Tracking Internal & External Referrals with Apricot

Welcome, we will start shortly!

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Meet Your Trainer

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Learning Objective

By the end of this session, our goal is to arm you with strategies for tracking different types of referrals within your organization and across your community to ensure your Participants' needs are being met.

Agenda

- Overview
- Internal Referrals
- Incoming Referrals
- Outgoing Referrals

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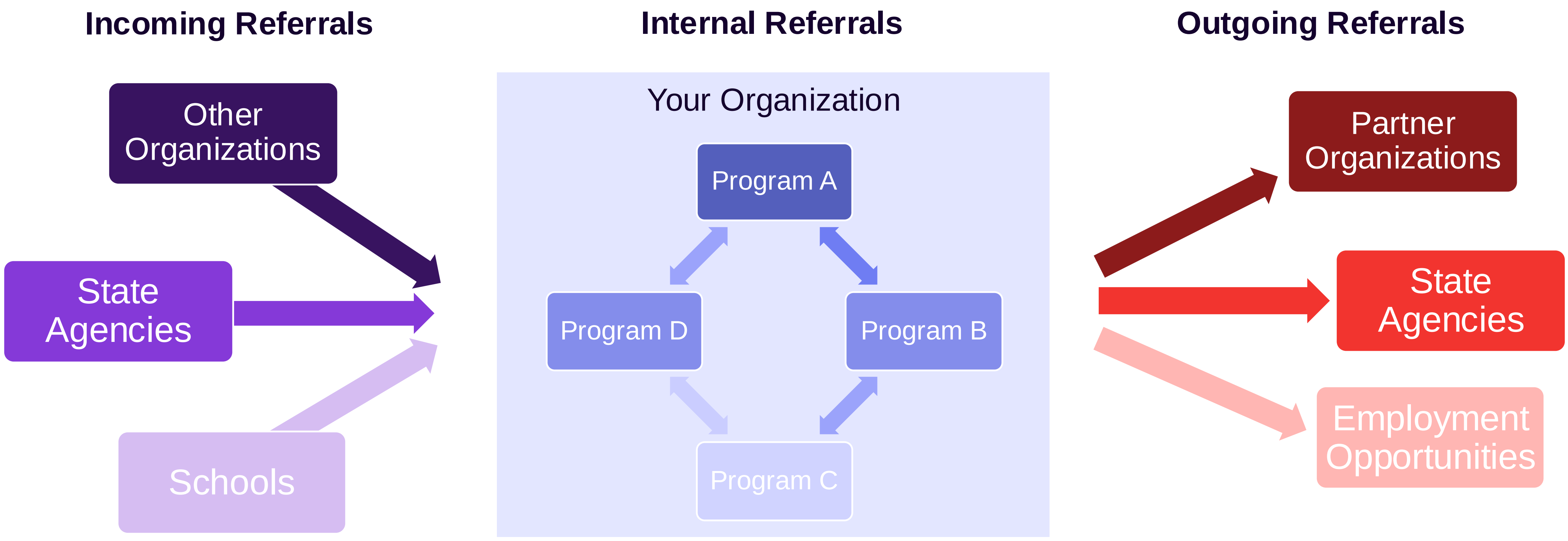
Overview

Tracking Referrals

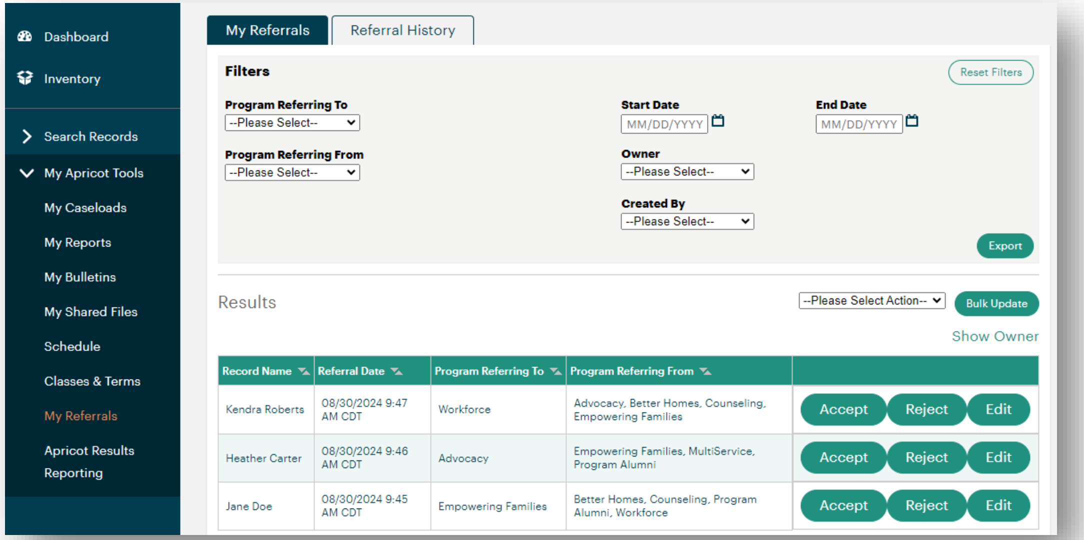
Enabling collaboration inside and outside your organization to address Participant needs.



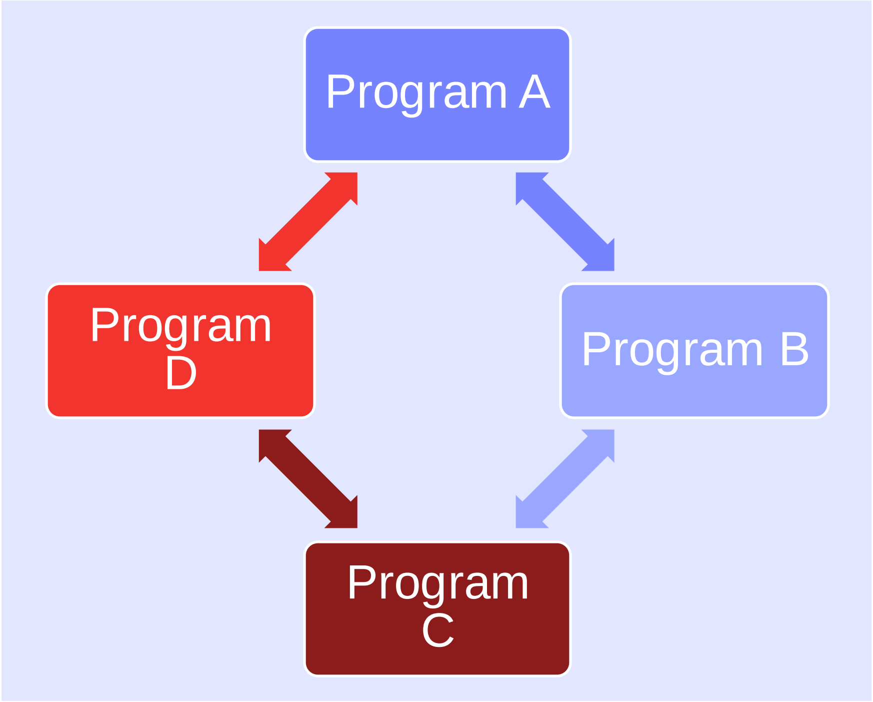
Internal Referrals

Internal Referrals

- Ability to share **Participants across Programs**.
- Formalized Approval & Rejection process.
- Updates **Program Assignment** when accepted.
- Can grant access to specified Tier 2 records.



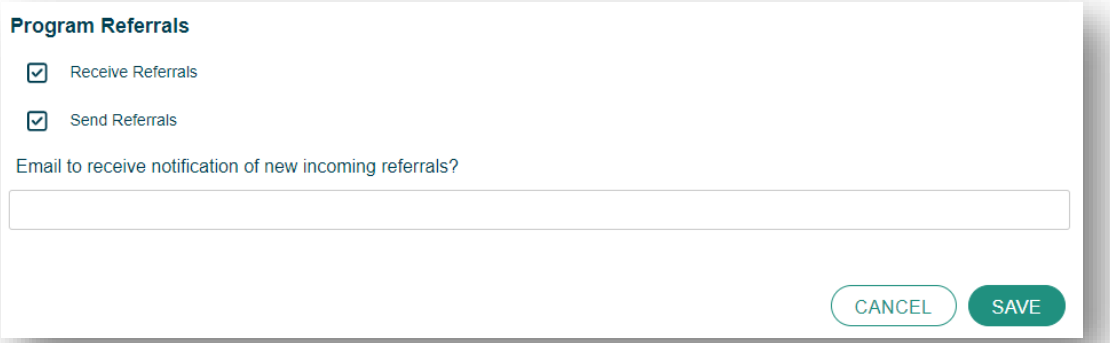
Your Organization



Enabling Internal Referrals

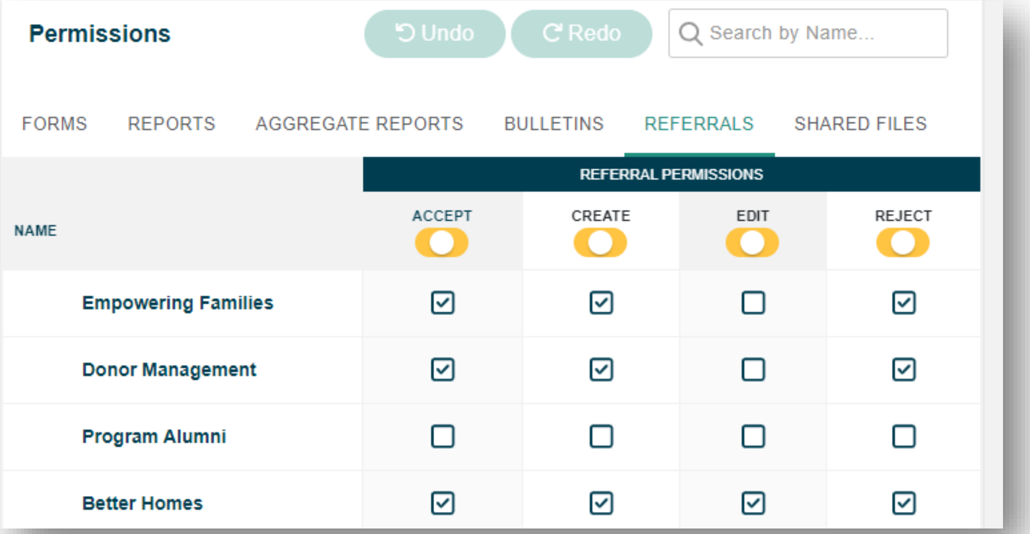
Step 1: Turn on at the Program level.

Access Control > Sites & Programs



Step 2: Decide which Roles can send & manage.

Access Control > Users > Roles



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Sending Internal Referrals

Step 1: Choose Participant.

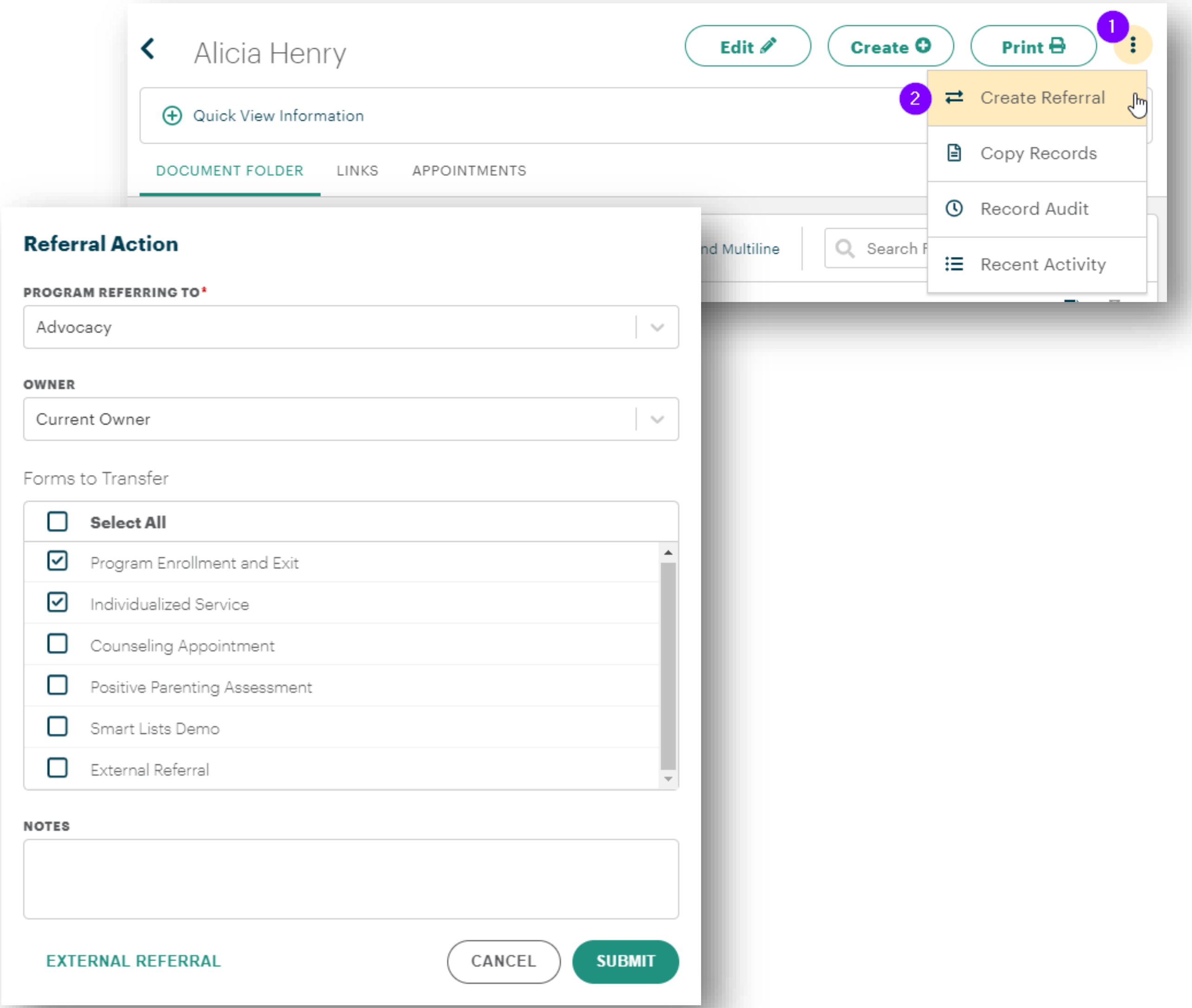
Step 2: Specify "Program Referring To."

Step 3: Indicate Owner *(i.e. Caseload).*

Step 4: Select which Tier 2 forms to share.

Step 5: Add optional Notes.

Step 6: Submit & await approval.



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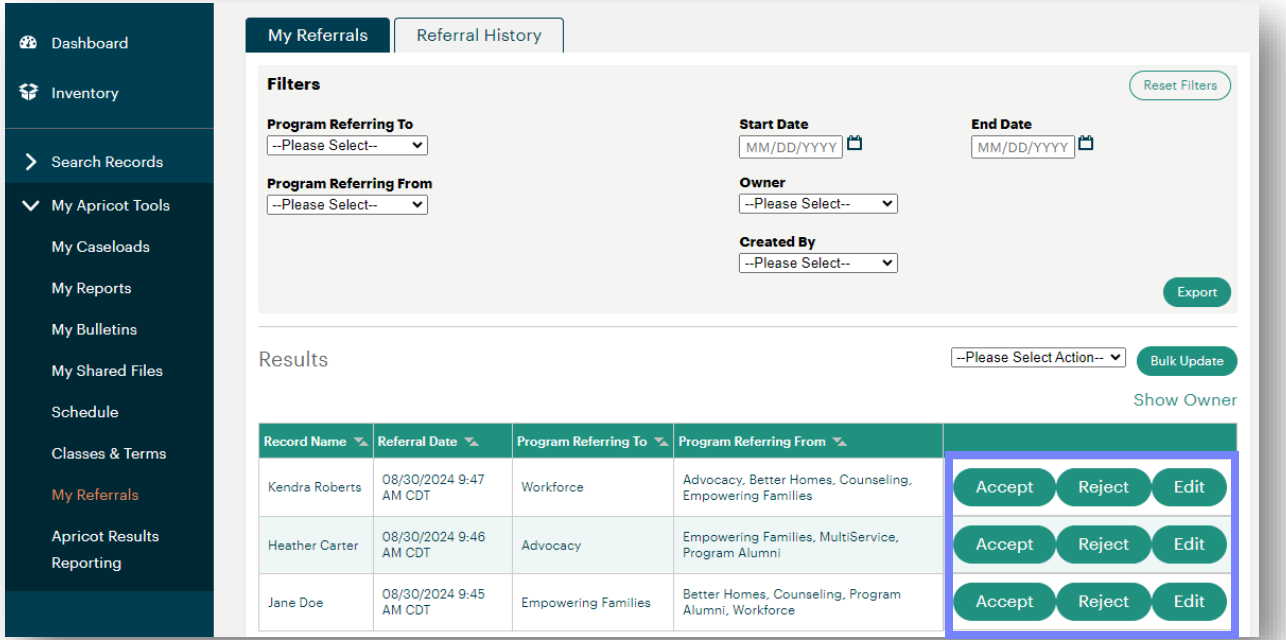
Managing Internal Referrals

Step 1: Go to My Referrals.

Step 2: View full list or filter.

Step 3: Click to [Accept], [Reject] or [Edit].

- Accept: Updates Program Assignment for Tier 1 and specified Tier 2s.
- Reject: Sends email notification to Referring Program & Referral moved to history.
- Edit: Can adjust shared Tier 2 forms, add Notes & then Accept or Reject.



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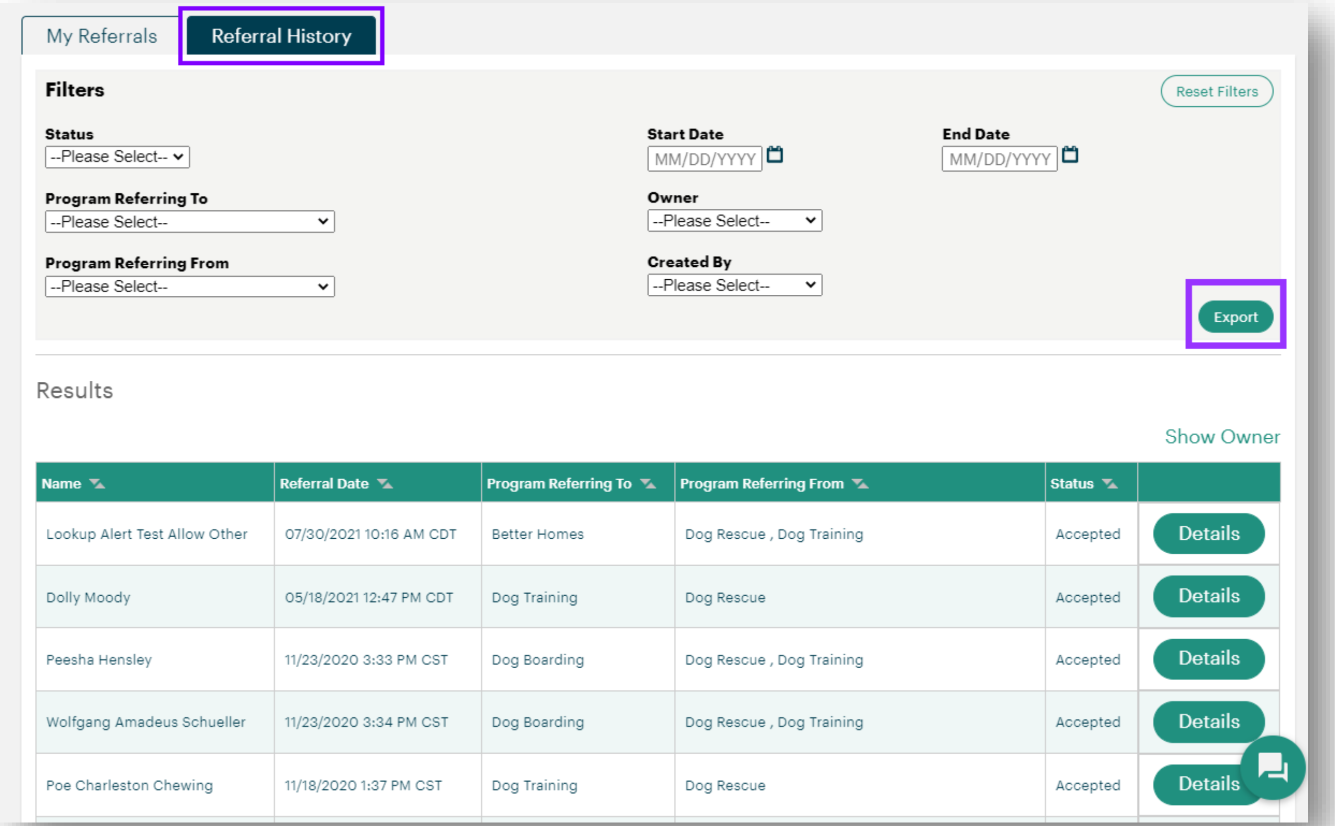
Internal Referral Reporting

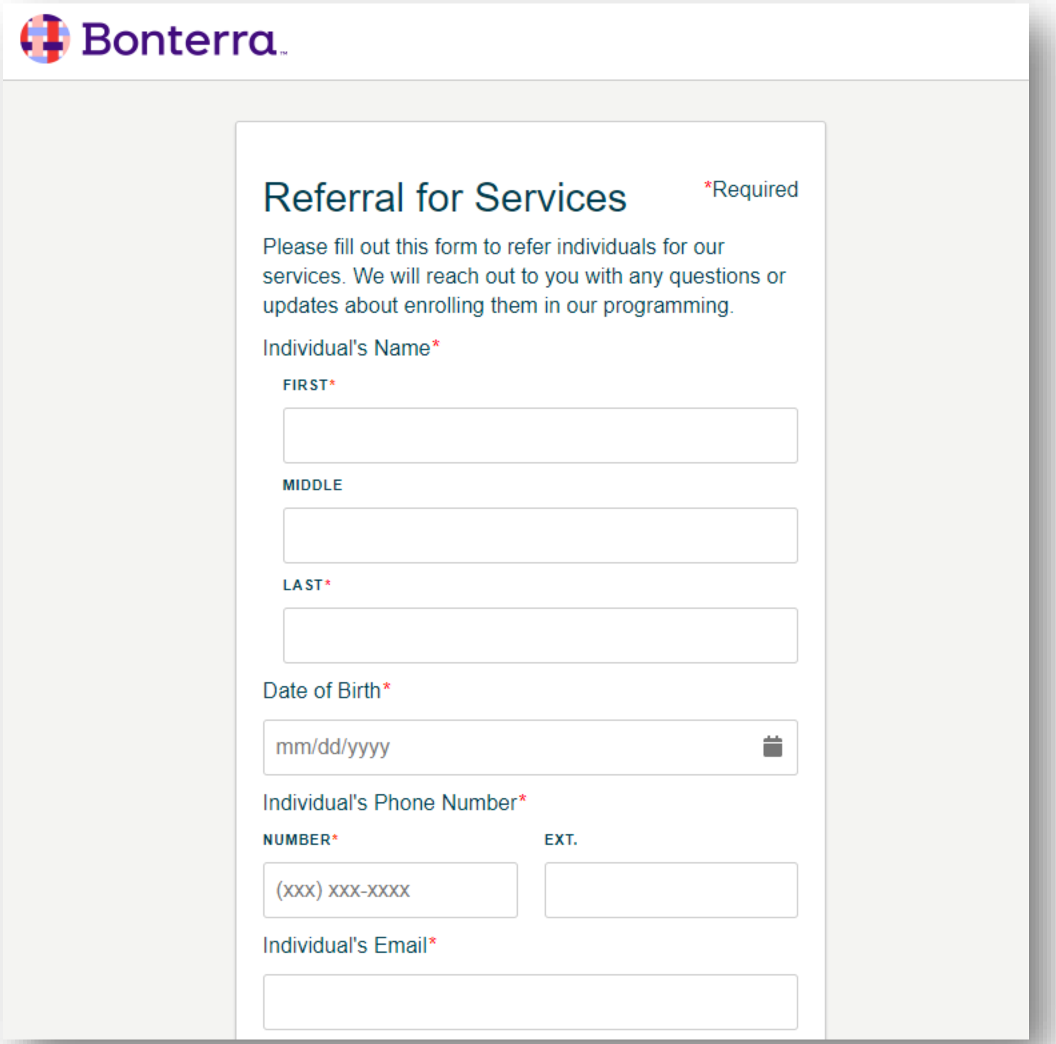
Internal Referrals are not currently available in Reporting, but you can export history to review and analyze.



Incoming Referrals

Incoming Referrals

- Recommendation for receiving referrals from others.
- Ability to collect information about person in need via customized external **Intake Form**.
- Data loads into Apricot, starting individual's **Tier 1**.
- Use **Report Bulletin** for tracking pending referrals.



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Referral for Services

*Required

Please fill out this form to refer individuals for our services. We will reach out to you with any questions or updates about enrolling them in our programming.

Individual's Name*

FIRST*

MIDDLE

LAST*

Date of Birth*

mm/dd/yyyy

Individual's Phone Number*

NUMBER*

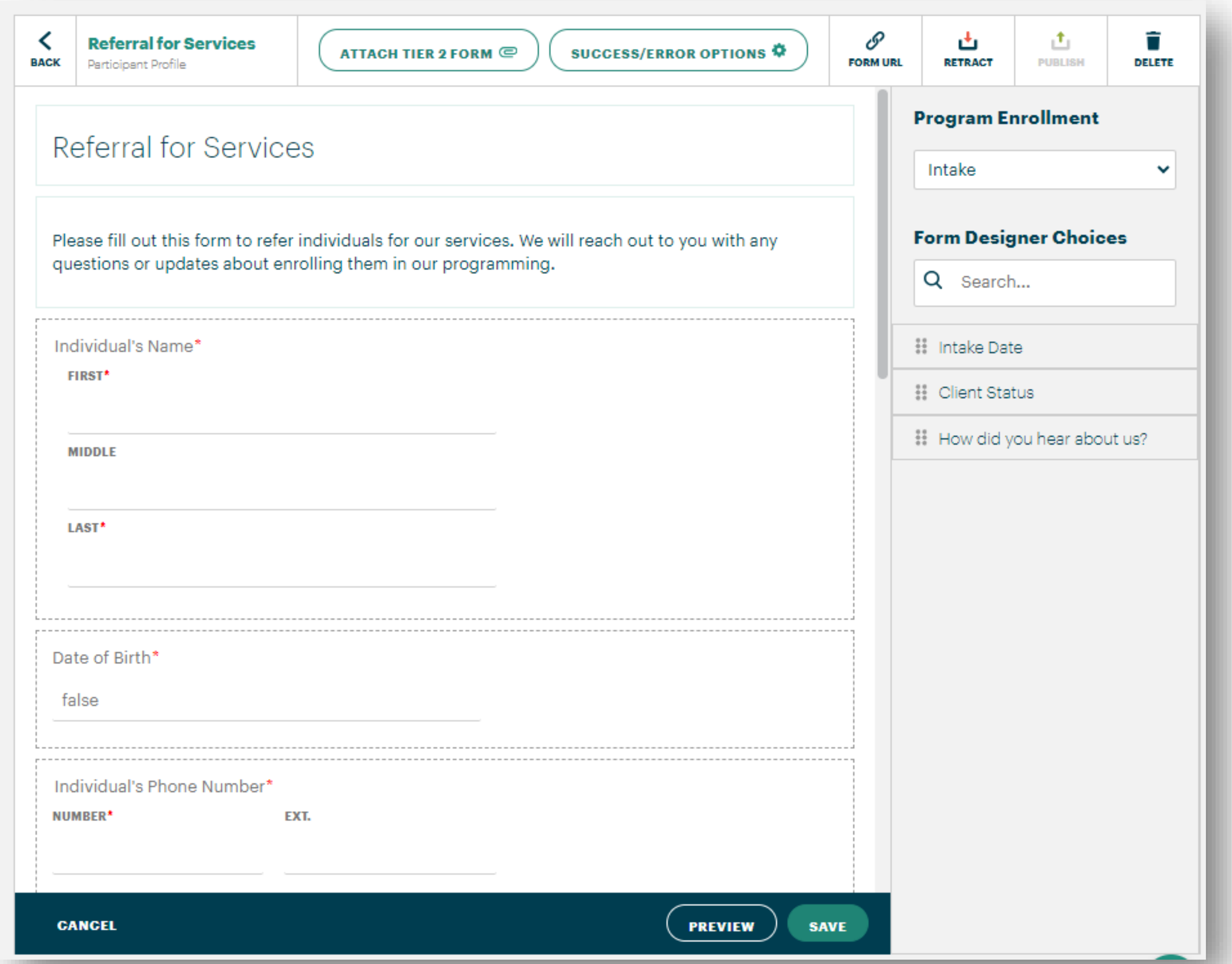
(xxx) xxx-xxxx

EXT.

Individual's Email*

Intake Forms

- **External version** of existing Tier 1.
- Choose which **fields** to include.
- **Customize** language for audience.
- Recommend separate **Intake Program** to hold submissions before accepting.



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Intake Forms

Step 1: Go to External Access > Intake Forms.

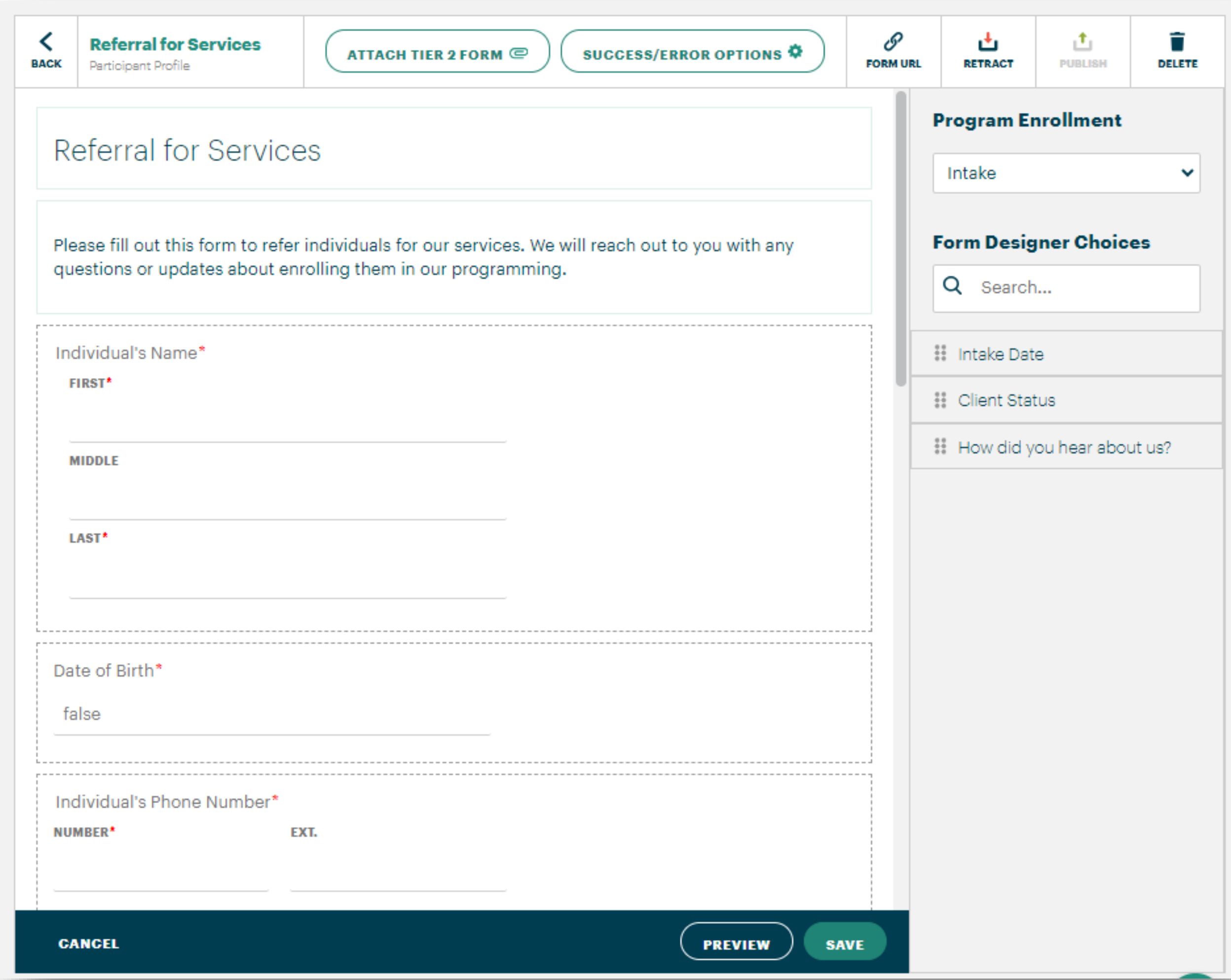
Step 2: Set Internal Name & Select Tier 1.

Step 3: Add External Name & Description.

Step 4: Customize available fields.

Step 5: Set Record Program Assignment.

Step 6: Publish & Share!



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Managing Incoming Referrals

- Use a **Report Bulletin** to tracking incoming.
- Filter so accepted referrals no longer appear on report.

Incoming Referrals ▾

Pending Referrals

New Section
Report last run August 30th 2024, 2:17 pm
Click to refresh data

Search

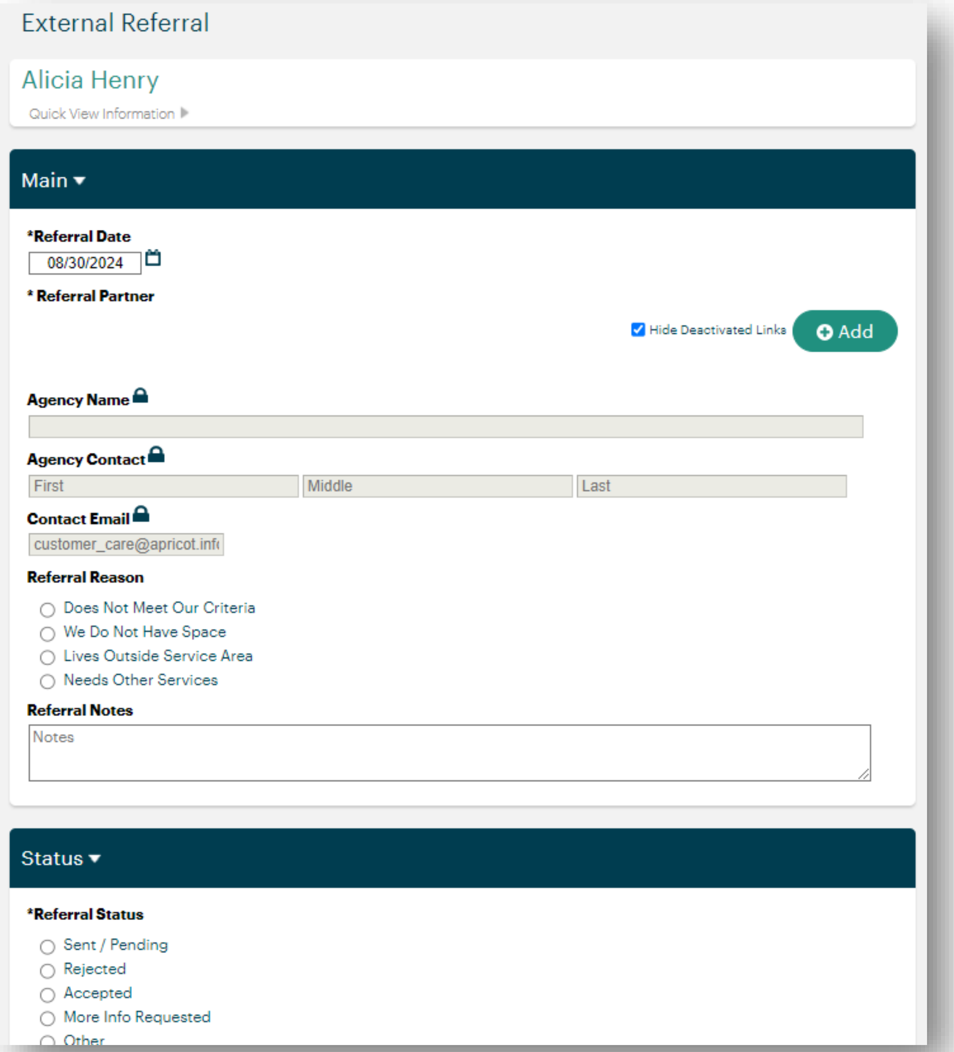
Displaying 4 of 4 Rows (Expand All Cells)

Submission Date	First	Last	Date of Birth	Client Phone Number	Client Email
08/30/2024	Sarah	Jones	05/02/2000	412.498.8933.	Sarah@gmail.com
08/30/2024	James	Jimenez	04/20/1989	423.672.0000.	JJ1989@gmail.com
08/30/2024	Carlos	Alegre	12/04/1996	123.454.8733.	Carlos@gmail.com
08/30/2024	Ted	Smith	12/05/2004	123.652.2394.	Tedsmom@gmail.com

Outgoing Referrals

External Referrals

- **Tier 2** and linked **Tier 1** for tracking outgoing referrals.
- Option to send email with relevant information to partner.
- Requires **manual updates** of status by your staff.



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Tracking External Referrals

Step 1: Create Tier 1 for tracking Referral Partners.

Step 2: Create Tier 2 under Participant for Referrals.

Step 3: Add link to Referral Tier 2 to capture Referral Partner.

Step 4: Consider Auto Populate fields to pull in Contact.

Step 5: Add Email Trigger to send referral via email.

Step 6: Publish both forms & start tracking.

Tracking External Referrals

Step 1: Create Tier 1 for tracking Referral Partners.

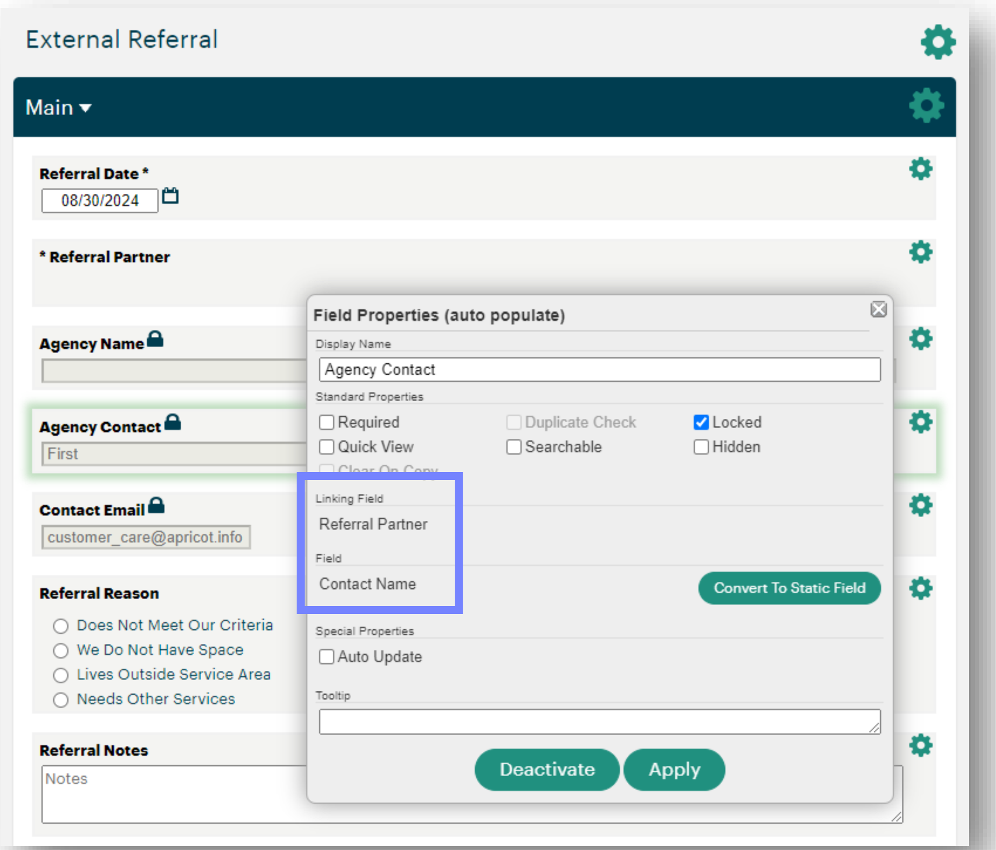
- Profile to capture partner contact & offerings.

Step 2: Create Tier 2 under Participant for Referrals.

- Tracking referral date, reason & relevant notes.

Step 3: Add link to Referral Tier 2 to capture Referral Partner.

Step 4: Consider Auto Populate fields to pull in Contact.



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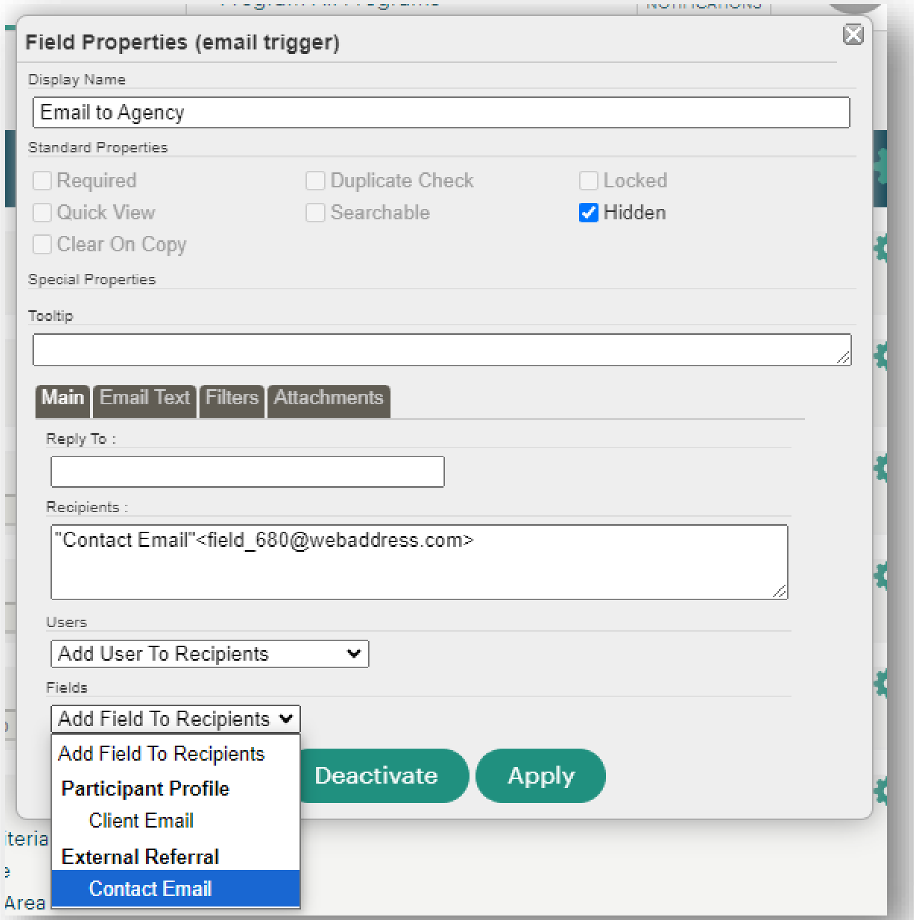
Tracking External Referrals

Step 5: Add Email Trigger to send referral via email.

- Use Auto Populate fields for contact.
- Include other referral details in email body.

Step 6: Publish both forms & start tracking.



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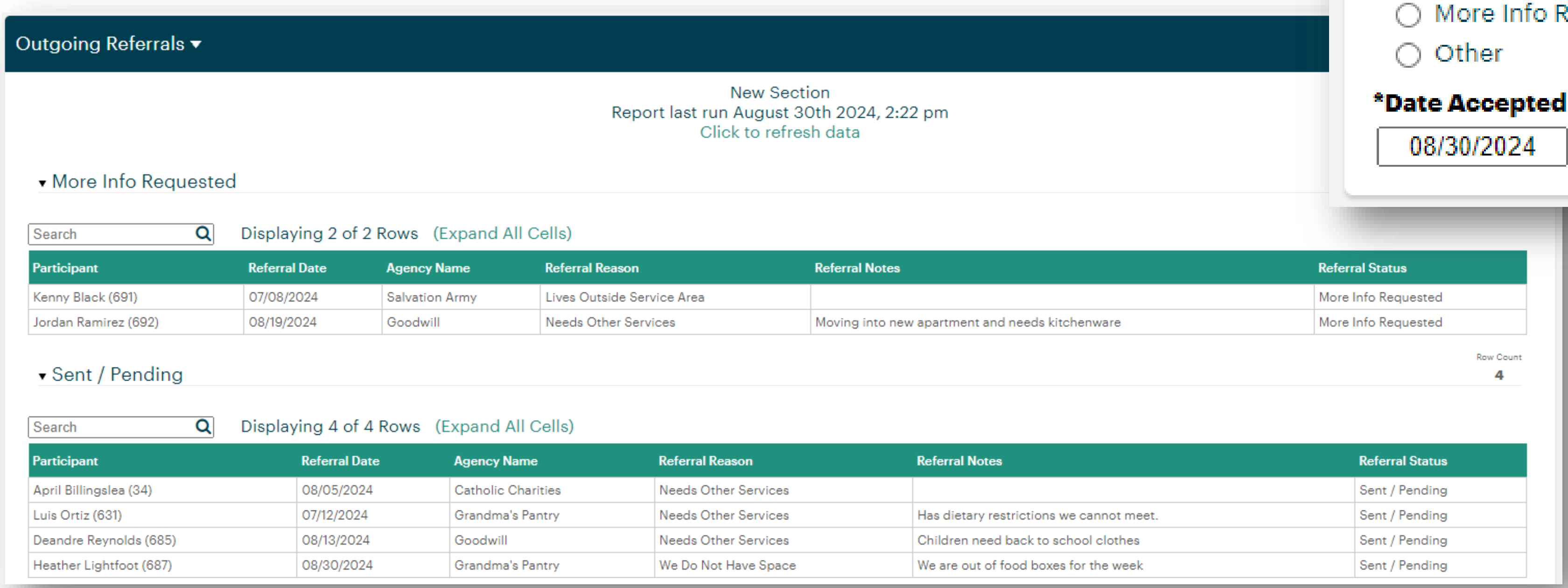
Managing External Referrals

- Use a **Report Bulletin** for visibility by status.
- Update **Status** within Tier 2 as agencies respond.



Outgoing Referrals ▾

New Section
Report last run August 30th 2024, 2:22 pm
Click to refresh data

▾ More Info Requested

Search | Displaying 2 of 2 Rows (Expand All Cells)

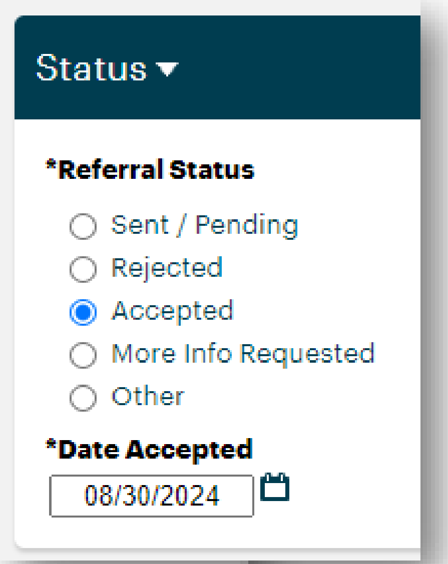
Participant	Referral Date	Agency Name	Referral Reason	Referral Notes	Referral Status
Kenny Black (691)	07/08/2024	Salvation Army	Lives Outside Service Area		More Info Requested
Jordan Ramirez (692)	08/19/2024	Goodwill	Needs Other Services	Moving into new apartment and needs kitchenware	More Info Requested

Row Count
4

▾ Sent / Pending

Search | Displaying 4 of 4 Rows (Expand All Cells)

Participant	Referral Date	Agency Name	Referral Reason	Referral Notes	Referral Status
April Billingslea (34)	08/05/2024	Catholic Charities	Needs Other Services		Sent / Pending
Luis Ortiz (631)	07/12/2024	Grandma's Pantry	Needs Other Services	Has dietary restrictions we cannot meet.	Sent / Pending
Deandre Reynolds (685)	08/13/2024	Goodwill	Needs Other Services	Children need back to school clothes	Sent / Pending
Heather Lightfoot (687)	08/30/2024	Grandma's Pantry	We Do Not Have Space	We are out of food boxes for the week	Sent / Pending



Status ▾

*Referral Status

- ○ Sent / Pending
- ○ Rejected
- ● Accepted
- ○ More Info Requested
- ○ Other

*Date Accepted

08/30/2024

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Additional Resources

Additional Training Opportunities

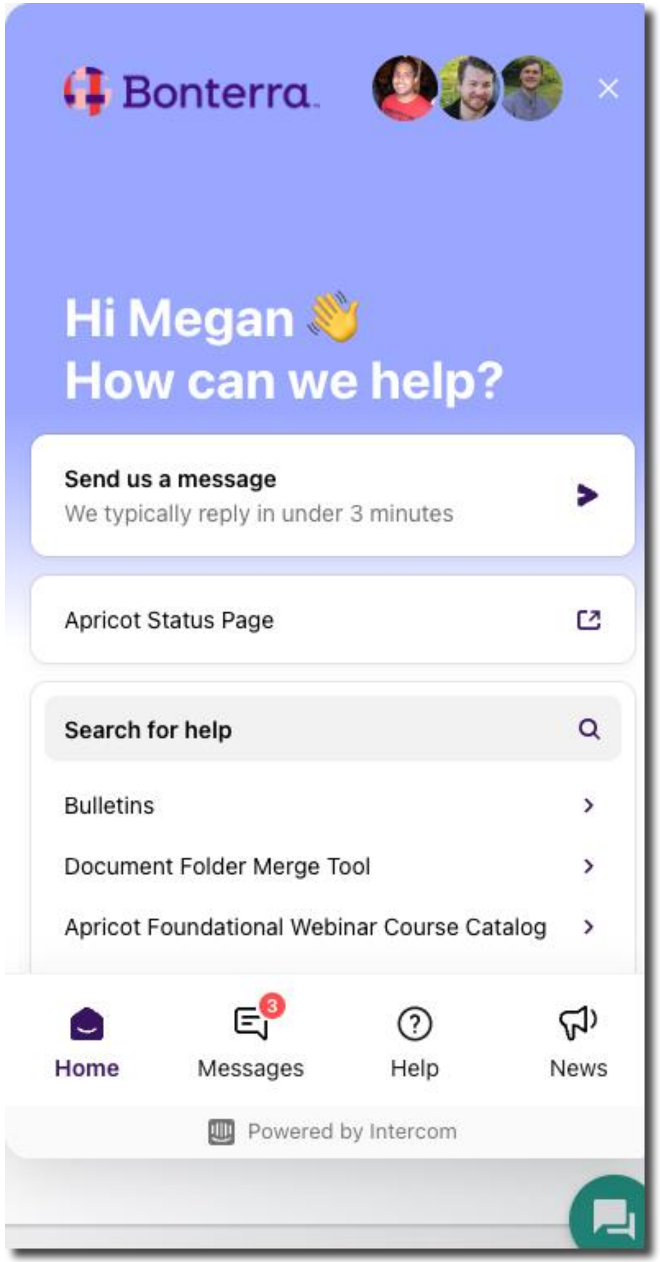
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

Build confidence & knowledge in our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com



Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!

Thank you for attending!

We hope to see you
in future trainings.

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