partner is taking steps to contact the resident and provide services.

Closed indicates the referral has been completed, meaning the resident either received the services or referral was closed for another reason.

Referral Inbox

The referral can be Assigned to specific staff member within the organization or remain Unassigned.



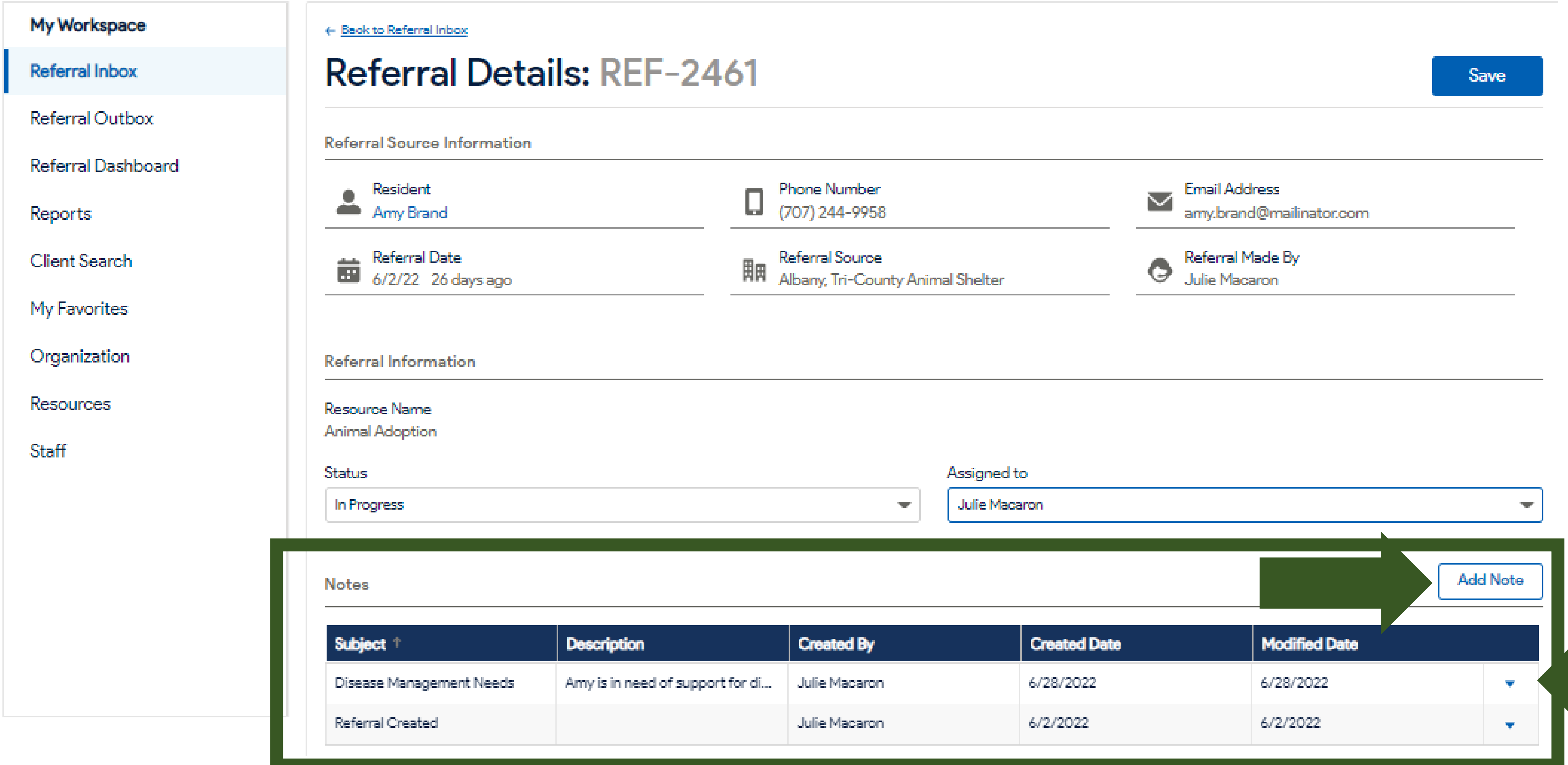
Click **Save** after making any changes on the Referral Details screen.

Reminder:

If an organization's staff have not completed onboarding, they cannot view the Workspace or be assigned a referral.

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.

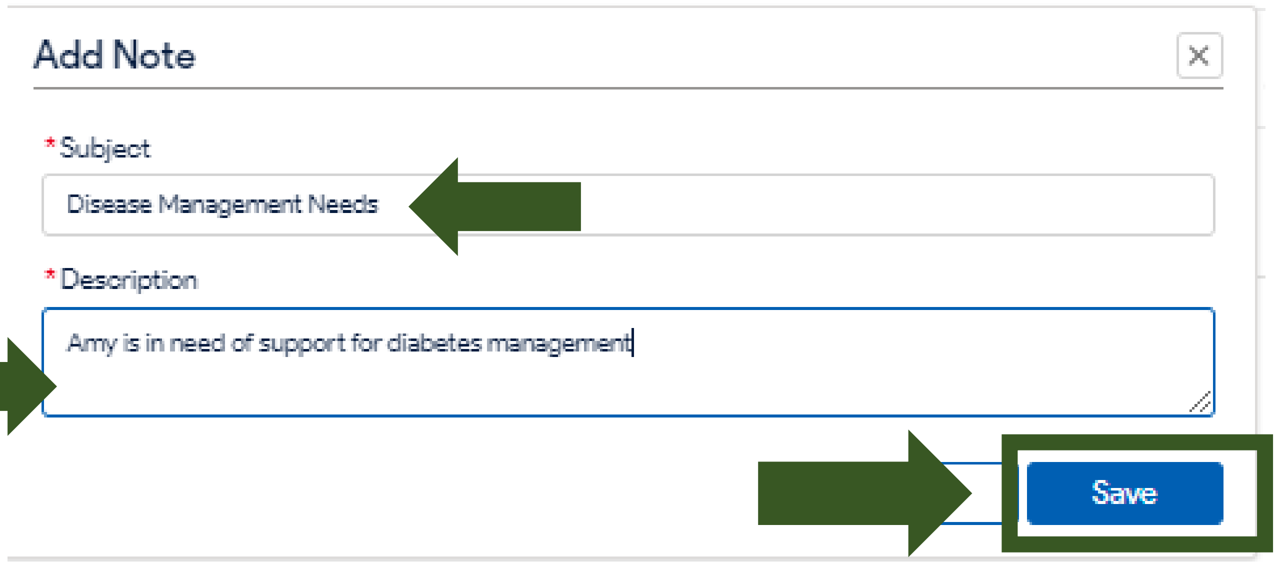


To View a previous note, click the down arrow next to the **Note**.

Click **Add Note** to create new Note

Referral Inbox

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.

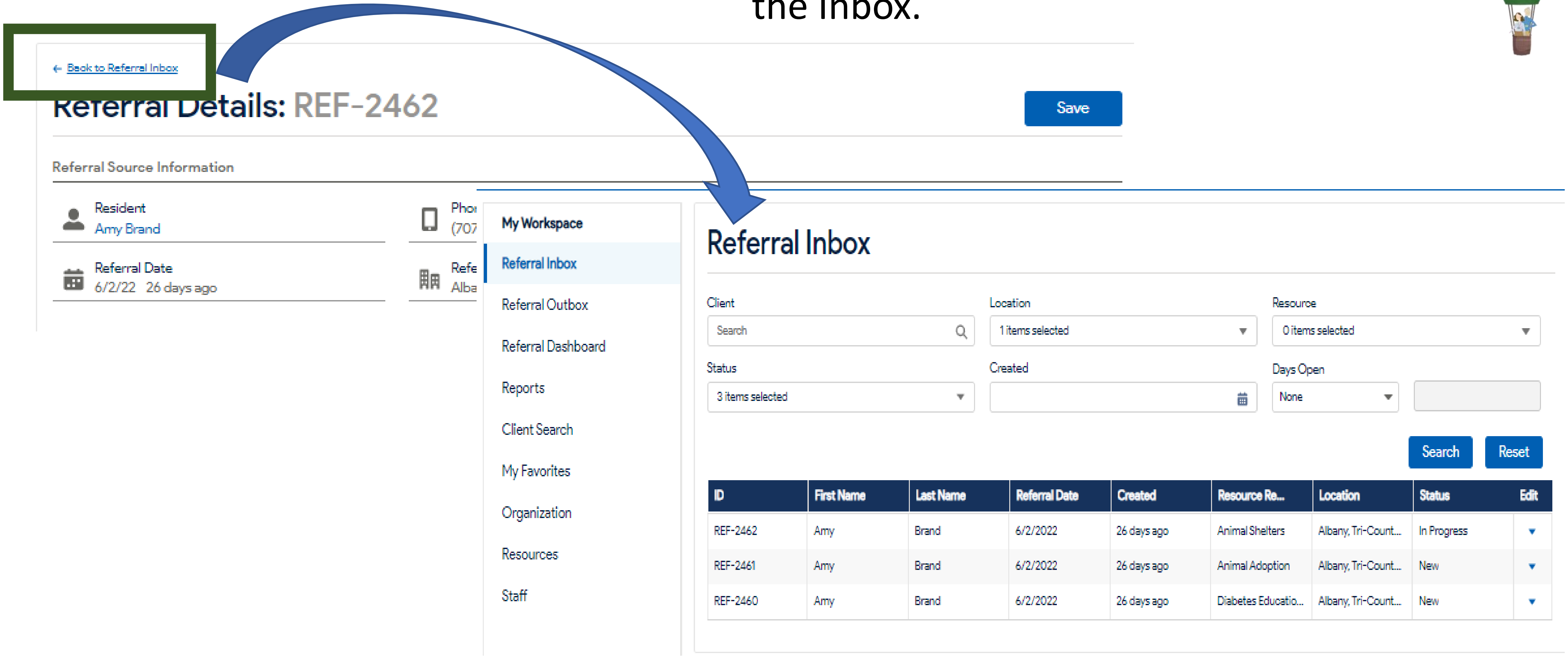
Notes

Add Note

Subject	Description	Created By	Created Date	Modified Date
Disease Management Needs	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

Referral Inbox

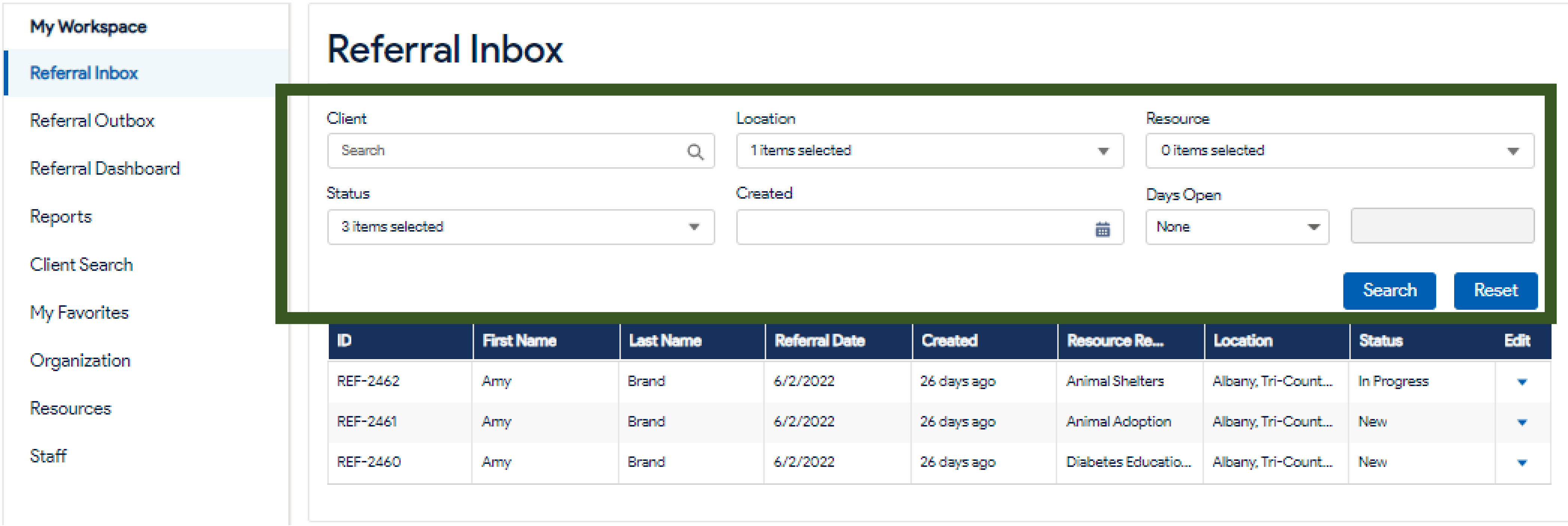
From the **Referral Details** screen, click **Back to Referral Inbox** to return to the Inbox.



Referral 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.

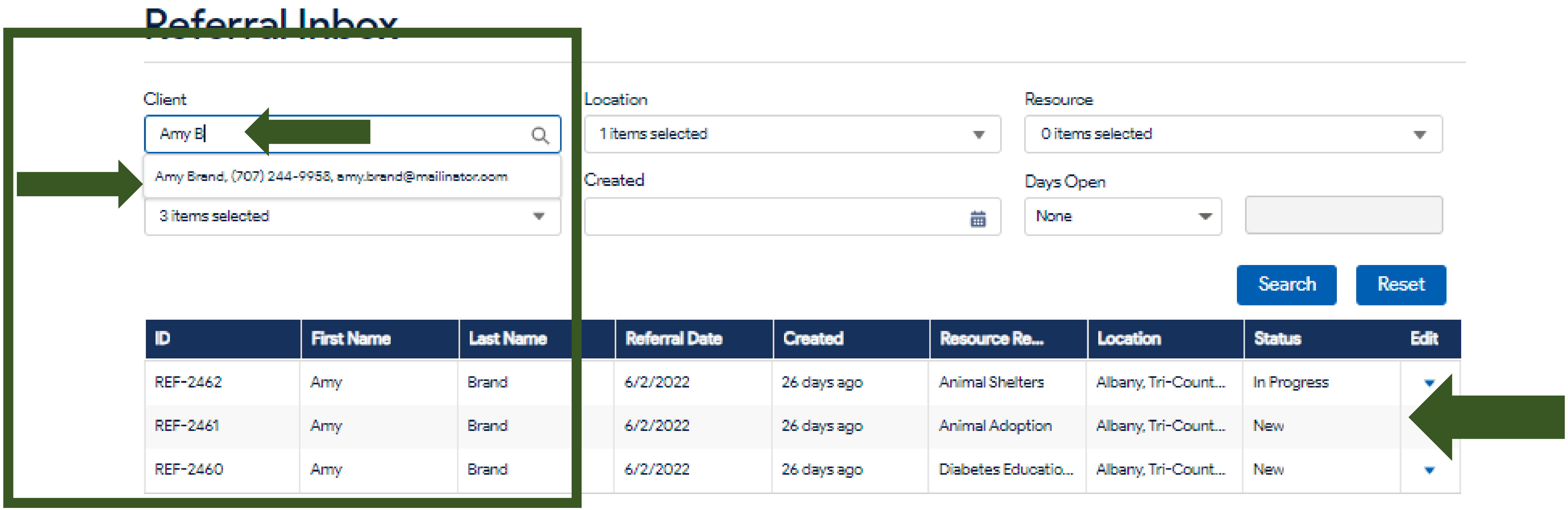


ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes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

Referral Inbox

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.

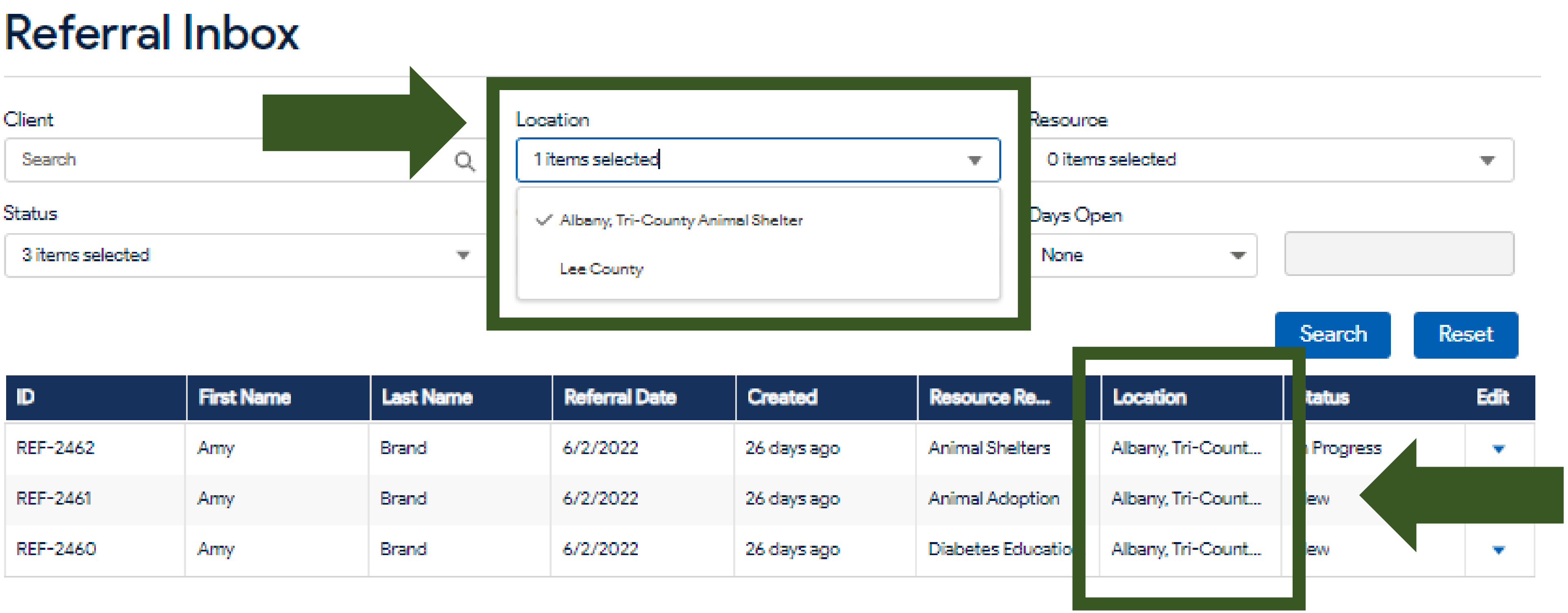


Referral Inbox

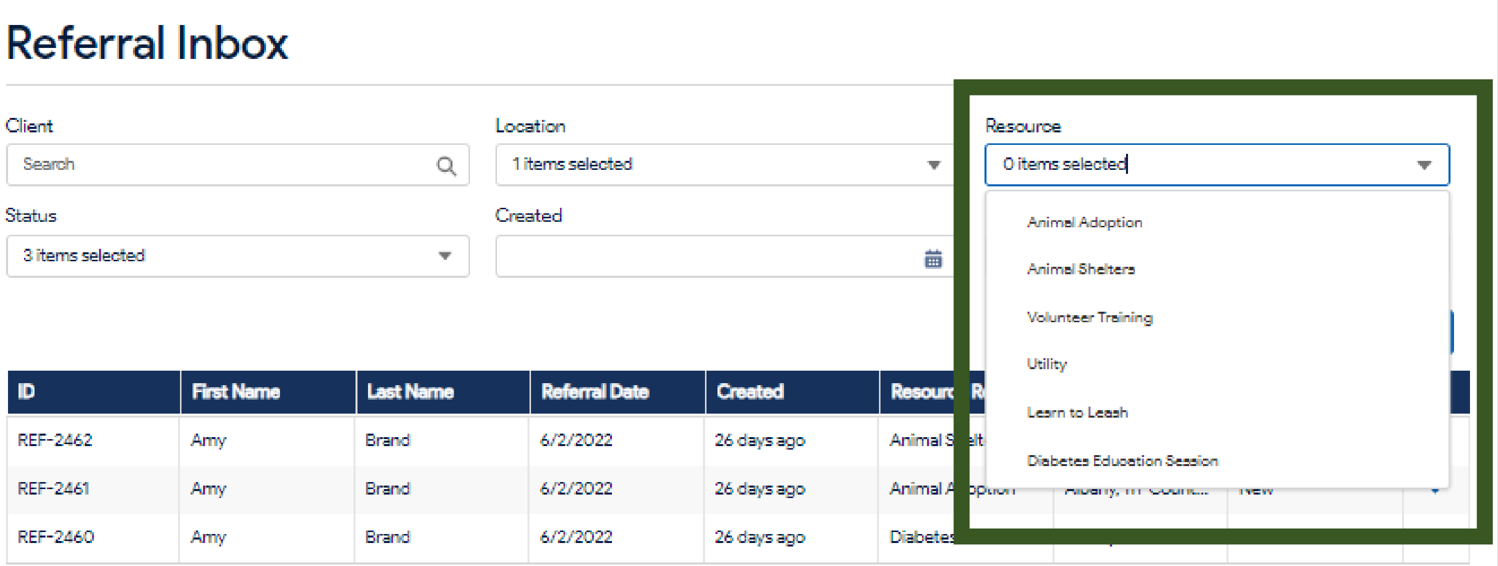
Community Partners can search the **Referral Inbox** by **Location**.

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.



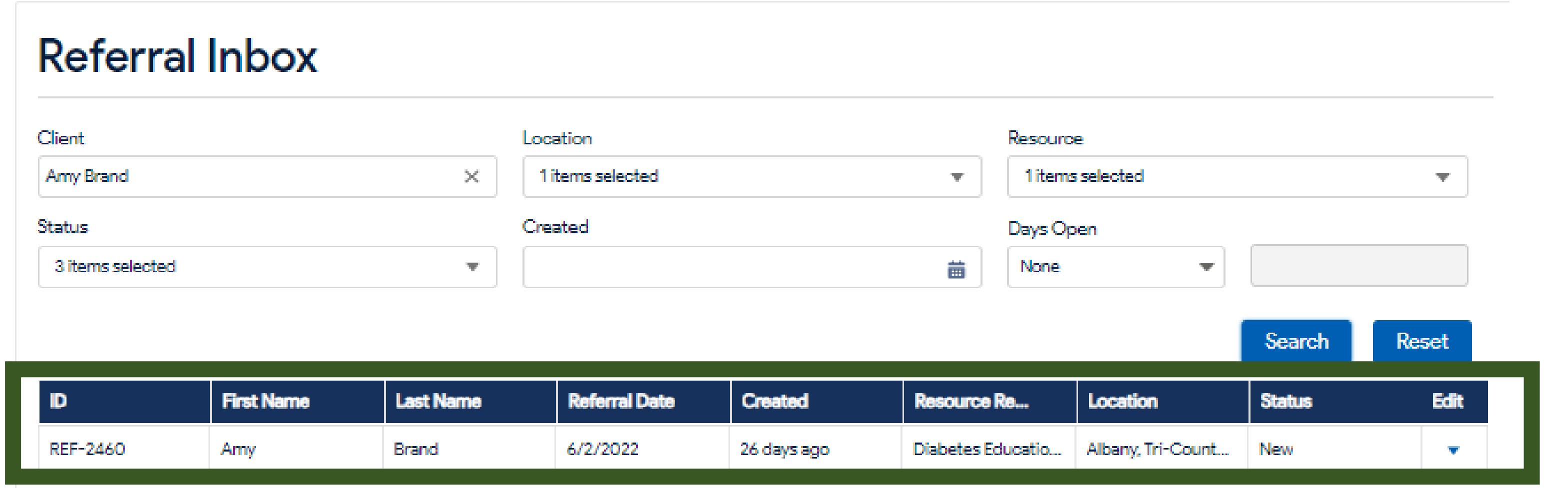
Referral Inbox



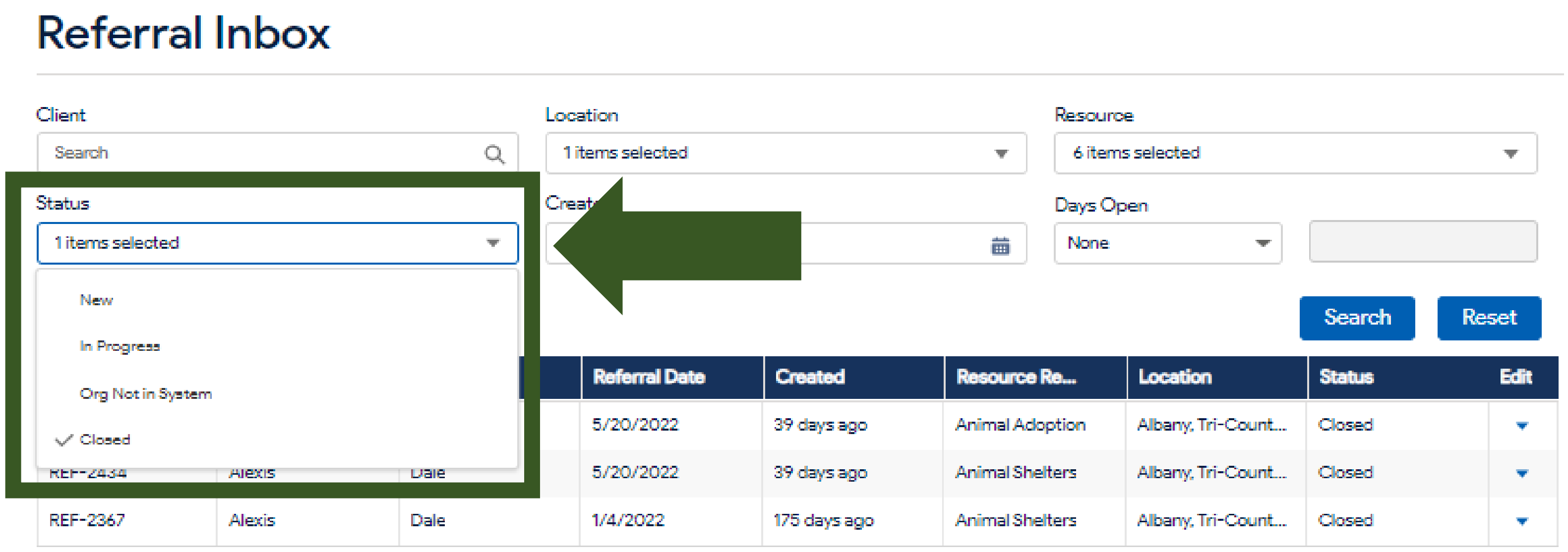
To search the Referral Inbox by **Resource**, click the **down arrow**, select the **Resource** name to search, then click **Search.**

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

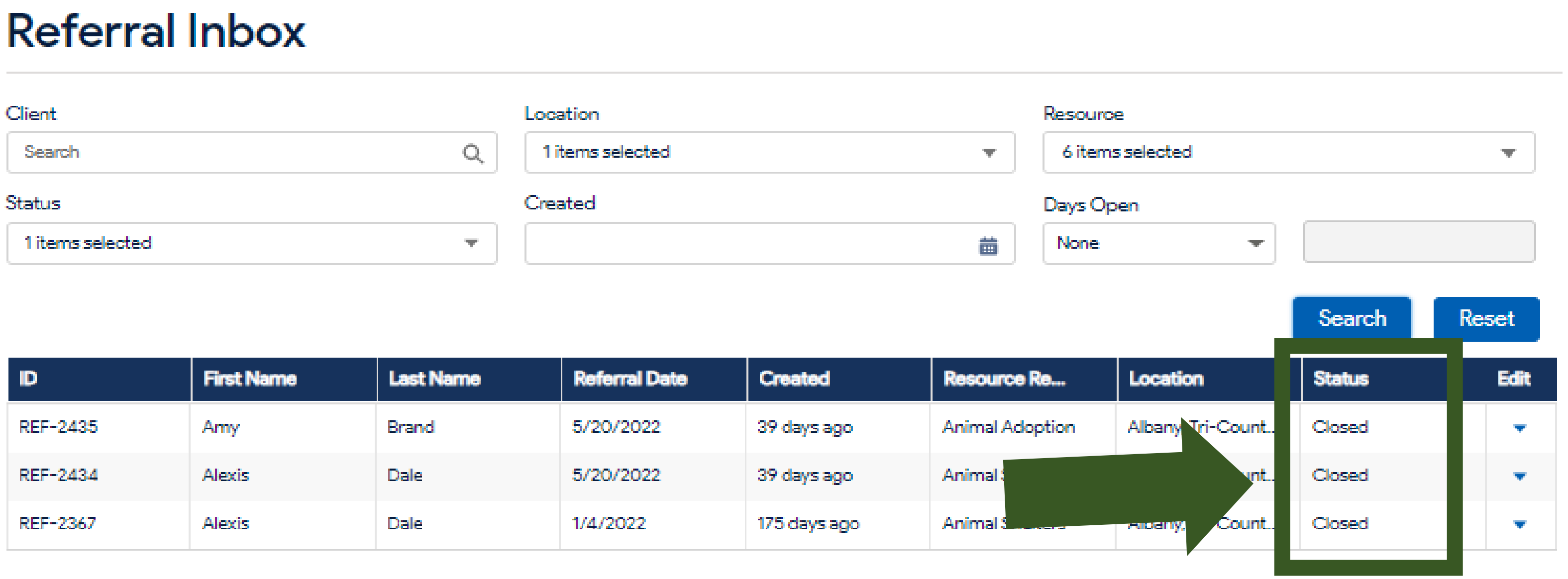
The search can be conducted for a **specific resident** or for a **broad search** for all Referrals received for a specific Resource.



Referral Inbox



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

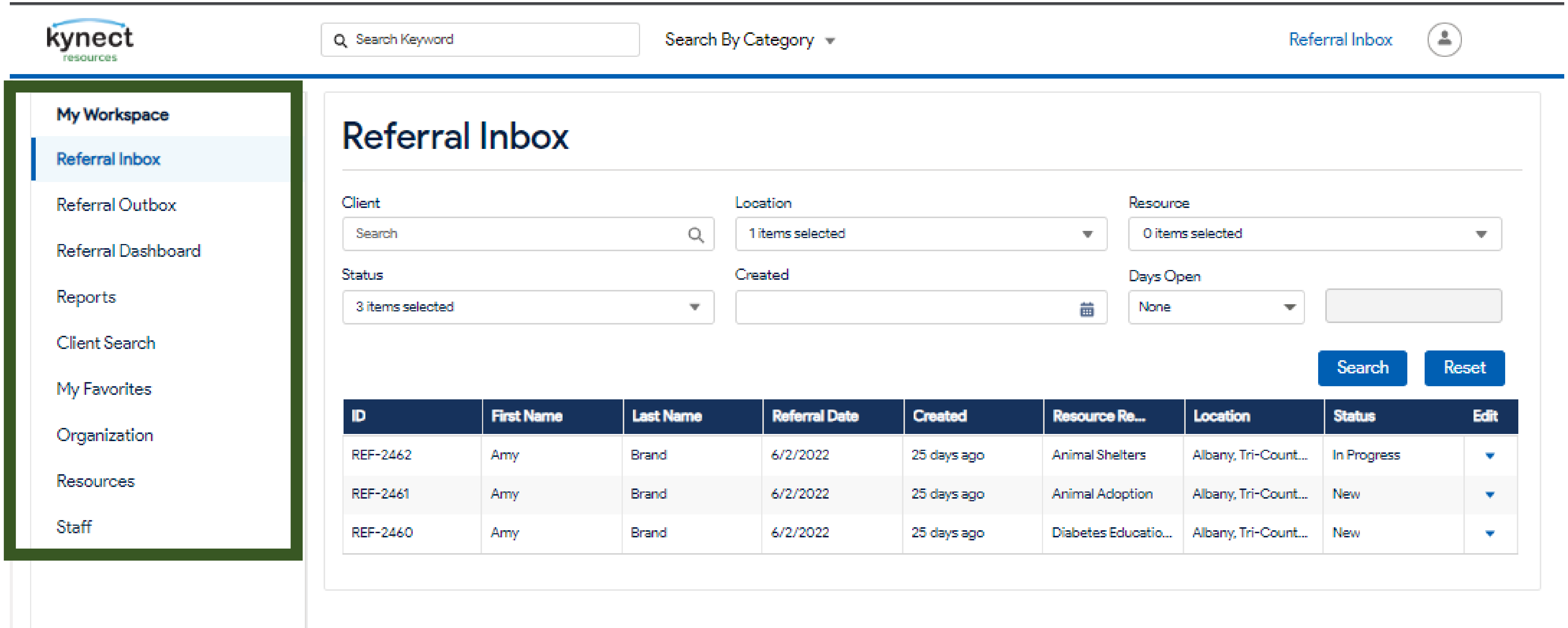


The results will display all referrals from the **Inbox** with the **selected status.**

Referral Inbox

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