How To Send A Referral In CONNECT

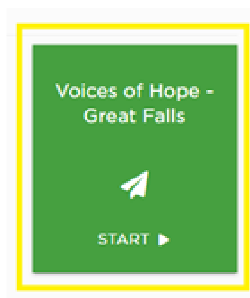
1. Search for the client in the system. If client is not already in the CONNECT system, create and save new client profile.

2. Search and select the service(s) you would like to refer client to. Have the client review the ROI and information authorized in the release. Upon consenting, have the client sign the ROI.

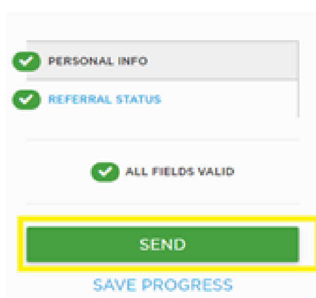
    I. Client signatures may be obtained via PDF upload of a physically signed ROI, client self-typing their name in the CONNECT system, or via text-code signature.

3. After the ROI has been signed, the CONNECT system will display each of the agencies you selected and have a signed ROI form within green boxes.

4. Click the green box to begin sending the referral to that agency. It will look like the image below and have "Start" listed in the green box for all unsent referral.



5. Complete all relevant tabs in the referral form. When all required sections of the referral are finished, you may then click the green SEND icon to send the referral in the CONNECT system



6. A properly sent referral will appear greyed out and display as "Active" in that client's profile.