

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 screenshot shows a web application interface for entering referrals. On the left, there is a sidebar with client information: Name (Doe, John), Gender (Transgender Other), DOB (03/23/1985), E2ID (NOT114568), UCI (JHDE0323853U), and Eligibility (Ineligible). Below this, it states 'Client is Eligible' and 'Provider is Eligible'. There is also a 'Progress Notes' section. The main area is titled 'Referrals' and contains two sections: 'Incoming Referrals' and 'Outgoing Referrals'. Both sections have a table with columns: Referred By, Provider Location, Service Category, Subservice, Referral Date, Status/Outcome Date, and Status. Both tables currently show 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A red box highlights a '+ New Entry' button in the Outgoing Referrals section.

The Referred By field will automatically list your agency.

Step 2: Select appropriate *Referred To* provider

The screenshot shows the 'New Entry | Referrals' form. It has two dropdown menus: 'Referred By' with the value 'Fulton County' and 'Referred To' with the value 'Open Hand Atlanta, Inc.'.

Step 3: Specify the Prover Location for the referral

The screenshot shows the referral entry form with the following fields: 'Provider Location' (required, red asterisk, dropdown menu showing 'Select a value'), 'Referral Date' (required, red asterisk, date picker), 'Service Category' (required, red asterisk, dropdown menu showing '-- Please Select --'), and 'Subservice' (required, red asterisk, dropdown menu showing '-- Please Select --'). There is also a 'Notes' field with a lock icon. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

New Entry | Referrals

* Referred By: Fulton County

* Referred To: Open Hand Atlanta, Inc.

* Provider Location: This value is required. Project Open Hand

* Referral Date: 04/17/2023

* Service Category: -- Please Select --

* Subservice: Food Bank/Home-delivered Meals, Medical Nutrition Therapy, Retention - EHE EBI

Notes

Cancel Save

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.

* Service Category: Food Bank/Home-delivered Meals

* Subservice: -- Please Select --

Notes: Delivery of Home-Delivered Meal, Food Pantry, Home-Delivered Meal, Mechanical Soft Meal, Nutritional Supplement Non-RD, Produce Bag, Snack

Save

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.

HIV Status H&I Status Medical Referrals Services

➤ Incoming Referrals

Referred By Provider Location Service Category Subservice Referral Date Status/Outcome Date Status

No data available in table

Showing 0 to 0 of 0 entries ← Previous Next →

➤ Outgoing Referrals

Record added successfully!

+ New Entry

Referred To	Provider Location	Service Category	Subservice	Referral Date	Status/Outcome Date	Status
Open Hand Atlanta, Inc.	Project Open Hand	Food Bank/Home-delivered Meals	Home-Delivered Meal	04/17/2023		Waiting for response Cancel

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

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		<input type="button" value="Accept"/> <input type="button" value="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?

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	<input type="button" value="Deliver a Service"/> <input type="button" value="Lost to Follow up"/> <input type="button" value="Cancel"/>
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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.

The screenshot shows the 'Add Services' form in a client record. The form is titled 'Add Services' and is located under the 'Services' tab. The form includes the following fields:

- Provider Location: Project Open Hand
- Service Date: 04/17/2023
- Service: Food Bank/Home-delivered Meals
- Subservice: Home-Delivered Meal
- Contract: (Dropdown menu)
- # of Units: 1
- Unit Cost: \$ 0
- Total Cost: \$ 0

A red box highlights the Contract, # of Units, and Unit Cost fields. The 'Add Service' button is located at the bottom right of the form.

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

The screenshot shows the 'Service Notes' pop-up box. The box has a title bar 'Service Notes' and a toolbar with the following icons: undo, redo, bold, italic, bulleted list, numbered list, link, unlink, and insert link. The text area is empty. A lock icon is visible in the bottom right corner of the text area.

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

Referred By	Provider Location	Service Category	Subservice	Referral Date	Status/Outcome Date	Status
Fulton County	Project Open Hand	Food Bank/Home-delivered Meals	Home-Delivered Meal	04/17/2023		<button>Accept</button> <button>Reject</button>

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

Option 3: Referrals Report

Step 1: Reports → Referrals Report

- Quality Management Reports**
 - e2 Visual Analytics
 - Client Satisfaction Visual Analytics
 - Client Services Count Report
- Client Management**
 - Referrals Report**

Step 2: Select Date Range

Report Date Range: From Date: To Date: or Select:

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

* 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

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.