How to Use Referrals in e2Fulton

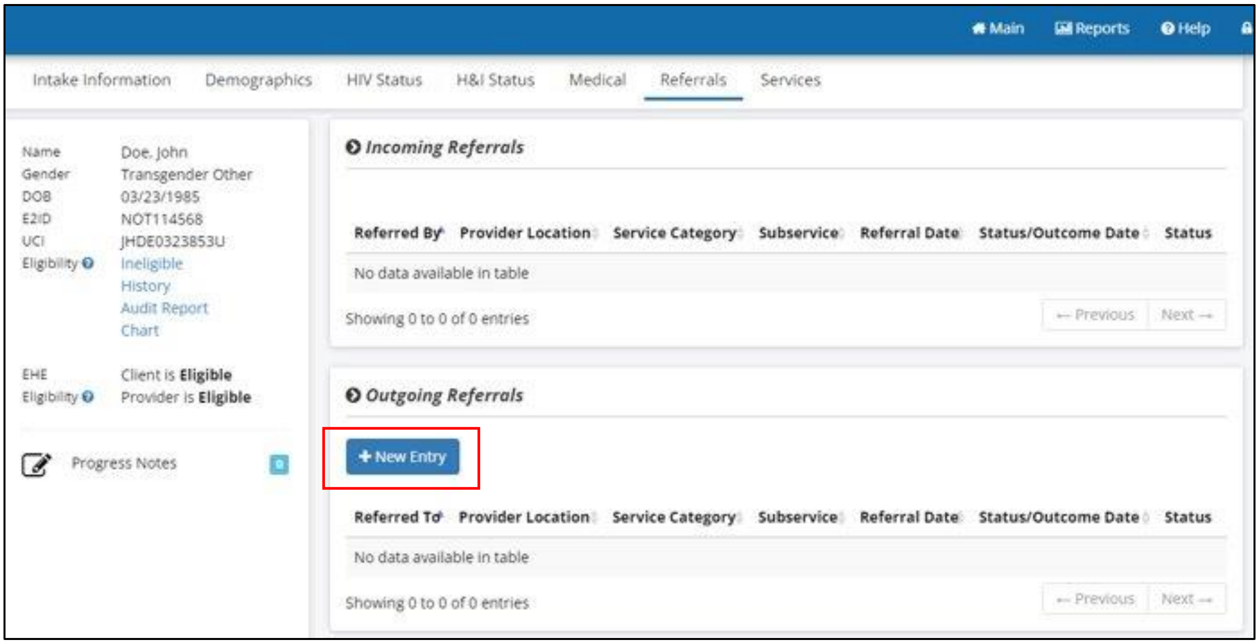
This document is intended to be a high-level overview on how to enter referrals, complete referrals, and run reports on referrals in e2Fulton.

It includes sections on:

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

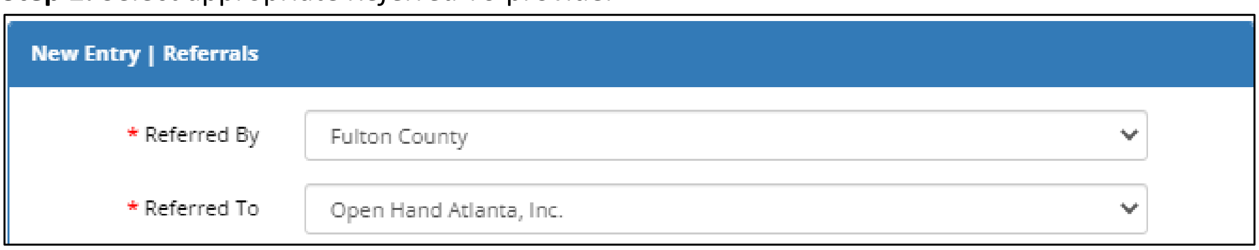
Entering Referrals

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

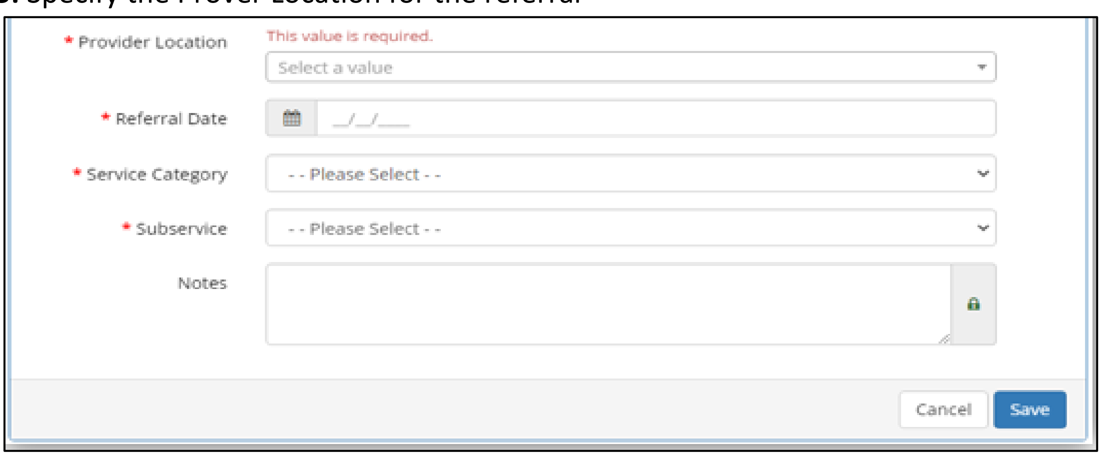


The Referred By field will automatically list your agency.

Step 2: Select appropriate *Referred To* provider



Step 3: Specify the Prover Location for the referral

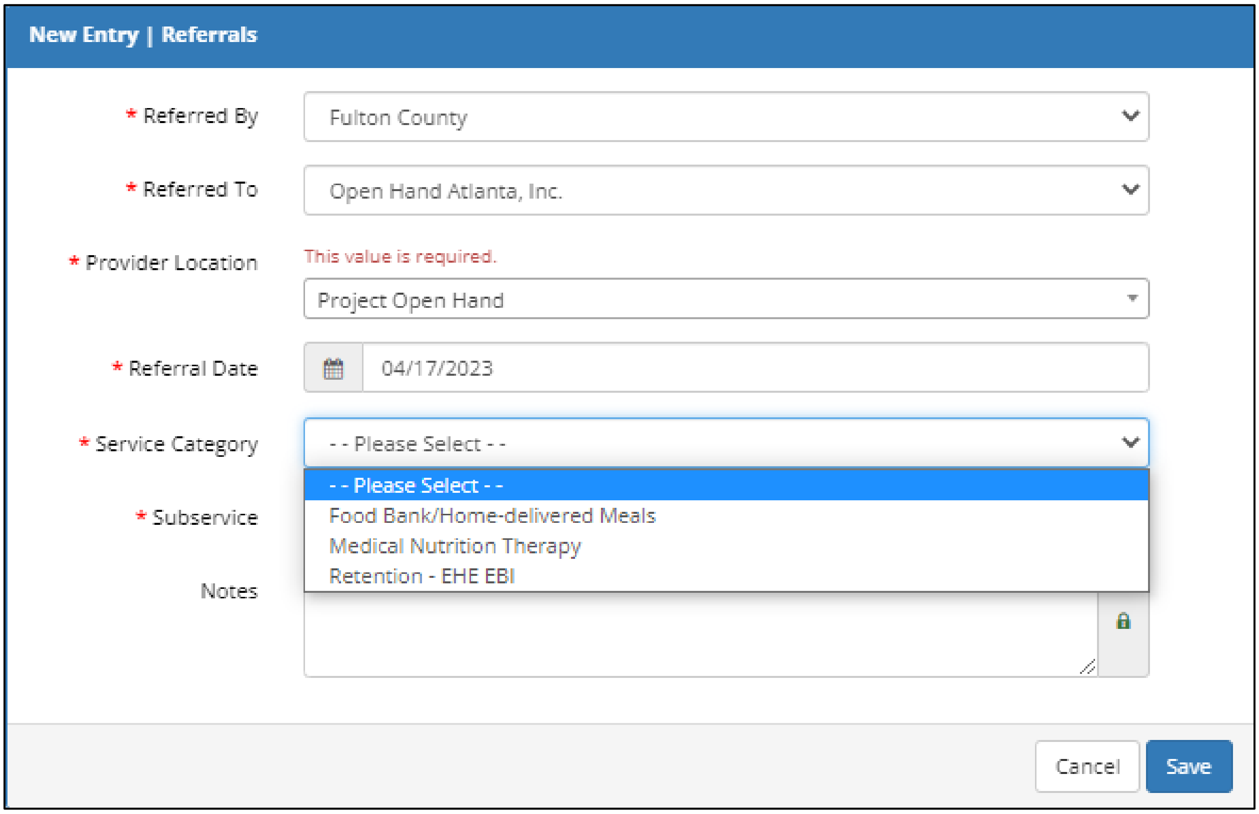


Please Note: Different Provider Locations may offer different services.

Step 4: Enter the Referral Date

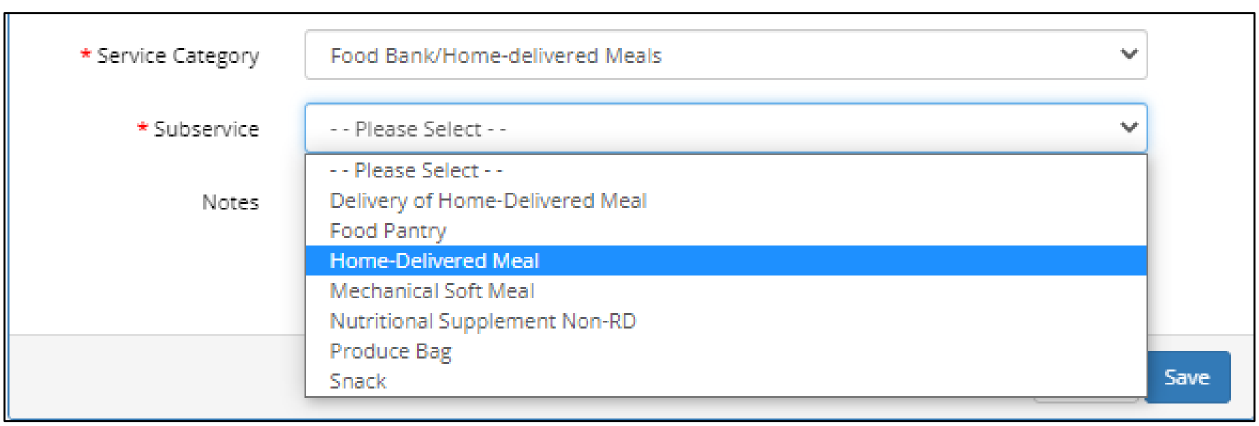
This is the date the client requested the service not the date the referral is being entered.

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.

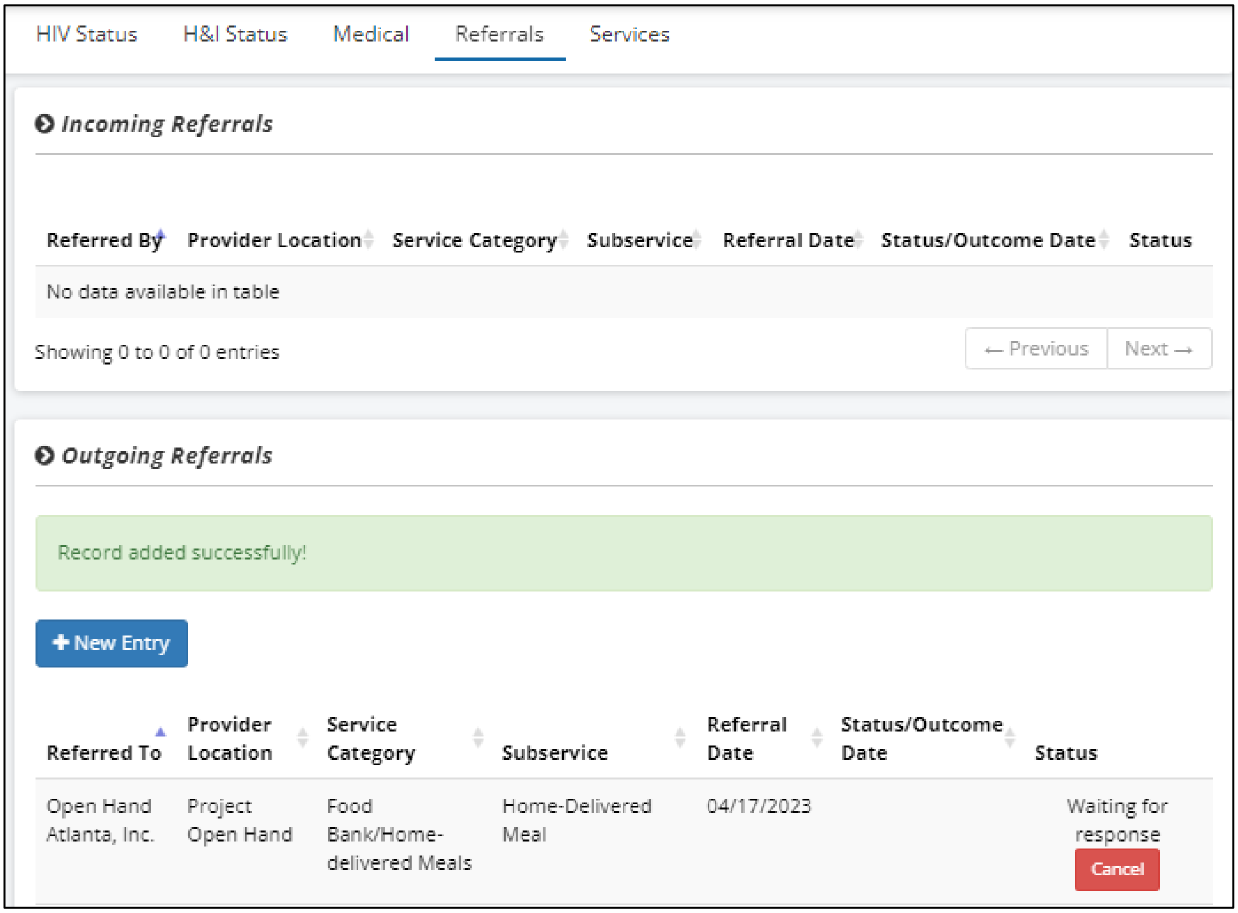
Step 6: Select the appropriate Subservice from the drop-down menu.



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

Users | Client Search | Add Client | All Referrals | Data Migration | Service Contracts | Procurement | Fiscal

Referral Filters

Incoming Referrals

Client	Referred By	Referred To	Provider Location	Service Category	Subservice	Referral Date	Status/Outcome Date	Status
John Doe NOT114568	Fulton County	Open Hand Atlanta, Inc.	Project Open Hand	Food Bank/Home-delivered Meals	Home-Delivered Meal	04/17/2023	04/17/23	Rejected
John Doe NOT114568	Fulton County	Open Hand Atlanta, Inc.	Project Open Hand	Food Bank/Home-delivered Meals	Home-Delivered Meal	04/17/2023		Accept Reject

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.

Accept Referral? | Referrals

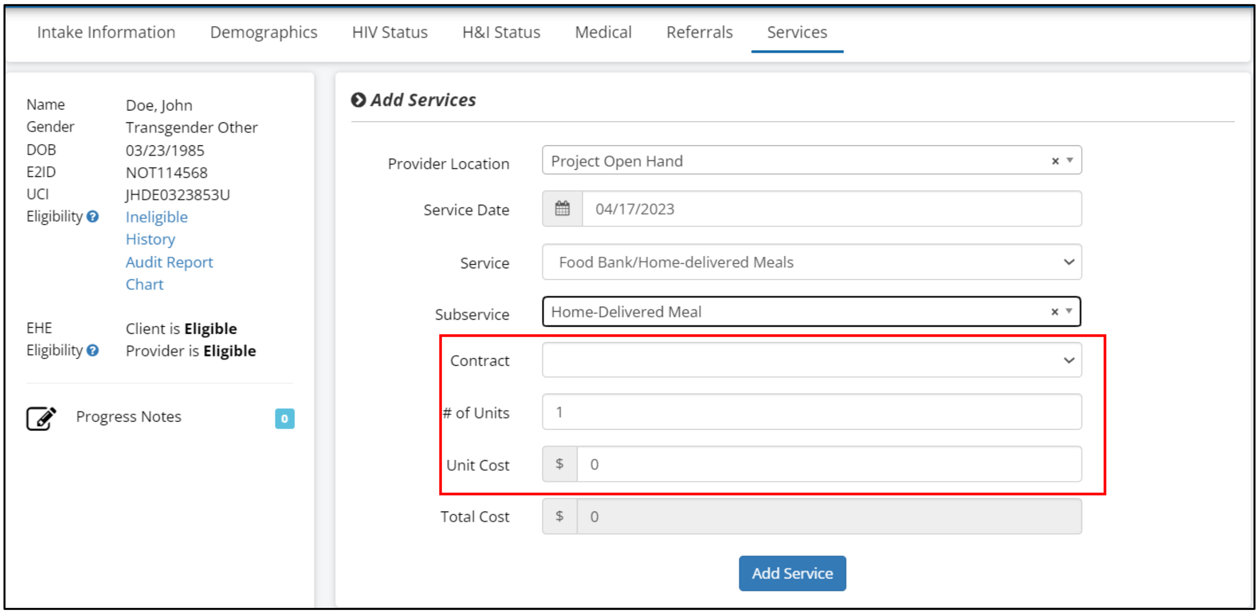
Are you sure you want to accept this referral?

Yes | No

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.

John Doe NOT114568	Fulton County	Open Hand Atlanta, Inc.	Project Open Hand	Food Bank/Home-delivered Meals	Home-Delivered Meal	04/17/2023	Deliver a Service Lost to Follow up Cancel

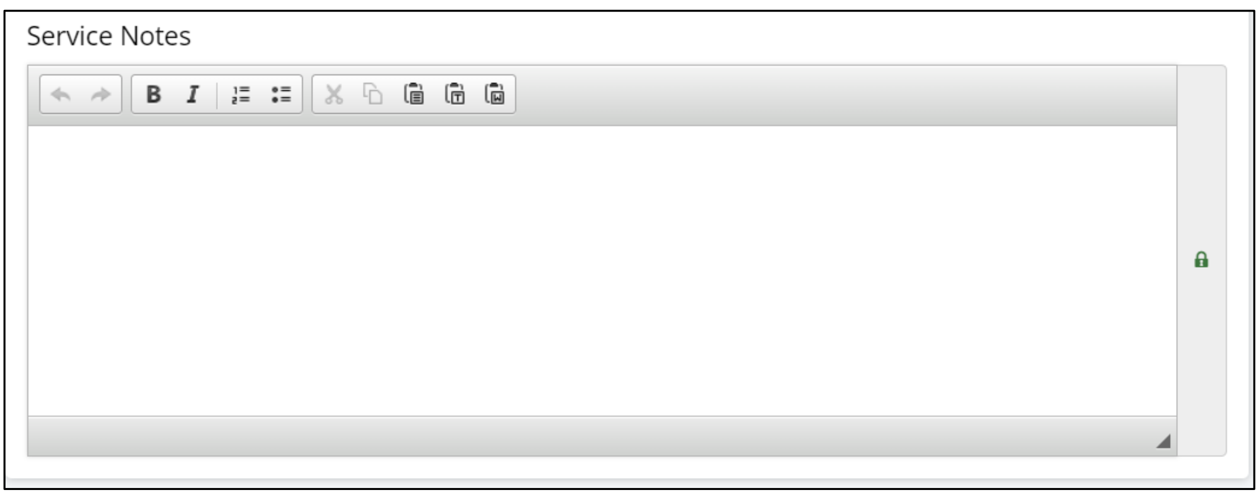
Step 5: After the *Deliver a Service* selection, the client record will open to the Services tab where you can complete the service entry for the completed service.



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

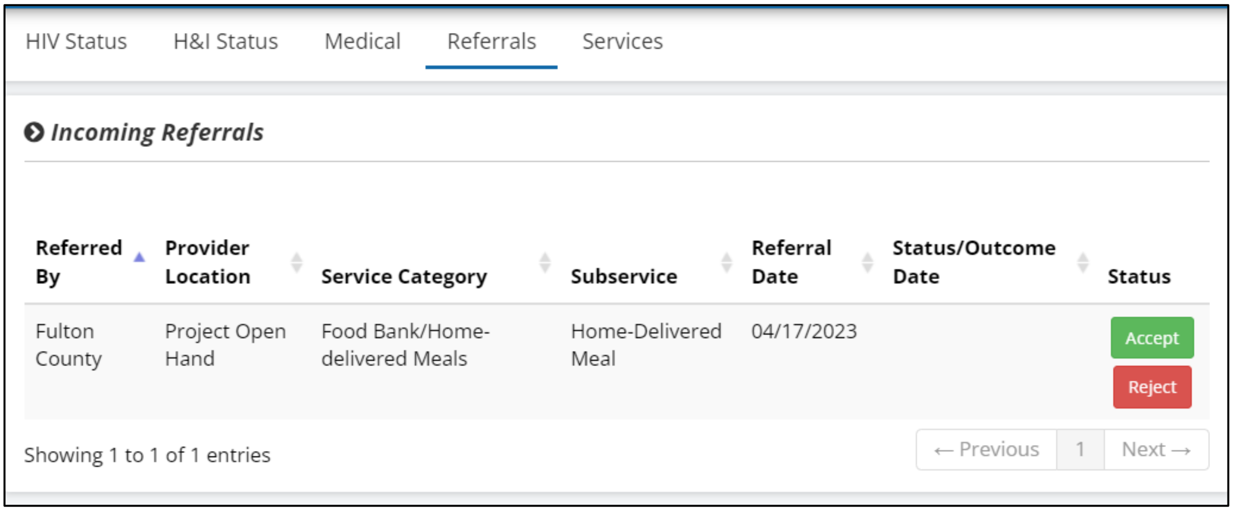


Step 9: Add Service

Option 2: Client Record

If you are aware of a referral, you can navigate directly to the client record

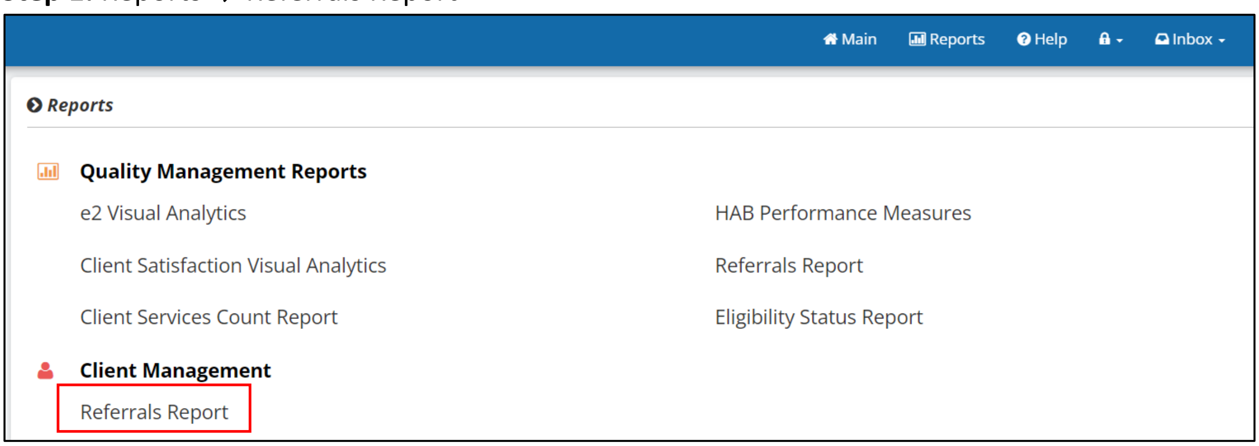
Step 1: Client Search → Navigate to a client record → Referrals tab → Incoming Referrals



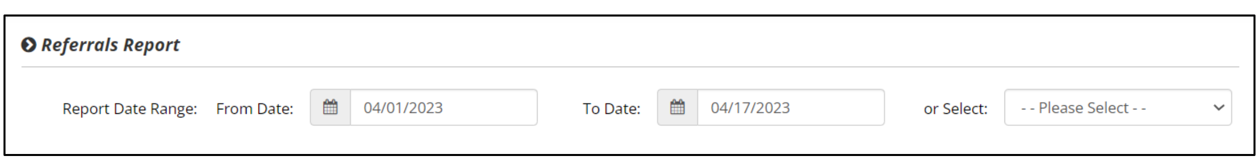
From this point, Steps 2-9 repeat as shown in pages 5-6.

Option 3: Referrals Report

Step 1: Reports → Referrals Report



Step 2: Select Date Range



Step 3: Specify Service Category(s) → Run Report

* Specify Service Category(s): 47 selected ▾

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*

Referrals Report

Incoming

Export to PDF | Export to CSV

AGENCY NAME	# INCOMING	NO RESPONSE	REJECTED	ACCEPTED	COMPLETED	ACCEPTED AND WAITING	ACCEPTED WAITING MORE THAN 2 WEEKS	CANCELED	LOST TO FOLLOWUP
Open Hand Atlanta, Inc.	6	2	1	3	1	1	0	1	0

Outgoing

Export to PDF | Export to CSV

AGENCY NAME	# OUTGOING	NO RESPONSE	REJECTED	ACCEPTED	COMPLETED	ACCEPTED AND WAITING	ACCEPTED WAITING MORE THAN 2 WEEKS	CANCELED	LOST TO FOLLOWUP
Open Hand Atlanta, Inc.	0	0	0	0	0	0	0	0	0

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

Clients Drilldown - Open Hand Atlanta, Inc. - Incoming Referrals - Total

Export to PDF | Export to CSV

E2ID	First Name	Last Name	Num. Referrals	
NOT114568	John	Doe	3	View

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