

Follow these instructions to add referrals:

1. Click *Referrals*.

Direction	Referral Date	Provider	Service Category	Status	Complete Date	Class	Comments	Referral Type
Outgoing	05/20/2021	Aardvark All	Outpatient/Ambulatory Health	Complete	05/21/2021			External
Outgoing	12/14/2020	Default	Non-Medical Case Managem	Pending				Internal
Incoming	12/14/2020	Default	Buddy/Companion Service	Pending				Internal

2. Click *Add*.

Date:

Type:

Provider:

Service Category:

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

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

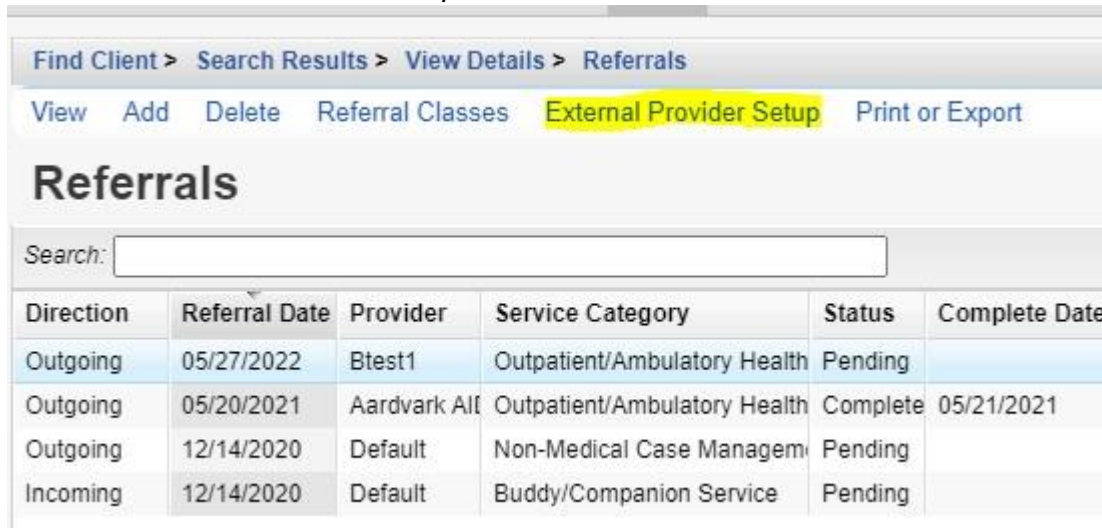
**Referral Type** – Internal referrals are referrals to providers that exist in CAREWare. External referrals are referrals to other providers.

**Referral Provider** – A user can select any provider that exists in CAREWare for internal referrals. 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*.



The screenshot shows a web interface for managing referrals. At the top, there is a breadcrumb trail: "Find Client > Search Results > View Details > Referrals". Below this is a navigation bar with buttons for "View", "Add", "Delete", "Referral Classes", "External Provider Setup" (highlighted in yellow), and "Print or Export". The main heading is "Referrals". Below the heading is a search box labeled "Search:". Underneath the search box is a table with the following data:

Direction	Referral Date	Provider	Service Category	Status	Complete Date
Outgoing	05/27/2022	Btest1	Outpatient/Ambulatory Health	Pending	
Outgoing	05/20/2021	Aardvark All	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 > 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 Ag				

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

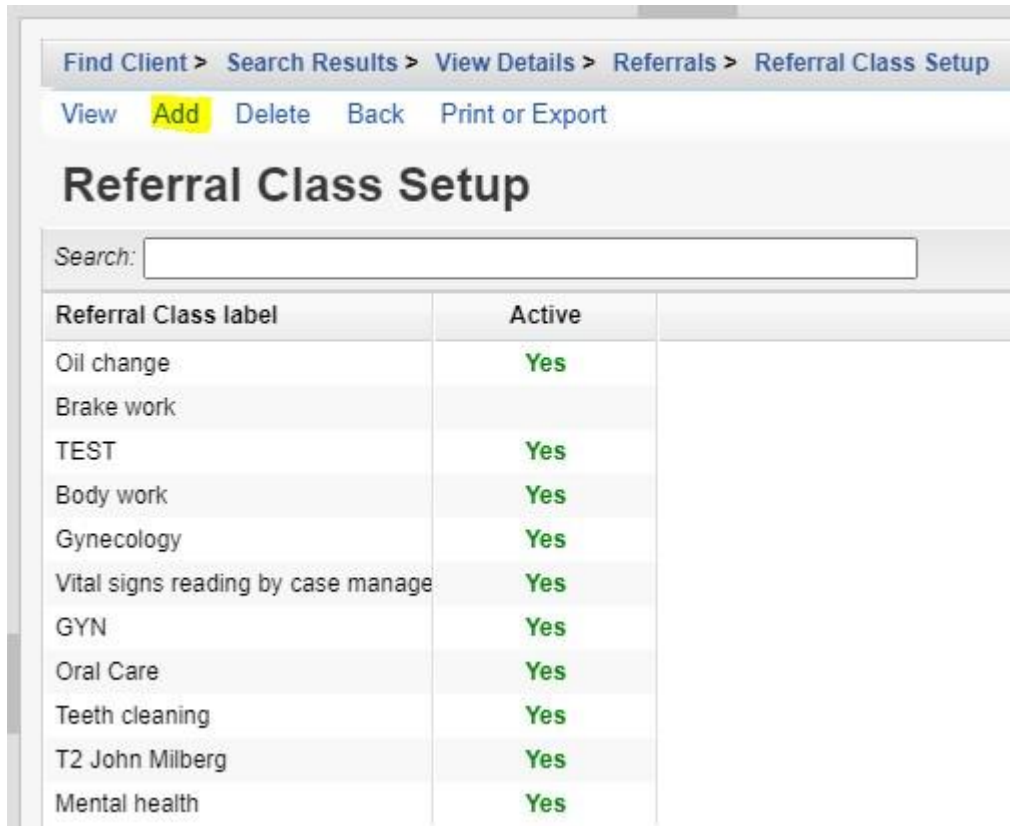
View Add Delete Referral Classes External Provider Setup Print or Export

## 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 All	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*.



The screenshot shows a web application interface for 'Referral Class Setup'. At the top, there is a breadcrumb trail: 'Find Client > Search Results > View Details > Referrals > Referral Class Setup'. Below this, there are navigation buttons: 'View', 'Add' (highlighted in yellow), 'Delete', 'Back', and 'Print or Export'. The main heading is 'Referral Class Setup'. Below the heading is a search box labeled 'Search:'. The main content is a table with two columns: 'Referral Class label' and 'Active'. The table lists several referral classes, all of which are marked as 'Active'.

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*.

The screenshot shows a web-based administrative interface. On the left is a navigation sidebar with a 'Customize' gear icon and a list of menu items: 'Provider Summary', 'Add Client', 'Find Client', 'Reports', 'Rapid Entry', 'My Settings', 'System Information', 'System Messages', 'Administrative Options' (highlighted in yellow), 'Switch Providers', 'Log Off', and 'My Links'. Below the sidebar is a URL: 'https://hab.hrsa.gov/program-grants-management/careware' and a note: 'Build 112 z14 is the minimum build number required to run the 2021 AD R!'. The main content area is titled 'Administrative Options' and contains a list of settings, each with a button and a description:

- Data Import and Export Features** (PDI, PDE, HL7)
- Data Oversight** (Client Merge, Field Merge, Required Fields)
- Email Alert Scheduler** Manage Email Alert Scheduler
- Employee Setup** Link a user account to employee information
- Server Management** Manage server settings and view logged system events
- Cap On Charges setup** Cap On Charges feature activated
- Manage Referral Setup** Manage external providers, referral classes and more

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