

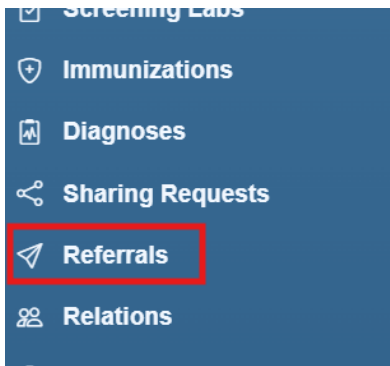
# Referrals

|                                 |                                                                                                                                 |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Purpose                         | Create and maintain internal and external referrals in a client record.                                                         |
| Who should do this              | CAREWare users responsible for coordinating and documenting client referrals.                                                   |
| Use this guide when you need to | Add a referral, manage external providers, update referral classes, or locate referral setup in Central Administration.         |
| Main warning                    | Internal referral completion is recorded by the referred-to provider; users can enter a completion date for external referrals. |

**Quick path**  
Client record › Referrals › Add

## Add a referral

**Step 1.** On the client screen’s vertical menu, click Referrals.



**Step 2.** Click Add.

ViewAddDeleteReferral ClassesExternal Provider SetupHelpPrint or ExportColumn visibility▼Copy

### Referrals

Search:  « < > » 100 ▼ entries per page Showing 0 to 0 of 0 entries

| Direction | Referral Date | Referral Codes | Provider | Service Category |
|-----------|---------------|----------------|----------|------------------|
|           |               |                |          |                  |

### Referrals buttons

| Item | What it does              |
|------|---------------------------|
| View | Open the selected record. |
| Add  | Create a referral record. |
| Edit | Edit a referral record.   |

|                                |                                        |
|--------------------------------|----------------------------------------|
| <b>Delete</b>                  | Delete a referral record.              |
| <b>Referral Classes</b>        | Set up classes for referrals.          |
| <b>External Provider Setup</b> | Set up a list of external providers.   |
| <b>Help</b>                    | Open this user guide for Referrals.    |
| <b>Print or Export</b>         | Print or export the list of referrals. |
| <b>Column Visibility</b>       | Choose columns shown in the list.      |

**Step 3.** Select the Type of Referral: Internal or External.

**Step 4.** Select the Provider.

**Step 5.** Select the Service Category.

**Step 6.** Click Next.

**Step 7.** Click Save.

# Add an external provider

Step 1. Click External Provider Setup.

ViewAddDeleteReferral ClassesExternal Provider SetupHelpPrint or Export

Referrals

Search: <div><<<1>>></div>Go to page 1100 entries per

| Direction | Referral Date | Referral Codes | Provider            |
|-----------|---------------|----------------|---------------------|
| Outgoing  | 07/27/2026    |                | Steve's Test Agency |

Step 2. Click Add.

ViewAddDeleteBackPrint or ExportColumn visibilityCopy

Referral External Providers

Search: <div><<<1>>></div>Go to page 1100 entr

| Provider Name | Address | Contact Name | Phone |
|---------------|---------|--------------|-------|
| Unspecified   |         |              |       |

Step 3. Complete the provider contact form.

Step 4. Check Active.

Step 5. Click Save.

## Edit a referral record

When editing a referral, users can enter additional information, including a user-defined Referral Class.

**Important:** Users can enter a Complete Date for external referrals. For internal referrals, the referred-to provider sets the completion date.

## Update referral classes

**Step 1.** Click Referral Classes.

[View](#)
[Add](#)
[Delete](#)
[Referral Classes](#)
[External Provider Setup](#)
[Help](#)
[Print or Export](#)

Column visibility

## Referrals

Search: 

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Go to page   entries per page Showing

| Direction | Referral Date | Referral Codes | Provider |
|-----------|---------------|----------------|----------|
|-----------|---------------|----------------|----------|

**Step 2.** Click Add.

[View](#) [Add](#) [Delete](#) [Manage Codes](#) [Back](#) [Print or Export](#)

## Referral Class Setup

Search:

<<

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1

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| Referral Class label | Active |
|----------------------|--------|
|----------------------|--------|

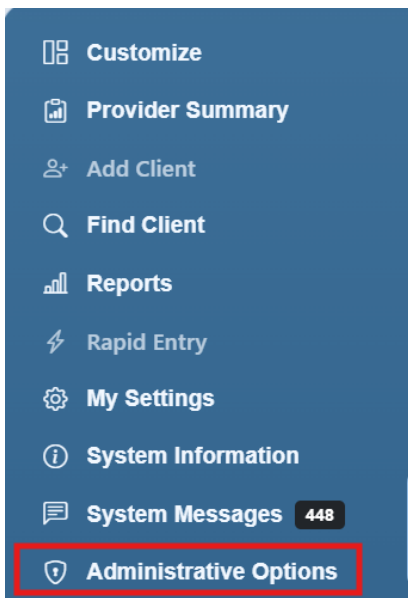
**Step 3.** Enter the Referral Class Label.

**Step 4. Click Active.**

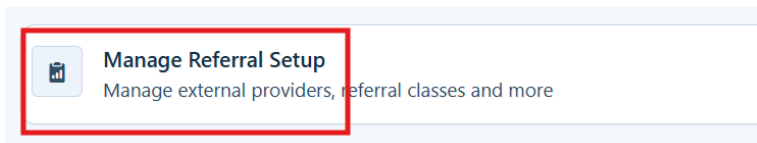
**Step 5. Click Save.**

# Manage referral setup in Central Administration

**Step 1.** Click Administrative Options.



**Step 2.** Click Manage Referral Setup.



Use the same procedures in this guide to add external providers and referral classes.

## How to confirm it worked

- The new referral appears in the client's Referrals list.
- The selected provider and service category match the intended referral.
- External providers and active referral classes are available for selection.

## Troubleshooting and common questions

**Why is a service category missing?** – Confirm that the provider has an active contract for that service category as of the referral date.

**Why is an external provider unavailable?** – Confirm that the provider was added in External Provider Setup and marked Active.

**Who completes an internal referral?** – The referred-to provider records the completion date for an internal referral.