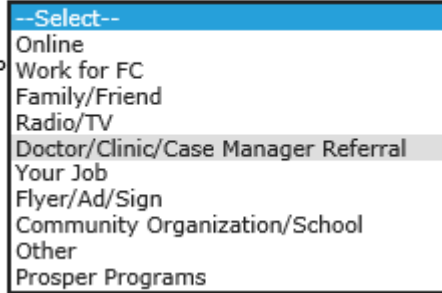


ETO: 2 Steps for Entering a Specific Program Referral Source

1. On the client's information page (where you enter demographics), choose "Doctor/Clinic/Case Manager Referral" from the "Referral Source" dropdown menu.

Referral Source



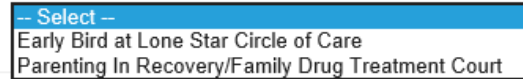
A screenshot of a dropdown menu titled "Referral Source". The menu is open, showing a list of options. The option "Doctor/Clinic/Case Manager Referral" is highlighted in grey, indicating it is the selected choice. Other options include "--Select--", "Online", "Work for FC", "Family/Friend", "Radio/TV", "Your Job", "Flyer/Ad/Sign", "Community Organization/School", "Other", and "Prosper Programs".

2. At the top of the client's supplemental intake, you'll see a dropdown – "Who referred you to Financial Wellness?" Choose the appropriate source.

Referral Source

Doctor/Clinic/Case Manager Referral

Who referred you to Financial Wellness?



A screenshot of a dropdown menu titled "Who referred you to Financial Wellness?". The menu is open, showing a list of options. The option "Parenting In Recovery/Family Drug Treatment Court" is highlighted in grey, indicating it is the selected choice. Other options include "-- Select --" and "Early Bird at Lone Star Circle of Care".