

# How to Record Referral Notes

PROGRAM: CAMBRIDGE CAN

Enrollment History Provide Services **Assessments** Notes Files Forms X Exit

PROGRAM ELIGIBILITY DETERMINATION

C-CAN Score Summary

INCOME	1	PHYSICAL HEALTH	0
HOUSING HISTORY	1	SUBSTANCE USE	2
MENTAL HEALTH	2	CROSS-CUTTING	2
CRIMINAL RECORD	0		

C-CAN Score PRE-SCREEN TOTAL 8

Streamlined Queue (Original)  Toggle Streamlined Queue on

REFER DIRECTLY TO COMMUNITY QUEUE(S) **Refer Here**

1

Refer clients directly to the community queue from the screen immediately after completing a Cambridge Streamlined Assessment

REFERRAL: ADD TO CQ

Send to Queues Streamlined Queue (Original)

Referred Program Community Queue

Referred to Agency Community Queue

Referring Agency Coordinated Access

Private

**Record notes here**

e.g., Client is sober and displays high functioning capabilities conducive to living on their own

SEND REFERRAL CANCEL

2

Leave a referral note with details of the client's engagement. Once sent, other providers can add additional notes to coordinate services. (You should record a note whenever you interact with a client on the queue.)

UNIQUE IDENTIFIER  
B6C213989

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Streamlined Queue (Original)

**VIEW DETAILS**

3

To return to the client's referral page, click on "view details" under the client's photo on their profile page. Case managers can record any attempts to reach the client here, successful or not.

PROFILE **HISTORY** PROGRAMS CONTACT LOCATION

HISTORY

Advanced Search Options View

Service Name	Start Date	End Date
Referral: Streamlined Queue (Original) Coordinated Access referral to Community Queue	07/20/2021	07/26/2021
Cambridge Streamlined Assessment Coordinated Access	07/20/2021	
Cambridge CAN Coordinated Access	07/20/2021	Active

4

To access a referral page after a client has been removed from the queue, navigate to the client's history tab and click on the edit icon next to the referral. If a client was removed from the queue, there will be an end date listed.