



UNITED WAY
Monterey County

**SMART REFERRAL
NETWORK**

Smart Referral Network 2.0

User Onboarding Kit | United Way Monterey County

A practical guide for agencies, Agency Administrators, and Agency Staff

Purpose of this kit

Use this kit to move a new organization from “we have access” to “we can confidently use SRN.” It covers agency setup, user access, MFA, the core referral workflow, consent and privacy, role responsibilities, support, and a simple first-30-days adoption plan.

1. What SRN 2.0 is

The Smart Referral Network is a shared community referral platform designed to help organizations identify needs, find the right service or program, send and receive referrals, keep clients informed, track progress, and document outcomes. SRN 2.0 adds stronger program-level matching, configurable eligibility, client self-service, SMS notifications, cross-county collaboration, role-based access, and enhanced reporting.

- Identify the client’s need and determine whether an outside partner is needed.
- Find the appropriate program—not simply the appropriate agency.
- Create a referral with the information the receiving program needs.
- Receive, accept/decline/forward, and work referrals in a timely way.
- Track the referral through its lifecycle and document the outcome.
- Use reporting to understand referral activity, response, completion, and service gaps.

2. Your onboarding path

Step	Who	What must happen
1. Join the 211 network	Agency leadership / designated contact	Complete the 211 agency application if the organization is new to the 211 directory. https://211montereycounty.org/agency-application/
2. Add or update programs	Agency leadership / designated contact	Complete the 211 program application for programs that should receive referrals. https://211montereycounty.org/program-application/
3. Notify United Way	Agency contact	Tell your United Way contact the application is complete so the program can be tagged for SRN.



4. Identify users	Agency Admin / agency leadership	Provide user name, email, and access level; identify who will send referrals and who will manage incoming referrals.
5. Complete training	All SRN users	Review training materials and practice the core referral workflow. https://www.unitedwaymcca.org/srn-resources
6. Activate MFA	Each user	Set up the approved authenticator method and never share credentials or codes.
7. Verify programs/inboxes	Agency Admin	Confirm users can access the correct agency/program/inbox and that program information is accurate.
8. Start using SRN	All users	Use SRN for new referral activity and report questions or defects promptly.

3. Before your first referral

The three things every agency should have in place

People • Process • Data. Identify the people responsible for referrals and follow-up; agree on the workflow and consent expectations; decide what outcomes should be documented and reported.

People

- ☐ At least one trained Agency Administrator.
- ☐ All staff who will create, receive, or manage referrals have SRN accounts.
- ☐ A clear owner for the incoming referral inbox.
- ☐ A backup person for coverage during absences.
- ☐ A process for promptly requesting access changes when staff join, change roles, or leave.

Process

- ☐ Staff know which needs should trigger an SRN referral.
- ☐ Staff know which programs to use for common needs.
- ☐ Staff know how to obtain/confirm client consent.
- ☐ Receiving staff know how quickly they are expected to respond.
- ☐ Staff know what constitutes a successful outcome and when to close a referral.

Data

- ☐ Agency and program information is current.
- ☐ Program eligibility and resource information is accurate.
- ☐ Users understand what information they should and should not include in referral notes.
- ☐ Agency leadership knows which referral and outcome measures it wants to monitor.



4. User roles and access

Capability	Agency Administrator	Agency Staff / User
Manage Agency Staff users	Yes — within the agency	No
Access Admin section	Yes	No
Maintain agency/program information	Yes	No / limited to assigned work
Create/find clients	Yes	Yes
Create, receive and track referrals	Yes	Yes
Add general client notes	Yes	Yes, within assigned access
Update received referral status	Yes	Yes
Export agency client list	Yes	No
Batch upload clients	Yes	No
Agency-level EMC outcome reporting	Yes	Limited to assigned client information

Important: administrative responsibility does not automatically mean broader access to client information. SRN permissions are scoped to the user's role, agency/program assignments, and applicable access rules.

5. Login, MFA and account security

1. Enter your individual SRN username and password.
 2. When prompted, open the approved authenticator application on the enrolled device.
 3. Enter the current one-time code.
 4. Complete MFA before access is granted.
- Never share your password or authentication code.
 - Do not share user accounts.
 - Use SRN only from an appropriate, secure device and follow your organization's security policies.
 - Request access changes when your job responsibilities change.
 - Agency Administrators should periodically review whether staff still need SRN access.

6. The core referral workflow

Stage	User action	Good practice
1. Find or create	Find the existing client before creating a new record; create a new client only when needed.	Use available identifying information carefully to reduce duplicate records.
2. Confirm consent	Make sure the client has valid consent before creating the referral.	Explain what information will be shared and why.
3. Find the program	Search for the service/program that fits the client's needs and eligibility.	Use program-level criteria and matching information rather than choosing only by agency name.



4. Create referral	Select the destination program and provide the required referral note/information.	Provide enough information for the receiving program to act without unnecessary disclosure.
5. Receive and respond	Receiving staff review the referral and accept, decline, or forward as appropriate.	Use the appropriate status and standardized decline reason.
6. Work and track	Update the referral as work progresses.	Do not let pending referrals sit without follow-up.
7. Close with outcome	Document the outcome when the service connection is resolved.	Use referral history and reporting to support follow-up and accountability.

7. Referral statuses

Status	What it means for staff
Pending	Referral has been sent and is awaiting action.
In Progress	Receiving agency has begun working the referral.
Enrolled	Receiving agency has enrolled the client in the program; this is the terminal success state in the defined lifecycle.
Declined	Receiving agency cannot accept the referral; use the appropriate standardized reason.
Forwarded	Receiving agency forwards the client to an alternative program when appropriate.
Auto-Declined	System closes a referral after the configured period of inactivity; current training materials identify a 90-day automatic-decline rule for referrals that remain pending.

Agency expectation

The receiving agency is responsible for reviewing incoming referrals, updating status, and documenting outcomes. A referral is not complete simply because it was sent.

8. Consent, privacy and client information

Consent is part of the referral workflow. SRN is designed to control access to client information and to support consent capture, renewal, revocation, and expiration processes.

- Do not create a referral when required consent is missing or expired.
- If the system indicates that consent must be renewed, use the available renewal workflow before attempting the referral again.
- Only access client information needed for your job.



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- Do not put unnecessary sensitive information in free-text notes.
- Use individual accounts and MFA; never share credentials.
- If you believe client information has been exposed improperly, follow your organization's incident-reporting process promptly.

Known training issue

An earlier training guide documented a situation where the Send Referral button may be missing because the client's waiver needs to be re-signed. The documented workaround is Clients → Find Clients → Actions → Renew/Revoke Waiver → Renew waiver, then return to the referral workflow. Treat this as a known workflow issue and follow current UWMC guidance if the interface has changed.

9. Client-facing capabilities

- Client portal/self-service access can provide referral history and status.
- Clients can update demographic information and manage consent through supported portal workflows.
- Clients can receive SMS notifications when referral status changes when they have opted in and the workflow is configured.
- The goal is to reduce the need for families to repeatedly tell their story while improving visibility into what happens after a referral is made.

10. Smart Matching and program-level eligibility

SRN 2.0 is designed to help users find the right program, not merely the right agency. Program eligibility can incorporate factors such as income, location, demographics, target population, available resources, and other partner-defined requirements.

- Use the client information you have gathered accurately.
- Review the suggested programs rather than assuming the first result is the only option.
- Matching supports the case manager's decision; it does not replace professional judgment.
- If a program is not appropriate, use the correct decline/forward workflow and reason.

11. Cross-county referrals

SRN 2.0 supports regional referrals across participating counties, including Monterey, Kings, Tulare, and Santa Cruz, with access controls intended to limit who can see cross-county client information.

- Confirm that the destination program serves the client's geography.
- Use the appropriate destination program and referral workflow.
- Do not assume that access to one county provides unrestricted access to another county's client data.



12. Reporting and what agencies should monitor

At a minimum, Agency Administrators should review:

- Referrals sent and received.
- Pending referrals and aging/stalled referrals.
- Accepted/enrolled, declined, and forwarded referrals.
- Response time and time to outcome where available.
- Top referral needs and destination programs.
- Referral activity by program, geography, and relevant demographic dimensions.
- Common decline reasons and service-capacity gaps.
- EMC outcomes where the agency is authorized to view them.

For Community Schools and similar partners

A useful local dashboard can include referrals sent, accepted, completed/enrolled, average response time, top referral needs, outcomes by school, and outcomes by student subgroup.

13. First 30 days: adoption plan

Time	Agency actions
Before launch	Confirm users, roles, MFA, program information, referral inbox ownership, consent workflow, and backup coverage.
Week 1	Complete training; practice finding/creating a client; practice creating and receiving a referral; verify notifications.
Week 2	Review real referrals; identify questions, stalled referrals, duplicate-record issues, and program-information gaps.
Week 3	Agency Admin reviews access and referral activity; refresh staff on any workflow problems.
Week 4	Review referral outcomes, response time, decline reasons, and adoption; identify one or two workflow improvements.

14. Agency Administrator monthly checklist

- ☐ Review active SRN users and deactivate staff who no longer need access.
- ☐ Confirm new staff have the correct role and agency/program assignment.
- ☐ Review agency and program information for accuracy.
- ☐ Review incoming and outgoing referral activity.
- ☐ Look for aging or stalled referrals.
- ☐ Review decline reasons for recurring service-access problems.
- ☐ Review relevant EMC/outcome reports.



- ☐ Confirm staff know how to report questions and bugs.
- ☐ Identify any program capacity or referral-routing changes that should be communicated to United Way.

15. Troubleshooting and support

Problem	First step
Cannot log in / MFA problem	Confirm username/password and authenticator code; do not share credentials. Use the established SRN access/reset process.
Referral cannot be sent	Check whether required consent is current and whether the destination program is active; if the waiver/consent prompt appears, complete renewal.
Referral is sitting in Pending	Receiving agency should review and act; follow up internally before the automatic-decline period is reached.
Wrong program or access	Contact the Agency Administrator to verify program configuration and user assignment.
Possible bug	Email srn@unitedwaymcca.org with what you were trying to do, what happened, and a screenshot/error message when available.
Training question	Use the SRN training resources and documentation; ask the designated agency/SRN contact for workflow clarification.

Training resources: <https://www.unitedwaymcca.org/srn-resources>

16. Suggested two-hour new-user orientation

Time	Topic	Practice
0:00–0:15	Welcome and why SRN 2.0	What SRN changes for clients, case managers, agencies, and the network.
0:15–0:30	Login, MFA and access	Log in; verify role and agency/program access.
0:30–0:55	Clients and consent	Find a client; avoid duplicates; review consent; discuss privacy.
0:55–1:20	Create a referral	Search for a program; create and send a referral.
1:20–1:40	Receive and work a referral	Review incoming referral; update status; decline/forward when appropriate.
1:40–1:50	Client portal and SMS	Review client-facing visibility and notifications.
1:50–2:00	Reporting, support and next steps	Review basic reporting, bug reporting, and first-30-days checklist.



17. Agency onboarding worksheet

Item	Agency answer
Agency Administrators	
Backup Administrator	
Agency Users	
Referral inbox owner	
Backup referral inbox owner	
Programs receiving SRN referrals	
Top 5 needs that should trigger a referral	
Expected response time	
Most important referral outcomes	
How consent is explained/captured	
How staff follow up on pending referrals	
How staff report incidents or privacy concerns	
Agency contact for SRN questions	
Date onboarding completed	

18. Quick-reference: the SRN habit

5. Find the client.
6. Confirm consent.
7. Find the right program.
8. Send the referral with useful, necessary information.
9. Watch the referral until it is resolved.
10. Update status and document the outcome.
11. Use reporting to improve the workflow.

The principle behind SRN

A referral is a handoff, not an endpoint. The value of a closed-loop network comes from knowing what happened after the referral was sent.