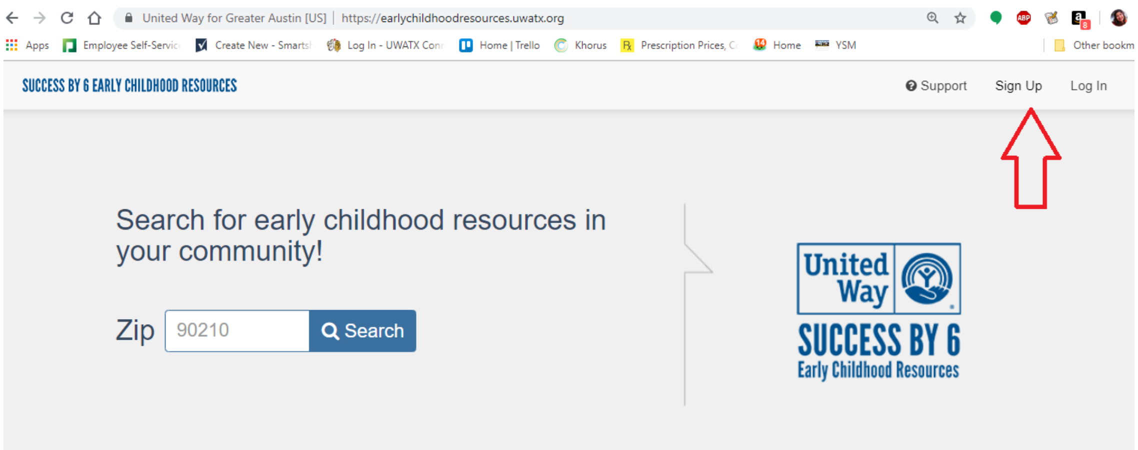
How to

This is a quick guide on the Success by 6 Early Childhood Resource and Referral tool. It will show you how to

- Create an account
- Add team members to your team
- Receive referrals
- Close referrals

Create account

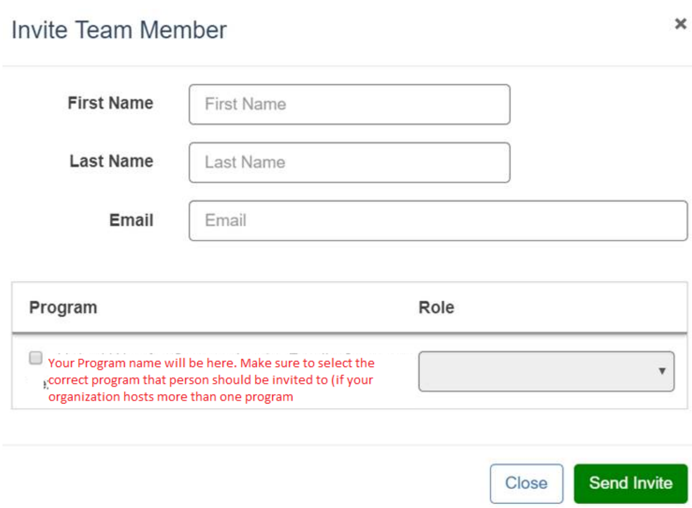
https://earlychildhoodresources.uwatx.org



To create an account, go to our site, and click sign up. Please use your work email and a strong and secure password that only you know.

Adding team members

You may want to add more team members to manage referrals, list other programs, or download your program's analytics. To add more team members login-> go to top right corner-> select **My Program Tools**-> and chose **My Team**. This window will appear. Put your team member's information in the fields and select a role.



If you have any questions, please contact, Cristina Alvarado, Success by 6 Early Childhood Resource and Referral

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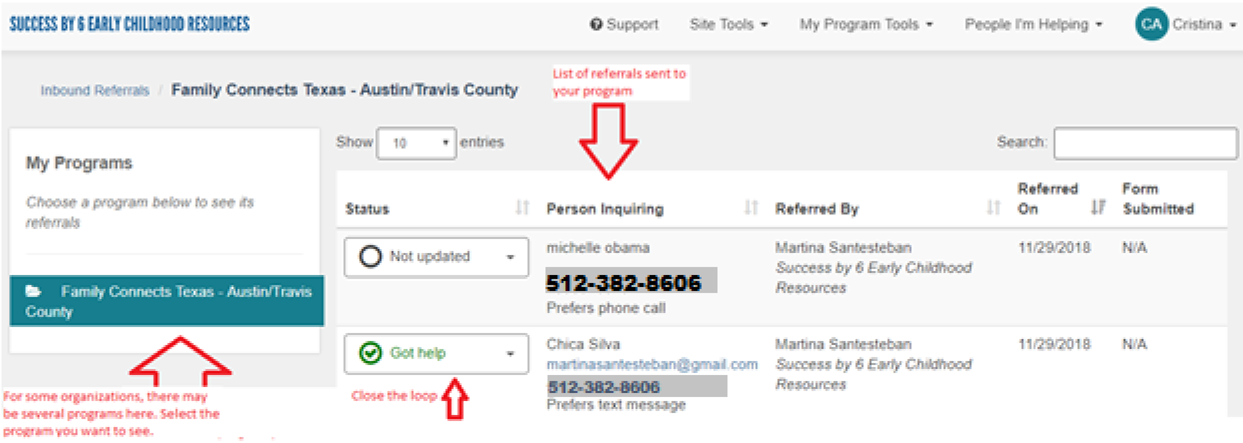
Receiving Referrals

At United Way for Greater Austin, we take thousands of calls through our 211 program. Our callers will be offered to speak to an Early Childhood Specialist who can discuss relevant programs and refer families to those resources most helpful to that specific family and their child.



Your organization may receive referrals this way, be sure to check on your referrals often. To do so make sure you're logged in, and go to the top right corner of your page -> select **My Program Tools** -> Select **Inbound Referrals**.

Once you are at the **Inbound Referrals** page you will see a list of **My programs** on the left. If your organization has more than one program listed they will appear here. Please select the program you wish to see. Once the program is selected, any inbound referrals will appear to the right. The **Status** indicates if you have **closed** the referral. The **Person Inquiring**, will list the name, contact information, and any other data points needed to contact that referral. To the right you will see which agency referred them in **Referred by.** Take note what day referrals were sent. Please **close** all referrals within 10 business days. Attempt to contact the client several times then change the status.

How to close a referral

Referrals are closed by changing their **status**. Here are the options you may select.

- Needs client action: If you are waiting on something from client
- Pending: Client was put on a waitlist
- Referred elsewhere: if client was referred to another program
- Got help: client was served by this specific program
- Couldn't get help: client was not eligible, was not ready to enroll.
- No longer interested: client did not want to enroll.