Referrals, Appointments, Resources
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Resources, Appointments and Referrals

• Definitions
  • **Resource** - General service and agency information that has been given or sent to the client.
  • **Referral** - Information given to client to contact or make appointments with a provider, social service agency or program.
  • **Appointment** - Specific dates and times that have been set up for a client to meet with a provider or agency.

• **Referrals, Appointments, and Resources** can be added and updated at any level of client contact or enrollment status:
  • Initial Contacts
  • New Referred Clients
  • Pending Enrolled Clients
  • Enrolled Clients
  • Pending Closed Clients
  • Closed Clients
Add New Referral, Appointment, or Resource

- Search appropriate client list (Initial contacts, New referrals, Enrolled, etc.)
- Search and Select Patient Profile
- Select the Participant name from the appropriate list to open the Patient Profile
From the Patient Profile Screen:

• To add a new contact, click the green “plus sign” to add a new contact, resource or referral provided, or appointment made.
• To view an existing contact, select View
• To open an existing contact, select the Date
Add Encounter/Engagement

- Encounters or Engagements (Client Contacts) must be entered and saved prior to adding any referrals, appointments, or resources.
  - A contact date must be entered in order to save and later retrieve the encounter/engagement record.
Service Type and Service Provider Information

- Add all Referrals, Appointments, or Resources individually
- You must “Save” after each entry before adding the next record
- There is no limit on the number of Referrals, Appointments, or Resources that can be made/entered for a client.
Service Programs/Providers - Types

- Service Programs/Providers
  - Community Based Agency Support
    - Basic Needs/General
    - Behavioral Health
    - Child Care
    - Community Centers
    - Domestic Violence
    - Early Head Start/Head Start
    - Early Intervention System
  - Education
  - Emergency Housing
  - Family Success Center
  - Fatherhood Services
  - Food Centers
  - Housing
  - Insurance Services
  - Job Training Program
  - Parenting Groups
  - School Based services
  - Smoking Cessation
  - Substance Abuse
  - Transportation
  - WIC/Nutrition

- Community Home Visiting
  - Healthy Families
  - Infant and Family Development
  - Local Health Department IPO
  - Nurse Family Partnership
  - Other social service
  - Out-of-Service Area
  - Parents as Teachers
Service Programs/Providers - Types

- Outreach and Case Management
  - ACA Navigators
  - Community Health Worker
  - CP&P Child Protective Services
  - DCP&P
  - Health Related Case Management
  - IPO Outreach and Case Management
  - Special Child Health Care

- Primary Medical Care
  - Dental Services
  - Family Health
  - Hospitals
  - Pediatric
  - Pregnancy Testing
  - Prenatal
  - Primary Medical Care - Children
  - Primary Medical Care - Mother
  - Primary Medical Care - Other
  - Women's Health
Add Resource

• Adding a Resource provided to client:
  • Selection options will change as you select the different types of programs

• Select Type = Resource
• Select Service Program / Provider
• Select Provider
Status and Outcome Information

• Recording and Tracking Status and Outcome Information:
  • Select Status
    • Open
    • Pending
    • Closed
    • Other
  • Select Outcome
    • Appointment Specific
      • Appointment Kept
      • Appointment Cancelled
      • Appointment rescheduled
    • Referral Specific – by Participant
      • Attempted Contact
      • Contacted
      • Made Appointment
      • Met with
    • Referral Specific – by Provider
      • Attempted Contact
      • Contacted
      • Made Appointment
      • Met with
    • General
      • Did not meet need
      • Unknown Outcome
      • Outcome N/A
  • Enter Outcome Date
  • Add Notes/Comments
    • General Notes – Information seen by any user with access to the patient/client record
    • Internal Notes – Information seen by the user and individuals within the same agency.
• Once saved, you will be brought back to Encounter/Engagement
• Additional records may be added without exiting the patient profile.
Add Referral

• Adding a Referral provided to client:
  • Selection options will change as you select the different types of programs

• Select Type = Referral
• Select Service Programs/ Providers
  • Select Type
  • Select Program
  • Select Provider (if specified)
• Select Status
• Select Outcome
  • Enter Outcome Date
• Add Notes/Comments
  • General Notes
  • Internal Notes
• Remember to Click “Save” after each entering each service.
Saved Referral Screen
Add Appointments

• Adding an Appointment made for or with the client:
  • Selection options will change as you select the different types of programs

• Select Type = Appointment
• Select Service Programs/Providers
  • Select Type
  • Select Program
  • Select Provider (if specified)
• Select Status
• Select Outcome
  • Enter Outcome Date
• Add Notes/Comments
  • General Notes
  • Internal Notes
• Remember to Click “Save” after each entering each service.
Saved Appointment Screen
• Staff members are responsible for recording, tracking and entering/updating outcomes for all referrals, resources, and appointments provided.
• Remember - the outcome date must always be added.
Outcome Types

- **Outcome Types:**
  - Appointment Specific
    - Appointment Kept – Client attended scheduled Appt.
    - Appointment Cancelled – Client cancelled appointment without rescheduling
    - Appointment Rescheduled – Appointment cancelled and rescheduled for another time/date
  - Referral Specific – by Participant
    - Attempted Contact
    - Contacted
    - Made Appointment
  - Referral Specific – by Provider
    - Attempted Contact
    - Contacted
    - Made Appointment
    - Met with
  - General
    - Did not meet need
    - Unknown Outcome
    - Outcome N/A
Delete Records

• Deleting a saved record of a Resource, Referral or Appointment:
  • Records should ONLY be deleted if the INCORRECT Referral, Appointment, or Resource was entered.
  • If a client has declined the service, update the outcome rather than deleting the record.
  • To delete a record, click “Delete this record” and “Save”