

How to Select a Referral

From within a Contact or Client Form, move to the Resource Search, and enter criteria in one or more fields.

Referrals And Presenting Needs Search Reset Search

Referrals Search Criteria Referrals Results

Service Search

Service Name
Contains

Service Post
Includes any

Service Keyword
Is Like

Geographic Area Served
Serves

Record Owner
Includes any

Site Search

Site Name
Contains

Street/Physical Address Physical
City
Contains

State
Includes any

County
Contains

Zip
Sort by closest

Reset Search

Your search results will appear on the next tab of the module. Locate the resource you wish to select from the list (and save for this client) and check the appropriate box and click on the word “Select” to capture the resource. Click on “Clear Row” to unselect the resource.

Referrals And Presenting Needs Search Reset Search

Referrals Search Criteria Referrals Results

Service Service Name	Service Geographic Area Served	Site Street/Physical Address	Service Phone (Main)	Service Eligibility	Agency Agency Name	Actions
<input checked="" type="checkbox"/> FREEDOM HOUSE	KENT, MI	926 South Washington Avenue Suite 210 Holland MI, 49423	(616) 281-0061	Adult women age 17 or older	Pine Rest Christian Mental Health Services	<input checked="" type="checkbox"/> Select Clear Row
<input type="checkbox"/> FREEDOM HOUSE	KENT, MI	300 68th Street SE Grand Rapids MI, 49548	(616) 281-0061	Adult women age 17 or older	Pine Rest Christian Mental Health Services	<input type="checkbox"/> Select Clear Row
<input type="checkbox"/> FREEDOM HOUSE	KENT, MI	1735 Van Wagner Road Spring Lake	(616)	Adult women age	Pine Rest Christian Mental	<input type="checkbox"/> Select

Your selected referrals will now appear at either the top of the module or the bottom depending on configuration, so that you can see the referrals saved for this client or contact. Once your form is completed, click the “Submit” button to save the record.

Submit