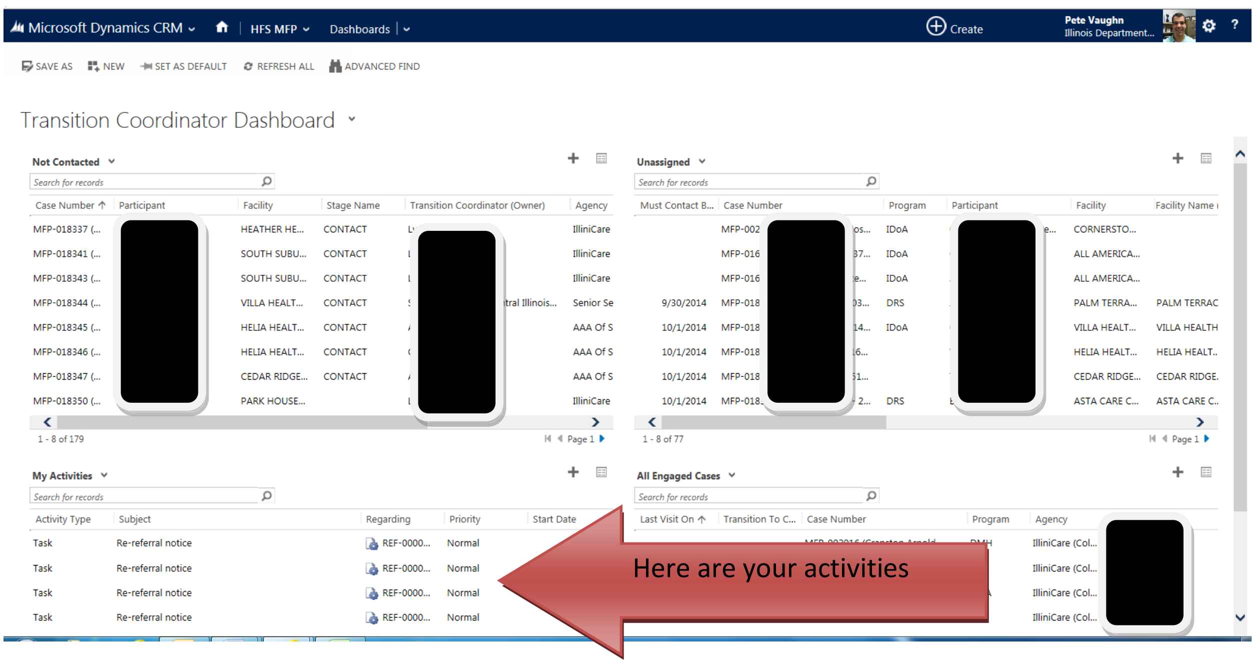
How to check for a re-referral notice in the CRM Web Application

Transition Coordinators and Supervisors are advised to check the system often for new referrals or re-referral notices. A new referral will create a case in your "Unassigned" view for follow-up. A re-referral will create an activity and assign it to the owner of the existing MFP case. A new case contact should be completed to document a follow up on a re-referral.

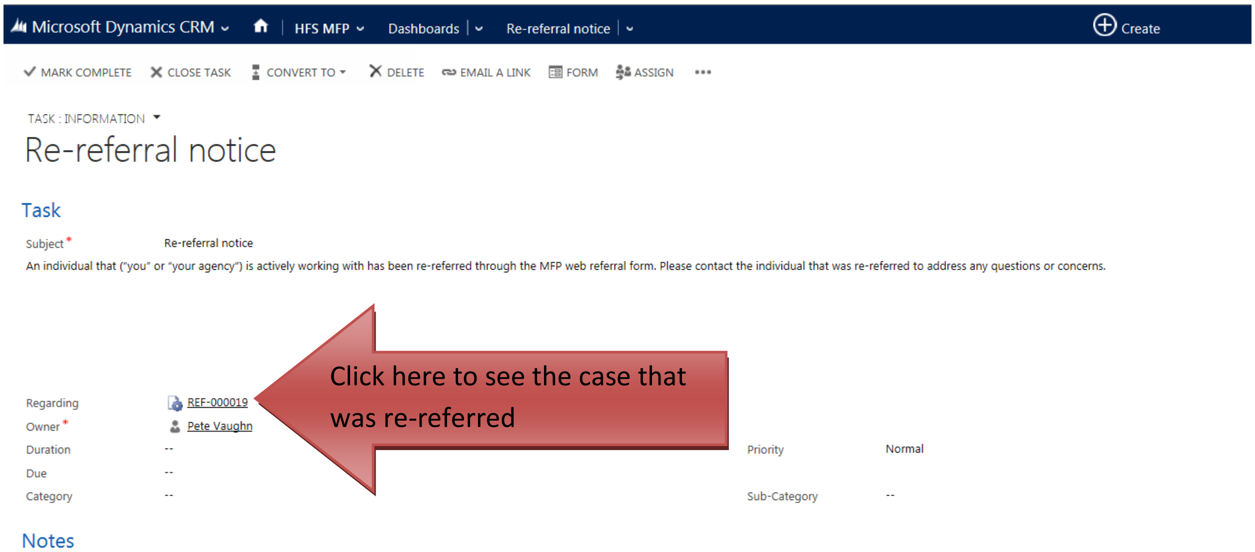
There are two way to check for a re-referral notice.

First Option – Check Your Dashboard

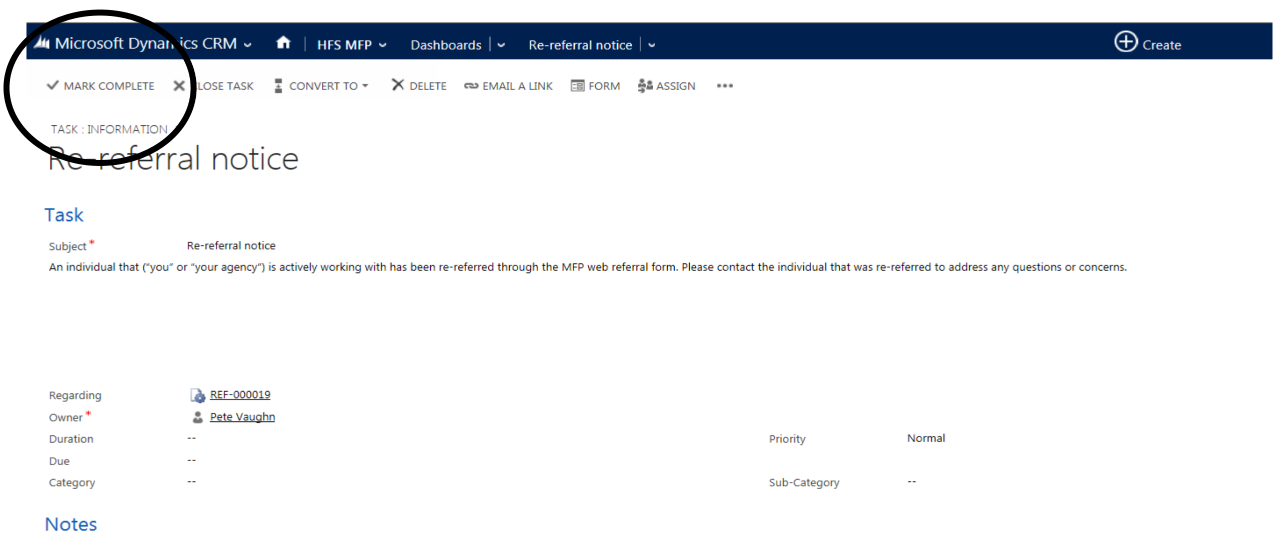
1. Log into the MFP/CRM web app
2. Make sure you are on the Transition Coordinator Dashboard. You will notice a list titled "My Activities". This is where re-referral notices will show up. Note: activities you create for yourself will also show in this list. Click the subject of the activity to see the detail screen.



3. The detail screen will look like the below image. Click the link in the regarding line to go directly to the MFP case that was re-referred.

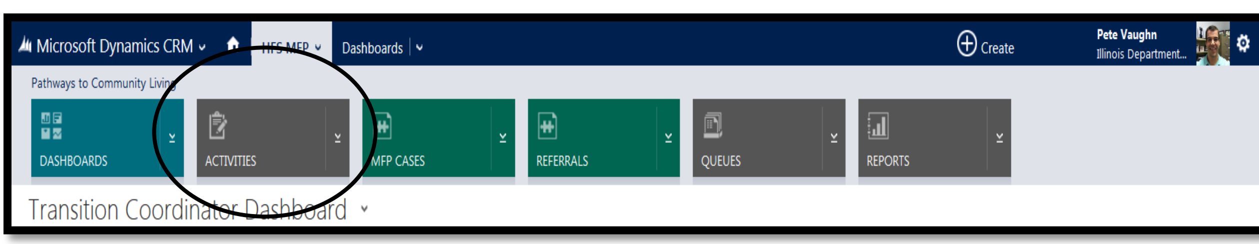


4. Don't forget to mark the re-referral task complete when you have followed up on the re-referral!

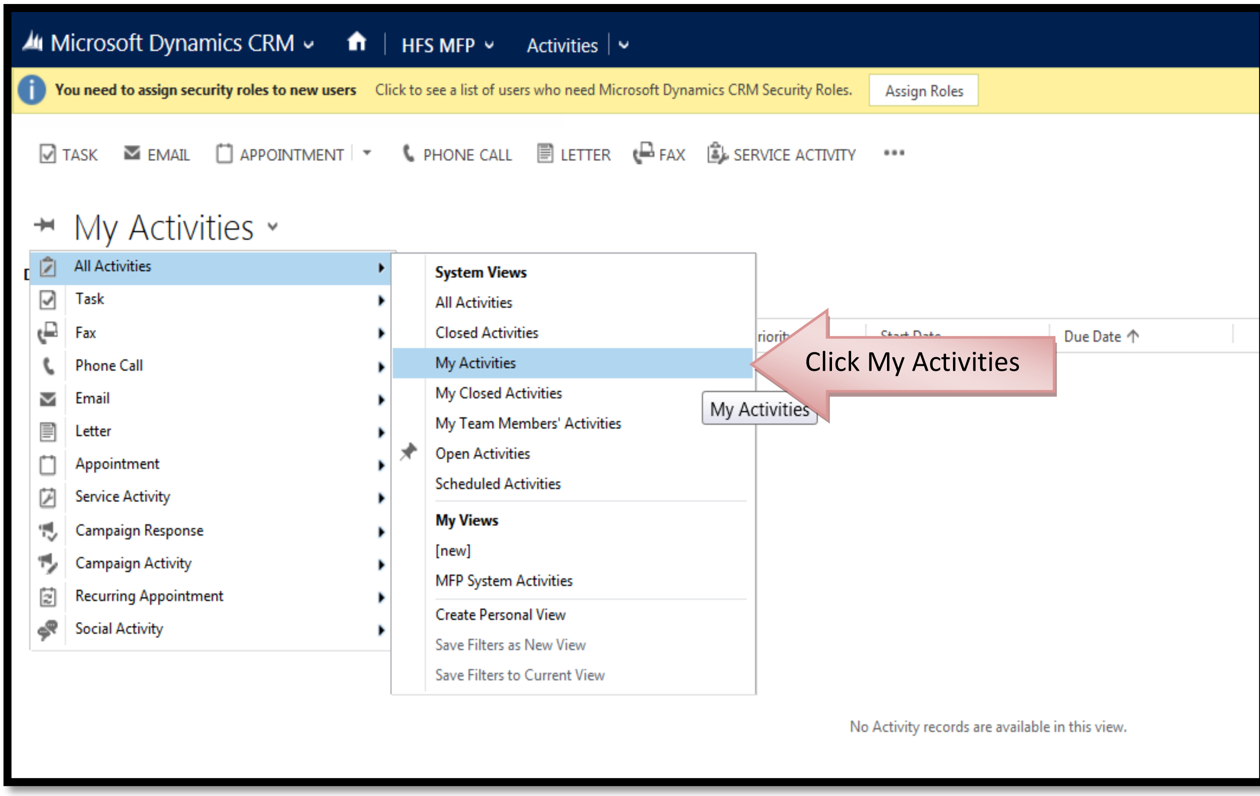


Second Option – Check the Activities Queue

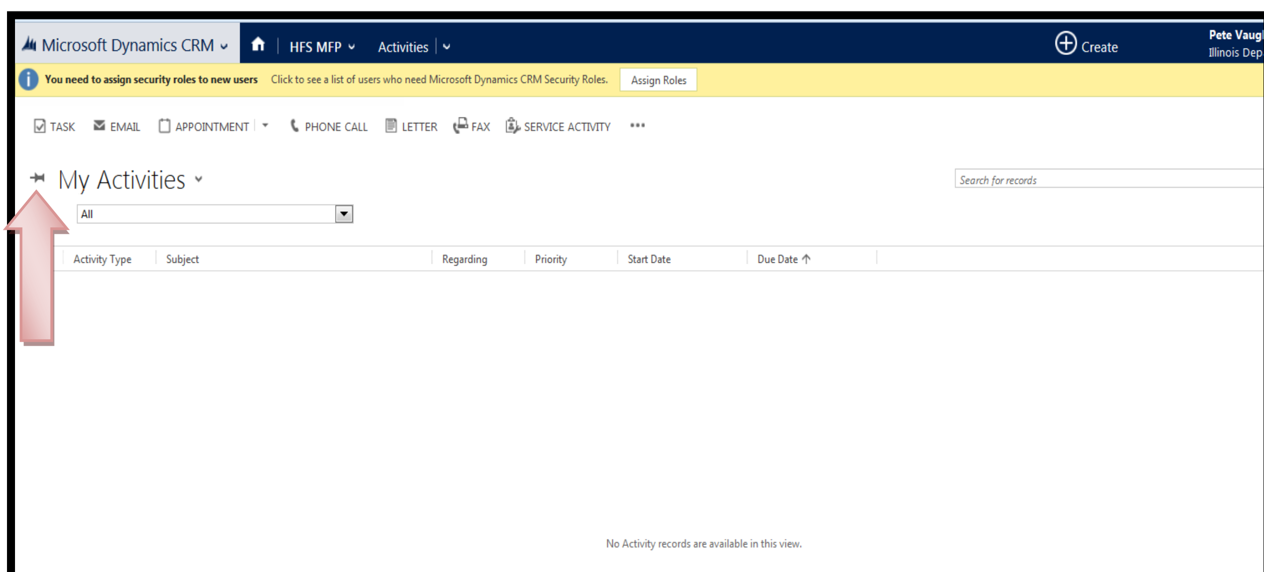
1. Log into the MFP/CRM web app
2. Navigate to the "activities" tab



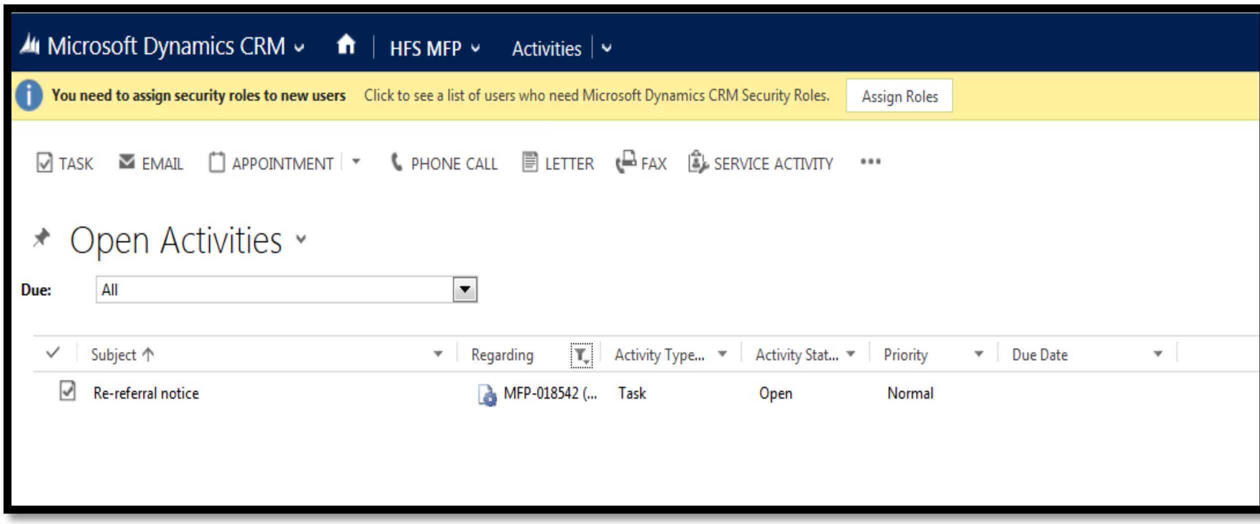
3. Once in the activities screen, click the arrow drop down next to the name of the view (circled below). Then select "All Activities" then click "My Activities" per the below screenshot.



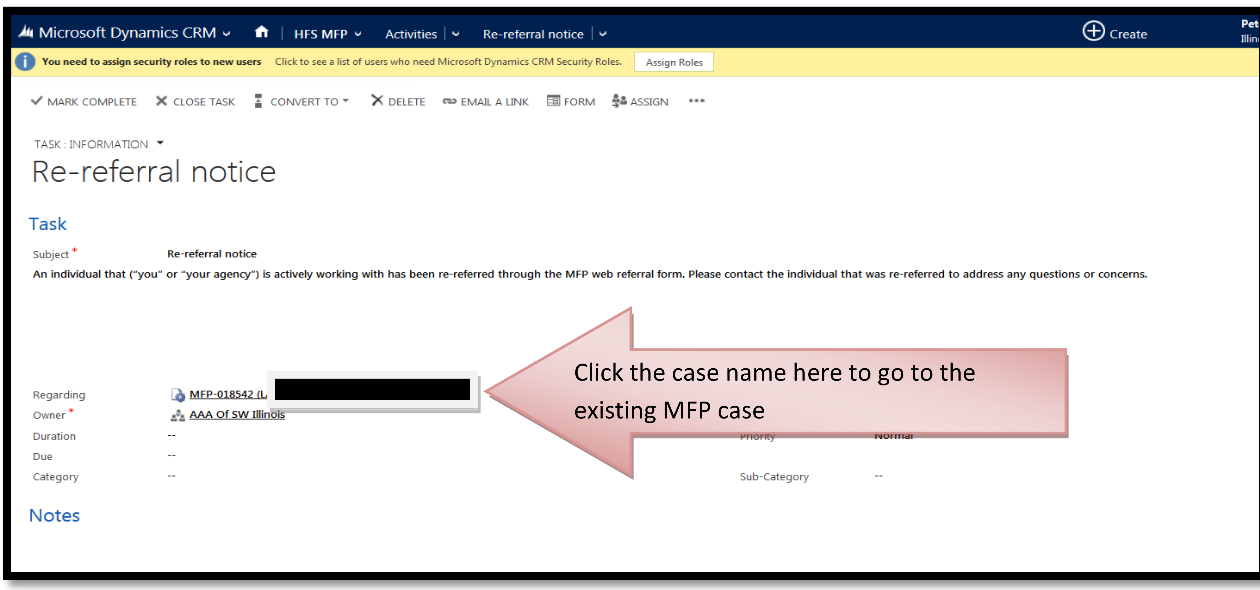
4. You will then see all your activities (either created by you or assigned to you by the system). You can make this your default view for activities by clicking the pin icon in the upper left of the screen. The pin is shown in the screenshot below.



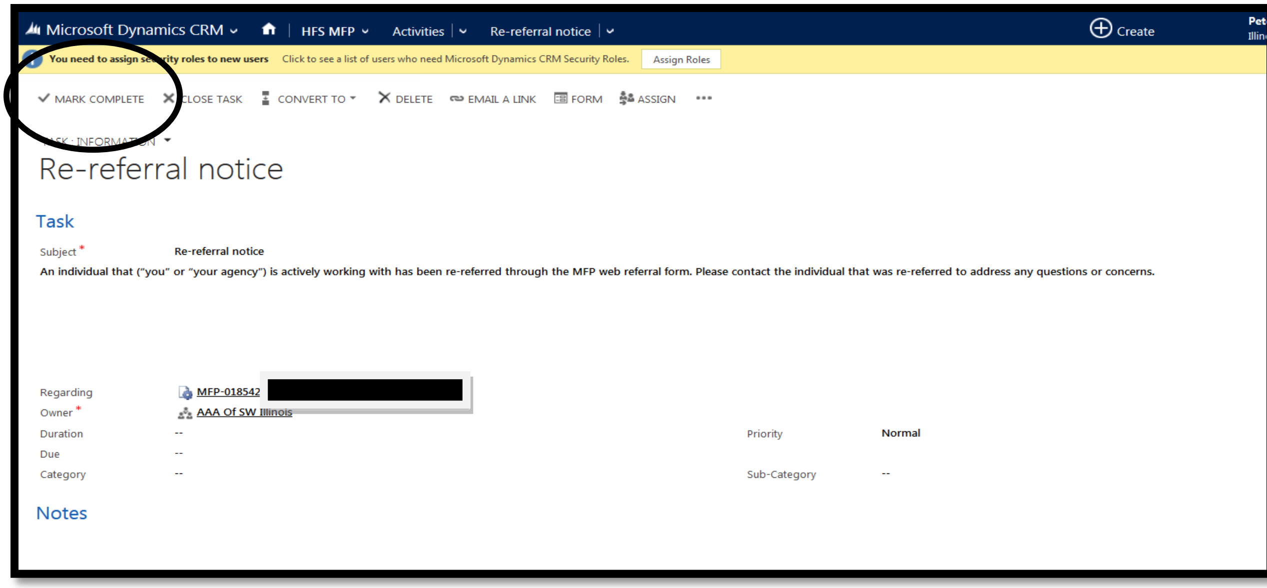
5. A re-referral notice will look like this. Click the subject of the activity to see detail.



6. The detail activity will look like the below screenshot. You can click name of the case to go directly to the existing case.

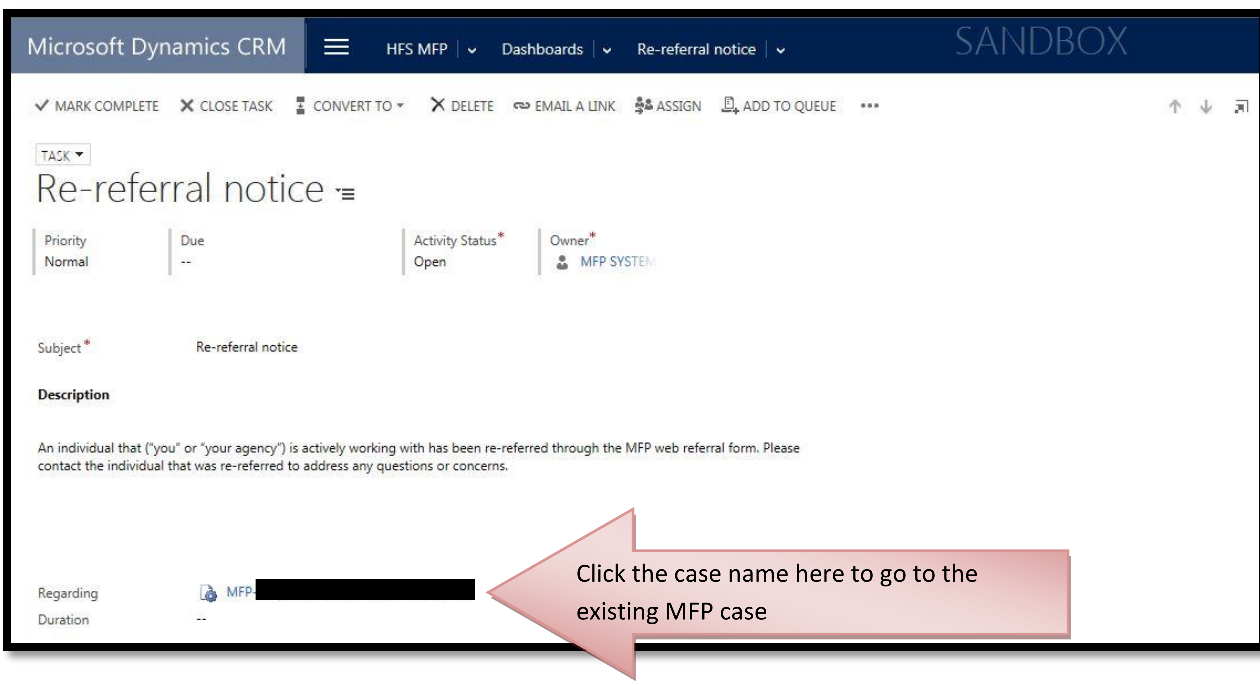


7. Once on the existing case, create a new case contact to document the re-referral follow-up. Once complete, check off the activity by going back to the activity and marking it complete. This will remove it from your open activities.

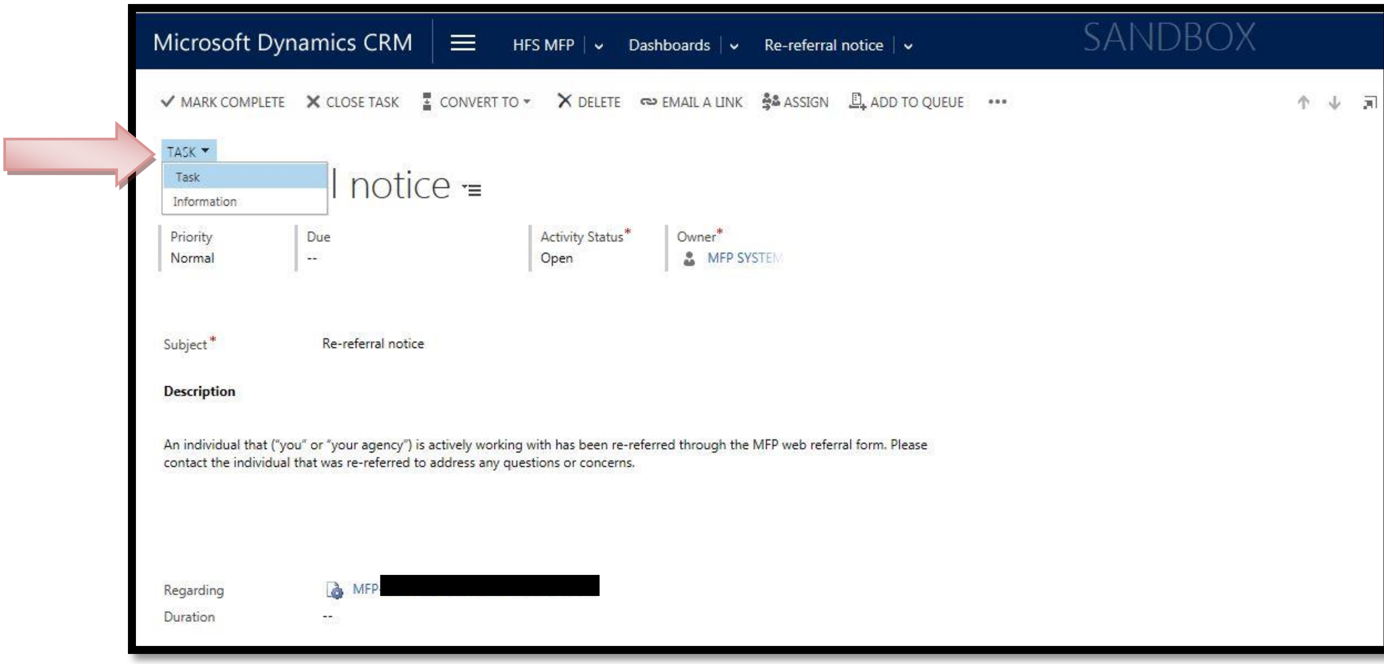


If the Referral itself is not visible in the notice—

1. View the re-referral notice as seen in the instructions above. Note that it links back to the MFP Case, without showing the referral that triggered the notice. You may want to view the referral itself, to determine participants' locations, contact information, etc.



2. Click "Task" in the upper left to view a drop down that lists "Task" and "Information" about the notice.



3. Select "Information" in order to view a more detailed description of the notice, including a link to the referral that triggered the notice. This referral will have updated information about participation location, status, etc. You can click on the link to take you to the referral.