

Responding to Referral:

Now that you have received a referral, you will need to locate the name of the referring counselor if it was not included on the referral form or in the referral note and then respond to the referring VRC letting them know you have received the referral. This information could be found in the “Note By” section if the VRC wrote the note, in the “CRP Note” text, on the attached referral form, or can always be found in the “Programs” tab.

1. Click on “Programs” tab and a list of the programs the client is enrolled in will be listed. Look at the “Vocational Rehabilitation” row and the associated “Worker” in the column to the right of the program. In this example, you can see that Anna Gibbs is the referring counselor for the VR program.

The screenshot shows the 'Programs' tab for client JAGGER, MICK (34751). The table below lists the programs and associated workers:

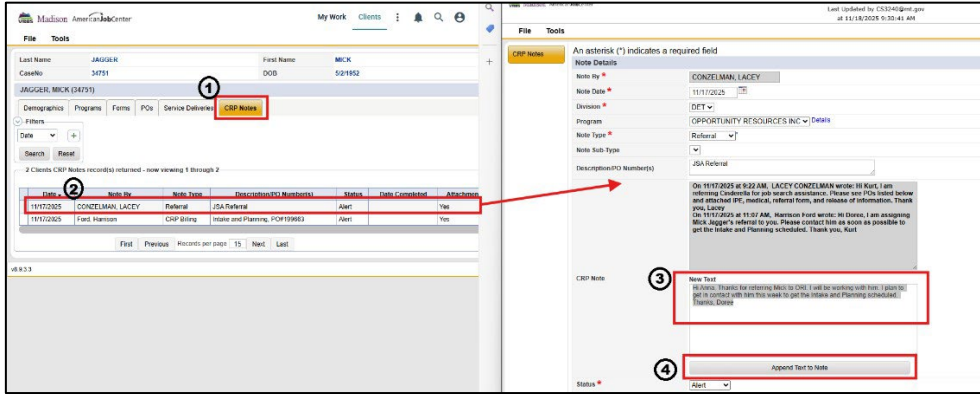
Division	Program	Worker	Status	Status Date	Enroll Date	Close/Exit Date	# of Days Enrolled	Employment Outcome at Exit
DET	PRE-EMPLOYMENT TRANSITION SERVICES	GIBBS, ANNALIESE	Pre-ETS Services, IPE	11/17/2025	11/17/2025		1	
DET	WAITLIST	GIBBS, ANNALIESE	Open	03/11/2025	03/11/2025		252	
DET	EXTENDED EMPLOYMENT	ALMEIDA, DENNIS JOHN	Open	01/01/2025	01/01/2025		321	
DET	BLIND ADJUSTMENT PROGRAM	GIBBS, ANNALIESE	Open	04/15/2025	04/15/2025		217	
DET	VOCATIONAL REHABILITATION	GIBBS, ANNALIESE	IPE-Career Services	03/18/2025	02/14/2025		277	

2. Now that you have located the name of the referring VRC, you need to go back to the Referral Note.
 - a. Click on “CRP Notes” tab.
 - b. Click on the Referral note to open it.
 - c. Type your response to the referring VRC. For example:

“Hi Anna, Thanks for referring Mick to ORI. I will be working with him. I plan to get in contact with him this week to get the Intake and Planning scheduled. Thanks, Doree.”

OR

“Hi Anna, Thanks for referring Mick to ORI. I have assigned Doree to work with him and will ask her to get in contact with him this week to get the Intake and Planning scheduled. Thanks, Kurt.”
 - d. Click “Append Text to Note.”



e. In “Notes Recipients Grid,” click the “Remove button” Remove from the line with your name.

Name	Date Sent	Date Read	Status	Date Signed	
TAYLOR, DOREE	11/18/2025		Unread		Remove

f. Click the “Lookup” button Lookup. A new screen will open called “Worker Search Popup.”
 g. Type the first 3 letters of the employment specialists last name into the “Search Text:” text box;

h. Click the “Search” button.



i. Double click on the name of the person that that you want to assign the referral to.

Worker Search Popup

Search by: Last Name Search Text gib

Search

2 record(s) returned

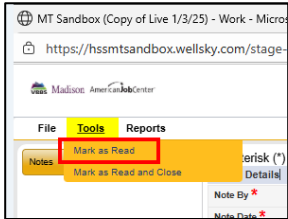
MEMBER ID	Worker	Title	User ID Active
503	GIBBONS, ROBERT		Yes
345	GIBBS, ANNALIESE	BUREAU CHIEF - PROGRAM SUPPORT & OPERATIONS	Yes

Cancel

j. Once you double click on the name of the worker, the “Worker Search Popup” screen will disappear and the CRP note will reappear with the employment specialist you selected listed in the “Note Recipients Grid.”

Note Recipients					
Add Note Recipient:		<input type="text"/>	Lookup	Clear	
Note Recipients Grid					
Name	Date Sent	Date Read	Status	Date Signed	
GIBBS, ANNALIESE	11/18/2025		Unread		Remove

3. Select “Mark as Read” from the Tools menu.



4. Click “Save and Close CRP Note” from the file menu and proceed with contacting the client, scheduling a meeting and completing the intake and planning requirements.

