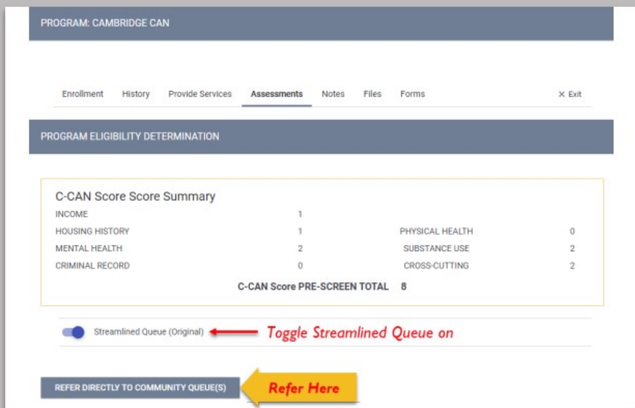
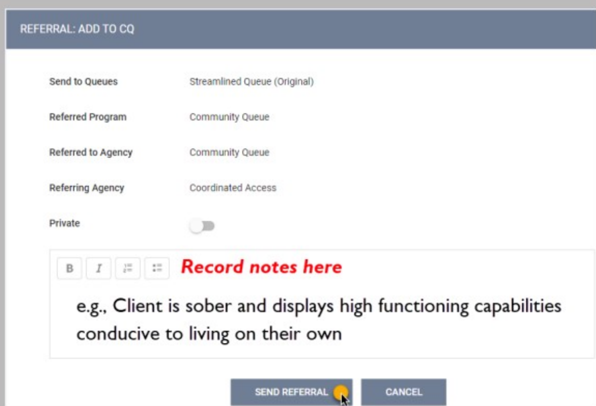
How to Record Referral Notes

Cambridge CAN
coordinated access network



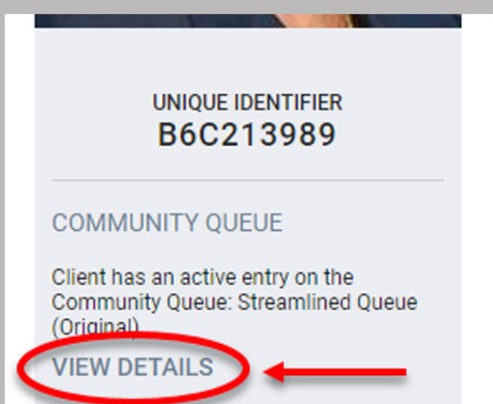
1

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



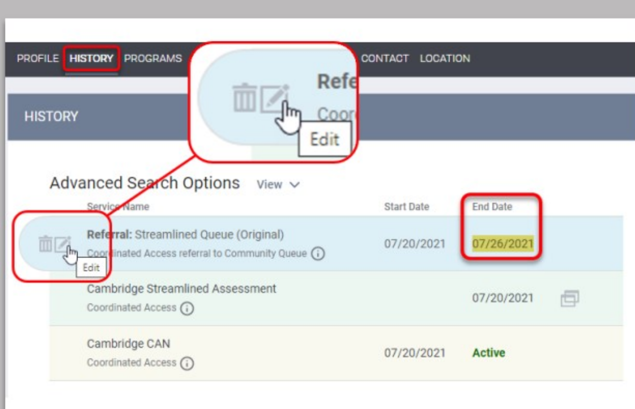
2

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.)



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.



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.