

KinderTrack – Intake Referral

A Press **Referral** under **Intake**.

B Enter the appropriate search criteria in the available fields—press **Search** to display the results.

Search Results: No items found Options

C Select the check box of the **Referral** you want to import to and select **Import**.

Referral Key	Referral Rank	Referral Date	Referral Source	Referral Status	Referral Status Date
UnitTest-SourceKey02	1	09/22/2023	CHOICES	Imported	09/22/2023
UnitTest-SourceKey02	2	09/22/2023	CHOICES	Updated	09/22/2023
UnitTest-SourceKey02	3	09/25/2023	CHOICES	Imported	09/25/2023
UnitTest-SourceKey02	4	09/26/2023	CHOICES	Imported	09/26/2023
UnitTest-SourceKey02	5	10/04/2023	CHOICES	Imported	10/04/2023
UnitTest-SourceKey02	6	10/04/2023	CHOICES	New Referral	10/04/2023
UnitTest-SourceKey02	7	09/11/2023	SNAP	Imported	09/21/2023
UnitTest-SourceKey01	8	09/18/2023	TANF Applicant	Withdrawn	09/18/2023
UnitTest-SourceKey01	9	09/18/2023	TANF Applicant	Updated	09/18/2023
UnitTest-SourceKey02	10	09/18/2023	TANF Applicant	Imported	09/18/2023

D An **Operator Search** page automatically displays. Enter the appropriate search criteria in the available fields. Press **Search**.

Note: The person selected will be the case worker assigned to the Referral once it has been imported into KinderTrack. The caseworker will then be able to process the Referral.

E Select the Operator radio button and press **Import**.

Search Results:

Name	Roles
Lopez, Carina	Programmer OCFS System Admin Payment Tech Provider Specialist

Import Cancel

F A message displays saying the Import request was submitted successfully.

Note: Once the Referral has been imported, you can see it under the Alerts section of the **Family > Summary** page.