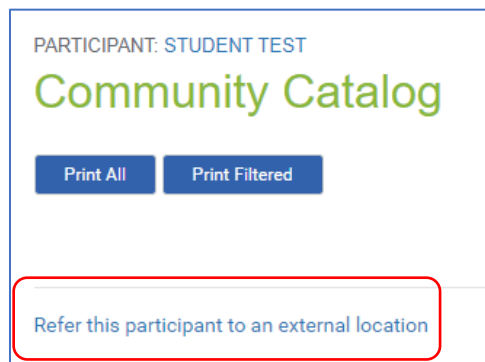


External Referrals:

An external referral is to a location that is not part of the CommunityPro Suite network within the consortium. The referral is more like an email that is tracked in the CPS system. Because only first name, last name, and phone and/or email are shared, an agreement is not required.

1. When you are in a **participant's record**, click the **Community Catalog**.
2. On the left side, click on the **Refer this client to an external location** link.



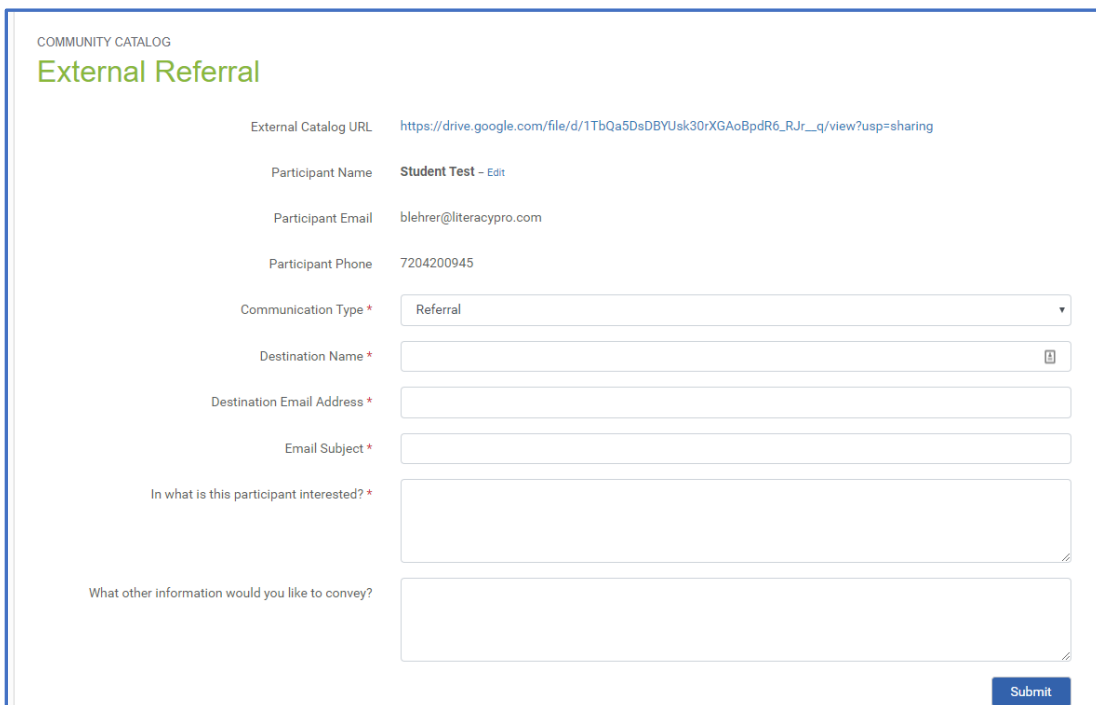
PARTICIPANT: STUDENT TEST

Community Catalog

Print All Print Filtered

Refer this participant to an external location

3. Use the **External Catalog URL** (optional) to access community agency listing by category and region with contact information.
4. **Complete** out the form.
5. Click on **Submit**.
6. Check the **Referrals** workflow step to view the external referrals made for the individual.



COMMUNITY CATALOG

External Referral

External Catalog URL https://drive.google.com/file/d/1TbQa5DsDBYUsk30rXGAoBpdR6_RJr_q/view?usp=sharing

Participant Name **Student Test - Edit**

Participant Email blehrer@literacypro.com

Participant Phone 7204200945

Communication Type * Referral

Destination Name *

Destination Email Address *

Email Subject *

In what is this participant interested? *

What other information would you like to convey?

Submit

Notes and Tips:

- 1) You can see all referrals made for this participant from the “Referrals” workflow step.
- 2) You can see all the referrals you have made on your “External Referrals” widget on the “My Workspace.”
- 3) To note the follow-up or contact, you can use the Transition Planner

Workflow

Review Quick Intake

✓ Agreements

Assessments

General Intake

Documents

1 Referrals

Announcements

WELCOME TO COMMUNITYPRO!

We are pleased to bring you CommunityPro! This system is designed to keep multiple agencies aware of participant progress like never before.

DOCUMENTS & RESOURCES

- FAQs
- Quick Start Guide
- Quick Reference Guides
- User Manual
- Release Updates

TIP OF THE MONTH

Set up Alert notifications and types through your User Profile to receive meaningful messages.

Go to your User Profile by clicking on your name in the upper right portion of your screen.

Choose the alert method(s) and type(s) you would like to be notified of and start receiving meaningful messages alerting you to items you deem important and relevant in your position.

For more information about setting up Alert Notifications and Types, please go to the FAQ link below:

- Set up Alert Notifications and Types

Thanks!
~ LPS Team

CommunityPro Suite New and Refresher User Training

Click here to watch CommunityPro Suite NEW USER training from July 29

Referrals

Incoming Referrals

New Referral	47
Accepted	5
Enrolled	2
Attended	0
Not Accepted	0
On Hold	0
Canceled	2
Rescheduled	0
Withdrew	1
Redirected	0
No Show	0
Completed	6
Unique Participants	54

Outgoing Referrals

New Referral	47
Accepted	5
Enrolled	2
Attended	0
Not Accepted	0
On Hold	0
Canceled	2
Rescheduled	0
Withdrew	1
Redirected	0
No Show	0
Completed	6
Unique Participants	54

2 External Referrals

Referral	4
Inquiry	0
Unique Participants	4

3 Transition Planner

PARTICIPANT: DYLAN ROSS

Current Education | College Plans | Education Services Needed | Employment Services Needed | Supportive Services - Needed | Training Services - Receiving / Received | Transition Services - Receiving / Received

Supportive Services - Receiving / Received

What program are you currently enrolled in?
(Check all that apply)

- English as a Second Language
- High School
- Career Tech
- Adult Education
- Citizenship
- High School
- Attending A
- School name
- Attending C
- College name

Needs Inventory

LOCATION	ACTIONS
No inventory found	

Referrals - History and Status

No referrals found

External Referrals - History and Status

DESTINATION	TYPE	EMAIL SUBJECT	PARTICIPANT INTEREST	NOTES	REFERRED ON	ACTIONS
NWCCD bcharles@shenidan.edu	Referral	SCOPE Referral	SCOPE Referral for Adult Education	Christina Eaton is his Case Manager for WIOA	09/16/2019 4:39 pm	+

Add Referral Followup

Followup Date:

Follow-up Activity Type:

Contact Made? Yes No

Contact Date:

Receiving Services? Yes No

Receiving Services Date:

Is the participant receiving services for which they were referred?

Note: