



# Quick Look at the **Referral Inbox**

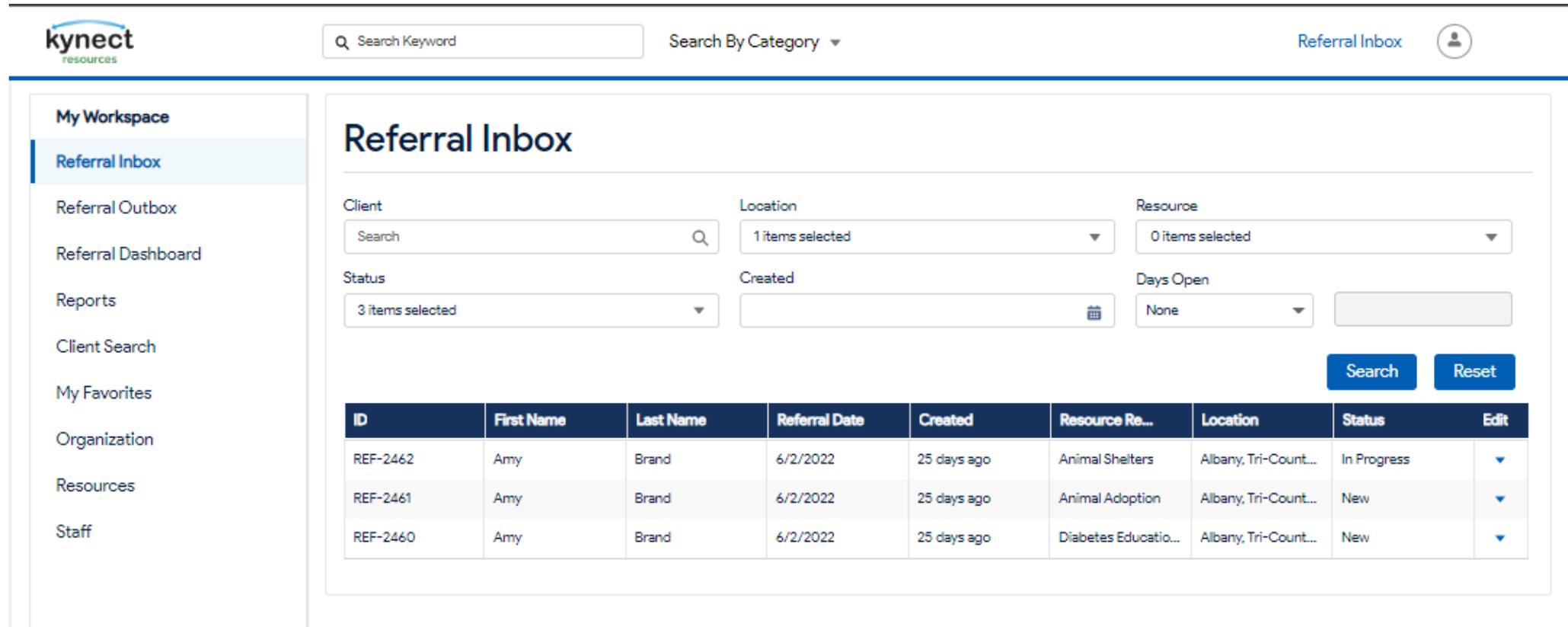
Use this Quick Look Guide to learn about the Referral Inbox

# 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**.



The screenshot shows the Kynect Resources Referral Inbox interface. At the top, there is a search bar with the text "Search Keyword" and a "Search By Category" dropdown. The "Referral Inbox" page title is visible in the top right corner. On the left side, there is a navigation menu with the following items: My Workspace, Referral Inbox (highlighted), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff.

The main content area is titled "Referral Inbox" and contains several filter fields:
 

- Client:** Search input field with a magnifying glass icon.
- Location:** Dropdown menu showing "1 items selected".
- Resource:** Dropdown menu showing "0 items selected".
- Status:** Dropdown menu showing "3 items selected".
- Created:** Date input field with a calendar icon.
- Days Open:** Dropdown menu showing "None".

 Below the filters are "Search" and "Reset" buttons.

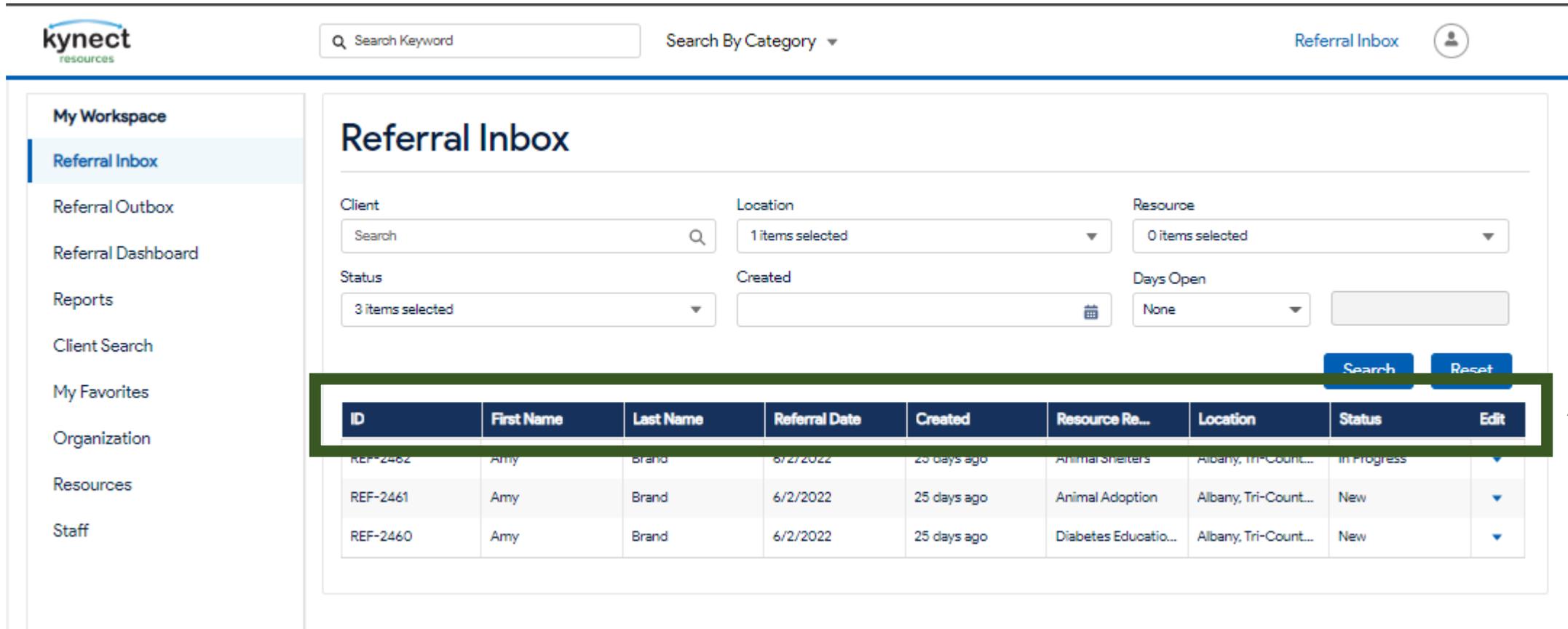
The main content area displays a table of referrals:

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

# 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 screenshot shows the Kynect Referral Inbox interface. At the top, there is a search bar with the text "Search Keyword" and a "Search By Category" dropdown. The page title "Referral Inbox" is visible in the top right corner. On the left side, there is a navigation menu with options: My Workspace, Referral Inbox (highlighted), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff.

The main content area is titled "Referral Inbox" and contains several filter fields:
 

- Client: Search input with a magnifying glass icon.
- Location: Dropdown menu showing "1 items selected".
- Resource: Dropdown menu showing "0 items selected".
- Status: Dropdown menu showing "3 items selected".
- Created: Date input field with a calendar icon.
- Days Open: Dropdown menu showing "None" and an empty input field.

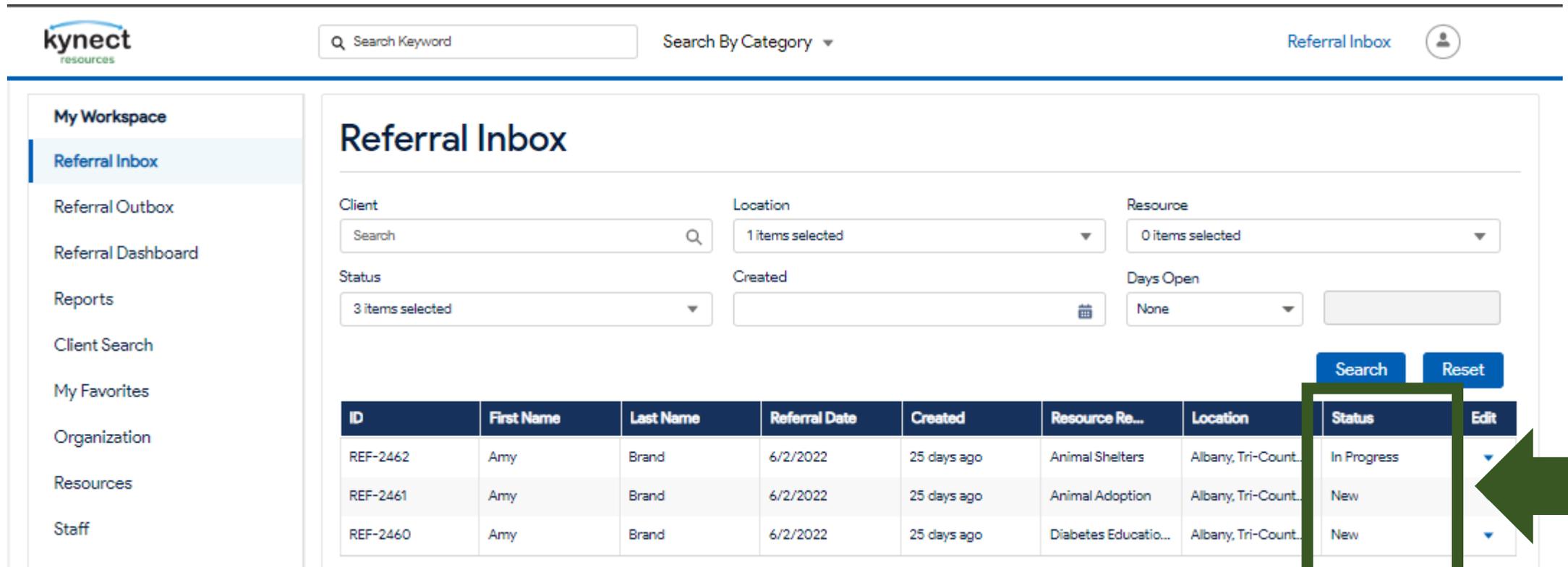
 Below the filters are "Search" and "Reset" buttons. A table of referrals is displayed below the filters, with the header row highlighted in dark blue. A green box highlights the header row, and a green arrow points to it from the right.

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼



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.



The screenshot shows the Kynect Referral Inbox interface. At the top, there is a search bar with the text "Search Keyword" and a "Search By Category" dropdown. The page title "Referral Inbox" is visible in the top right corner. On the left side, there is a navigation menu with options: My Workspace, Referral Inbox (highlighted), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff.

The main content area is titled "Referral Inbox" and contains several filter fields:
 

- Client:** Search input field.
- Location:** Dropdown menu showing "1 items selected".
- Resource:** Dropdown menu showing "0 items selected".
- Status:** Dropdown menu showing "3 items selected".
- Created:** Date input field with a calendar icon.
- Days Open:** Dropdown menu showing "None" and an empty input field.

Below the filters are "Search" and "Reset" buttons. A table displays the following data:

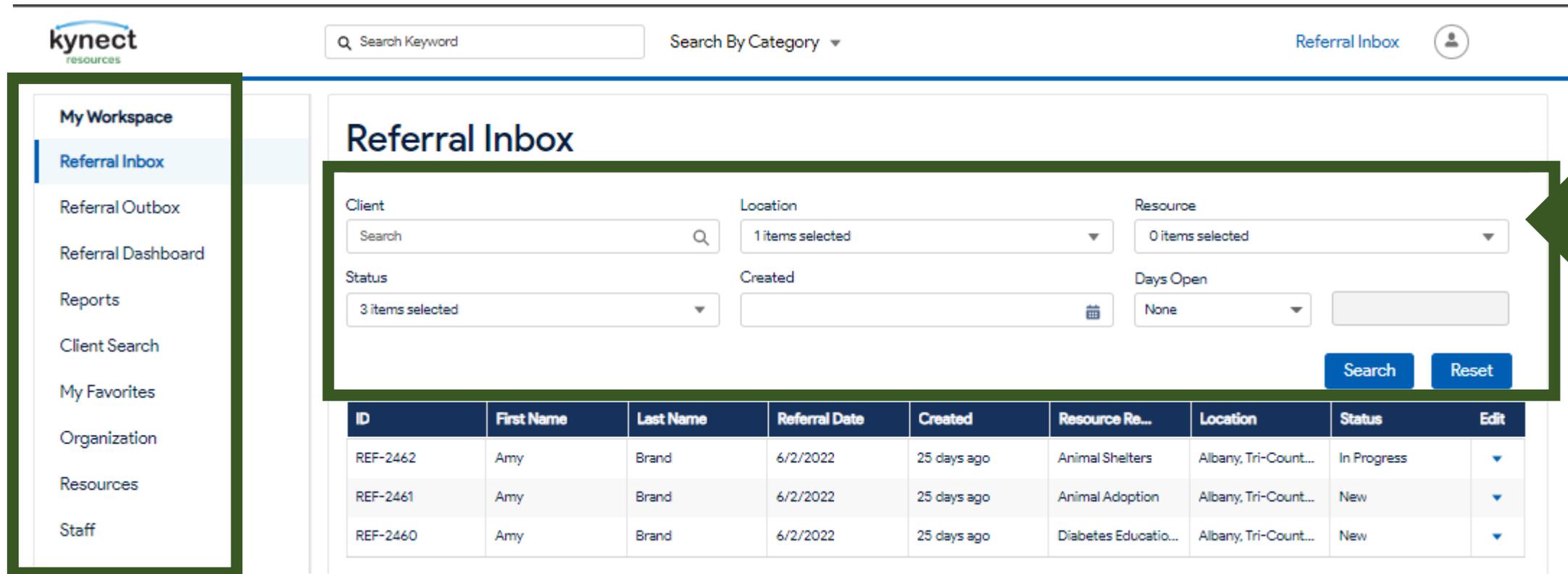
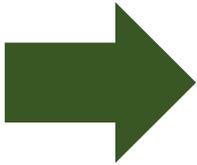
ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count.	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count.	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count.	New	▼

A green box highlights the "Status" column in the table, and a large green arrow points to it from the right side of the image.

# Referral Inbox

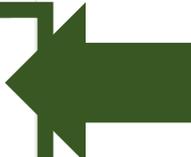


**Community Partners are also able to navigate to other functions using the links in My Workspace from the Referral Inbox screen. The Client search is also available from the Referral Inbox screen.**



The screenshot shows the Kynect Referral Inbox interface. On the left is a 'My Workspace' sidebar with a green border and a green arrow pointing to it. The sidebar contains the following links: My Workspace, Referral Inbox (highlighted), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The main content area is titled 'Referral Inbox' and contains a search filter section with a green border and a green arrow pointing to it. The filter section includes: Client (Search), Location (1 items selected), Resource (0 items selected), Status (3 items selected), Created (calendar icon), Days Open (None), and Search/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	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼



# Referral Inbox



To open 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

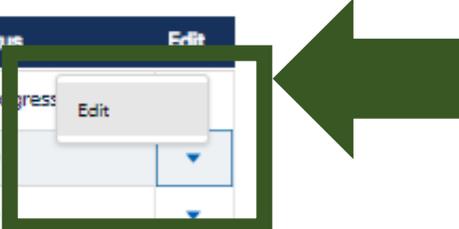
Resource

Status

Created

Days Open

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	<input type="button" value="Edit"/>
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	<input type="button" value="Edit"/>
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	<input type="button" value="Edit"/>



# Referral Inbox



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

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

[← Back to Referral Inbox](#)

## Referral Details: REF-2461

Save

### Referral Source Information

 Resident <a href="#">Amy Brand</a>	 Phone Number (707) 244-9958	 Email Address amy.brand@mailinator.com
 Referral Date 6/2/22 26 days ago	 Referral Source Albany, Tri-County Animal Shelter	 Referral Made by Julie Macaron

### Referral Information

Resource Name  
Animal Adoption

Status

New  
New  
In Progress  
Closed

Assigned to

Unassigned

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	▼

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**.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

[← Back to Referral Inbox](#)

## Referral Details: REF-2461

Save

### Referral Source Information

Resident  
Amy Brand

Phone Number  
(707) 244-9958

Email Address  
amy.brand@mailinator.com

Referral Date  
6/2/22 26 days ago

Referral Source  
Albany, Tri-County Animal Shelter

Referral Made By  
Julie Macaron

### Referral Information

Resource Name  
Animal Adoption

Status

New  
New  
In Progress  
Closed

Assigned to

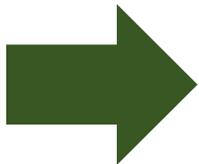
Unassigned

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	▼

**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.



# Referral Inbox

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



Search By Category ▾

Referral Inbox



## My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

[← Back to Referral Inbox](#)

## Referral Details: REF-2461

### Referral Source Information

Resident  
Amy Brand

Phone Number  
(707) 244-9958

Email Address  
amy.brand@mailinator.com

Referral Date  
6/2/22 26 days ago

Referral Source  
Albany, Tri-County Animal Shelter

Referral Made By  
Julie Macaron

### Referral Information

Resource Name  
Animal Adoption

Status

New

Assigned to

Unassigned

Julie Macaron

Unassigned

[Add Note](#)

Notes

Subject ↑	Description	Created By	Created Date	Modified Date
Referral Created		Julie Macaron	6/2/2022	6/2/2022

Save

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.

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

[← Back to Referral Inbox](#)

## Referral Details: REF-2461 Save

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Referral Source Information

Resident Amy Brand	Phone Number (707) 244-9958	Email Address amy.brand@mailinator.com
Referral Date 6/2/22 26 days ago	Referral Source Albany, Tri-County Animal Shelter	Referral Made By Julie Macaron

---

Referral Information

Resource Name  
Animal Adoption

Status In Progress Assigned to Julie Macaron

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

Click **Add Note** to create new Note

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



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.

**Add Note** ✕

---

\* Subject

Disease Management Needs

\* Description

Amy is in need of support for diabetes management

Save

After a **Note** has been added, it can be viewed in the **Notes** section, with the **Subject** and **Description** fields as entered.

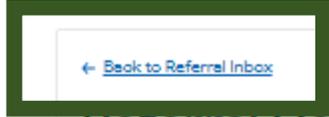
[Add Note](#)

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 Details: REF-2462

Save

### Referral Source Information

Resident  
Amy Brand

Phone  
(707)

Referral Date  
6/2/22 26 days ago

Referral  
Alba

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

## Referral Inbox

Client:   Location:  Resource:

Status:  Created:  Days Open:

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	▼

# 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.

**My Workspace**

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

## Referral Inbox

Client

Location

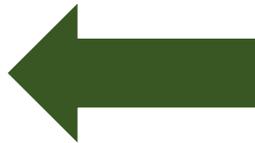
Resource

Status

Created

Days Open

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

Client

Amy Brand, (707) 244-9958, amy.brand@mailinator.com

3 items selected

Location: 1 items selected

Resource: 0 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	▼

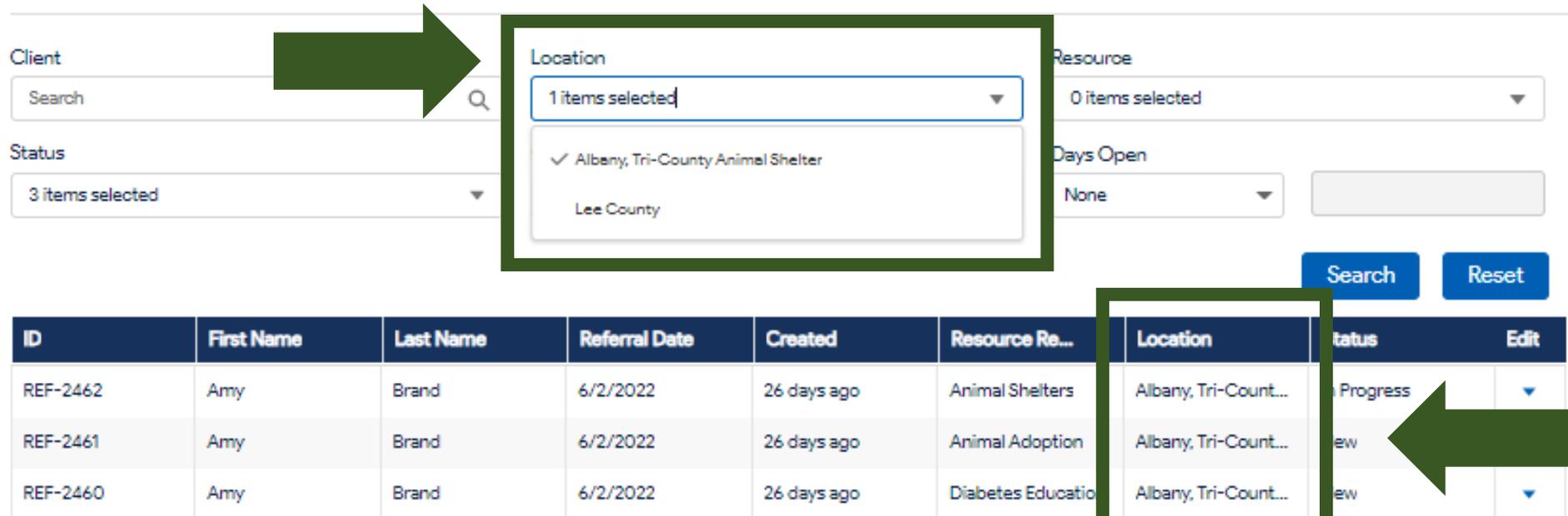
# Referral Inbox



**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



Client: Search

Status: 3 items selected

Location: 1 items selected

- ✓ Albany, Tri-County Animal Shelter
- Lee County

Resource: 0 items selected

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...	Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	ew	
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Education	Albany, Tri-Count...	ew	▼

# Referral Inbox



## Referral Inbox

Client: Search  Location: 1 items selected

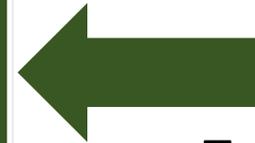
Status: 3 items selected

Created:

Resource: 0 items selected

- Animal Adoption
- Animal Shelters
- Volunteer Training
- Utility
- Learn to Leash
- Diabetes Education Session

ID	First Name	Last Name	Referral Date	Created	Resource
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Education Session



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

Client: Amy Brand Location: 1 items selected Resource: 1 items selected

Status: 3 items selected Created: Days Open: None

Search Reset

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

# Referral Inbox



## Referral Inbox

Client: Search

Location: 1 items selected

Resource: 6 items selected

Status: 1 items selected

Created:

Days Open: None

	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2434	5/20/2022	39 days ago	Animal Adoption	Albany, Tri-Count...	Closed	▼
REF-2434	5/20/2022	39 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼
REF-2367	1/4/2022	175 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼

**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

Client: Search

Location: 1 items selected

Resource: 6 items selected

Status: 1 items selected

Created:

Days Open: None

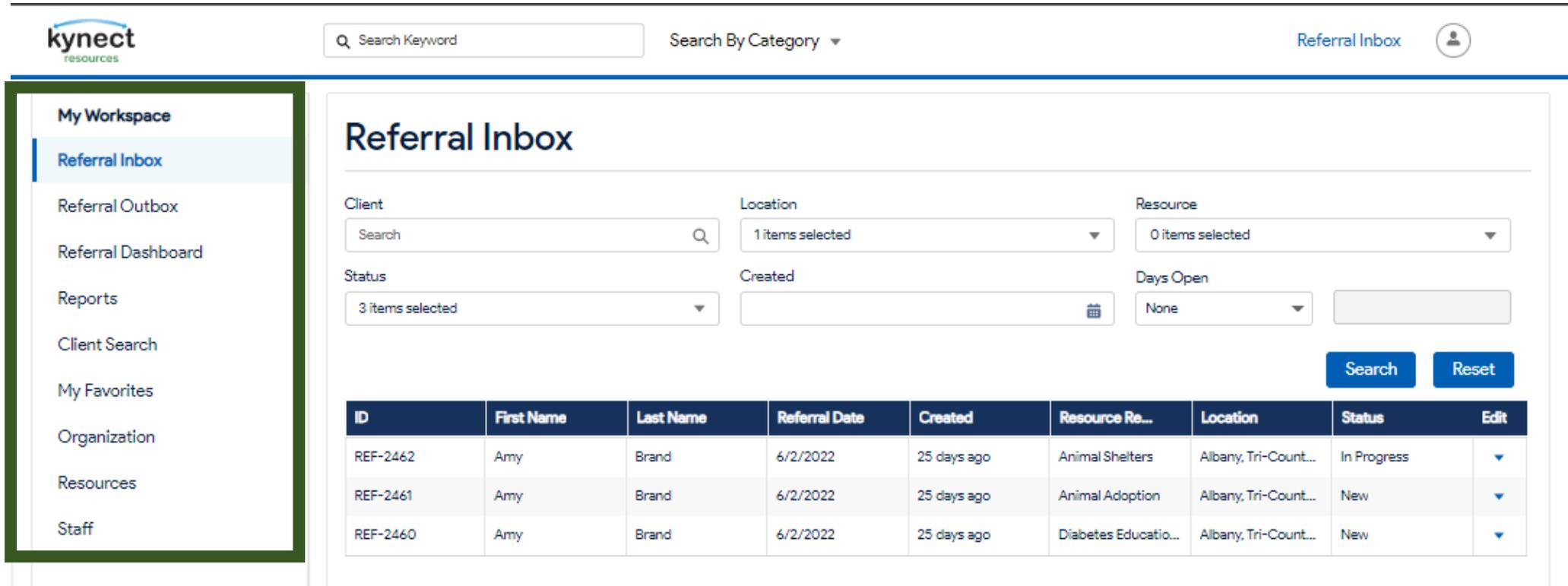
ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2435	Amy	Brand	5/20/2022	39 days ago	Animal Adoption	Albany, Tri-Count...	Closed	▼
REF-2434	Alexis	Dale	5/20/2022	39 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼
REF-2367	Alexis	Dale	1/4/2022	175 days ago	Animal Shelters	Albany, Tri-Count...	Closed	▼

# 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.



The screenshot shows the Kynect Referral Inbox interface. On the left is a 'My Workspace' sidebar with a green border, containing links to 'Referral Inbox', 'Referral Outbox', 'Referral Dashboard', 'Reports', 'Client Search', 'My Favorites', 'Organization', 'Resources', and 'Staff'. The main area has a search bar with 'Search Keyword' and 'Search By Category' dropdowns. Below the search bar are filters for Client, Location, Resource, Status, Created, and Days Open. A 'Search' button and a 'Reset' button are located to the right of the filters. 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	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼



# Thank you

For additional support, please use the Help section in **kynect resources** or email [kynectresources@ky.gov](mailto:kynectresources@ky.gov)