

Tracking Internal & External Referrals with Apricot

Welcome, we will start shortly!

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

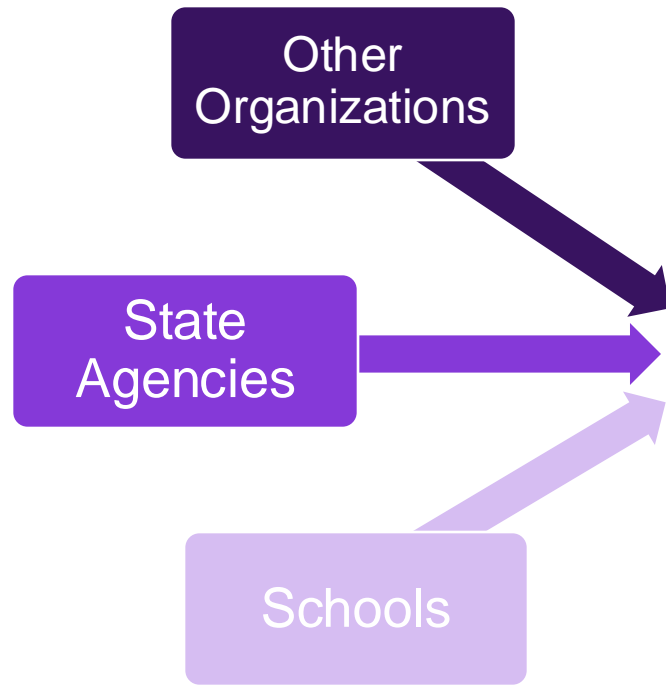
Outgoing Referrals

Overview

Tracking Referrals

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

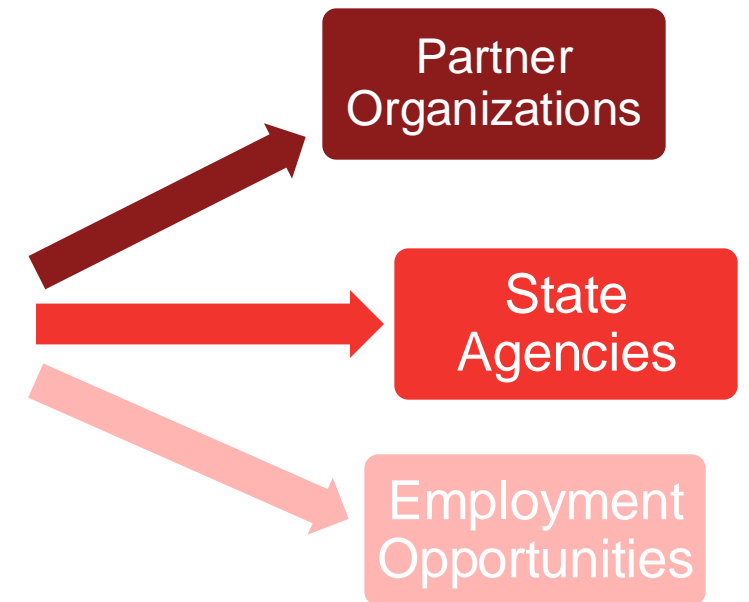
Incoming Referrals



Internal Referrals



Outgoing Referrals



Internal Referrals

Internal Referrals

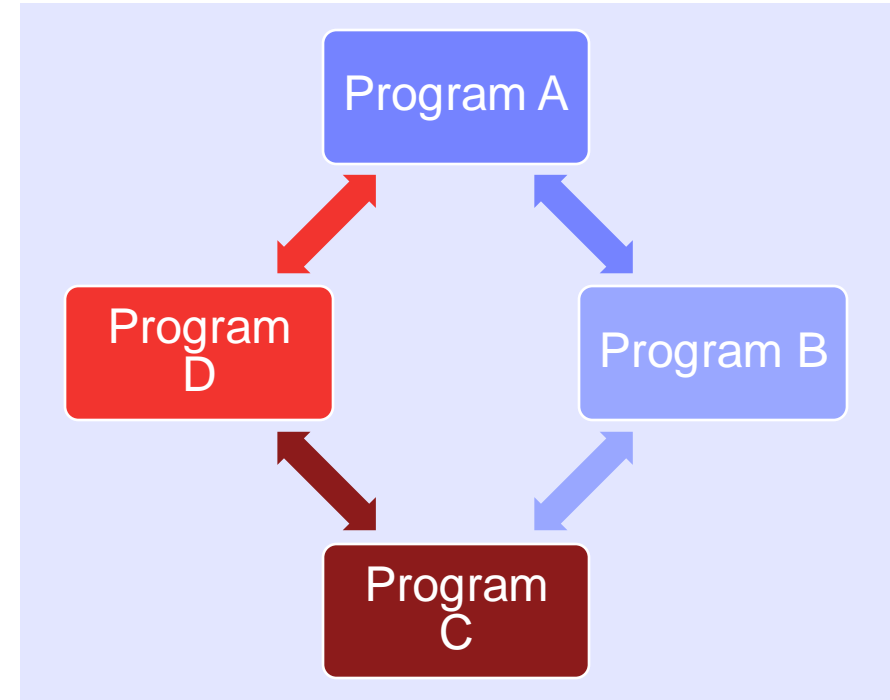
- Ability to share **Participants across Programs**.
- Formalized Approval & Rejection process.
- Updates **Program Assignment** when accepted.
- Can grant access to specified Tier 2 records.

The screenshot shows the 'My Referrals' interface with the following components:

- Filters:** Includes dropdowns for 'Program Referring To', 'Program Referring From', 'Owner', and 'Created By'. It also has date pickers for 'Start Date' and 'End Date', and an 'Export' button.
- Results:** A table with columns: Record Name, Referral Date, Program Referring To, Program Referring From, and actions (Accept, Reject, Edit).

Record Name	Referral Date	Program Referring To	Program Referring From	Actions
Kendra Roberts	08/30/2024 9:47 AM CDT	Workforce	Advocacy, Better Homes, Counseling, Empowering Families	Accept Reject Edit
Heather Carter	08/30/2024 9:46 AM CDT	Advocacy	Empowering Families, MultiService, Program Alumni	Accept Reject Edit
Jane Doe	08/30/2024 9:45 AM CDT	Empowering Families	Better Homes, Counseling, Program Alumni, Workforce	Accept Reject Edit

Your Organization



Enabling Internal Referrals

Step 1: Turn on at the Program level.

[Access Control > Sites & Programs](#)

Program Referrals

Receive Referrals

Send Referrals

Email to receive notification of new incoming referrals?

Step 2: Decide which Roles can send & manage.

[Access Control > Users > Roles](#)

Permissions Undo Redo

FORMS REPORTS AGGREGATE REPORTS BULLETINS **REFERRALS** SHARED FILES

NAME	REFERRAL PERMISSIONS			
	ACCEPT	CREATE	EDIT	REJECT
Empowering Families	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Donor Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Program Alumni	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better Homes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

The screenshot displays the user interface for sending an internal referral. At the top, the participant's name "Alicia Henry" is shown with "Edit", "Create", and "Print" buttons. A "Quick View Information" button is also present. Below this, there are tabs for "DOCUMENT FOLDER", "LINKS", and "APPOINTMENTS". A menu is open over the "Create Referral" button, listing options: "Copy Records", "Record Audit", and "Recent Activity".

The "Referral Action" form is the central focus. It contains the following fields and sections:

- PROGRAM REFERRING TO*:** A dropdown menu with "Advocacy" selected.
- OWNER:** A dropdown menu with "Current Owner" selected.
- Forms to Transfer:** A list of checkboxes for selecting forms to share:
 - Select All
 - Program Enrollment and Exit
 - Individualized Service
 - Counseling Appointment
 - Positive Parenting Assessment
 - Smart Lists Demo
 - External Referral
- NOTES:** A large text area for adding optional notes.
- EXTERNAL REFERRAL:** A label at the bottom left of the form.
- CANCEL** and **SUBMIT** buttons at the bottom right.

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.

The screenshot displays the 'My Referrals' interface. On the left is a dark sidebar menu with options: Dashboard, Inventory, Search Records, My Apricot Tools (with sub-items: My Caseloads, My Reports, My Bulletins, My Shared Files, Schedule, Classes & Terms), My Referrals (highlighted), and Apricot Results Reporting. The main content area has two tabs: 'My Referrals' (active) and 'Referral History'. Below the tabs are filter controls for 'Program Referring To', 'Program Referring From', 'Start Date', 'End Date', 'Owner', and 'Created By'. An 'Export' button is located at the bottom right of the filter section. Below the filters is a 'Results' section with a dropdown for actions ('--Please Select Action--') and a 'Bulk Update' button. A 'Show Owner' link is also present. The results are shown in a table with columns: Record Name, Referral Date, Program Referring To, Program Referring From, and a column of action buttons (Accept, Reject, Edit). The table contains three rows of data.

Record Name	Referral Date	Program Referring To	Program Referring From	Actions
Kendra Roberts	08/30/2024 9:47 AM CDT	Workforce	Advocacy, Better Homes, Counseling, Empowering Families	Accept, Reject, Edit
Heather Carter	08/30/2024 9:46 AM CDT	Advocacy	Empowering Families, MultiService, Program Alumni	Accept, Reject, Edit
Jane Doe	08/30/2024 9:45 AM CDT	Empowering Families	Better Homes, Counseling, Program Alumni, Workforce	Accept, Reject, Edit

Internal Referral Reporting

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

Filters

Status
--Please Select--

Program Referring To
--Please Select--

Program Referring From
--Please Select--

Start Date
MM/DD/YYYY

End Date
MM/DD/YYYY

Owner
--Please Select--

Created By
--Please Select--

Export

Results

Show Owner

Name	Referral Date	Program Referring To	Program Referring From	Status	Details
Lookup Alert Test Allow Other	07/30/2021 10:16 AM CDT	Better Homes	Dog Rescue , Dog Training	Accepted	Details
Dolly Moody	05/18/2021 12:47 PM CDT	Dog Training	Dog Rescue	Accepted	Details
Peesha Hensley	11/23/2020 3:33 PM CST	Dog Boarding	Dog Rescue , Dog Training	Accepted	Details
Wolfgang Amadeus Schueller	11/23/2020 3:34 PM CST	Dog Boarding	Dog Rescue , Dog Training	Accepted	Details
Poe Charleston Chewing	11/18/2020 1:37 PM CST	Dog Training	Dog Rescue	Accepted	Details

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.



The screenshot shows the Bonterra 'Referral for Services' form. The form title is 'Referral for Services' with a '*Required' indicator. Below the title is a brief instruction: '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.' The form contains several input fields: 'Individual's Name*' with sub-fields for 'FIRST*', 'MIDDLE', and 'LAST*'; 'Date of Birth*' with a date format 'mm/dd/yyyy' and a calendar icon; 'Individual's Phone Number*' with sub-fields for 'NUMBER*' (format '(xxx) xxx-xxxx') and 'EXT.'; and 'Individual's Email*'. The Bonterra logo is visible in the top left corner of the form interface.

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.

The screenshot displays the 'Referral for Services' form editor. The top navigation bar includes a 'BACK' button, the title 'Referral for Services' with a sub-label 'Participant Profile', and buttons for 'ATTACH TIER 2 FORM', 'SUCCESS/ERROR OPTIONS', 'FORM URL', 'RETRACT', 'PUBLISH', and 'DELETE'. The main form area contains a title 'Referral for Services', a descriptive paragraph, and three input sections: 'Individual's Name' with fields for 'FIRST', 'MIDDLE', and 'LAST'; 'Date of Birth' with a 'false' value; and 'Individual's Phone Number' with 'NUMBER' and 'EXT.' fields. A right-hand sidebar titled 'Program Enrollment' features a dropdown menu set to 'Intake' and a 'Form Designer Choices' section with a search bar and three toggleable options: 'Intake Date', 'Client Status', and 'How did you hear about us?'. The bottom of the editor has 'CANCEL', 'PREVIEW', and 'SAVE' buttons.

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!

The screenshot displays the 'Referral for Services' form interface. At the top, there is a navigation bar with a 'BACK' button, the title 'Referral for Services' (with 'Participant Profile' below it), and two buttons: 'ATTACH TIER 2 FORM' and 'SUCCESS/ERROR OPTIONS'. To the right of the navigation bar are four icons: 'FORM URL', 'RETRACT', 'PUBLISH', and 'DELETE'. The main content area is titled 'Referral for Services' and contains a text box with the instruction: '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.' Below this are three input fields for 'Individual's Name' with labels 'FIRST*', 'MIDDLE', and 'LAST*'. The 'Date of Birth*' field contains the value 'false'. The 'Individual's Phone Number*' field has labels 'NUMBER*' and 'EXT.'. At the bottom of the form are three buttons: 'CANCEL', 'PREVIEW', and 'SAVE'. On the right side, there is a sidebar with 'Program Enrollment' (set to 'Intake') and 'Form Designer Choices' (with a search bar and three items: 'Intake Date', 'Client Status', and 'How did you hear about us?').

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.



External Referral

Alicia Henry
Quick View Information ▶

Main ▾

*Referral Date
08/30/2024 📅

*Referral Partner
 Hide Deactivated Links [+ Add](#)

Agency Name 🔒

Agency Contact 🔒
First _____ Middle _____ Last _____

Contact Email 🔒
customer_care@apricot.infr

Referral Reason
 Does Not Meet Our Criteria
 We Do Not Have Space
 Lives Outside Service Area
 Needs Other Services

Referral Notes
Notes

Status ▾

*Referral Status
 Sent / Pending
 Rejected
 Accepted
 More Info Requested
 Other

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.

The screenshot displays the 'External Referral' form interface. The form includes fields for 'Referral Date *' (08/30/2024), '* Referral Partner', 'Agency Name', 'Agency Contact' (with a 'First' sub-field), 'Contact Email' (customer_care@apricot.info), 'Referral Reason' (with radio button options: Does Not Meet Our Criteria, We Do Not Have Space, Lives Outside Service Area, Needs Other Services), and 'Referral Notes'. A 'Field Properties (auto populate)' dialog box is open, showing the 'Agency Contact' field's configuration. The dialog includes sections for 'Standard Properties' (Required, Quick View, Clear On Copy, Duplicate Check, Searchable, Locked, Hidden), 'Linking Field' (Referral Partner), 'Field' (Contact Name), 'Special Properties' (Auto Update), and 'Tooltip'. A 'Convert To Static Field' button is visible in the dialog. The background form has a 'Main' dropdown menu and gear icons for field configuration.

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.

Field Properties (email trigger)

Display Name
Email to Agency

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable Hidden
 Clear On Copy

Special Properties

Tooltip

Main | Email Text | Filters | Attachments

Reply To :
[Text Field]

Recipients :
"Contact Email"<field_680@webaddress.com>

Users
Add User To Recipients

Fields
Add Field To Recipients

- Add Field To Recipients
- Participant Profile
- Client Email
- External Referral
- Contact Email**

Deactivate Apply

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**

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)

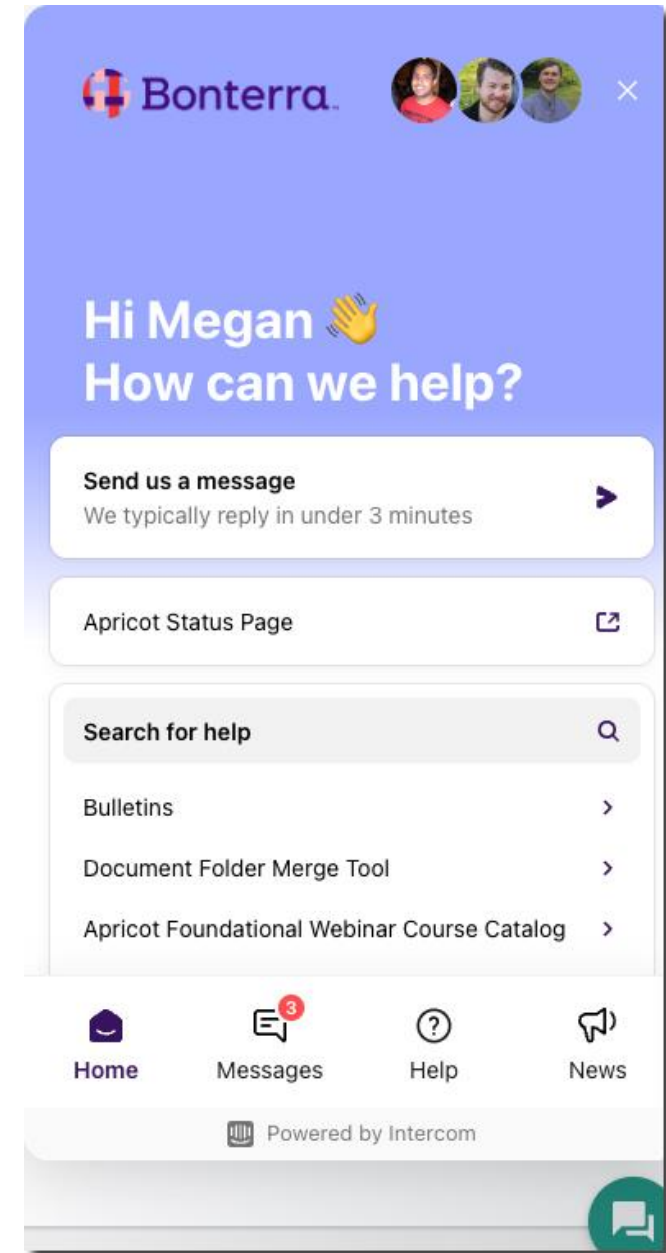


Build confidence & knowledge in
our software!

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.