Follow these instructions to add referrals:

1. Click *Referrals*.

2. Click *Add*.

3. Select the Type of Referral (Internal or External).
4. Select the Provider.
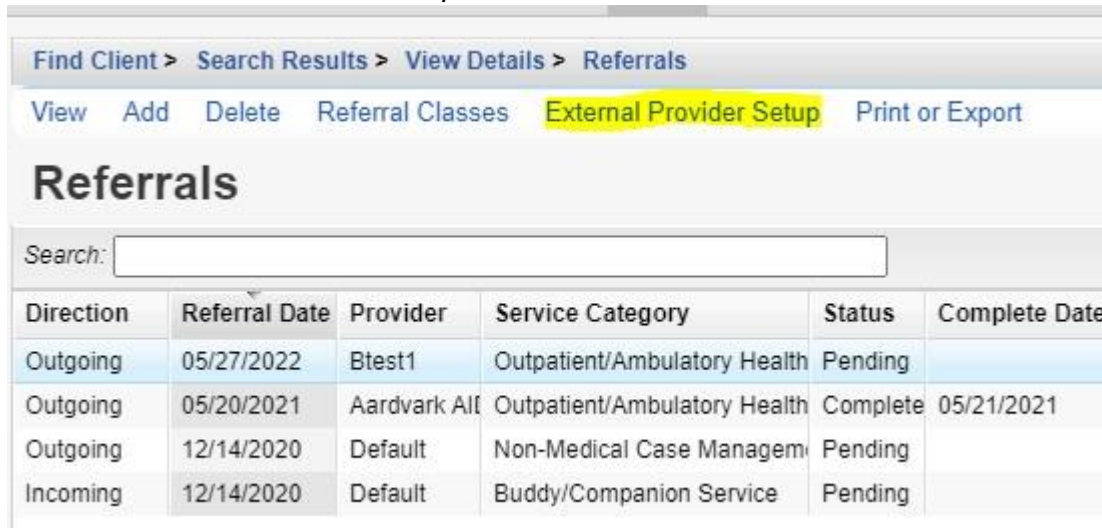5. Select the Service Category.
6. Click Next.
7. Click Save.

Referral Type – Internal referrals are referrals to providers that exist in CAREWare. External referrals are referrals to other providers.

Referral Provider – A user can select any provider that exists in CAREWare for internal referals. For external referrals they can select providers from the external provider list users add to

CAREWare.

Service Category – The service categories available are for contracts that are active as of the date of the referral for that provider.

Follow these instructions to add external providers:

1. Click *External Provider Setup.*

2. Click *Add.*

Find Client > Search Results > View Details > Referrals > External Provider Setup

View **Add** Delete Back Print or Export

Referral External Providers

Search: [   ]

Provider Name	Address	Contact Name	Phone	Active
Unspecified				
Aardvark AIDS Serv				Yes
Best Practices	1000 Best Street	Best Ever	555-999-5599	Yes
Test External Provid				
Hematology				Yes
Wonderful Services				
Happy Days Service				Yes
Test External Provid				Yes
The Best Service Pr	Across town			
OLHSA				Yes
Special Referral Age				

3. Complete the provider contact form.
4. Check *Active*.
5. Click *Save*.

When editing referral records, users can enter additional data, such as a Complete Date (for external referrals only--for internal referrals this date is set by the referred-to provider) and a user-defined Referral Class.

Follow these instructions to update Referral Classes:

1. Click Referral *Classes*.

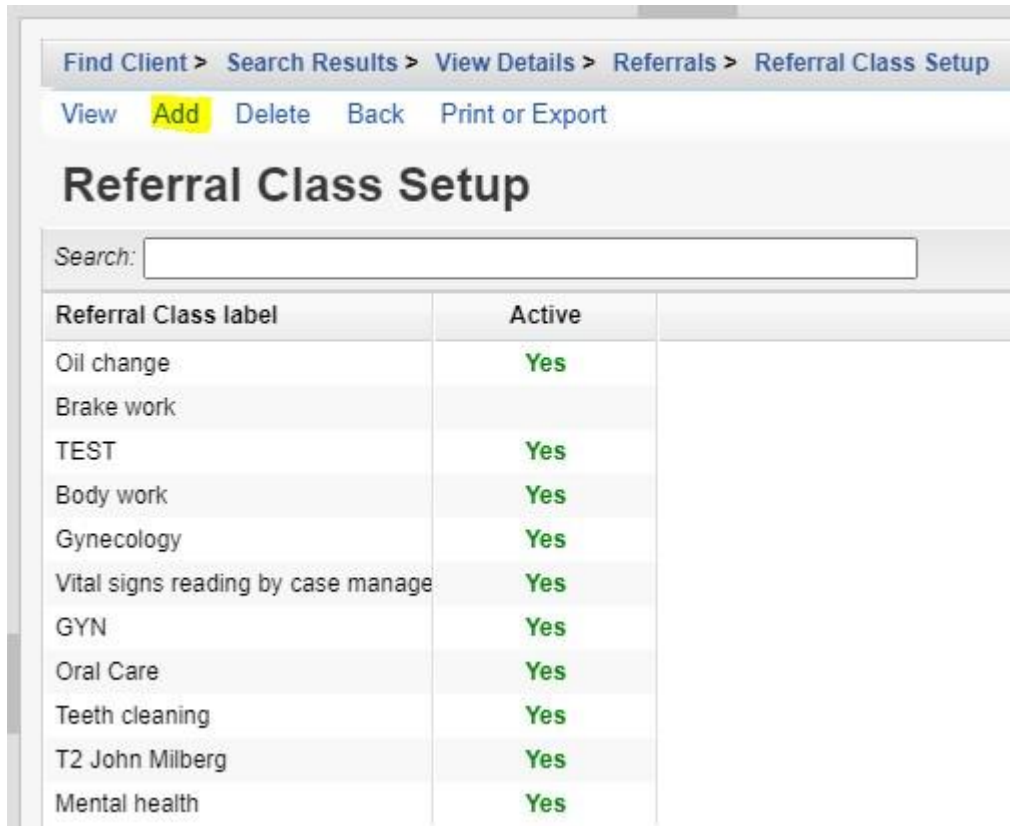Find Client > Search Results > View Details > Referrals

View Add Delete **Referral Classes** External Provider Setup Print or Export

Referrals

Search: [   ]

Direction	Referral Date	Provider	Service Category	Status	Complete Date
Outgoing	05/27/2022	Btest1	Outpatient/Ambulatory Health	Pending	
Outgoing	05/20/2021	Aardvark AII	Outpatient/Ambulatory Health	Complete	05/21/2021
Outgoing	12/14/2020	Default	Non-Medical Case Managem	Pending	
Incoming	12/14/2020	Default	Buddy/Companion Service	Pending	

2. Click *Add*.

Find Client > Search Results > View Details > Referrals > Referral Class Setup

View | Add | Delete | Back | Print or Export

Referral Class Setup

Search: [ ]

Referral Class label	Active
Oil change	Yes
Brake work	
TEST	Yes
Body work	Yes
Gynecology	Yes
Vital signs reading by case manage	Yes
GYN	Yes
Oral Care	Yes
Teeth cleaning	Yes
T2 John Milberg	Yes
Mental health	Yes

3. Enter the *Referral Class Label*.
4. Click *Active*.
5. Click *Save*.

In Central Administration, external providers can be added under Manage Referral Setup by following the instructions here:

1. Click *Administrative Options*.
2. Click *Manage Referral Setup*.

Here the same instructions for adding external referrals and adding referral classes can be completed.