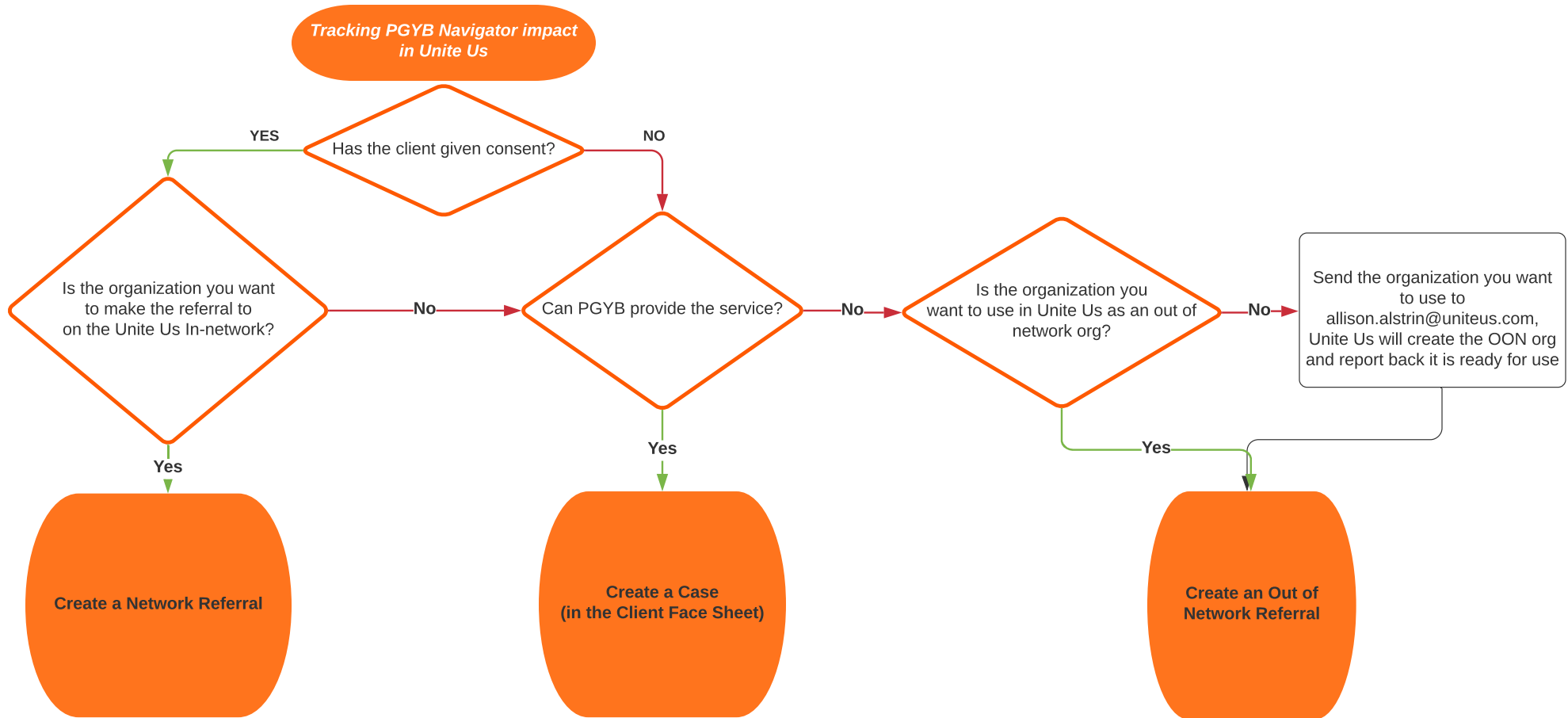


Project Got Your Back

Allison Alstrin | January 12, 2022



Create a Network Referral (have client consent and org in network)

A. Go to client face sheet, click Refer in the top right corner or + sign in navigation bar

1. Complete the referral

Other organization will serve the client and close the case

Service Types with Veteran services In-network: Housing & Shelter, Legal, Entrepreneurship, Food Assistance, Income Support, Social Enrichment, Sports & Recreation, Substance Use, Wellness

Create a Case

A. Go to client face sheet, click on Cases sub tab

1. Click on blue create a new case
2. Select program (Internal Navigation), service type (most applicable), and make yourself the the case worker

B. When the case is resolved, log in and close the case

This example will most often be used to track when someone has gotten employed.

Create an Out of Network Referral

A. Go to client face sheet, click on Refer in the top right corner

1. Select the Service type
2. Click blue out of network case box
3. Complete the referral selecting the out of network organization (note: the referral will show in Cases)

B. When the case is resolved, log in and close the case