Receive a Social Services Referral

Desktop Procedure

09.22.14 (v3)

OCCRN Program Description

Powered by AXEIUM, the Orange County Community Referral Network is a cloud-based, electronic referral system that is the result of a collaborative program to facilitate referral relationships by and between organizations that serve our safety net population.

It's as easy as 1, 2, 3 … ***Find → Review → Take Ownership!***

Step-by-Step

Login

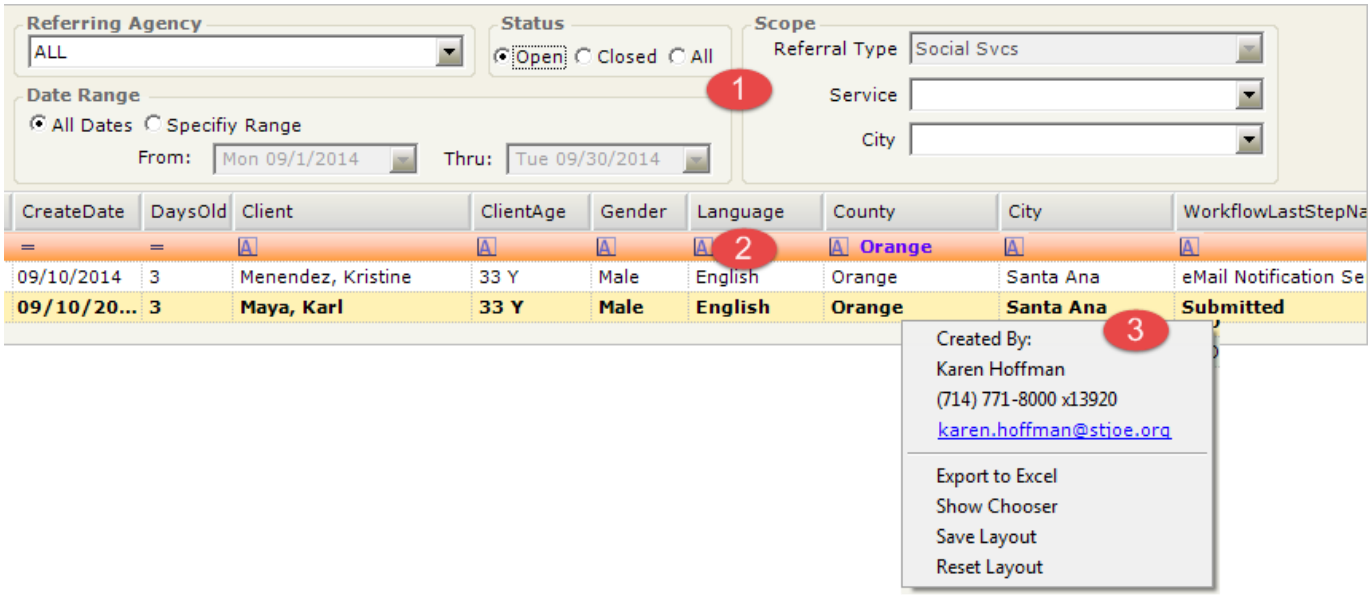
FIND

Quick filters allow you to select from the most common criterion, i.e., who sent it; open/closed status; date ranges; taxonomy; and service area.

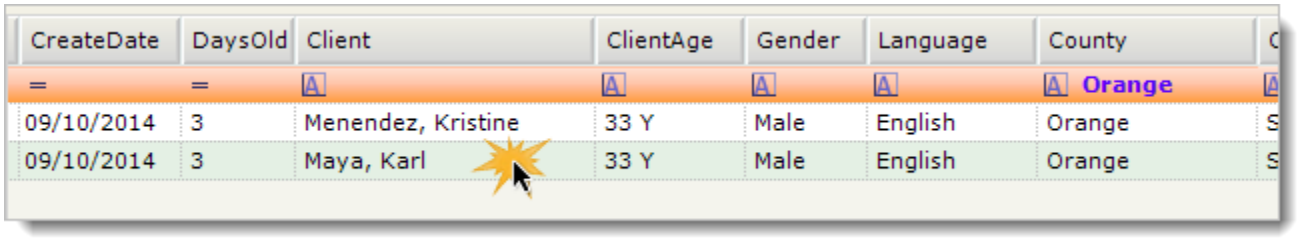
Grid filters allow additional and complex sorting on all available columns,

Right click, to see who sent the referral; export to Excel; change which rows show; and save or reset your layout.

1. Quick Filters
2. Grid Filters
3. Right Click, Context Menu

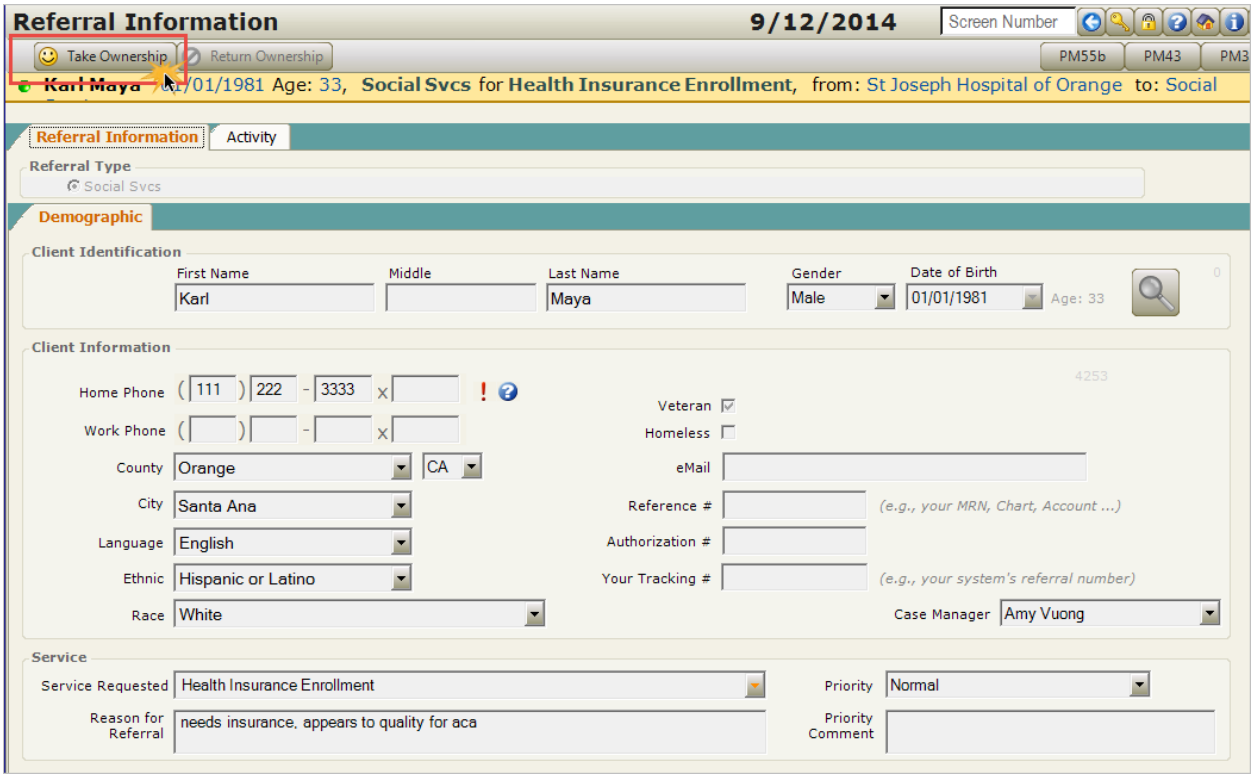


Double click a row to open the details page

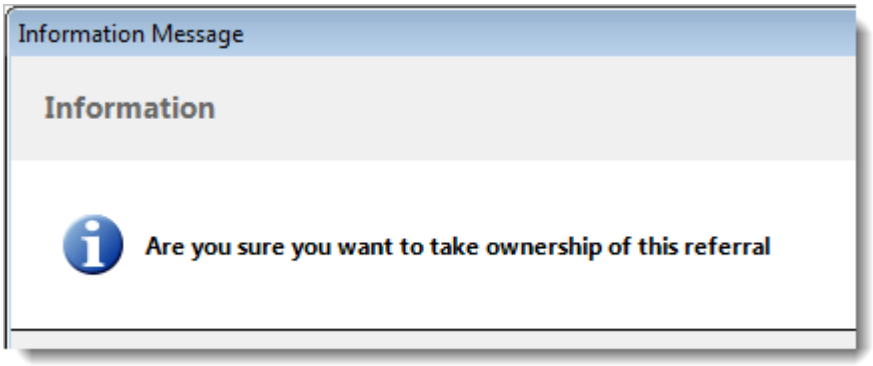


REVIEW & TAKE OWNERSHIP

REVIEW the information, and if candidate appears to be eligible, **TAKE OWNERSHIP**



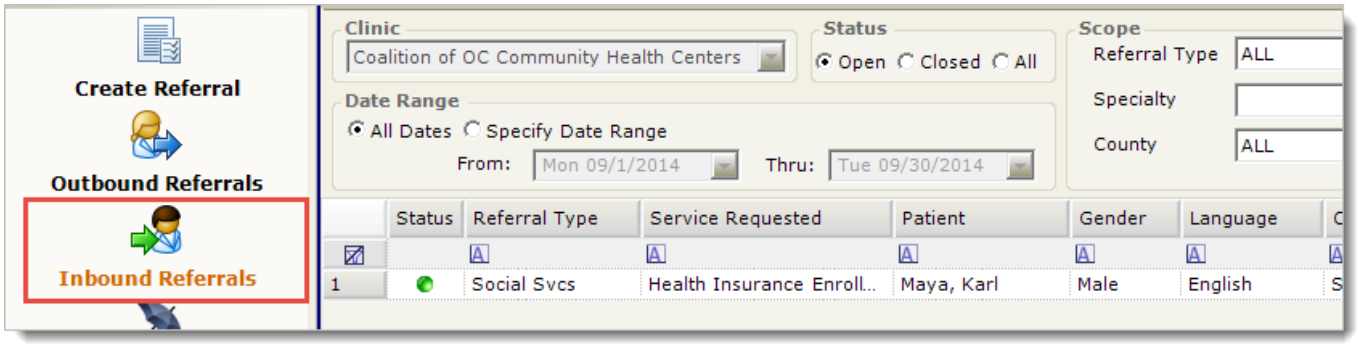
Confirm your intent



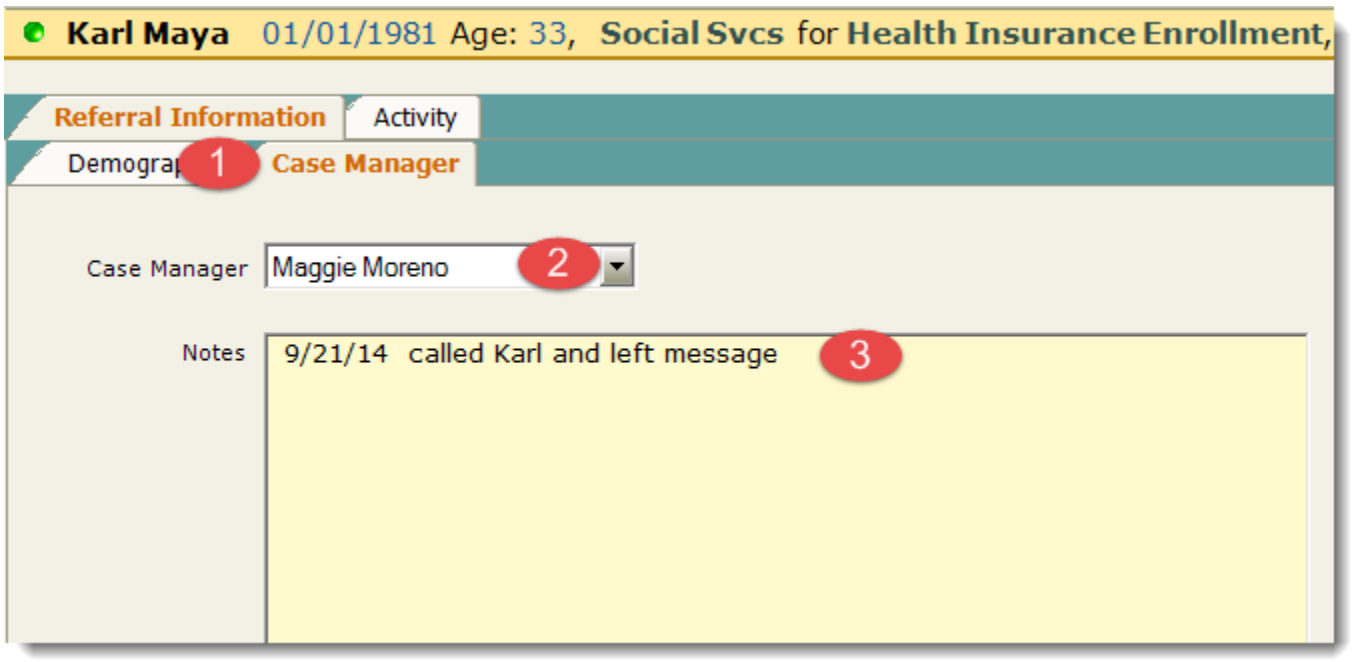
NOTE that your action is recorded in the workflow activity log

CASE MANAGEMENT

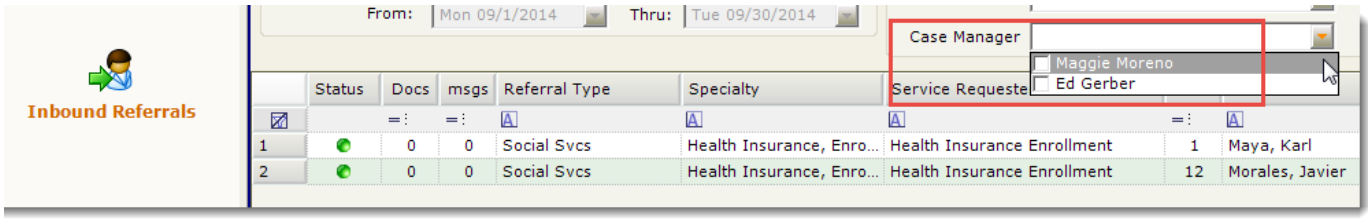
Referrals for which you take ownership, will now appear in your **Inbound Referral** queue.



Open the referral, and navigate to the Case Manager tab, assign a case manager … and perhaps, use the note box to keep track of your progress

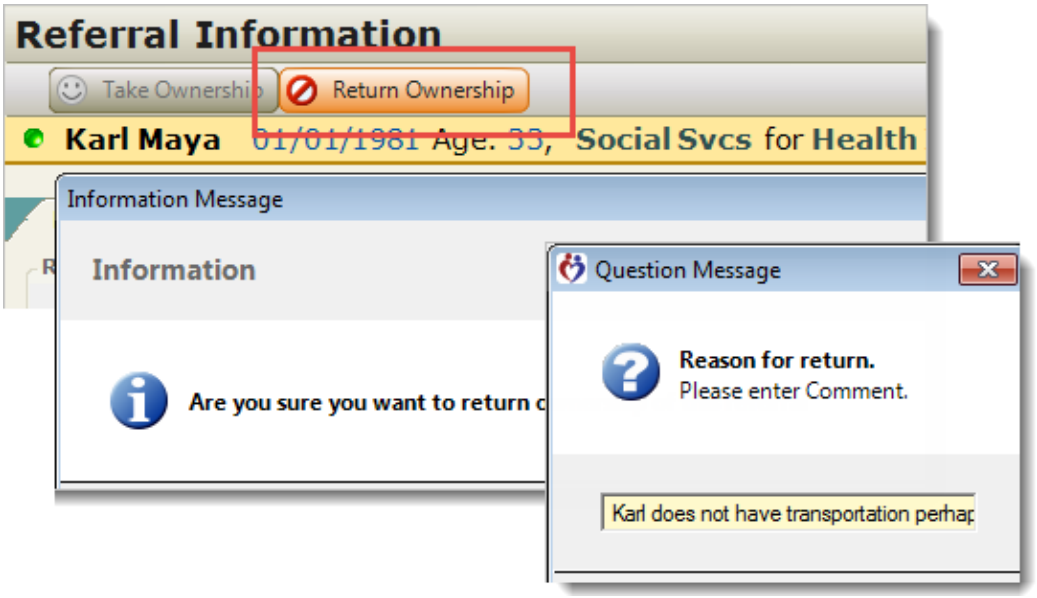


Now that you have assigned a case manager, when you open your Inbound Referrals, you have the option to filter the list.

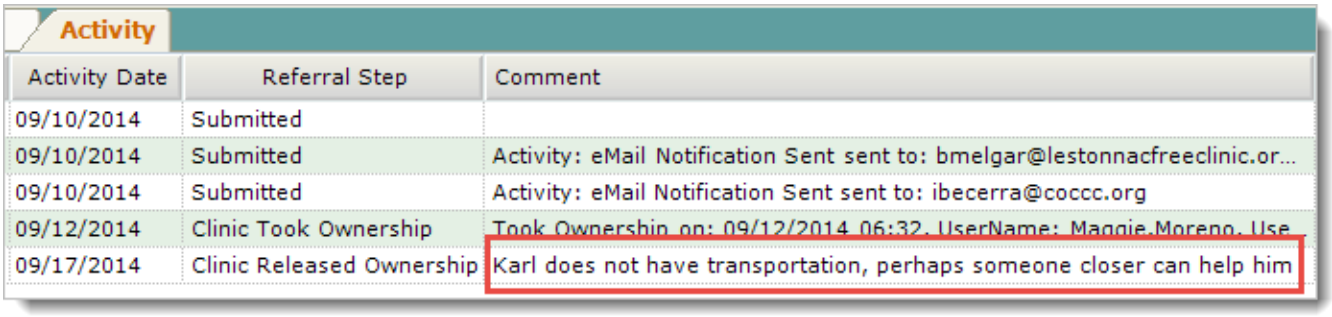


Return Ownership

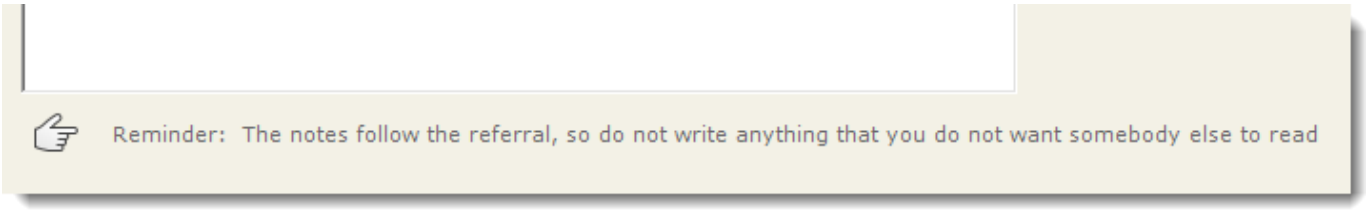
If you later find out that this person is not qualified for your service you can return ownership



After you return ownership, the referral is back in the Social Services queue …

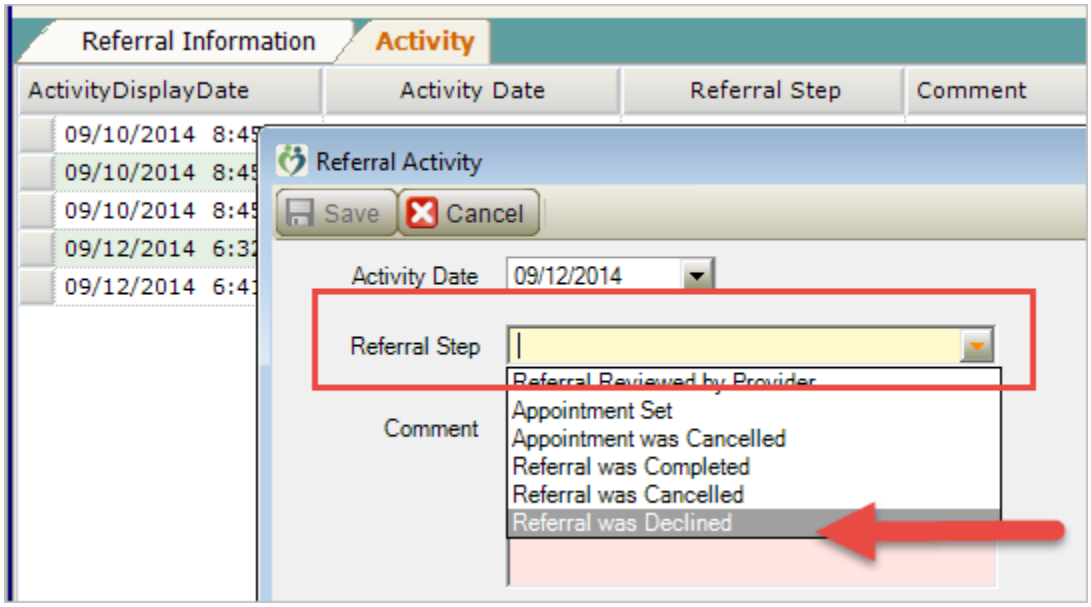


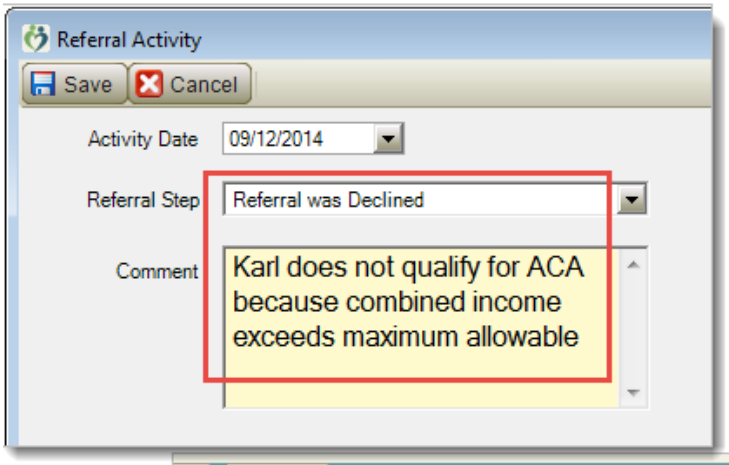
Please keep in mind that when you return ownership that your case management notes are not deleted and will be there for the benefit of the next person

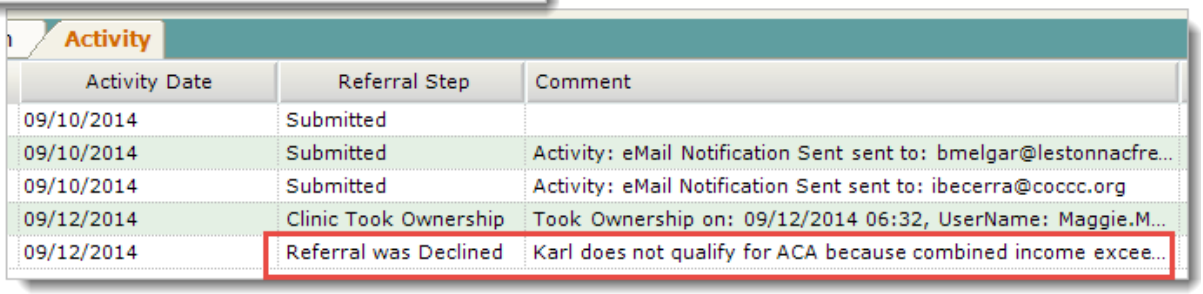


Decline Referral

However, you can also choose from – and record – a different workflow activity, for example, *if the candidate is not eligible for this service – from anybody* the better choice would be to DECLINE the referral, and provide a comment.



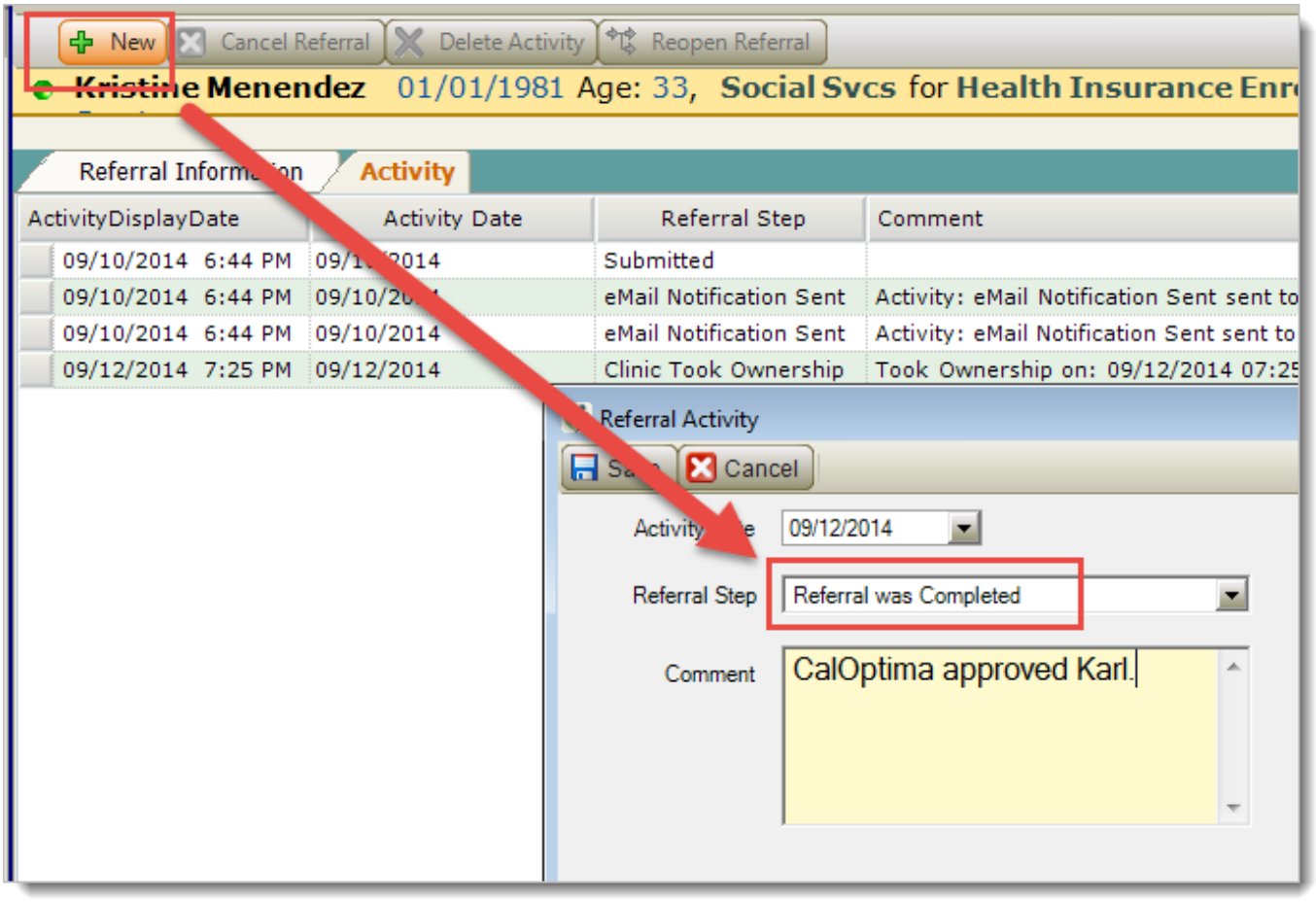




Complete Referral

Lastly, and VERY IMPORTANT, when you complete the referral, record the good news.

Statistical reports keep track of open/closed, how long open, how many sent/received, from whom/to whom, and so forth … i.e., information that is typically requested by funders.



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