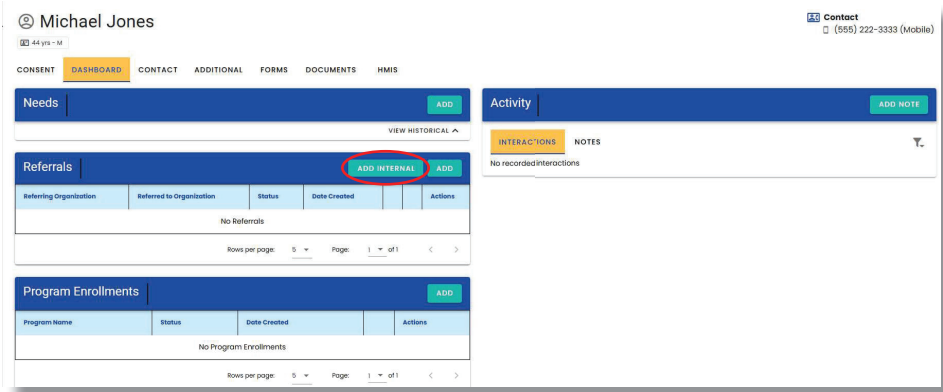




Referrals Quick Reference Guide

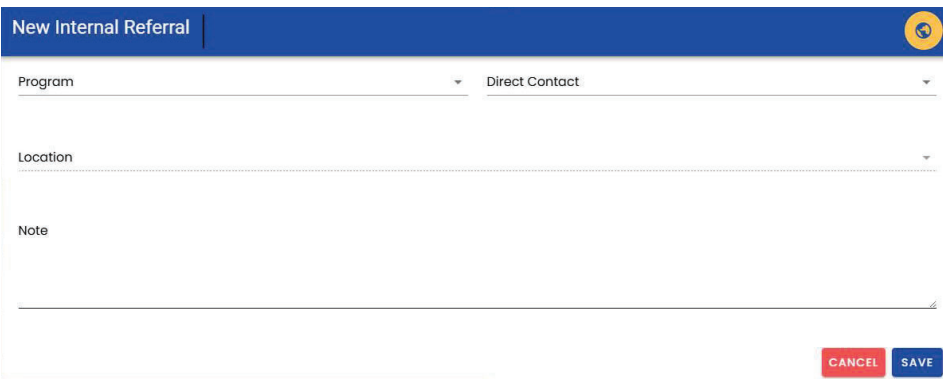
Step 1: Add a Referral

The platform offers two options for referrals: internal and external. We will start with adding in an internal referral. Start from the community member's Dashboard. Click on ADD INTERNAL.



Option 1: Internal Referral

The Internal Referral window will open. Use the drop-down menus to complete the required information.





To select Available Services, click on the green plus sign. A pop-up window will ask you to confirm that you wish to add the service. Click YES or NO based on the requirements.

The first screenshot shows the 'New Internal Referral' form. The 'Program' is 'Shelter Based Care' and the 'Direct Contact' is 'Julie Beltes'. Under 'Available Services', there is a list item 'Medical Respite Facilities / Beds for Homeless People' with a green plus sign circled in red. A note below says 'Community Member requires immediate medical respite bed'. At the bottom right are 'CANCEL' and 'SAVE' buttons.

The second screenshot is a confirmation window titled 'Adding Need'. It asks 'Would you like to add this need on the community member?' and shows the selected service 'Medical Respite Facilities / Beds for Homeless People'. At the bottom right, there are two buttons: a red 'NO' button and a green 'YES' button, both circled in red.

If you click YES, you have the option to add a note. Then click on SAVE.

This screenshot shows the 'New Internal Referral' form after the service has been added. The 'Available Services' list now contains the item 'Medical Respite Facilities / Beds for Homeless People'. A text area for notes is visible with the text 'Community Member requires immediate medical respite bed'. At the bottom right, the 'SAVE' button is circled in red.

The internal referral is now displayed on the Dashboard.

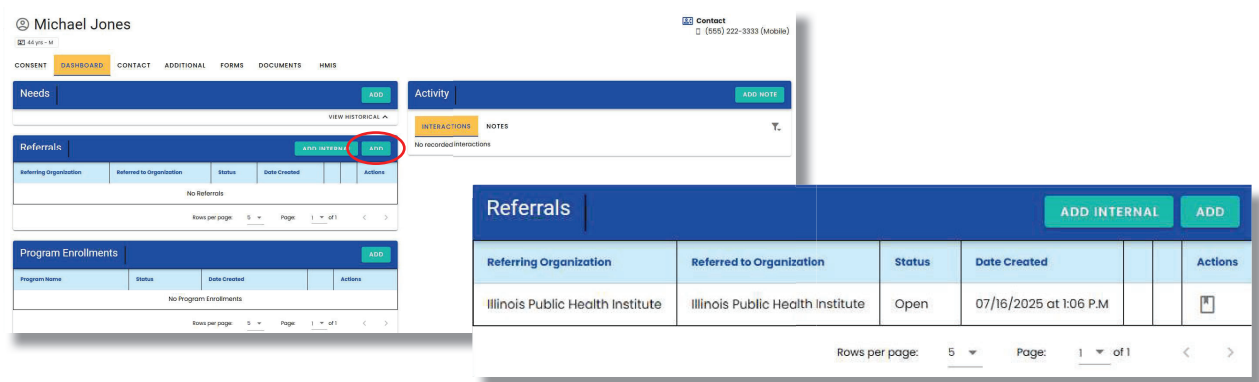
Referrals						ADD INTERNAL	ADD
Referring Organization	Referred to Organization	Status	Date Created				Actions
Illinois Public Health Institute	Illinois Public Health Institute	Open	07/16/2025 at 1:06 P.M				

Rows per page: 5 Page: 1 of 1

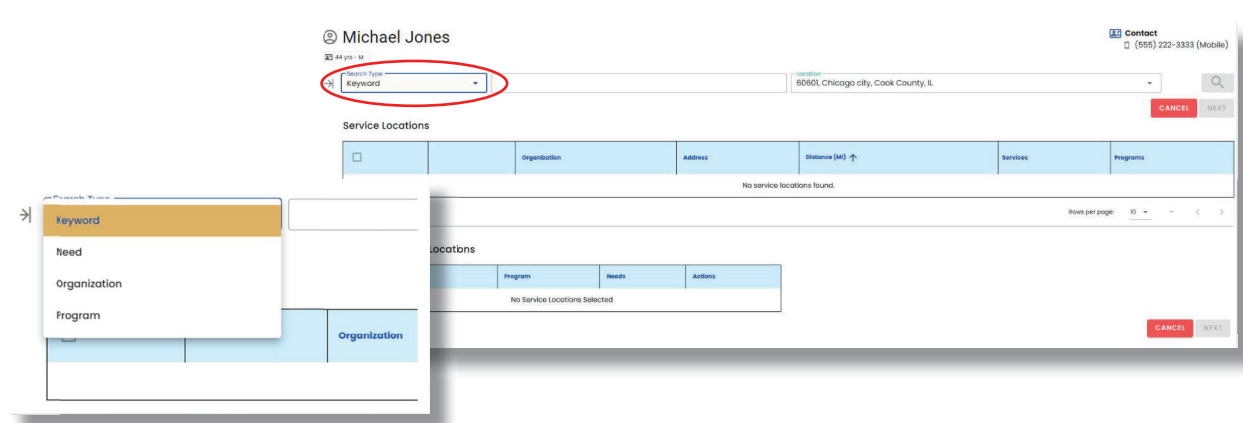


Option 2: External Referral

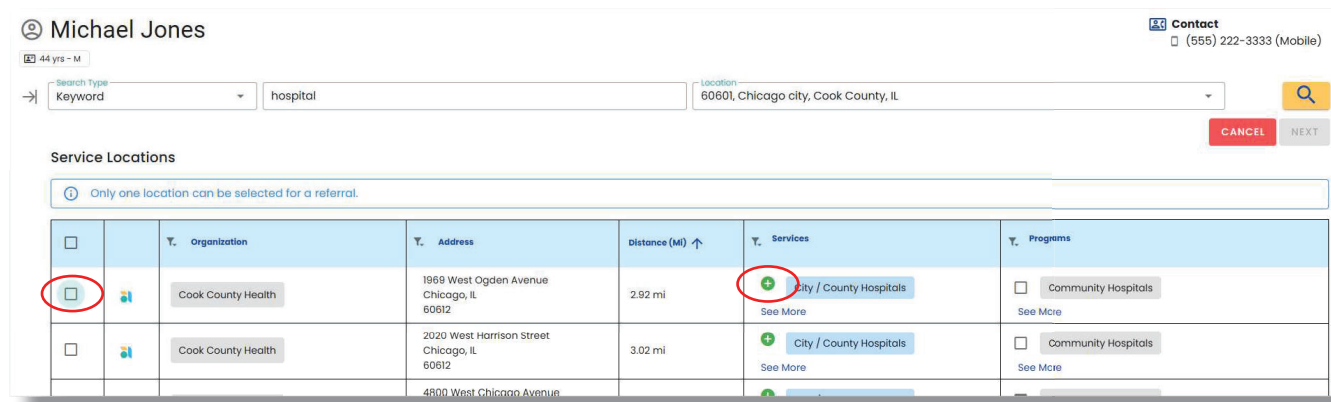
The second option for referrals is an external referral. Start from the Dashboard of the community member. Click on ADD.



The Referral window will open. You have four options on how to search: Keyword, Need, Organization, and Program. For this example, we will search by keyword.



Enter in the keyword and click on the gold magnifier to search. For this example, we are searching for a hospital to refer the Community Member to. A list of hospitals will be displayed. Check off the box next to the hospital you choose, then click on the green plus sign in the Services column.





A pop-up window will appear to confirm the need. For this example, we will click on YES.

	Organization	Address
<input type="checkbox"/>	Cook County Health	1969 West Ogden Chicago, IL 60612
<input type="checkbox"/>	Cook County Health	2020 West Harrison Chicago, IL 60612
<input checked="" type="checkbox"/>	Cook County Health	4800 West Chicago Chicago, IL 60651

Adding Need

Would you like to add this need on the community member?

City / County Hospitals

The next step will require you to choose a type of Program and a type of Service. Click the box next to the appropriate Program, then click on the green plus sign for the required Service. This will prompt a pop-up to confirm adding. Click on YES. Then scroll to the bottom of the screen and click on NEXT.

Programs	Services
<input type="checkbox"/> HIV/AIDS Program	<input checked="" type="checkbox"/> AIDS / HIV Clinics <input checked="" type="checkbox"/> Sexually Transmitted Disease Screening
<input checked="" type="checkbox"/> CareLink Program	<input checked="" type="checkbox"/> Health Care Discount Enrollment Programs

Adding Need

Would you like to add this need on the community member?

Health Care Discount Enrollment Programs

Organization	Program	Needs	Actions
Cook County Health	Community Hospitals CareLink Program		REMOVE



The next window that appears provides options to flag for follow-up, add a note, or attach a supporting document. For this example we will add a document. Click on the paper clip next to the globe icon.

Michael Jones
44 yrs - M

Follow Up: Flagged for follow up
Follow Up Date: mm/dd/yyyy

Provide Details to Michael: Phone Number, E-Mail

Buttons: EDIT, CANCEL, SUBMIT

Cook County Health

Needs	Address	Programs	Direct Contact	Note
Needs: City / County Hospitals, Health Care Discount Enrollment Programs	4800 West Chicago Avenue Chicago, IL 60661	Community Hospitals, CareLink Program	Contact	Note

Buttons: CANCEL, SUBMIT

The attachment box will appear. Click on ADD.

Attach Referral Document

<input type="checkbox"/>	Name	Type	Description	Uploaded On
No data available				

Rows per page: 5 Page: 1 of 1

Buttons: CANCEL, ADD

In the pop-up window add the document name, type, and description, and upload your document. Once completed, click on SAVE.

New Document

Name: Cook Cty Hosp Referral

Document Type: Other

Description: Referral for x-ray at hospital

File: Hospt Refe...l Note.pdf
The File field is required

Buttons: CANCEL, SAVE



Now click on ADD to complete the upload of the attachment.

Attach Referral Document

<input type="checkbox"/>	Name	Type	Description	Uploaded On ↓
No data available				

Rows per page: 5 Page: 1 of 1

The final step is to click on SUBMIT.

Michael Jones 44 yrs - M Contact (555) 222-3333 (Mobile)

allow Up Provide Details to Michael EDIT CANCEL SUBMIT

Flogged for follow up Phone Number

How Up Date: 7/24/2025 E-Mail

Cook County Health

Needs	Address	Programs	Direct Contact	Note
City / County Hospitals Health Care Discount Enrollment Programs	4800 West Chicago Avenue Chicago, IL 60691	Community Hospitals CareLink Program	Contact	Note: Referred to hospitals

The external referral has been added and appears on the Dashboard in the Referrals section.

Referrals

Referring Organization	Referred to Organization	Status	Date Created	Actions
Illinois Public Health Institute	Cook County Health	Open	07/16/2025 at 1:41 P.M	<input type="button" value="📄"/>
Illinois Public Health Institute	Illinois Public Health Institute	Open	07/16/2025 at 1:06 P.M	<input type="button" value="📄"/>

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