How to Use Referrals in e2Fulton

This document is intended to be a high-level overview on how to enter referrals, complete referrals, and run reports on referrals in e2Fulton.

It includes sections on:

- Entering Referrals
- Processing Referrals (three options)
  - Option 1: All Referrals Module
  - Option 2: Client Record
  - Option 3: Referrals Report
**Entering Referrals**

**Step 1: Client Search → Navigate to Client Record → Open a Client Record → Referrals → New Entry**

The Referred By field will automatically list your agency.

**Step 2: Select appropriate Referred To provider**

**Step 3: Specify the Prover Location for the referral**

*Please Note:* Different Provider Locations may offer different services.
Step 4: Enter the Referral Date

This is the date the client requested the service not the date the referral is being entered.

Step 5: Select the appropriate Service Category from the drop-down menu.

If the service category you are seeking is not listed, that means the service is not provided at the provider location selected or not provided by that provider at all.

Step 6: Select the appropriate Subservice from the drop-down menu.

Step 7: Add any necessary notes the provider may need to execute the requested service.
Step 8: Save the Referral

After saving, the referral will be listed at the top of the Outgoing Referrals list. You can return to the client record → Referrals tab and cancel if necessary.

Reminder: The client must have a global consent form uploaded in e2Fulton or provided consent to the Referred To provider so that staff have access to the client record and referral. If the consent form is not uploaded, the Referred To agency will not receive the referral. The consent form must be uploaded before a referral can be made.
Processing Referrals
Depending on e2Fulton access, there are different ways to review incoming referrals.

Option 1: All Referrals Module

Step 1: All Referrals

Step 2: If all necessary information to complete the referral is present, please select Accept. If your agency is not able to complete the referral or the client is not eligible for the specific subservice requested, please select Reject.

Step 3: If you select to Accept or Reject the referral, a pop-up will open requesting confirmation of your choice. Select Yes. Per PPPN-076: Referral Timelines, referrals must be Accepted or Rejected within 2 business days of receipt.

Step 4: After accepting the Referral, you can select Deliver a Service, Lost to Follow Up, or Cancel. If the client is lost to follow up, you can make that selection. If the service is delivered to the client, select Deliver a Service. Per PPPN-076: Referral Timelines, a selection must be made within 2 weeks of referral acceptance.
**Step 5:** After the *Deliver a Service* selection, the client record will open to the Services tab where you can complete the service entry for the completed service.

![Image of service entry](image)

**Step 6:** Select the appropriate Contract, enter Number of Units provided, and Unit Cost.

**Step 7:** Add Service

**Step 8:** Add Service Notes in pop-up box

![Image of service notes](image)

**Step 9:** Add Service
Option 2: Client Record
If you are aware of a referral, you can navigate directly to the client record.

Step 1: Client Search → Navigate to a client record → Referrals tab → Incoming Referrals

From this point, Steps 2-9 repeat as shown in pages 5-6.

Option 3: Referrals Report

Step 1: Reports → Referrals Report

Step 2: Select Date Range
**Step 3:** Specify Service Category(s) → Run Report

The Referrals Report can be exported to both a PDF and Excel CSV file. The report can be used to track the progress of both Incoming and Outgoing referrals.

**Step 4:** Select the hyperlink under # Incoming

**Step 5:** Review the clients and proceed to select View for the desired client record

From this point, Steps 2-9 repeat as shown in pages 5-6.