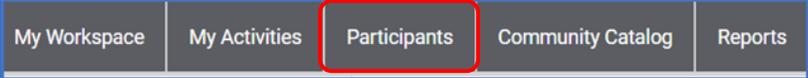
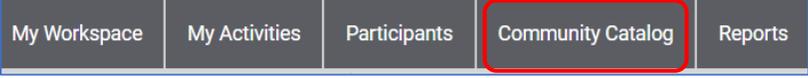
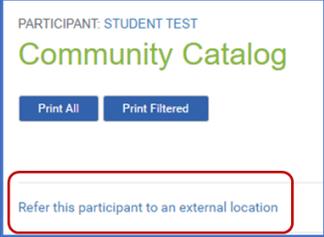
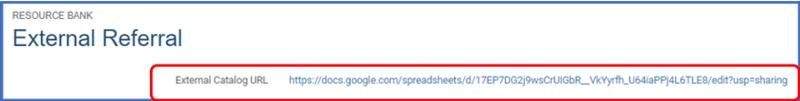
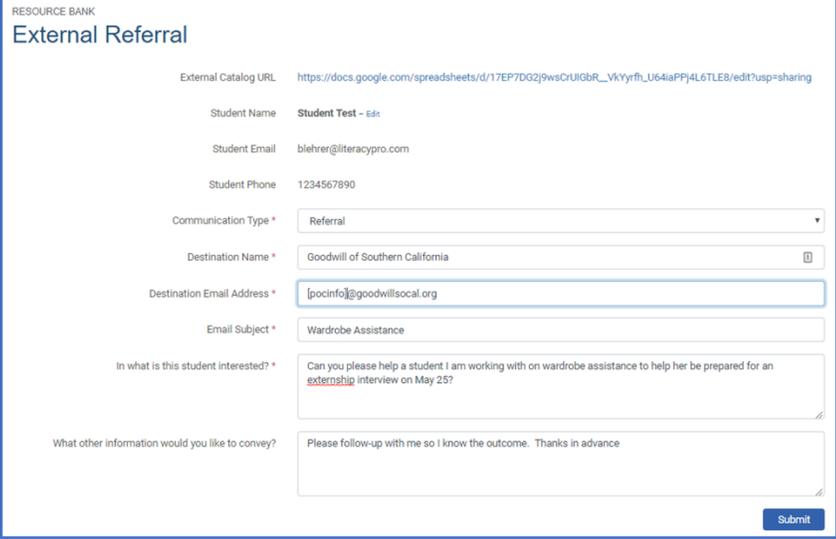


# How to Send an External Referral

Examples of when to use this feature:

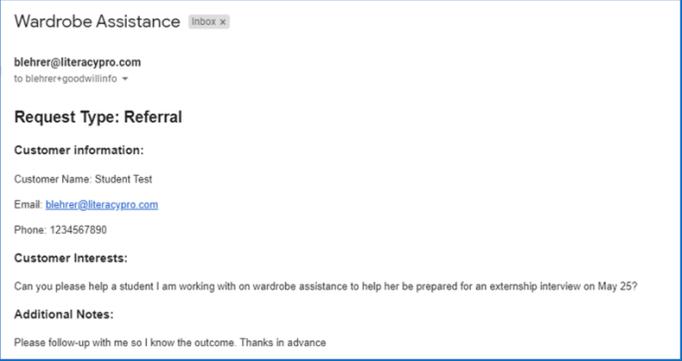
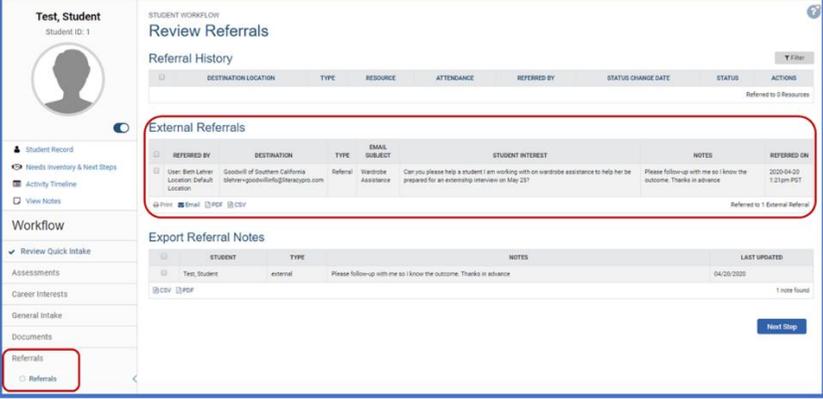
This is helpful for a referral, inquiry, or share contact to an agency outside your network

	Action	Visual
1	Locate a student's record you want to refer.	
2	Go to the Community Catalog from the student's record.	
3	On the left side, click "Refer this client to an external location link"	
4	At the top of the form, use the External Referral URL (optional) to access community partners your consortium may have identified - location and POC contact information. The URL will open in a separate window. However, the form can be filled out for other community-based organizations, not just what is listed.	
5	<p>Fill out the form:</p> <p>The recipient will receive the <b>student's name, email and phone</b> if it is listed at the top. (click edit if you need to change any of these three fields).</p> <p><b>Communication:</b> Referral (warm handoff sent to the destination), Inquiry (inquiry sent to destination), or Contact Shared (info shared with the participant, but no email is sent to the destination)</p> <p><b>Destination Name:</b> To where?</p> <p><b>Destination Email:</b> To whom?</p> <p><b>Email Subject:</b> In regards to?</p>	

# How to Send an External Referral

Examples of when to use this feature:

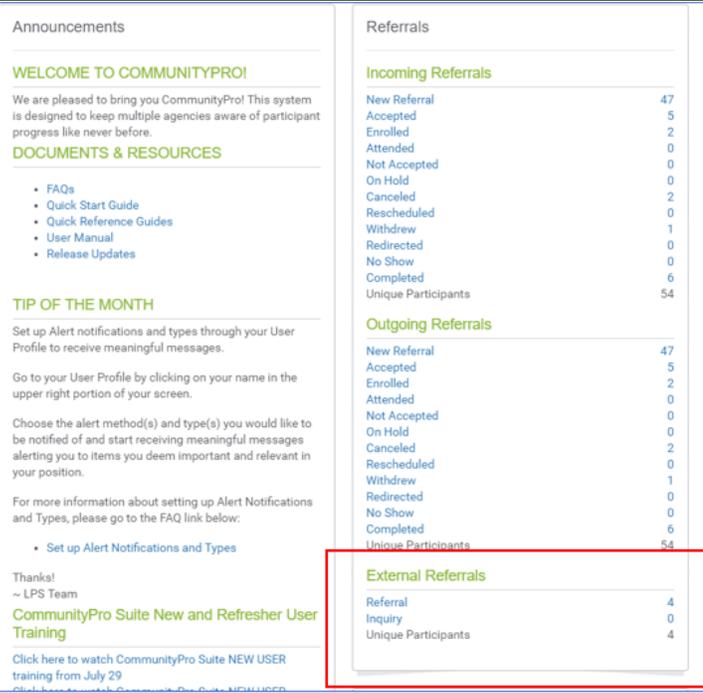
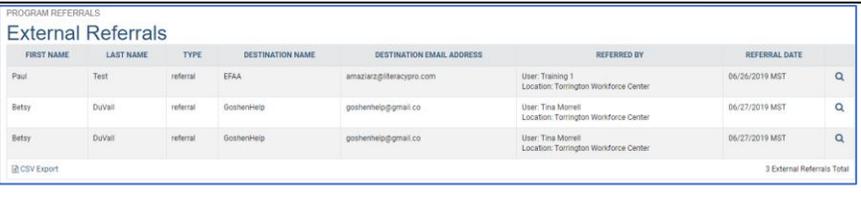
This is helpful for a referral, inquiry, or share contact to an agency outside your network

	<p><b>In what is the student interested?</b> Fill out information that the recipient needs to know. Why are you reaching out?</p> <hr/> <p><b>Other information to convey?</b> Suggest requesting the recipient follows up with you</p> <hr/> <p><b>Click Submit</b></p>																																							
!	<p>Note: External Referrals look like they come from the user's email account. The email mirrors the form above exactly. If the recipient replies, the user will receive an email to his/her inbox. The communication will take place *outside* of CommunityPro. The image to the right to the right is an example of what the recipient will receive.</p>	 <p>Wardrobe Assistance <span>Inbox x</span></p> <p>blehrer@literacypro.com to blehrer+goodwillinfo</p> <p><b>Request Type: Referral</b></p> <p><b>Customer information:</b> Customer Name: Student Test Email: <a href="mailto:blehrer@literacypro.com">blehrer@literacypro.com</a> Phone: 1234567890</p> <p><b>Customer Interests:</b> Can you please help a student I am working with on wardrobe assistance to help her be prepared for an externship interview on May 25?</p> <p><b>Additional Notes:</b> Please follow-up with me so I know the outcome. Thanks in advance</p>																																						
6	<p>External Referrals are tracked on the student Referrals Workflow Step.</p>	 <p>Test, Student Student ID: 1</p> <p>STUDENT WORKFLOW <b>Review Referrals</b></p> <p>Referral History</p> <table border="1"> <thead> <tr> <th>DESTINATION/LOCATION</th> <th>TYPE</th> <th>RESOURCE</th> <th>ATTENDANCE</th> <th>REFERRED BY</th> <th>STATUS CHANGE DATE</th> <th>STATUS</th> <th>ACTIONS</th> </tr> </thead> <tbody> <tr> <td colspan="8">Referred to 0 Resources</td> </tr> </tbody> </table> <p>External Referrals</p> <table border="1"> <thead> <tr> <th>REFERRED BY</th> <th>DESTINATION</th> <th>TYPE</th> <th>EMAIL SUBJECT</th> <th>STUDENT INTEREST</th> <th>NOTES</th> <th>REFERRED ON</th> </tr> </thead> <tbody> <tr> <td>User: Beth Leher Location: Default Location</td> <td>Goodwill of Southern California <a href="mailto:bethleher@goodwillinfo@literacypro.com">bethleher@goodwillinfo@literacypro.com</a></td> <td>Referral</td> <td>Wardrobe Assistance</td> <td>Can you please help a student I am working with on wardrobe assistance to help her be prepared for an externship interview on May 25?</td> <td>Please follow-up with me so I know the outcome. Thanks in advance</td> <td>2020-04-20 1:23pm PST</td> </tr> </tbody> </table> <p>Export Referral Notes</p> <table border="1"> <thead> <tr> <th>STUDENT</th> <th>TYPE</th> <th>NOTES</th> <th>LAST UPDATED</th> </tr> </thead> <tbody> <tr> <td>Test, Student</td> <td>external</td> <td>Please follow-up with me so I know the outcome. Thanks in advance</td> <td>04/20/2020</td> </tr> </tbody> </table> <p>1 note found</p> <p>Next Step</p>	DESTINATION/LOCATION	TYPE	RESOURCE	ATTENDANCE	REFERRED BY	STATUS CHANGE DATE	STATUS	ACTIONS	Referred to 0 Resources								REFERRED BY	DESTINATION	TYPE	EMAIL SUBJECT	STUDENT INTEREST	NOTES	REFERRED ON	User: Beth Leher Location: Default Location	Goodwill of Southern California <a href="mailto:bethleher@goodwillinfo@literacypro.com">bethleher@goodwillinfo@literacypro.com</a>	Referral	Wardrobe Assistance	Can you please help a student I am working with on wardrobe assistance to help her be prepared for an externship interview on May 25?	Please follow-up with me so I know the outcome. Thanks in advance	2020-04-20 1:23pm PST	STUDENT	TYPE	NOTES	LAST UPDATED	Test, Student	external	Please follow-up with me so I know the outcome. Thanks in advance	04/20/2020
DESTINATION/LOCATION	TYPE	RESOURCE	ATTENDANCE	REFERRED BY	STATUS CHANGE DATE	STATUS	ACTIONS																																	
Referred to 0 Resources																																								
REFERRED BY	DESTINATION	TYPE	EMAIL SUBJECT	STUDENT INTEREST	NOTES	REFERRED ON																																		
User: Beth Leher Location: Default Location	Goodwill of Southern California <a href="mailto:bethleher@goodwillinfo@literacypro.com">bethleher@goodwillinfo@literacypro.com</a>	Referral	Wardrobe Assistance	Can you please help a student I am working with on wardrobe assistance to help her be prepared for an externship interview on May 25?	Please follow-up with me so I know the outcome. Thanks in advance	2020-04-20 1:23pm PST																																		
STUDENT	TYPE	NOTES	LAST UPDATED																																					
Test, Student	external	Please follow-up with me so I know the outcome. Thanks in advance	04/20/2020																																					

# How to Send an External Referral

Examples of when to use this feature:

This is helpful for a referral, inquiry, or share contact to an agency outside your network

<p>7 External Referrals are tracked in total and as a drilldown from the My Workspace at the bottom of the Referrals widget</p>	
<p>The Referrals Widget can open as a grid with details, columns can be sorted, and the grid can be exported as a csv.</p>	
<p>8 Needs Inventory &amp; Next Steps: <b>This is an optional step.</b> Some clients like to track the follow-ups about the external referrals (and internal referrals). This can be done by going to the Needs Inventory &amp; Next Steps icon under the student image. Scroll down to the Referrals Area. Click the "+" Action button to add a referral follow up. A form will appear to capture date, type of activity, if contact made or not, and if the student is receiving services for which they were received, and notes.</p> <p>NOTE: Any referral follow-up made here will automatically create an event on the Activity Timeline.</p>	