

# Create & Process a Service Referral for a Client



This guide provides a step-by-step process for creating a service referral for clients, ensuring that users can efficiently navigate the system and complete necessary tasks. Users can streamline their workflow, improve client support, and ensure accurate documentation of services provided. It's an essential resource for anyone involved in client management, particularly in social services or healthcare settings. NOTE: Service Referrals no longer need to be done in CAREWare.

- 1 Navigate to <https://lvtgarwisetest.jprog.net/RWISE/home>

The screenshot shows the TriYoung Login Portal. At the top center is a cartoon owl wearing a red awareness ribbon. Below the owl, the text reads 'Welcome to the TriYoung Login Portal' and 'Please Login Below'. The login form is a white box with a yellow circular icon on the left. It contains two input fields: 'Username' with a placeholder 'CAREWare Username' and 'Password' with a placeholder 'CAREWare Password'. Below the fields is a purple 'Submit' button. At the bottom of the form, there is a 'CAREWare' logo and a 'Reset Password' link.

## 2 Enter your credentials

Welcome to the TriYoung Login Portal  
Please Login Below

**Username**

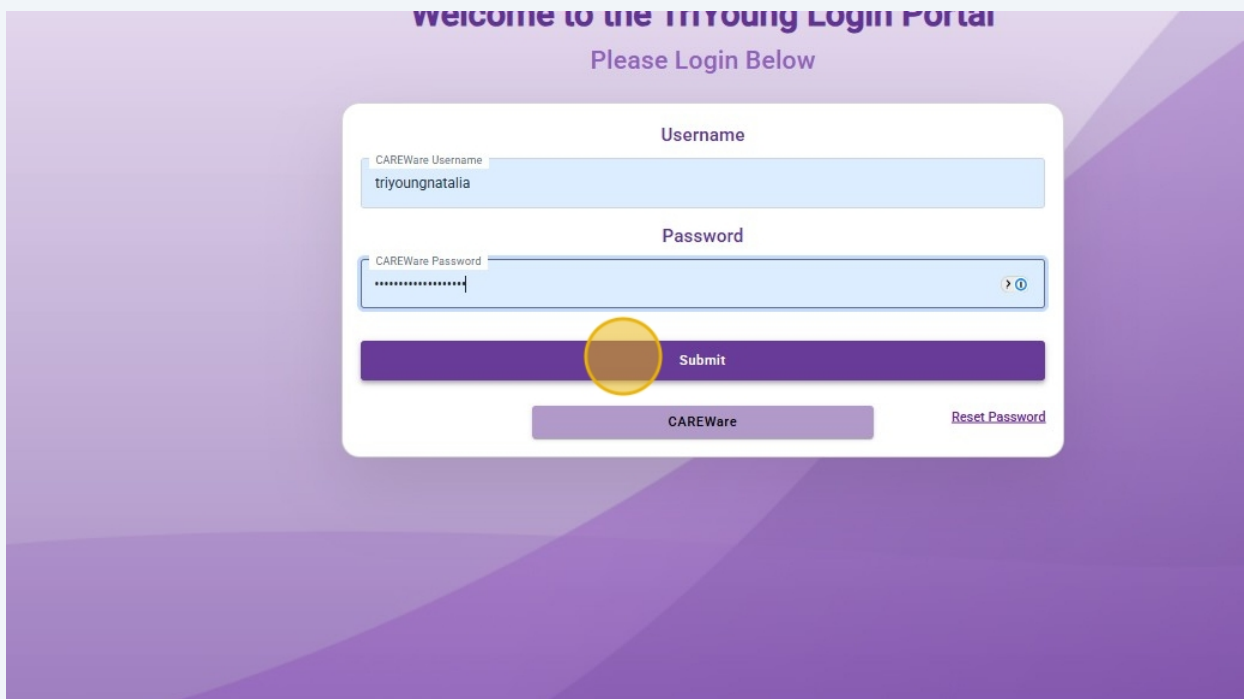
CAREWare Username  
triyoungnatalia

**Password**


CAREWare Password  
.....

Submit

CAREWare [Reset Password](#)



## 3 Select your provider domain.



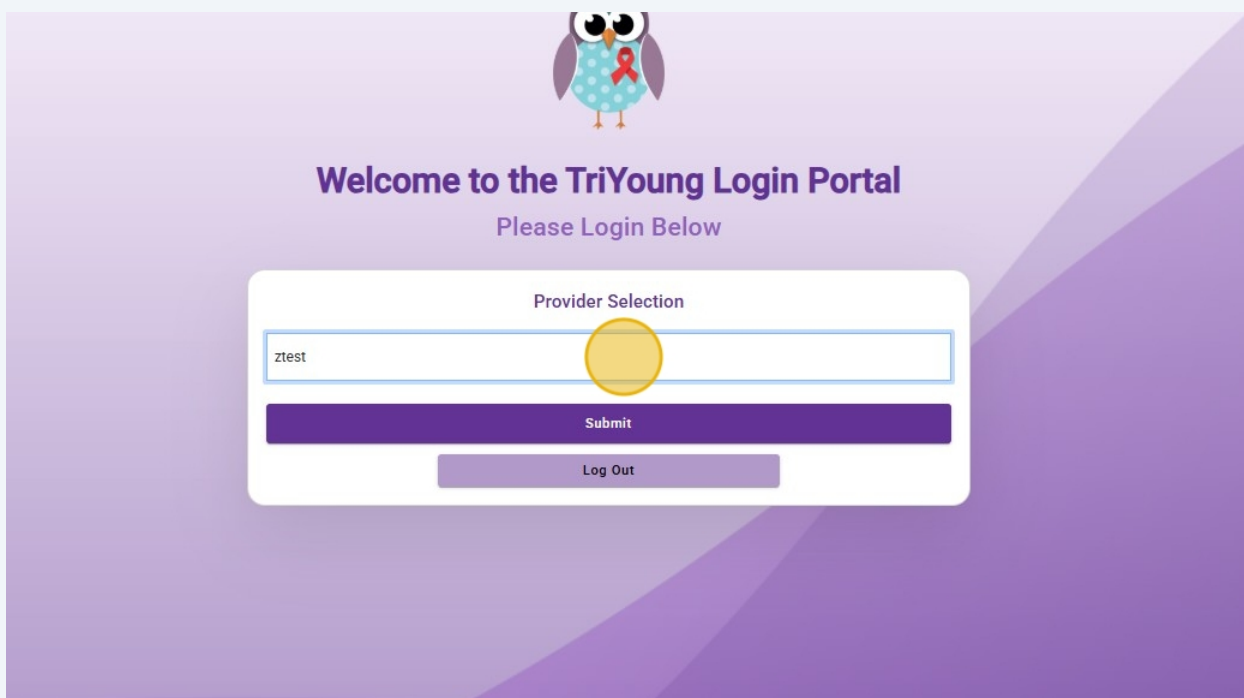
Welcome to the TriYoung Login Portal  
Please Login Below

**Provider Selection**

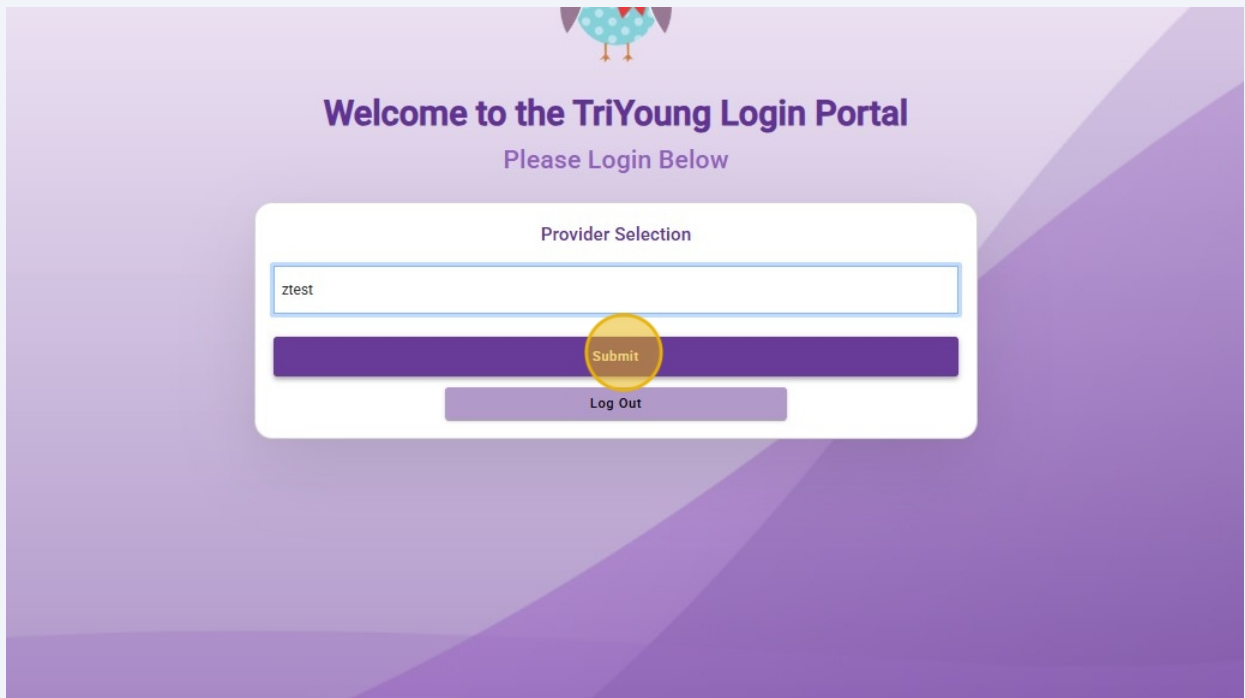
ztest

Submit

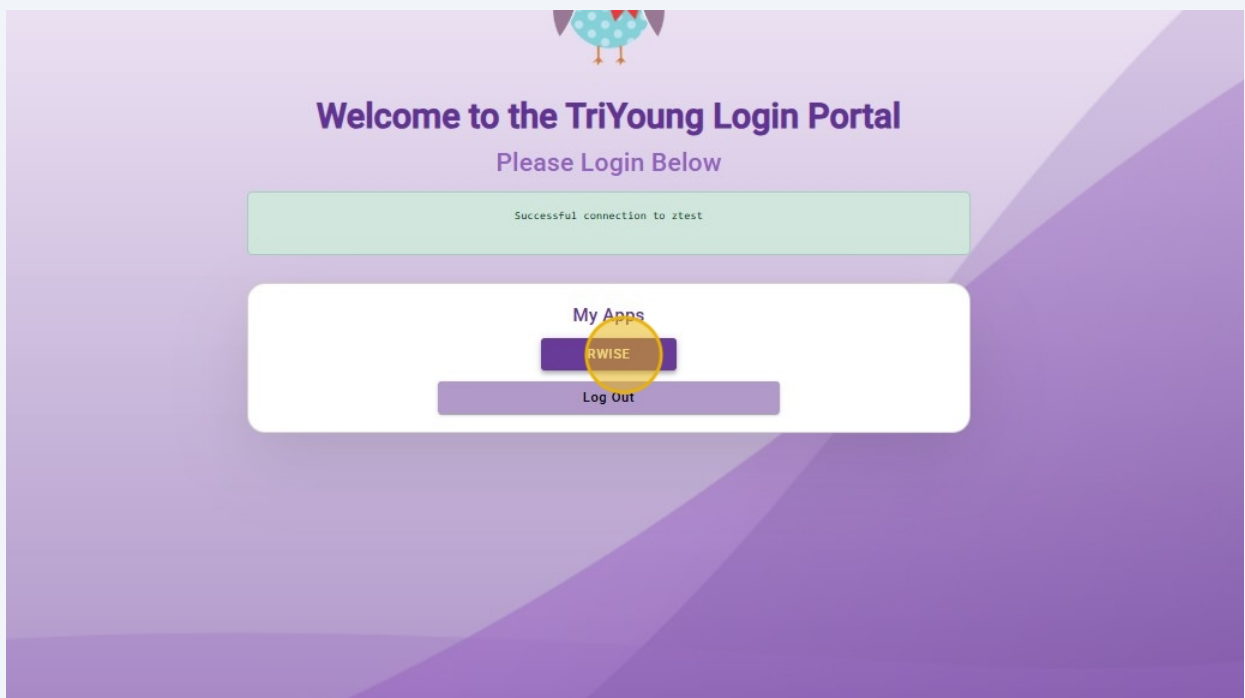
Log Out



4 Click "Submit"



5 Click "RWISE" as the web application



6 Search for your client by entering any of the following into the search criteria:

### Enter search criteria

Partial matches will be included

Active Only

**SEARCH**

**ADD CLIENT**

7 Select your client

Active Only

**SEARCH**

**ADD CLIENT**

First Name	Last Name	Date of Birth	URN	Encrypted UCI
Minnie	Mouse	03/17/1975	MNMMU0317754U	DAEA73CEC6A3C...
Mickey	Mouse	01/01/2000	MCMU0101001B	64857125D13A5C...
Minnie	Mouse	03/24/2004	MNMMU0324042U	CFC5321437BC2A...

Page Size: 20 1 to 3 of 3 < > Page 1 of 1 > >

## 8 Click "Service Referrals"

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains several menu items: "Client Contact Information", "Other Client Info", "Client Level Data", "Eligibility Information", "Service Referrals" (highlighted with a yellow box), and "Attachments". The main content area displays a section titled "Eligibility Applications" with a "New Application" button. Below this is a table with the following data:

Referring Provider	Application Date	Status	Last Updated	Progress Status	Program Type
Client Submitted	09/09/2024	Completed		Application Processed	
Client Submitted	11/01/2023	Completed		Application Processed	

Below the table, there is a pagination control showing "Page Size: 20", "1 to 5 of 5", and "Page 1 of 1". A yellow circle highlights a "+" sign in the bottom right corner of the sidebar area.

## 9 Click on the "+" sign

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains a "Service Referrals" section with a "+" sign highlighted by a yellow circle. The main content area displays a table with the following data:

Referring Provider	Application Date	Status	Last Updated	Progress Status	Program Type
Client Submitted	09/09/2024	Completed		Application Processed	
Client Submitted	11/01/2023	Completed		Application Processed	

Below the table, there is a pagination control showing "Page Size: 20", "1 to 5 of 5", and "Page 1 of 1". A "Clear Filters" button is visible in the sidebar area.

10

Click this checkbox if it is an Emergency Referral. Leave unchecked if regular priority.

**Minnie Mouse**  
URN: MNMU0317754U

### Create Service Referral

Emergency

Referral Date	09/27/2025	Direction	Outgoing
Referral Type	Select Referral Type	Status	Select Status
Provider	Select Provider	Service Category	Select Service Category
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments			
Sender Name and Number		Receiver Name and Number	

11

Select the "Internal" option.

**Minnie Mouse**  
URN: MNMU0317754U

### Create Service Referral

Emergency

Referral Date	09/27/2025	Direction	Outgoing
Referral Type	Internal	Status	Select Status
Provider	Select Provider	Service Category	Select Service Category
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments			
Sender Name and Number		Receiver Name and Number	
Receiver Comments			



Alert! INTERNAL must always be chosen as the option when sending a referral to a provider within the Ryan White Network. If you choose External - the referral will not be sent as that is for tracking purposes only when clients needs services beyond Ryan White.

12

Select "Pending" option as it needs to be in this status to remain open and send to the receiving provider.

**Minnie Mouse**  
URN: MNMU0317754U

### Create Service Referral

Emergency

Referral Date 09/27/2025	Direction Outgoing
Referral Type Internal	Status Pending
Provider Select Provider	Service Category Select Service Category
External Provider Name	Complete Date mm/dd/yyyy
Sender Comments	
Sender Name and Number	Receiver Name and Number
Receiver Comments	

13 Select the Provider from this dropdown

URN: MNMU0317754U

### Create Service Referral

Emergency

Referral Date	09/27/2025	Direction	Outgoing
Referral Type	Internal	Status	Pending
Provider	Better Lunch	Service Category	Select Service Category
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments			
Sender Name and Number		Receiver Name and Number	
Receiver Comments			

14 Select the "Service Category"

URN: MNMU0317754U

### Create Service Referral

Emergency

Referral Date	09/27/2025	Direction	Outgoing
Referral Type	Internal	Status	Pending
Provider	Better Lunch	Service Category	Food Bank/Home-Delivered Meals
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments			
Sender Name and Number		Receiver Name and Number	
Receiver Comments			

**15** Click this field and enter any useful notes.

The screenshot shows a referral form with the following fields and values:

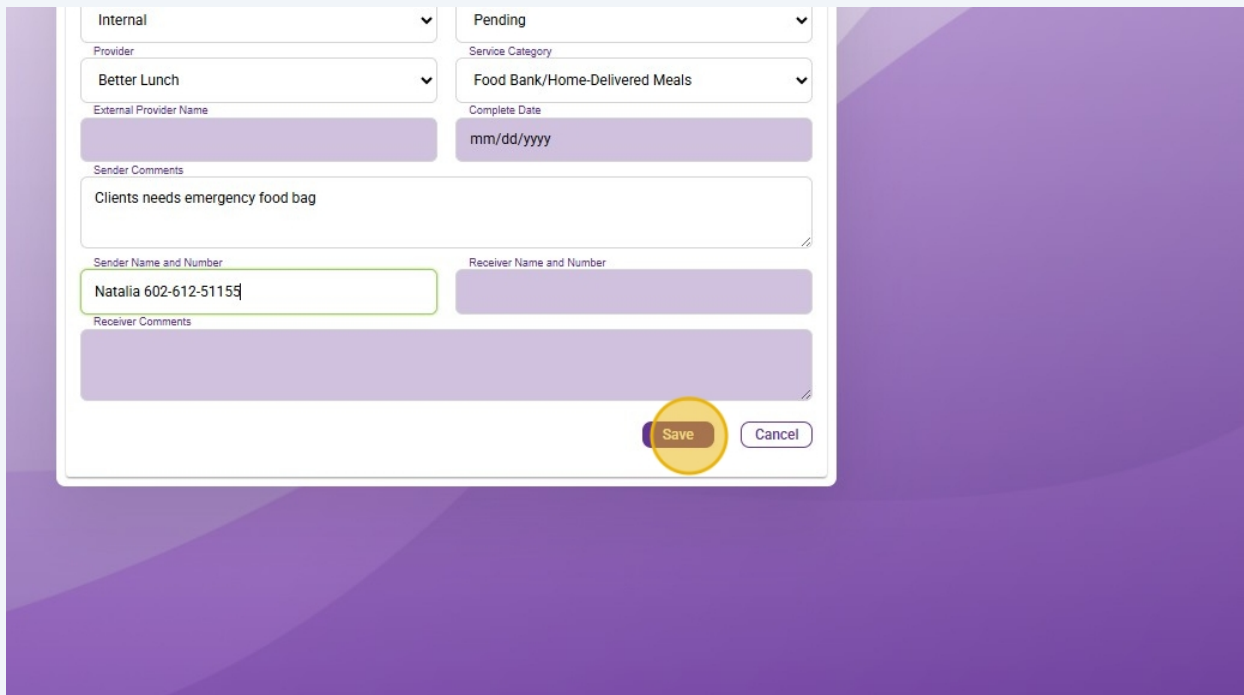
- Emergency
- Referral Date: 09/27/2025
- Direction: Outgoing
- Referral Type: Internal
- Status: Pending
- Provider: Better Lunch
- Service Category: Food Bank/Home-Delivered Meals
- External Provider Name: (empty)
- Complete Date: mm/dd/yyyy
- Sender Comments: (empty, highlighted with a yellow circle)
- Sender Name and Number: (empty)
- Receiver Name and Number: (empty)
- Receiver Comments: (empty)
- Buttons: Save, Cancel

**16** Click this text field and type in your name and phone number in case you need to be reached by the other provider.

The screenshot shows the same referral form as above, but with the following changes:

- Sender Comments: Clients needs emergency food bag
- Sender Name and Number: (empty, highlighted with a yellow circle)
- Receiver Name and Number: (empty)
- Receiver Comments: (empty)
- Buttons: Save, Cancel

## 17 Click "Save"

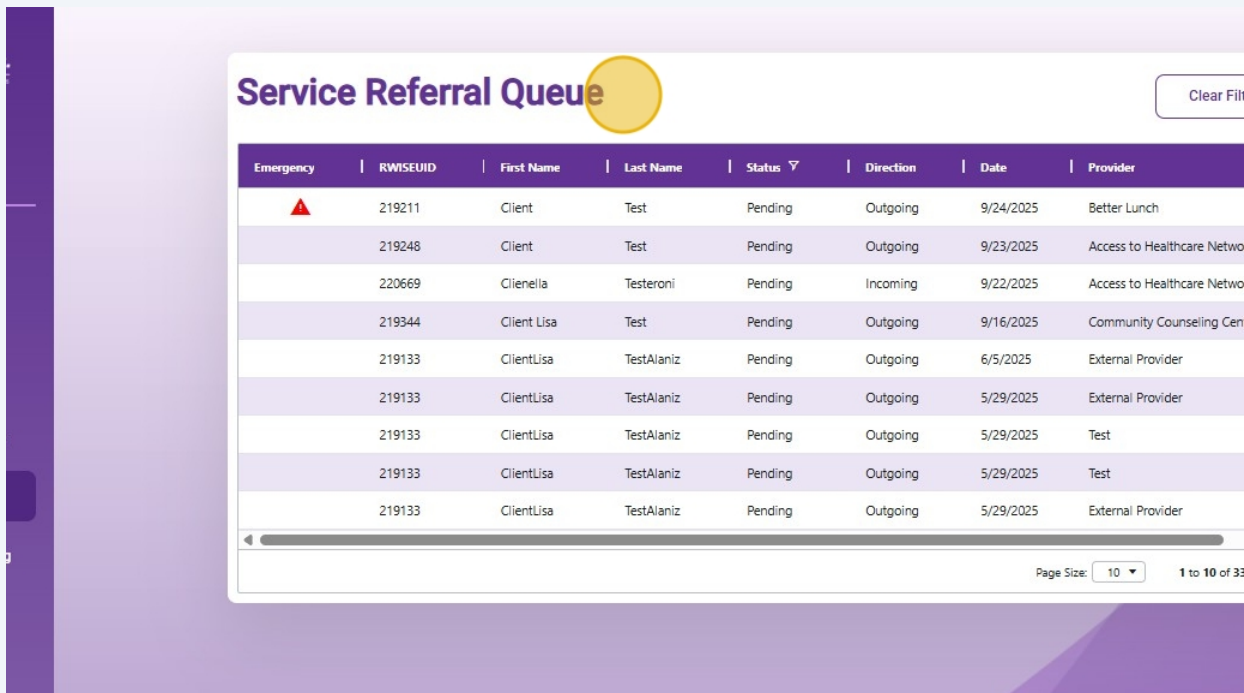


The screenshot shows a service referral form with the following fields and values:


- Internal: Internal
- Pending: Pending
- Provider: Better Lunch
- Service Category: Food Bank/Home-Delivered Meals
- External Provider Name: (empty)
- Complete Date: mm/dd/yyyy
- Sender Comments: Clients needs emergency food bag
- Sender Name and Number: Natalia 602-612-51155
- Receiver Name and Number: (empty)
- Receiver Comments: (empty)

The "Save" button is highlighted with a yellow circle.

## 18 Click "Service Referrals" and you will see the full list of all incoming and outgoing referrals.



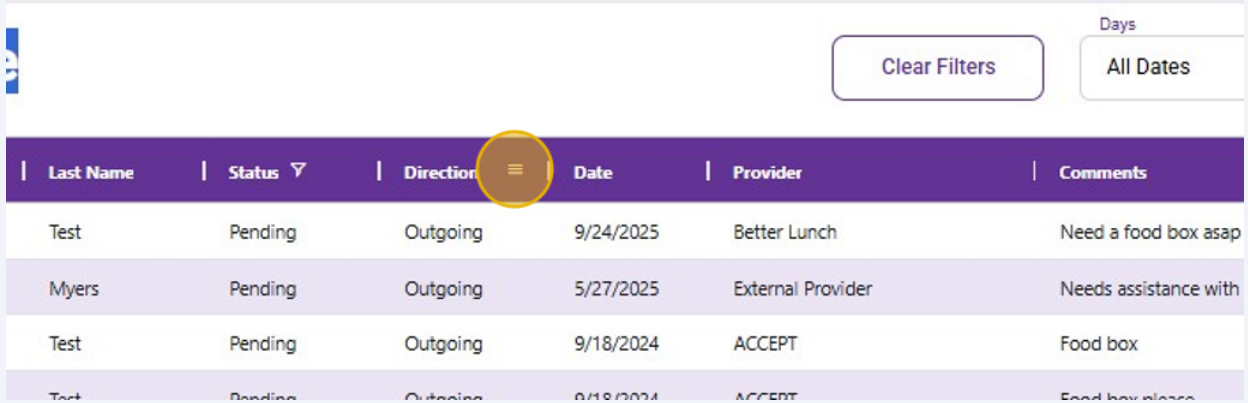
The screenshot shows the "Service Referral Queue" table with the following data:

Emergency	RWISEUID	First Name	Last Name	Status	Direction	Date	Provider
	219211	Client	Test	Pending	Outgoing	9/24/2025	Better Lunch
	219248	Client	Test	Pending	Outgoing	9/23/2025	Access to Healthcare Netwo
	220669	Cienella	Testeroni	Pending	Incoming	9/22/2025	Access to Healthcare Netwo
	219344	Client Lisa	Test	Pending	Outgoing	9/16/2025	Community Counseling Cen
	219133	ClientLisa	TestAlaniz	Pending	Outgoing	6/5/2025	External Provider
	219133	ClientLisa	TestAlaniz	Pending	Outgoing	5/29/2025	External Provider
	219133	ClientLisa	TestAlaniz	Pending	Outgoing	5/29/2025	Test
	219133	ClientLisa	TestAlaniz	Pending	Outgoing	5/29/2025	Test
	219133	ClientLisa	TestAlaniz	Pending	Outgoing	5/29/2025	External Provider


The "Service Referral Queue" label is highlighted with a yellow circle. The page size is 10, and there are 1 to 10 of 33 items.

19

You can click on any column name to sort the list in ascending or descending order. You can also filter the list on keywords. To filter, hover over the column until you see the 3 lines menu.

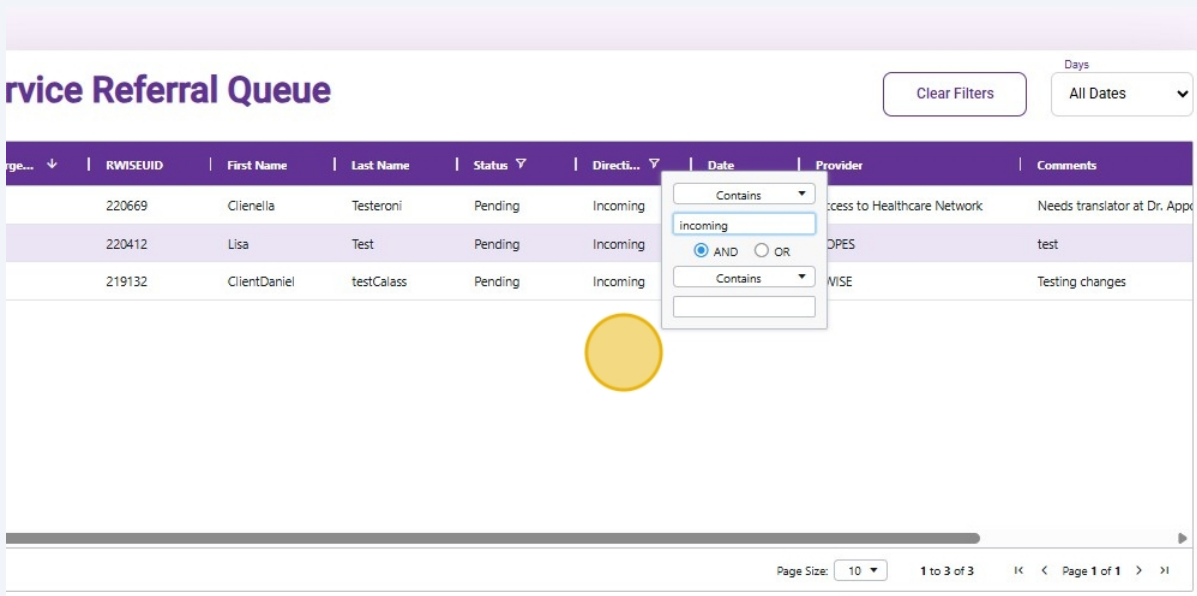


Clear Filters Days All Dates

Last Name	Status ▾	Direction 	Date	Provider	Comments
Test	Pending	Outgoing	9/24/2025	Better Lunch	Need a food box asap
Myers	Pending	Outgoing	5/27/2025	External Provider	Needs assistance with
Test	Pending	Outgoing	9/18/2024	ACCEPT	Food box
Test	Pending	Outgoing	9/18/2024	ACCEPT	Food box

20

In this example, we are filtering to only see all of the INCOMING types so I can process those out.



Service Referral Queue Clear Filters Days All Dates ▾

Page...	RWISEUID	First Name	Last Name	Status ▾	Directi... ▾	Date	Provider	Comments
	220669	Clenella	Testeroni	Pending	Incoming		Access to Healthcare Network	Needs translator at Dr. App
	220412	Lisa	Test	Pending	Incoming		DPES	test
	219132	ClientDaniel	testCalass	Pending	Incoming		RWISE	Testing changes

Page Size: 10 1 to 3 of 3 Page 1 of 1

21 Click "Clear Filters" to clear filter and return to the full list.

The screenshot shows a web interface titled "ferral Queue". At the top right, there are two buttons: "Clear all filters" and "Clear Filters". The "Clear Filters" button is highlighted with a yellow circle. Below the buttons is a "Days" dropdown menu set to "All Dates". The main part of the interface is a table with the following columns: EUID, First Name, Last Name, Status, Direct..., Date, Provider, and Comments. The table contains three rows of data:

EUID	First Name	Last Name	Status	Direct...	Date	Provider	Comments
9	Clienella	Testeroni	Pending	Incoming	9/22/2025	Access to Healthcare Network	Needs translator at Dr. Appo
2	Lisa	Test	Pending	Incoming	5/25/2025	HOPES	test
12	ClientDaniel	testCalass	Pending	Incoming	3/27/2025	RWISE	Testing changes

At the bottom of the table, there is a "Page Size" dropdown set to "10", and navigation controls showing "1 to 3 of 3" and "Page 1 of 1".

22 To process an incoming referral click on the client of choice and you will be taken to their profile.

The screenshot shows a client profile for "Clienella Testeroni" with the URN: CITS0505652U. Below the profile information is a "Service Referral" form. The form includes an "Emergency" checkbox and several input fields:

- Referral Date: 09/22/2025
- Referral Type: Internal
- Provider: Access to Healthcare Network
- External Provider Name: (empty)
- Direction: Incoming
- Status: Pending
- Service Category: Linguistics Services
- Complete Date: mm/dd/yyyy
- Sender Comments: Needs translator at Dr. Appointment
- Sender Name and Number: Lisa 123-456-7899
- Receiver Name and Number: (empty)

23 Scroll down to the Service Referrals area and click on the pencil icon to edit.

**Clenella Testeroni**  
URN: CITS0505652U

### Service Referral

Emergency

Referral Date	09/22/2025	Direction	Incoming
Referral Type	Internal	Status	Pending
Provider	Access to Healthcare Network	Service Category	Linguistics Services
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments	Needs translator at Dr. Appointment		
Sender Name and Number	Lisa 123-456-7899	Receiver Name and Number	

24 You will only be able to edit STATUS, RECEIVER NAME and NUMBER, and RECEIVER COMMENTS. This is because we don't want receivers to be able to change the information sent from another provider. Click this dropdown and select the appropriate Status.

**Clenella Testeroni**  
URN: CITS0505652U

### Service Referral

Emergency

Referral Date	09/22/2025	Direction	Incoming
Referral Type	Internal	Status	Pending
Provider	Access to Healthcare Network	Service Category	Linguistics Services
External Provider Name		Complete Date	mm/dd/yyyy
Sender Comments	Needs translator at Dr. Appointment		
Sender Name and Number	Lisa 123-456-7899	Receiver Name and Number	
Receiver Comments			

25 Click this text field.

A screenshot of a web form with a purple and white color scheme. The form contains several input fields and buttons. A yellow circle highlights the 'Receiver Name and Number' field, which is currently empty. The form includes the following fields: 'Referral Type' (Internal), 'Status' (Completed), 'Provider' (Access to Healthcare Network), 'Service Category' (Linguistics Services), 'External Provider Name' (empty), 'Complete Date' (09/27/2025), 'Sender Comments' (Needs translator at Dr. Appointment), 'Sender Name and Number' (Lisa 123-456-7899), and 'Receiver Name and Number' (empty). There are 'Save' and 'Cancel' buttons at the bottom right. An 'Attachments' section is visible at the bottom left.

26 Click this field.

A screenshot of the same web form as in step 25. The 'Receiver Name and Number' field is now filled with the text 'Natalia 602-612-5155'. A yellow circle highlights this field. All other fields and buttons remain the same as in the previous screenshot.

27 Click "Attachments" to review any relevant supporting documents.

The screenshot shows a form with several fields. The 'Sender Comments' field contains the text 'Needs translator at Dr. Appointment'. The 'Sender Name and Number' field contains 'Lisa 123-456-7899' and the 'Receiver Name and Number' field contains 'Natalia 602-612-5155'. The 'Receiver Comments' field contains the text 'any notes you would like to indicate the action taken or next steps.' Below these fields are 'Save' and 'Cancel' buttons. A yellow circle highlights the 'Attachments' section below. The 'Attachments' section has a 'Clear Filters' button and a 'Days' dropdown menu set to 'All Dates'. Below this is a table with columns 'Location', 'File Name', 'Content', and 'Uploaded By'. The table is currently empty, displaying 'No Rows To Show'.

28 Click "Save"

This screenshot is identical to the previous one, but with a yellow circle highlighting the 'Save' button in the bottom right corner of the form. The 'Attachments' section is also visible, showing the same table structure and 'No Rows To Show' message.

29

And that's it! You're done.