

## ReferralQ and Capacity Tracking

Helplines, contact centers, and other human service organizations are now being asked to expand their scope to go beyond providing information and referral during a single interaction. They now must often track whether the help seeker successfully received assistance from referred organizations, if their needs were met or they still need help, and whether SDOH markers were improved. With iCarol you can assign a help seeker to one or more lists for services and track their status with these programs.

### Document Interactions

- Customize forms to collect the data you need
- Complete intakes, screenings or assessments
- Provide referrals from an integrated database
- Assign help seekers to one or more ReferralQ or lists for services provided by your own agency or your CBO partner
- Reduce help seeker frustration by referring to services with the capacity to serve, or by adding them to waitlists



### Track Capacity

Manage CBO capacity, and use it as one of several criteria you evaluate to decide where to refer your help seekers. When a referral is made to the program, that program's capacity is automatically reduced in the ReferralQ.



### Make the Referral

- View, filter, sort, and search for those awaiting services using the ReferralQ Dashboard
- Prioritize who is next in line for services
- Refer help seekers to an appropriate service associated to their need

### Work More Closely with CBO Partners

Use our optional **Provider Portal** add-on to even more directly integrate and share knowledge with your CBO partners. With the Provider Portal your partners can:



- Enter and edit their service capacity
- Directly obtain referral and contact data information
- Update the help seeker's status as they progress through the program or service

### Use ReferralQ For

- Shelter Placement
- Crisis Stabilization
- Rapid Rehousing
- Mobile Crisis Dispatch
- Financial/Utility Assistance
- Child Care Referrals
- Holiday Gift/M Meal Programs
- Tax Preparation Season
- And more!