AES
Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

INFORMATION & REFERRAL SET UP & USER GUIDE

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Overview of Referral Section

There are several different ways to set up and use the Referral pages; the more comprehensive you make the setup, the easier the process is for the end user. An Organization that wants to track numbers of referrals without any other information could simply create one or more Activities and be able to count numbers of Clients and numbers of Referral Activities, and not use the Referral pages at all.

The simplest setup scenario involves creating one or a limited number of categories with one or a minimum number of generic STD names (sub categories) for each one. Internal Programs would then be linked to the appropriate one, and external Programs can be created and linked to them as well. The end User in this case needs to know the referral sources well to know which one to use for a specific Client.

A more complex set of categories and STD names can be created, which can make it easier for the end User to find the appropriate Referral Source. The Programs, internal and external, would be linked to those categories.

In both cases, when the end User makes a referral, they can select the appropriate category and STD name and with the click of a button see all the potential Program locations available. These can be mapped with Microsoft Map Point or MapQuest to find the most convenient location.

The most extensive set up includes setting up a condition parameter for each STD name. An initial assessment set of questions can be created, many of them directly relating to the conditions used in the set up. After a Client completes Central Intake and answers the assessment questions, the end user can click a button on the Central Intake referral page to see a list of the potential STD names the Client is eligible to be referred to, and the location popup would display all locations for each STD name/condition.

Referrals can be made for Clients in Encounter, Central Intake or Program modules.

The Basic Process of setting up Referral system

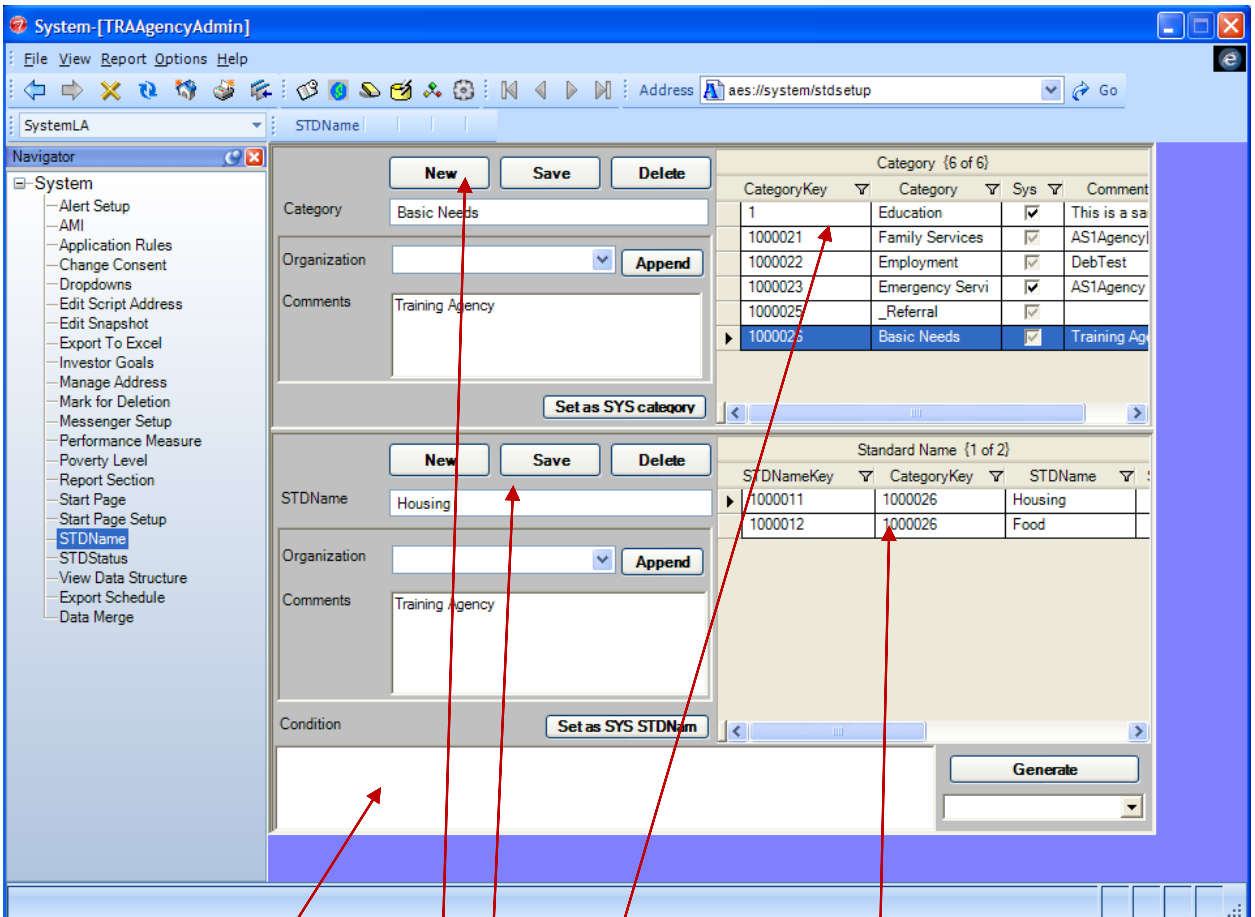
1 Set up Categories, STD Names (and optionally Conditions) on STD setup page
  - These will be Category and subcategory choices on Referral page

2 Link Category/STD Name combinations to internal Programs on Details popup on Program Setup page
3 Link Location/Contact combinations to internal Programs on Details popup on Program Setup page
4 Create Referral Activities on Program Setup page for Internal Referrals
5 Create External Organizations, Locations, Contacts and Programs
  a Link Location/Contact combination to external Programs
  b Link Category/STD Name combinations to external Programs
6 Create Central Intake Program only if using Central Intake referrals
7 Create Assessment Questions for initial assessment/profile (if using)

Set up Section:
Create Category, STD Name, Conditions

Create Categories and STD Names within those categories on this page. When the User is making a Referral, the Categories will appear as choices on the Referral page; once a Category is selected, the STD Names of that Category will be displayed. Categories and STD Names will be available for all Organizations, system-wide.

Conditions can be set up for each STD Name allowing automatic referrals to be created for a Client on the Referral page.



Navigating the STD Name Page

- Available Categories are displayed in the CATEGORY GRID
- Create new Categories in the left top section
- Subcategories (STDNames) of the selected Category are displayed in the STANDARD NAME GRID
- Create new STDNames in the left middle section
- Conditions for the Standard Name are displayed in the window at the bottom of the page; they are created in the popup Query Window that appears when the GENERATE button is used

Create a new Category

1 Click the NEW button at the top of the page
2 Enter Category name
   a All Organization will have access to this Category
3 If the Category should not be changed, i.e. it is used for reporting, click SET AS SYS CATEGORY button
4 Click SAVE button when finished with Category
5 Repeat for additional Categories

➤ *Categories are the broadest grouping for Referrals*

➤ *These items will appear as choices in the Category dropdown in the top section of the Referral page*

Create new STD Name

1 Click the NEW button in middle section
2 Enter STD Name
   a All Organization will have access to this STD Name
3 If the STD Name should not be changed, i.e. it is used for reporting, click SET AS SYS STD NAME button
4 Click SAVE button when finished with Category
5 Repeat for additional STD Names within the Category

➤ *Each Category can be subdivided into one or more STD names*

➤ *Each combination of Category and STD Name will appear in the grid in the third section of the Details popup window on the Program Setup page*

➤ *These items will be displayed in the top grid on the Referral page once the Category is selected in the dropdown*

➤ *The STD Name will not appear unless a Program has been linked to it on the Program Setup page Details popup or on the Programs page in the External Org section*

Set Conditions for Referral

Conditions need to be created only if using the Assessment in Central Intake to create automatic eligibility listings for Referrals.

1 Select STD Name in Standard name grid
2 Select View to link with in dropdown beneath GENERATE button
   a The View determines which items will appear as choices in the Query window
3 Click GENERATE button

In popup Query window:

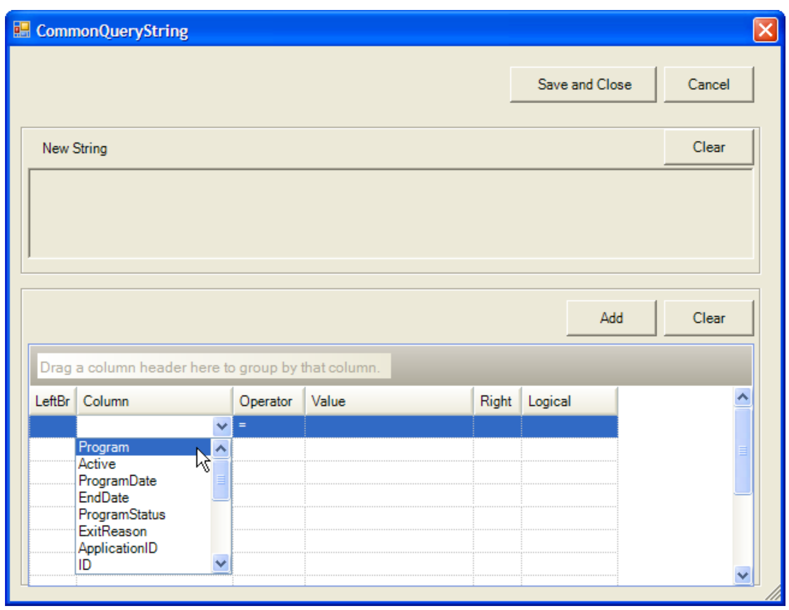
4 Select item to Query in the Column dropdown
   a Choices are determined from View chosen in dropdown
5 Select Operator
   a =, >, <, Etc.
6 Enter Value to match
7 If adding a secondary criteria, select AND or OR in Logical column dropdown:
   a Use AND if both criteria must match
   b Use OR if one or the other criteria must match
8 Click ADD button above grid
   a To delete a condition after adding, click CLEAR button in top section

Condition String will appear in New String box.

9 Click SAVE AND CLOSE button when finished

Entire Condition String will appear in Condition box.

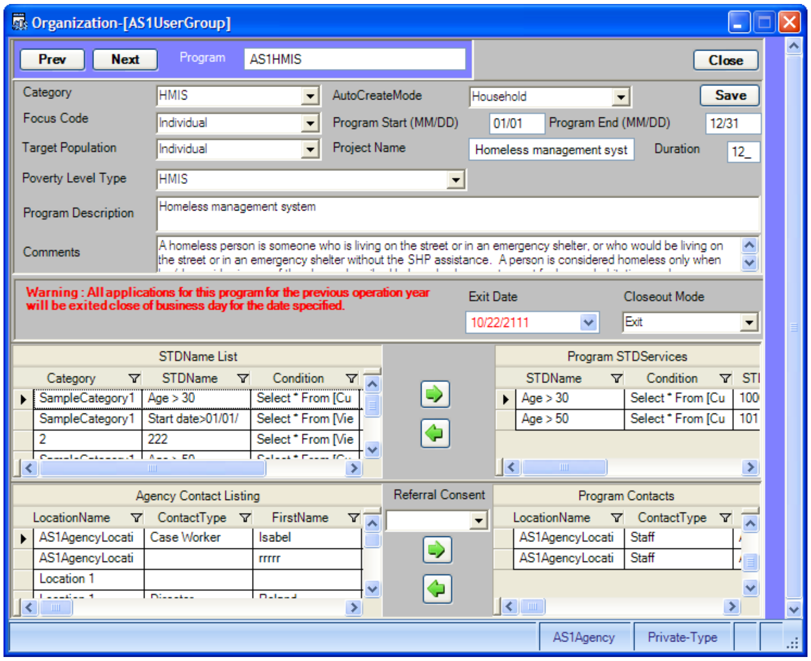
10 Repeat step for each Standard Name to be used



Create Internal Program Links

Each Program that will be used for Referrals needs to be linked to one or more Category/STD Name combinations. Create the links on the Details popup window on the Program Setup page.

Complete Program Link



1 Select Program in the PROGRAM GRID in the top section on the Program Setup page
2 Click DETAILS icon button to open Details popup

In the third section:

The left side lists all Category /STD Name combination.

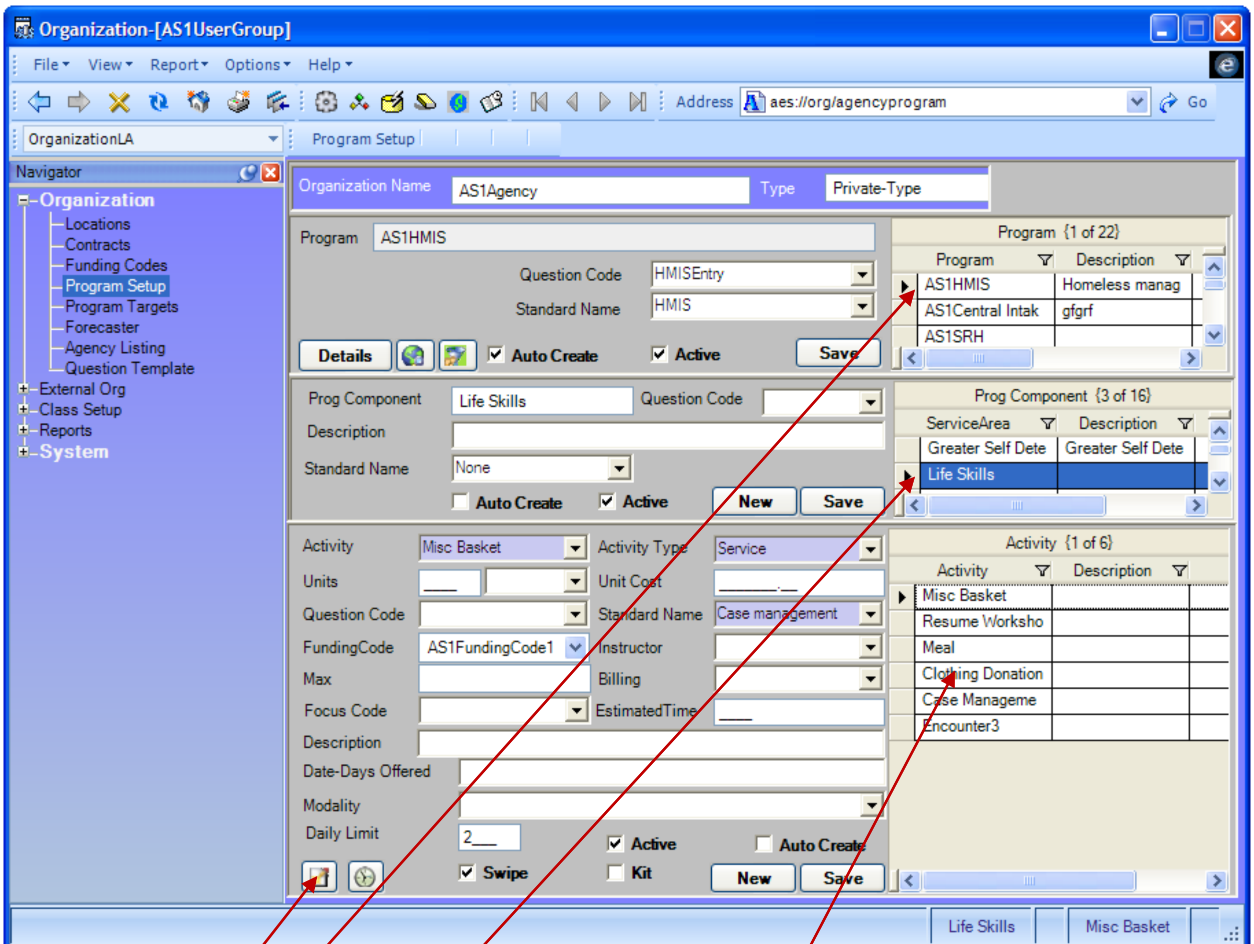
3 Select the ones that should be linked with this Program
   a The items listed in this Grid are set up on the STD Names page
4 Click RIGHT ARROW button 
   a STD Name will appear in PROGRAM STD SERVICES GRID on right side of third section
   b To remove a referral link, click the LEFT ARROW button

In the fourth section:

5 AGENCY CONTACT LISTING GRID shows all the Contacts that were created for the Agency on the Location page
6 Select the appropriate Contact(s) for this Program
   a These are the Contact(s) who will show up on the Referral Page as the person(s) to refer Clients to
7 Select the appropriate level of consent for this Contact
   a This will determine who can refer Clients to this Contact and who will see this Referral Source in the Services Location popup window
      i) System means all Organizations in the Collaborative will see this Referral Source
      ii) Region means all Agencies in your Region
      iii) Organization means all Users in your Agency
8 Click the RIGHT ARROW button
   a The Contact will appear in the PROGRAM CONTACTS GRID on the right side
   b Use the LEFT ARROW button to remove a Contact
9 Click SAVE button at top of popup window
10 Click PREV or NEXT button to bring up a different Program, if needed, and repeat steps for that Program
11 Click CLOSE button at top of popup window when finished

Create Referral Activities

Referral Activities are required for Internal Programs; multiple Activities can be created and they will all be displayed in the Activity dropdown on the Services Location popup window when the program is selected.



Navigating the Program Setup Page

- Select the Program and Program Component to see existing Activities
- Activities available for Referral will be listed in the <u>Activities Grid</u>
- Use the Referral button to make a Referral Activity from an existing Activity

Add Activity as Referral Activity

Make sure the correct Program and Program Component are selected first.

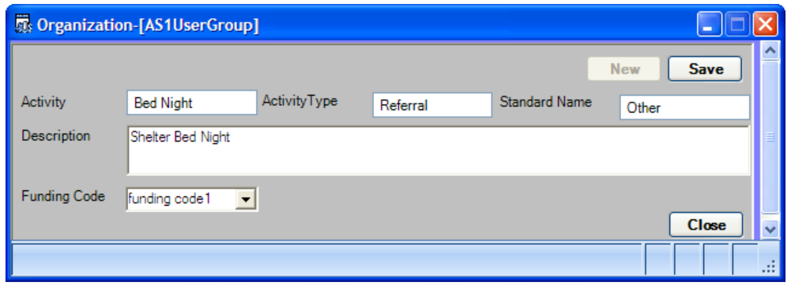
1 Select the Activity that should appear as Referral Activity in ACTIVITY GRID
2 Click REFERRAL icon button in lower left corner 
3 In popup, click NEW button

Activity, Activity Type and Standard Name will populate themselves from ACTIVITY GRID; the Activity type will be Referral.

4 Enter Description
5 Select Funding Code
6 Click SAVE button
7 Click CLOSE button
8 Repeat for additional Referral Activities

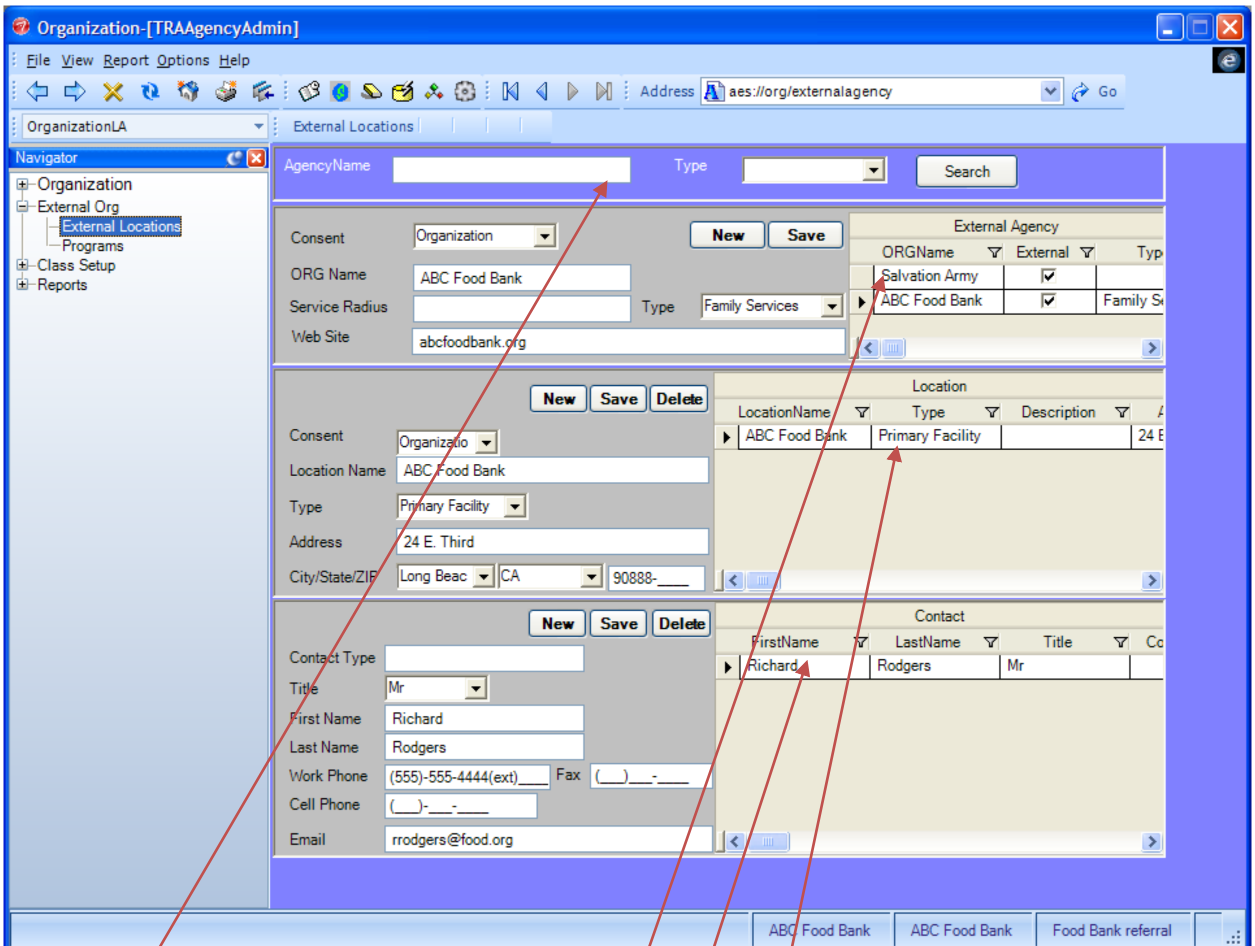
➤ *Referral Activities can be created from any existing Activity*

➤ *All Activities set up as Referrals here will appear in the Activity dropdown on the Referral page Services Location popup window when the Category /STD Name linked to this Program is selected*



Create External Organizations

The External Organization pages are used to create external Referral Sources. The Organization can contain one or more Programs. Organizations and Programs created here will appear as choices on the Services Locations popup of the Referral page. External Organizations and Program need to be created only if Referrals will be made to external sources.



Navigating the External Org - Locations Page

- Search for Organization in blue search section
- All available external Organizations appear in the <u>External Agency Grid</u>
- All Locations of selected Organization appear in the <u>Location Grid</u>
- All Contacts of selected Location appear in <u>Contact Grid</u>

View existing Organizations

1 Enter Agency Name and/or select Type at top of page
   a Leave blank to search for all Agencies
2 Click SEARCH
3 All matching organizations will appear in the EXTERNAL AGENCIES GRID

> ➤ *Locations and Contacts entered here will be linked to Programs on the next page; these combinations will then be available as choices on the Referral pages and will appear on Referral reports given to Clients*

Create new Organizations

1 Click NEW button at top of page
2 Select Consent
   a This determines who will have access to this Organization on the External Locations page
3 Enter ORG Name
4 Enter Service Radius
5 Select Type of organization
6 Enter Web Site
7 Click SAVE

Create Organization Location

1 Click NEW button in middle section of page
2 Select Consent
3 Enter Location Name
4 Select Type of Location
5 Enter Address, City, State, Zip
6 Click SAVE
   a Use DELETE to remove unwanted Location
7 Repeat for additional Locations

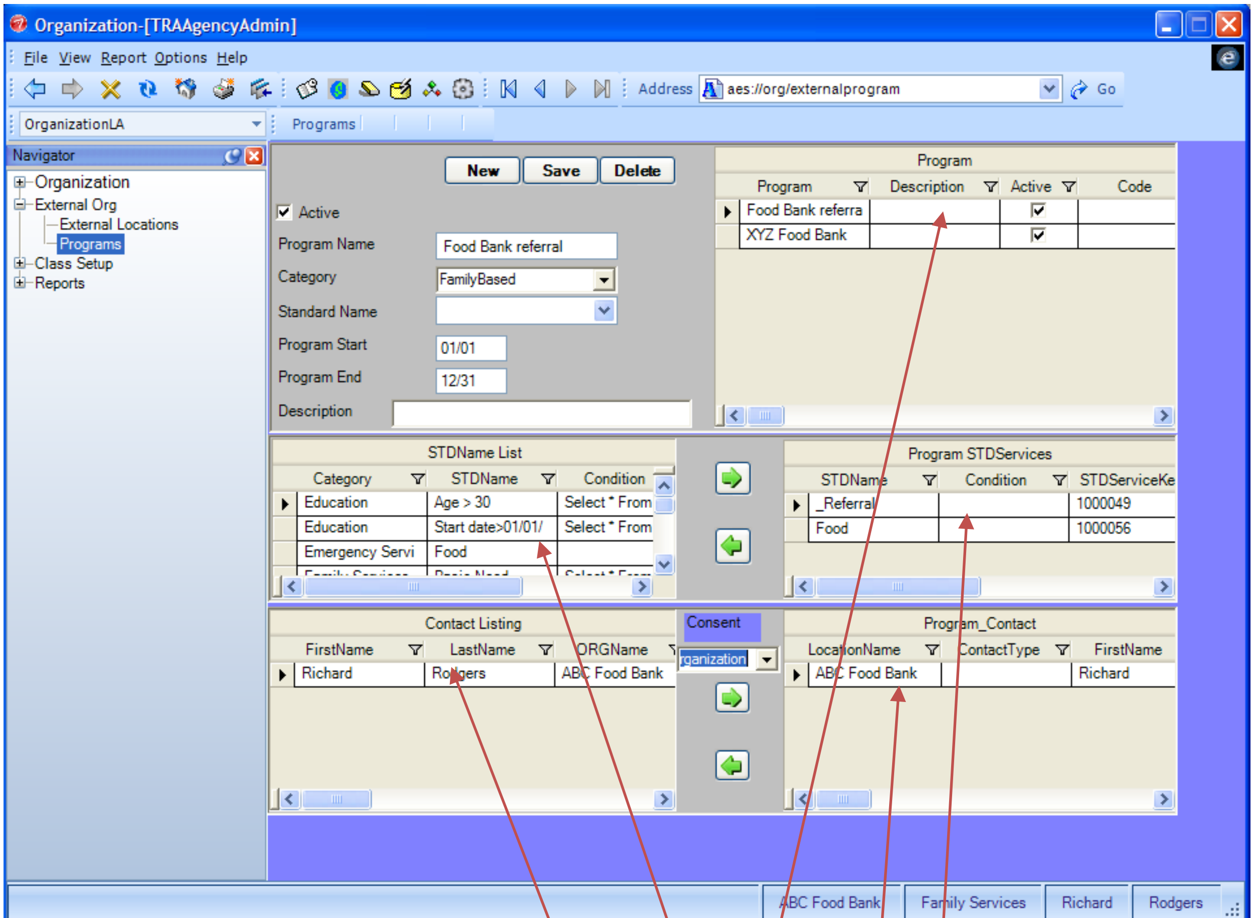
> ➤ *At least one Location and Contact must be created in order for the Program to appear as a choice on the Locations popup screen on the Referral page*

Create Location Contacts

1 Make sure correct Location is selected in LOCATION Grid
2 Click NEW button in bottom section of page
3 Enter Contact type
4 Select Title
5 Enter First and Last Name
6 Enter phone and email information
   a Email address is necessary only if using automatic notification
7 Click SAVE button
   a Use DELETE to remove unwanted Contact
8 Repeat for additional Contacts at this Location
   a Each Contact that should be available as a Referral Contact should be created here

Create External Programs & Links

The External Programs pages are used to create external Programs to use as Referral Sources. An Organization must have at least one Program and may contain more than one Program. The last Organization selected on the Locations page will be active when opening this page.



Navigating the External Org - Programs Page

- Active Organization will appear in Status Bar
- All available Programs of the active Organization appear in the Program Grid
- All STD Names/Conditions set up for the Agency appear in the STD Name List Grid
- STD Names/Conditions linked to this Program appear in Program STD Services Grid
- All Locations for the active Organization appear in the Contact Listing Grid
- Locations & Contacts linked to this Program appear in Program Contact Grid
- Change to a different Organization by using the arrows in the toolbar at the top of the page

View existing Programs

1. Make sure correct Organization is selected
   a. Use blue toolbar arrows to scroll through available Organizations
   b. Organization name will be shown in Status Bar at bottom
2. All available Programs will appear in the Program Grid

> ➤ *Programs created here will be available as choices on the Referral pages Service Locations popup window and will appear on Referral reports given to Clients*
>
> ➤ *Referral Activities in the Activity dropdown on the Referral page will automatically be named the same as the Referral Program*

Create new Program

1. Click NEW button at top of page
2. Enter Program Name
   a. This name will appear in the Activity dropdown when a User creates a Referral for a Client
3. Select Category
   a. This is not required, but is a way to classify the Referrals
4. Select Standard Name
   a. This is not required, but is the Program Standard Name
5. Enter Program Start and End Dates
6. Enter Description
7. Click to create checkmark in Active checkbox
8. Click SAVE

Setup Program Referral Links

In the second section, the STD Names List Grid shows items that were set up on the STD Name page, each combination of Category and STD Name will be displayed in the STD Names List Grid on the left side.

1. Select all conditions that apply to this Program in the STD Names List Grid on the left side
2. Click the right arrow button to apply the condition to this Program

   a. STD Name will appear in Program STD Services Grid on right side of third section
   b. To remove a referral link, click the LEFT ARROW button

Link Location and Contact to the Program

In the third section, the Contact Listing Grid shows all the Contacts that were created for this Agency on the Locations page.

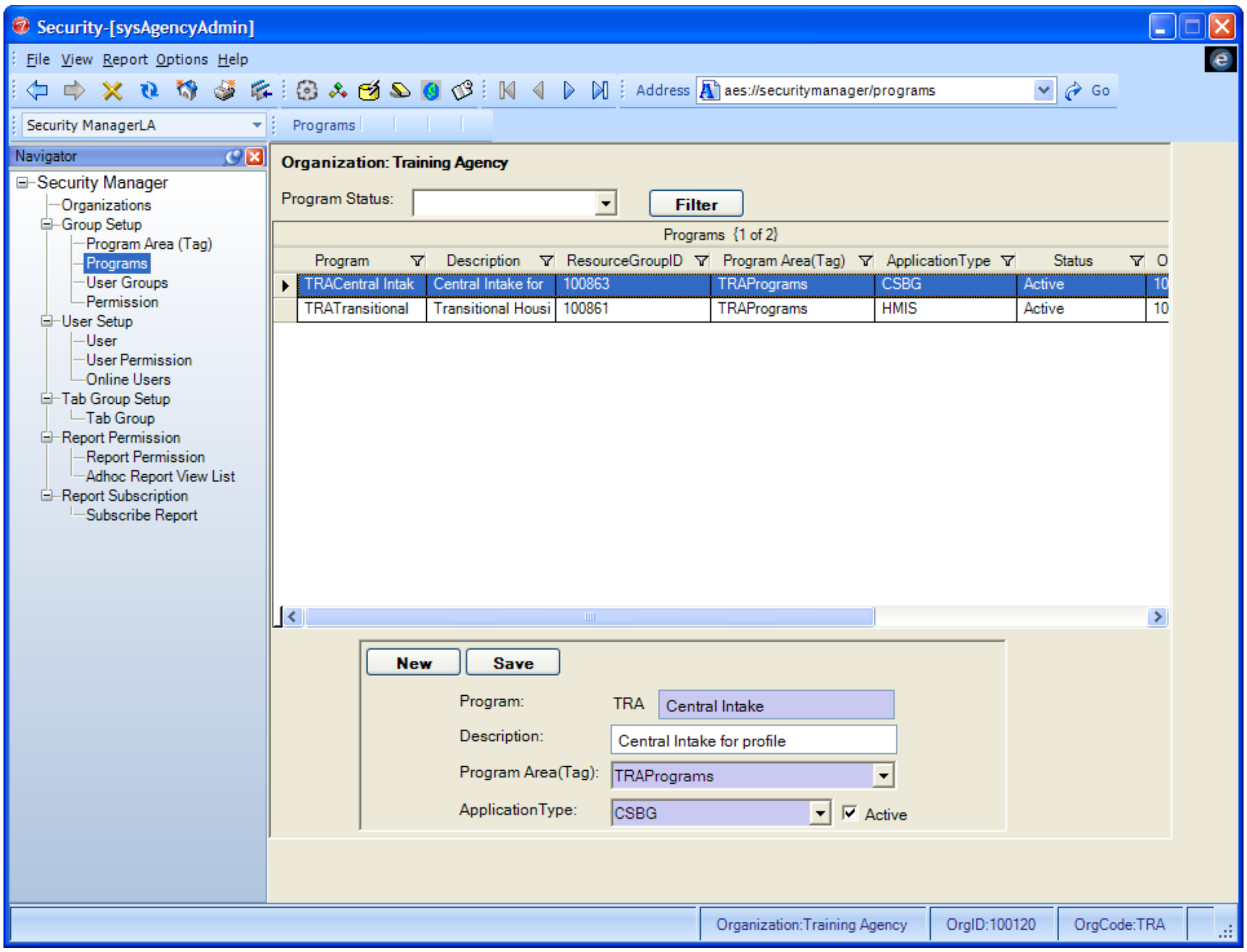
1. Select the appropriate Contact(s) for this Program
   a. These are the Contact(s) who will show up on the Referral Page as the person(s) to refer Clients to
2. Select the appropriate level of consent for this Contact
   a. This will determine who will have this Referral Source appear in the Services Location popup window
3. Click the RIGHT ARROW button

   a. The Contact will appear in the Program Contacts Grid on the right side
   b. Use the LEFT ARROW button to remove a Contact

> ➤ *The Consent Level determines who will see this Program/ Location/ Contact as a choice for Referrals:*
> *- System = entire Collaborative*
> *-Region = only Organizations in your Region*
> *-Organization = only Users in your Agency*

Create Central Intake Program

A Central Intake program needs to be created if you will be making Referrals in Central Intake; the Program will not appear in Program dropdowns on the Entry pages or Search pages. The assessment record needs to be created for a Client in order to use the Central Intake Referral page.



Create Central Intake Programs

1. Click NEW button at bottom of page
2. Enter name for Program (3-digit Org Code appears automatically)
   a. Name must be **Central Intake**
3. Enter Description
4. Select Program Area (Tag)
   a. Any existing Program Area is usable
5. Select Application Type
   a. Use an Application currently used by your Organization
6. Click to create checkmark in Active box
7. Click SAVE button
   a. Program will appear in PROGRAM GRID

Create Assessment for Program

Use the Organization Library, Agency Program page to create the Question Code for the Assessment.

1. Find the Central Intake program in the PROGRAMS GRID on the right side of the page
2. Enter the new Code in Question Code field
   a. This determines the Questions that will appear on the Eligibility or Profile page in Central Intake

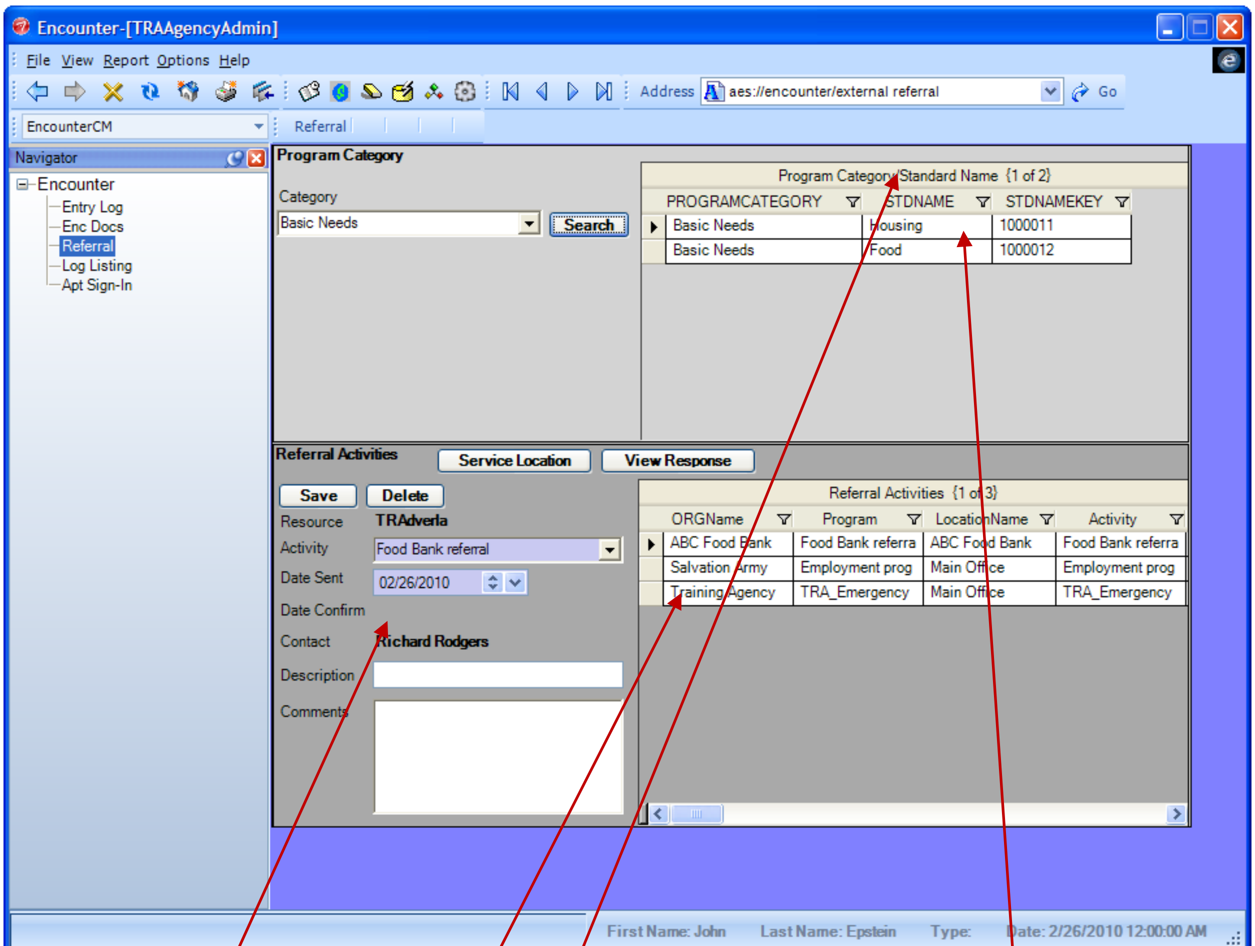
> ➤ *Questions do not have to be asked or answered to use the Referral Page in Central Intake, but a record needs to be created on the Profile page*

To create Questions for the Assessment, see the Question Template page in the Organization User Guide.

User Section
Create Encounter Referral for Client

Use the Encounter module to record Referrals for people who you are not collecting Central Intake information.

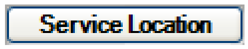
The Referral page is for referring Clients to other Programs or Activities, both internal and external. After the Client has completed the initial Assessment, potential Referral Sources can be set up automatically on this page. Activities appearing in the dropdown have been designated on the Program Setup page or are the name of the external Program.



Navigating the Referral Page

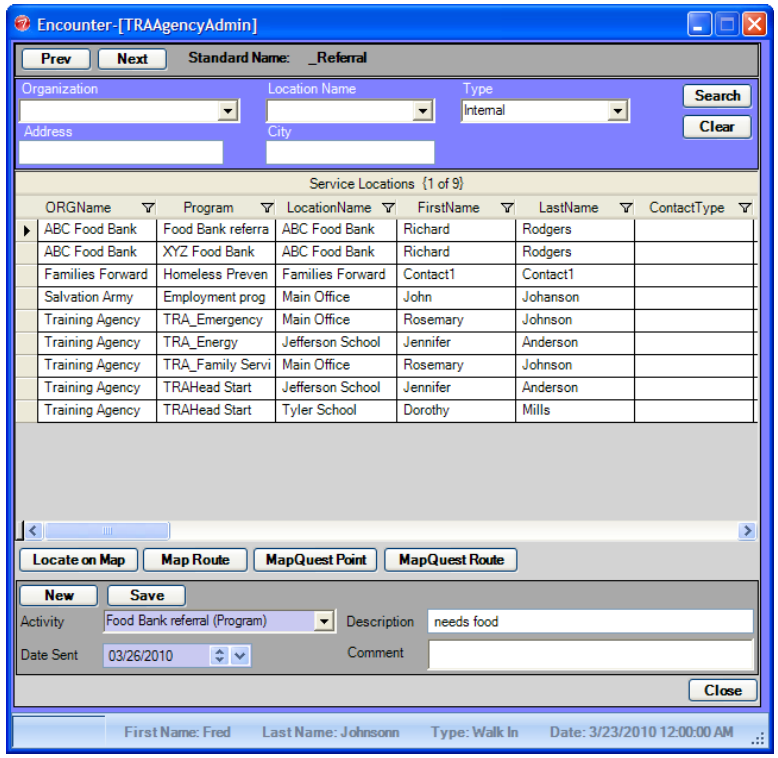
- All available Categories will be listed in the Category dropdown in the top section
- All available selections for the selected Program Category will be displayed in the PROGRAM CATEGORY/STANDARD NAME GRID
- Referrals will be created in the Service Location popup window accessible with the Service Location button
- Referrals will be displayed in REFERRALS GRID the after being created
- Details about the selected Referral will appear in the lower left section

Create Referral

1 Make sure correct Client is selected
   a Use Log Listing page to find Client if needed
1 In the top section, select Category
2 Click SEARCH button
   a A list of Standard names matching the category will appear in the PROGRAMS CATEGORY/STANDARD NAME GRID
3 Select the item to use in the PROGRAMS CATEGORY/STANDARD NAME GRID
4 Click SERVICE LOCATION button 

5 In the popup window:
   a All available Locations for this Referral are displayed in the SERVICE LOCATIONS GRID
6 Filter the list by selecting any of the parameters in the top blue section, then click SEARCH
   a Use CLEAR to clear all search fields and begin a new search
7 Map any location or route using Microsoft MapPoint or MapQuest in Internet browser:
   a Select the Location(s) to map
   b Click LOCATE ON MAP or MAPQUEST button to Map
   c Click MAP ROUTE or MAPQUEST ROUTE button to create route
8 Click NEW button
9 Select Activity
10 Enter Description
11 Select Date Sent
12 Enter Comment
13 Click SAVE button
14 Click CLOSE button when finished

Referral information will automatically populate onto Referral page.

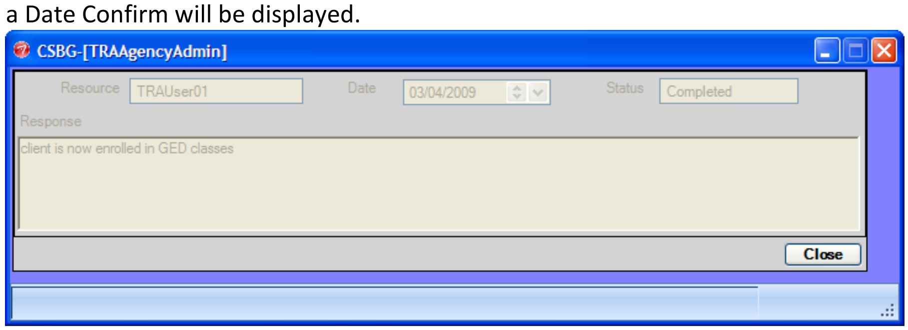


View Referral Response

If a Response has been created, a Date Confirm will be displayed.

Make sure correct Referral is selected in the REFERRALS GRID.

1 Click VIEW RESPONSE button
   a The response cannot be changed or edited, only viewed
2 Click CLOSE button when finished

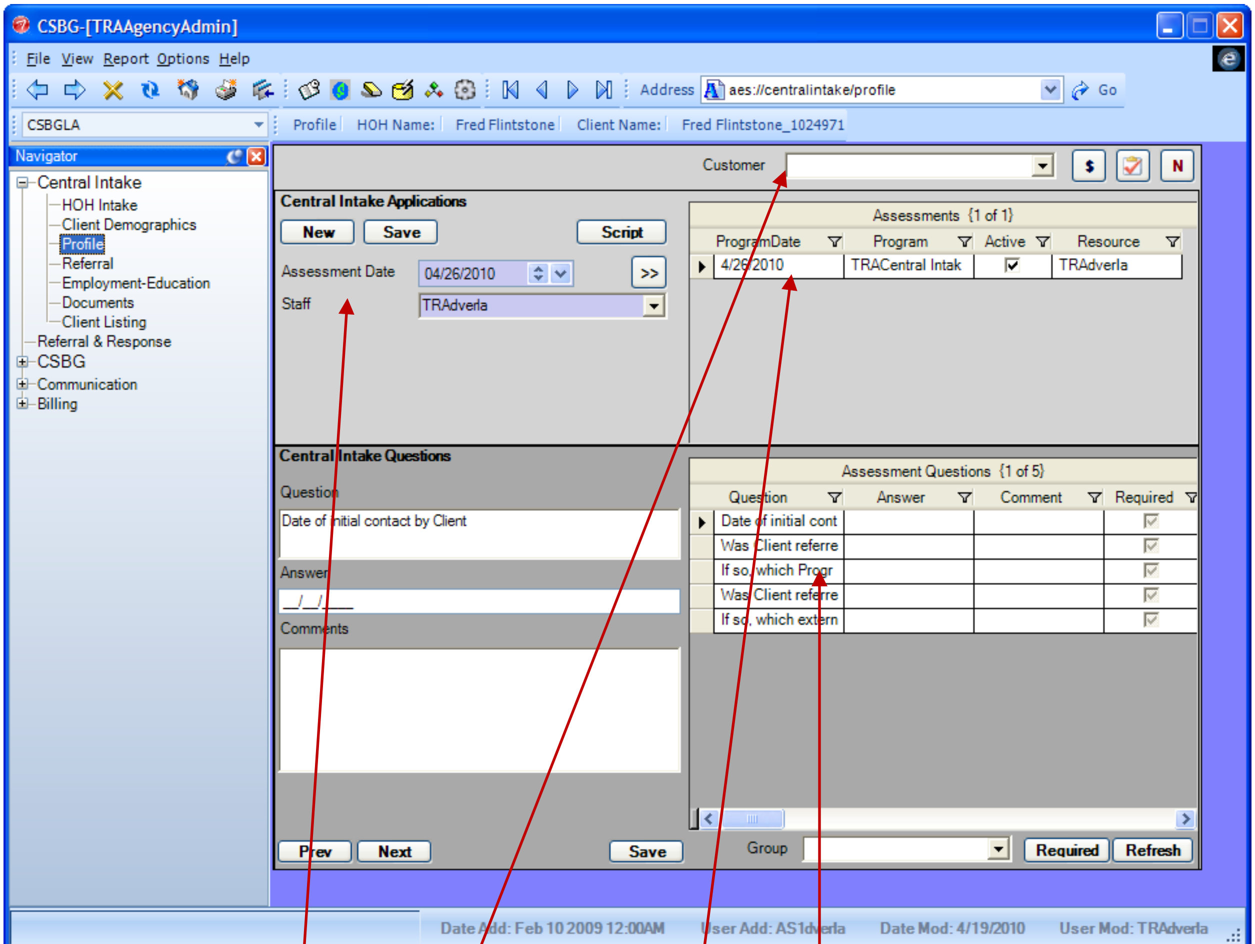


Edit or Delete Referral Record

1 Select Referral in REFERRALS GRID
2 Make necessary changes
3 Click SAVE button
4 To delete record, click DELETE button

Create Central Intake Referral
Create Profile record for Client

The Eligibility page is used to do an initial assessment of the Client. The Client does not have to be enrolled into a Program to do the assessment.



Navigating the Eligibility Page

- HOH and active Client are listed at top of page
- Select Client in customer dropdown
- Create and Save a new Assessment in this section
- All existing Assessments will appear in the <u>Assessments Grid</u>
- Questions for selections Assessment section will appear in the <u>Assessment Questions Grid</u>

Create a new Profile/Assessment record

A profile record needs to be created in order to use the Referral page, although the profile does not need to contain any actual profile questions. If your Agency is using an entire assessment, go to *Create a Profile* below.

1. Make sure correct Client is selected
   a. Use Listing page to find Client
   b. Use dropdown at top of page to select Customer
   c. Head of Household and current Client are listed in blue Status Bar at top of page
2. Click NEW button
3. Assessment Date and Staff will automatically fill in, but may be changed if needed
4. Click SAVE button
5. Go to Referral page

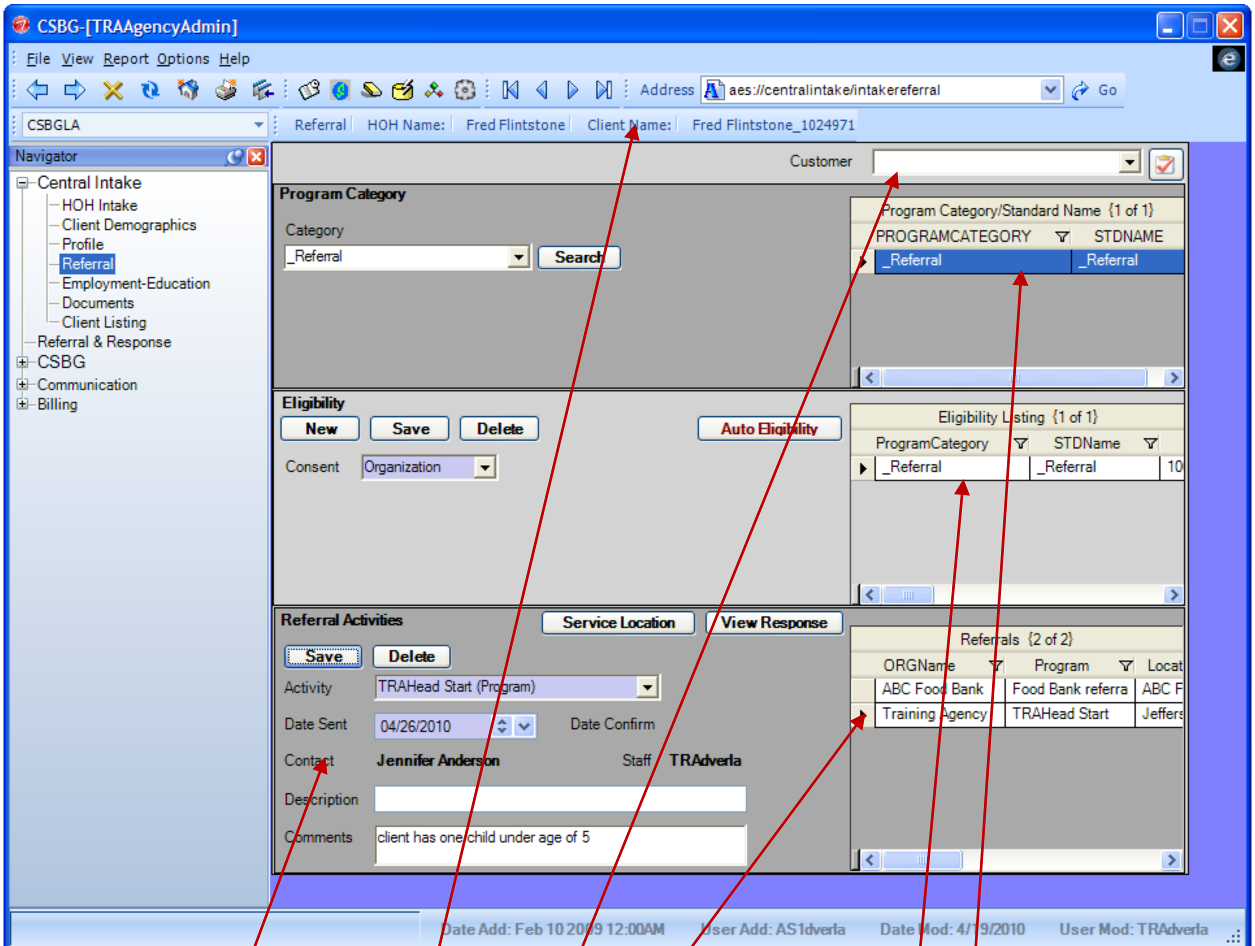
Create a Profile

If your Agency is using an entire assessment (rather than just creating the record in order to create referrals):

1. Make sure correct Client is selected
   a. Use Listing page to find Client
   b. Use dropdown at top of page to select Customer
   c. Head of Household and current Client are listed in blue Status Bar at top of page
2. Click NEW button
3. Assessment Date and Staff will automatically fill in, but may be changed if needed
4. Click SCRIPT button
   a. The Assessment will appear in a new window; answer to each question will cause the next appropriate question to appear
5. Click SUBMIT in assessment window when finished
6. Click SAVE on Profile page
   a. Profile record will appear in the ASSESSMENTS GRID and questions and answers will appear in ASSESSMENT QUESTIONS GRID
7. Go to Referral page

Create Central Intake Referral for Client

The Referral page is for referring Clients to other Programs or Activities, both internal and external. After the Client has completed the initial Assessment, potential Referral Sources can be set up automatically on this page. Activities appearing in the dropdown have been designated on the Program Setup page or are the name of the external Program.



Navigating the Referral Page

- HOH and active Client are listed at top of page
- Select different Client in customer dropdown
- All available Categories will be listed in the Category dropdown in the top section
- All available selections for the selected Program Category will be displayed in the <u>PROGRAM CATEGORY/STANDARD NAME GRID</u>
- All Combinations the Client is eligible to be referred to will be displayed in the <u>ELIGIBLE LISTING GRID</u>
- Referrals will be created in the Service Location popup window accessible with the Service Location button
- Referrals will be displayed in <u>REFERRALS GRID</u> the after being created
- Details about the selected Referral will appear in the lower left section

If the Client has completed an entire Assessment on the Profile page, go to *Automatically generate all possible Referral sources* section below.
If the Client has a profile record on the profile page, but no questions were answered, go to *Manually select possible Referral sources* section below.

Automatically generate all possible Referral sources

Automatic Referrals can be set up only if an Assessment has been completed on the Client.

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer
   b Head of Household is listed in Status Bar
2 In the middle section, select Consent Level
3 Click the AUTO ELIGIBILITY button

All Category/STD Name combination this Client is eligible to be referred to, based on the answers given in the Assessment, will appear in the ELIGIBILITY LISTING GRID. Those conditions have been set up in advance with the Assessment and the Program Setup page Details section.

4 Select the item to use in the ELIGIBILITY LISTING GRID
5 Go to *Create Referral* section below

Manually select possible Referral sources

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer
   b Head of Household is listed in Status Bar
2 In the top section, select Category
3 Click SEARCH button
   a A list of Standard names matching the category will appear in the PROGRAMS CATEGORY/STANDARD NAME GRID
4 Select the item to use in the PROGRAMS CATEGORY/STANDARD NAME GRID

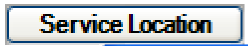
In the middle section:

5 Click NEW button
6 select Consent Level
7 Click the SAVE button

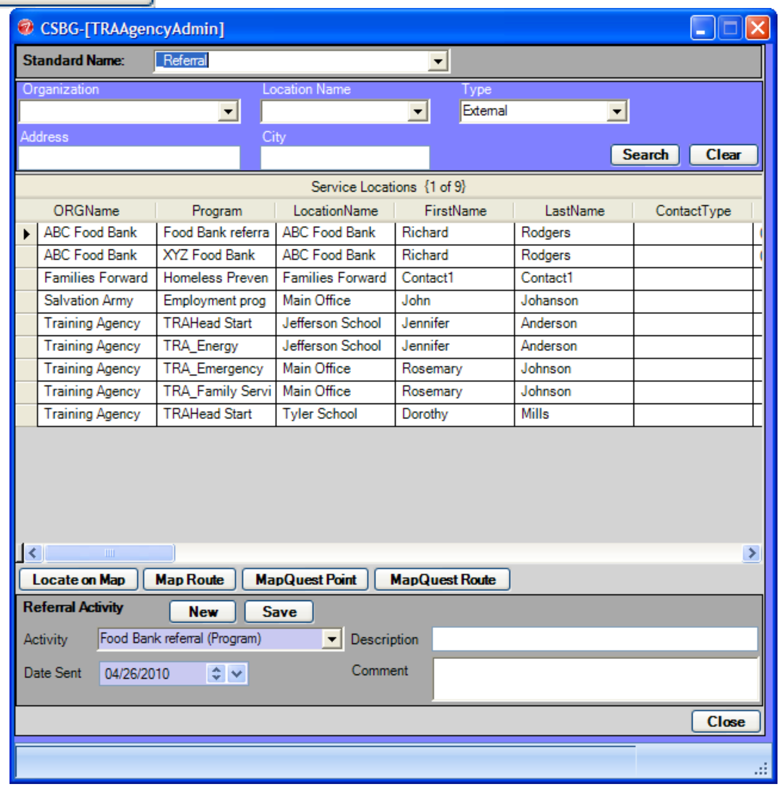
All Category/STD Names this Client is eligible to be referred to will appear in the ELIGIBILITY LISTING GRID. Those combinations have been set up in advance.

8 Select the item to use in the ELIGIBILITY LISTING GRID
9 Go to *Create Referral* section below

Create Referral

1 Make sure correct Client is selected
2 Make sure correct Category/STDName is selected in Eligibility section
3 Click SERVICE LOCATION button 

4 In the popup window:
   a All available Locations for this Referral are displayed in the SERVICE LOCATIONS GRID
5 Filter the list by selecting any of the parameters in the top blue section, then click SEARCH
   a Use CLEAR to clear all search fields and begin a new search
6 Map any location or route using Microsoft MapPoint or MapQuest in Internet browser:
   a Select the Location(s) to map
   b Click LOCATE ON MAP or MAPQUEST button to Map
   c Click MAP ROUTE or MAPQUEST ROUTE button to create route
7 Click NEW button
8 Select Activity
9 Enter Description
10 Select Date Sent
11 Enter Comment
12 Click SAVE button
13 If making additional Referral, select Standard Name in dropdown at top and repeat steps
14 Click CLOSE button when finished



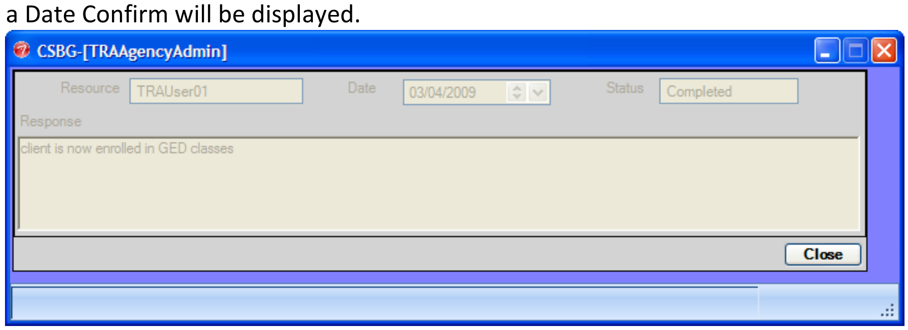
Referral information will automatically populate onto Referral page.

View Referral Response

If a Response has been created, a Date Confirm will be displayed.

Make sure correct Referral is selected in the REFERRALS GRID.

1 Click VIEW RESPONSE button
   a The response cannot be changed or edited, only viewed
2 Click CLOSE button when finished

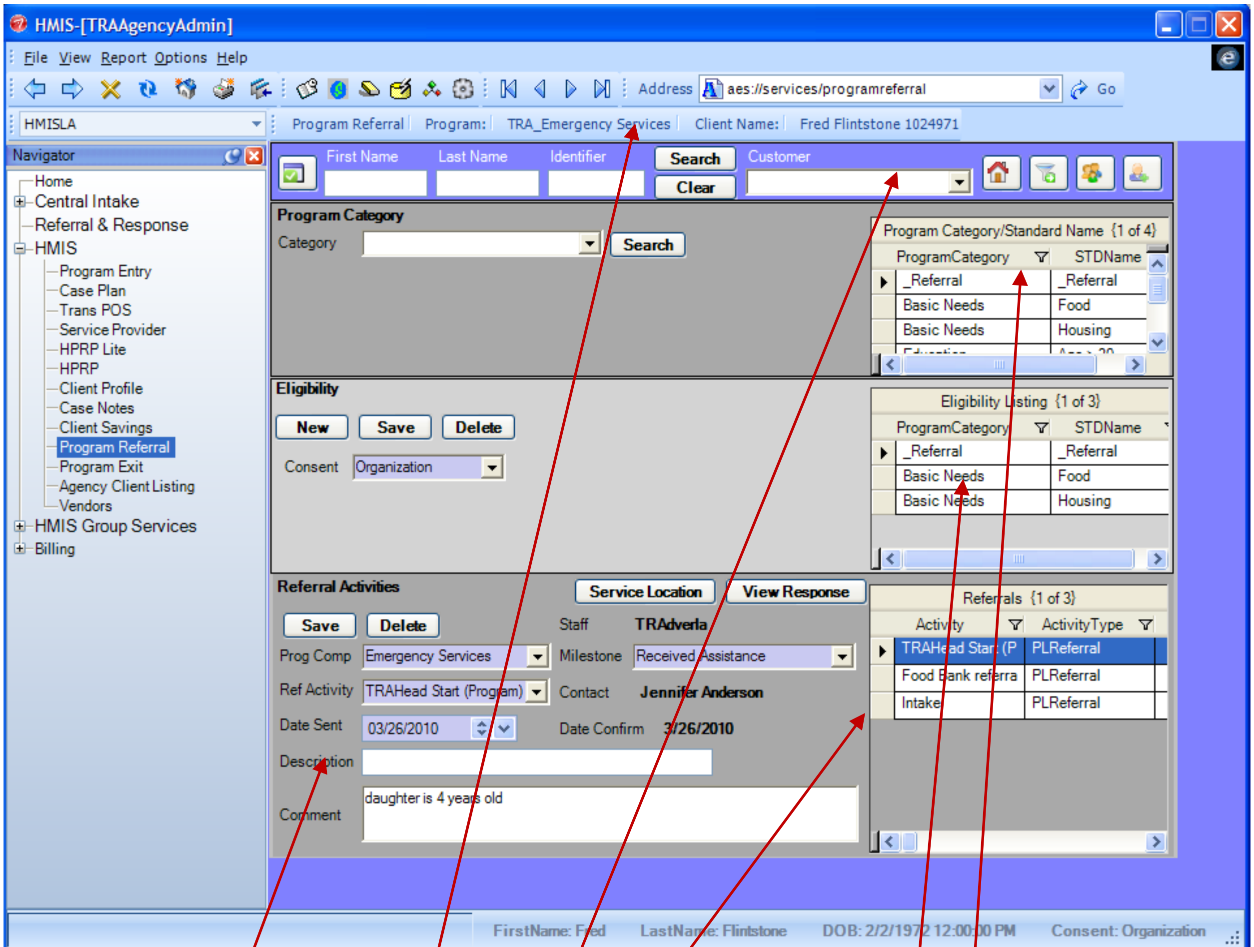


Edit or Delete Referral Record

1 Select Referral in REFERRALS GRID
2 Make necessary changes
3 Click SAVE button
4 To delete record, click DELETE button

Create Program Referral for Client

The Referral page is for referring Clients to other Programs or Activities, both internal and external. After the Client has completed the initial Assessment, potential Referral Sources can be set up automatically on this page. Activities appearing in the dropdown have been designated on the Program Setup page or are the name of the external Program.



Navigating the Referral Page

- HOH and active Client are listed at top of page
- Select different Client in customer dropdown
- All available Categories will be listed in the Category dropdown in the top section
- All available selections for the selected Program Category will be displayed in the PROGRAM CATEGORY/STANDARD NAME GRID
- All Combinations the Client is eligible to be referred to will be displayed in the ELIGIBLE LISTING GRID
- Referrals will be created in the Service Location popup window accessible with the Service Location button
- Referrals will be displayed in REFERRALS GRID the after being created
- Details about the selected Referral will appear in the lower left section

Create Referral

1 Make sure correct Client is selected

  a Use dropdown at top of page to select Customer

  b Head of Household is listed in Status Bar

2 In the top section, select Category

3 Click SEARCH button

  a A list of Standard names matching the category will appear in the PROGRAMS CATEGORY/STANDARD NAME GRID

4 Select the item to use in the PROGRAMS CATEGORY/STANDARD NAME GRID

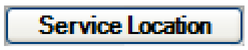
In the middle section:

5 Click NEW button

6 Select Consent Level

7 Click the SAVE button

In the bottom section:

8 Click SERVICE LOCATION button 

9 In the popup window:

  a All available Locations for this Referral are displayed in the SERVICE LOCATIONS GRID

10 Filter the list by selecting any of the parameters in the top blue section, then click SEARCH

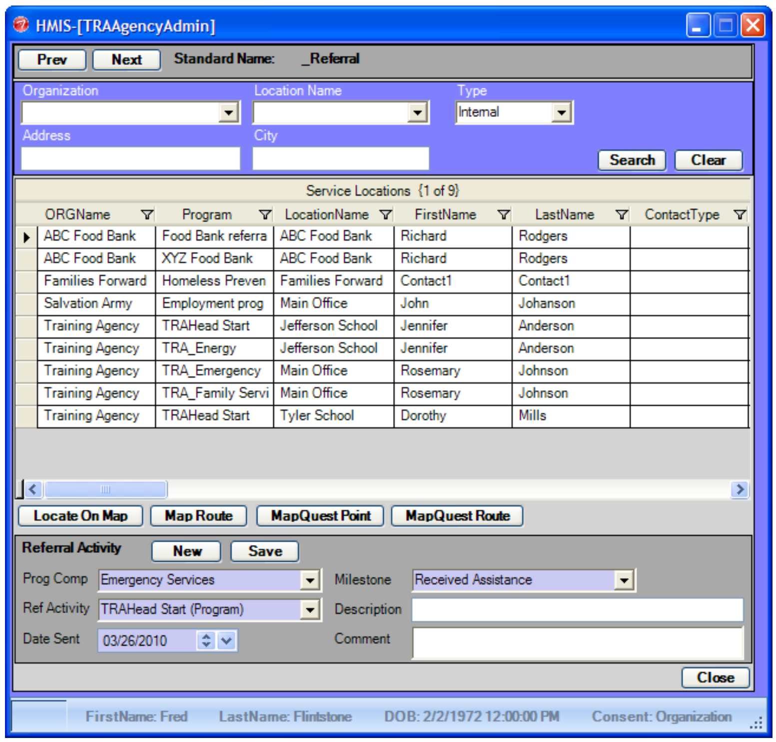
  a Use CLEAR to clear all search fields and begin a new search

11 Map any location or route using Microsoft MapPoint or MapQuest in Internet browser:

  a Select the Location(s) to map

  b Click LOCATE ON MAP or MAPQUEST button to Map

  c Click MAP ROUTE or MAPQUEST ROUTE button to create route



12 Click NEW button

13 Select Program Component

14 Select Milestone

15 Select Activity

16 Enter Description

17 Select Date Sent

18 Enter Comment

19 Click SAVE button

20 If creating Referrals in additional Categories:

21 Click PREV or NEXT button at top of window to select other Category

  a Repeat above steps for new Category

22 Click CLOSE button when finished

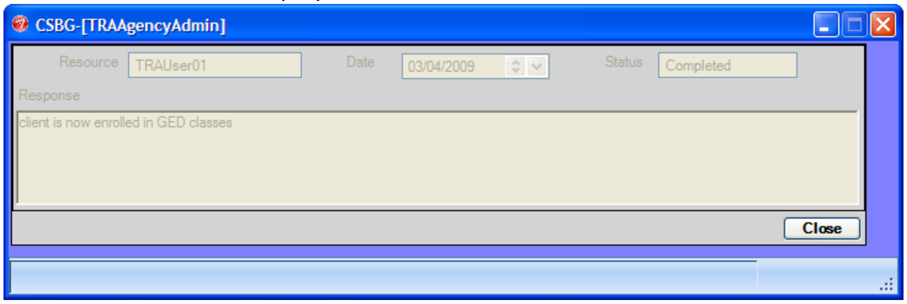
Referral information will automatically populate onto Referral page.

View Referral Response

If a Response has been created, a Date Confirm will be displayed.

Make sure correct Referral is selected in the REFERRALS GRID.

1 Click VIEW RESPONSE button
   a The response cannot be changed or edited, only viewed
2 Click CLOSE button when finished

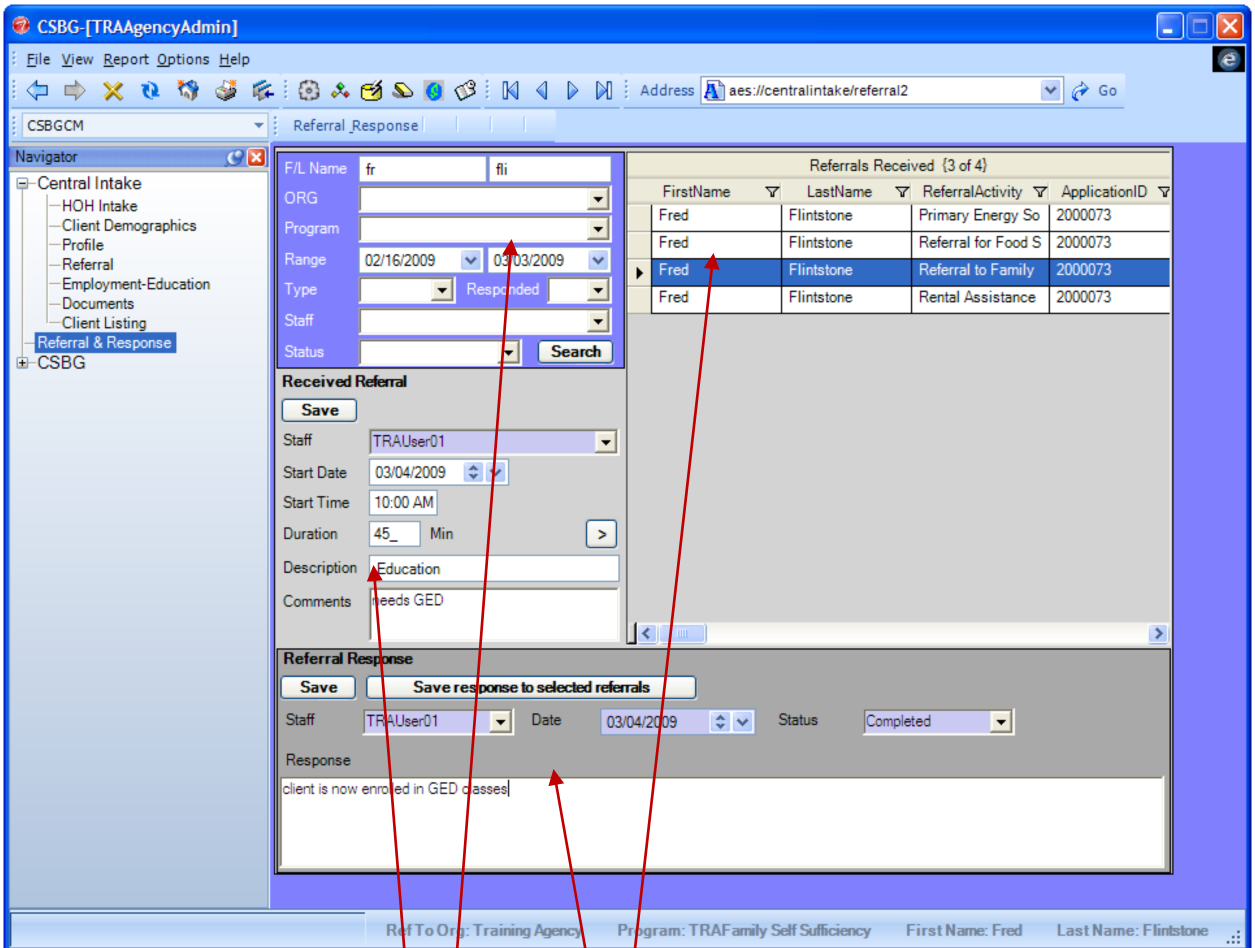


Edit or Delete Referral Record

1 Select Referral in REFERRALS GRID
2 Make necessary changes
3 Click SAVE button
4 To delete record, click DELETE button

Referral & Response Page

The Referral & Response page allows Users to look up a Referral, both external and internal, made on a Client and respond to it by making an appointment and/or comments. The View Response button on the Referral page is a popup that allows the User to see the response made to the Referral.



Navigating the Referral & Response Page

- Search for Referrals in the upper blue section
- All matching Referrals will be displayed in the <u>Referrals Received Grid</u>
- Create appointments in the middle section
- View or create a response to a Referral in the bottom section

Find Referral

There are several ways to search for referrals, select the search criteria, and then click SEARCH:

1 To find all Referrals for a particular Client:
  a Enter Client First and/or Last Name
    i) The entire name does not need to be entered
2 To find all Referrals for one Agency or Program:
  a Select Agency and/or Program
3 To find all Referrals during a range for Dates:
  a Enter Start and End Dates of time period
4 To find all Referrals made to external sources or to internal Programs:
  a Select External in Type dropdown for external sources
  b Select Internal in Type dropdown for internal Programs
5 To find all Referrals to which Responses have been made:
  a Select Yes or No
6 To find all Referrals made by a Staff Member
  a Select User Name in Staff dropdown
7 To find all Referrals with a particular Status
  a Select Status in dropdown

Referrals matching criteria will appear in Referrals Received Grid

Create a Client Appointment

After the Referral is received, an appointment can be made.

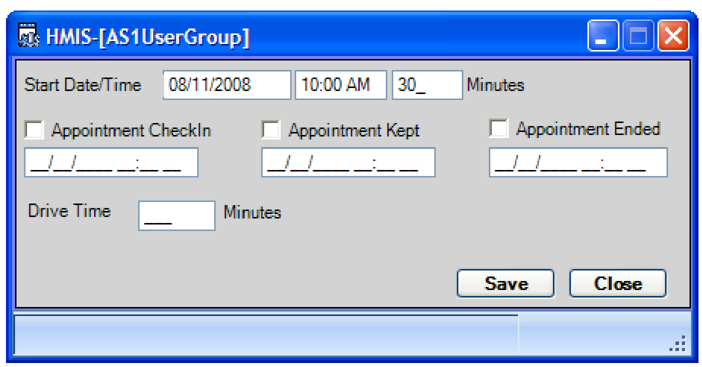
1 Make sure correct Referral is selected in Referrals Received Grid
2 In the middle container, enter the requested data for the future appointment
3 Description and comments appear automatically from the Referral page information
4 Click SAVE

Enter Appointment detail information

Make sure correct Client and appointment are selected.

1 Click SHOW APPOINTMENT DETAIL button 

2 In popup, start date and time will appear automatically if entered on main page
3 Click to create checkmark in Appointment Check in, Kept and/or Ended checkboxes
4 Enter dates and times in check in, kept and/or ended fields
5 Enter Drive Time in minutes
6 Click SAVE button
7 Click CLOSE button when finished



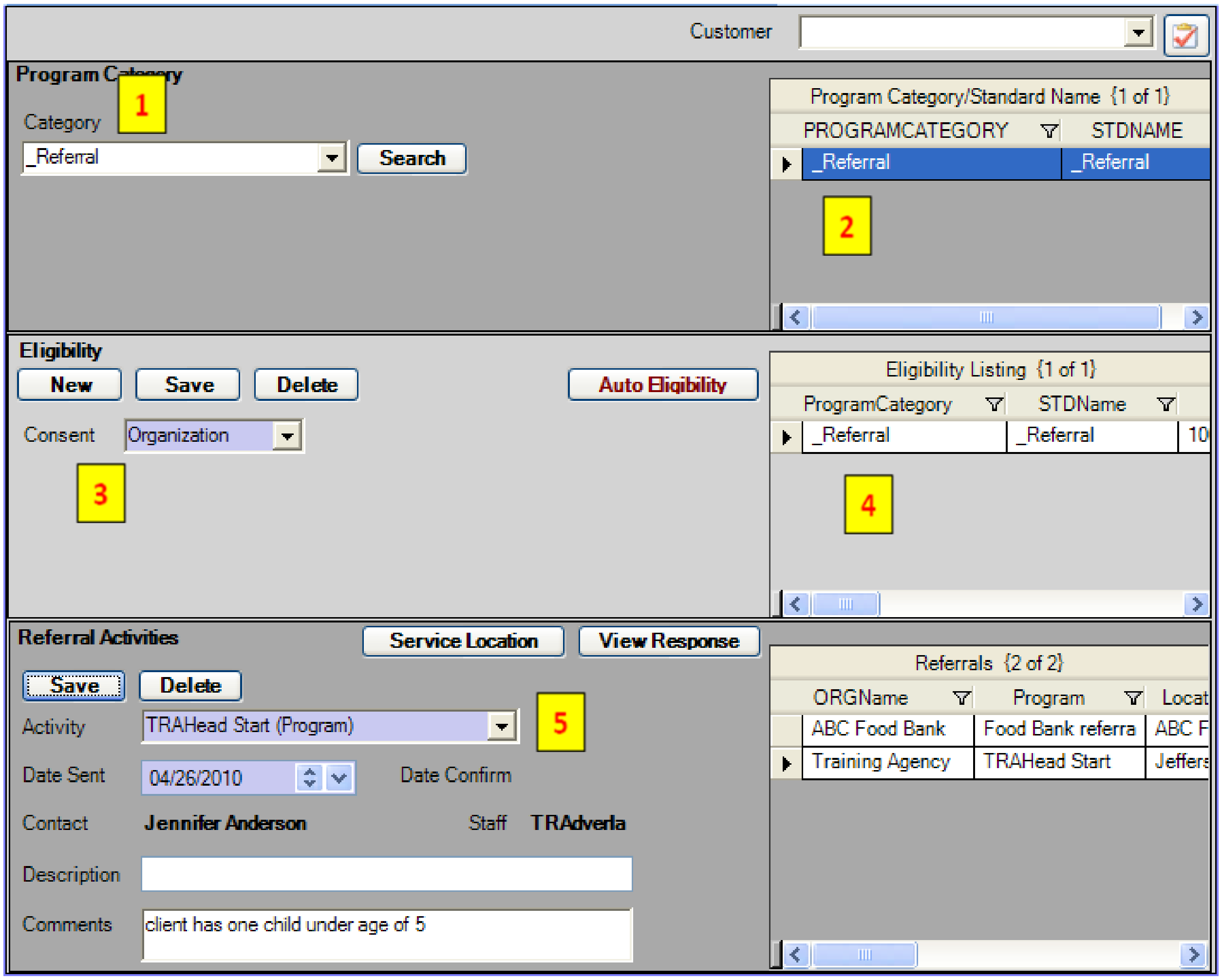
Respond to initial Referral

Make sure correct Referral(s) is selected in Referrals Received Grid

1 Select Staff
2 Select Date of response
3 Select Status of response
4 Enter Response information
5 Click SAVE to save to one Referral or SAVE RESPONSE TO SELECTED REFERRALS to save to multiple Referrals

This response will be available via the VIEW RESPONSE button on the Referral page.

Referral Page



1 Category dropdown:

- All categories created on STD Name page

2 Grid:

- All STD Names of the selected Category after SEARCH clicked
  - All Category/STD Name combinations that are linked to a program, internal or external
  - If a combination is not linked to any programs it will not be displayed in the Grid (see next entry)
- If a different Organization has linked a combination to a Program and used System for the consent for the Contact, it will be displayed here

3 Consent Level in Eligibility container:

- This consent determines who will have access to any Referrals linked to this Category

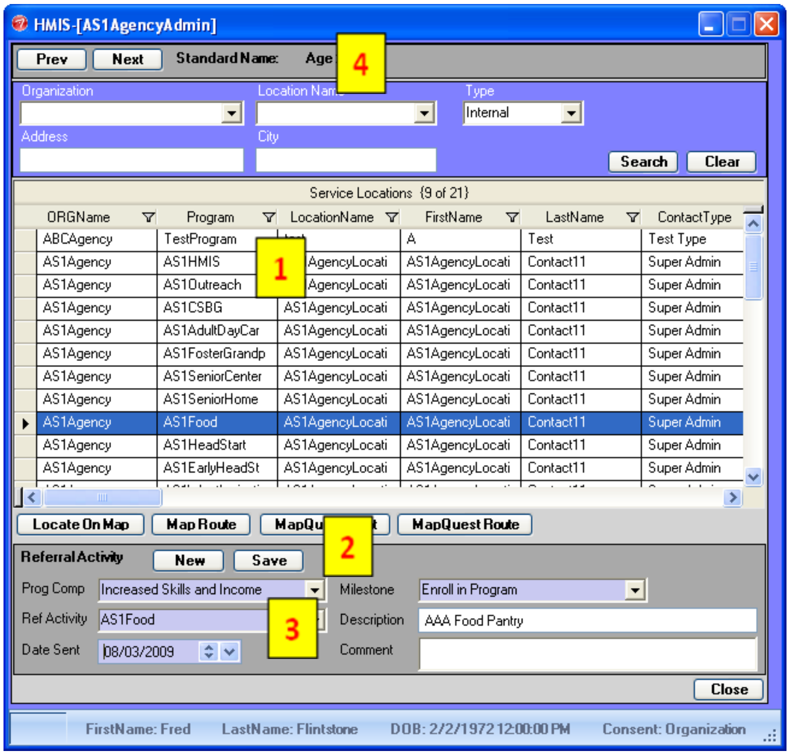
4 Eligibility Listing (Central Intake and Program module only):

- Categories displayed on the right side of this container will remain in this Grid and will be available to create new Client referrals using the Service Location popup window

5 Bottom container

- Referral appears here after creation and save in Service Location popup window
  - Items can be changed here after creation in popup window
- Program module page also includes Program Component and Milestone
- Contact name comes from selection in popup window
- Date Confirm comes from response created on Referral and Response page

Service Location popup



1 Grid

- All Internal and External Programs linked to selected Category combination appear
    - List can be filtered, for example to show only Internal or External, or Programs in one Organization
- Consent on Location/Contact combo determines who will see these items
    - If set to Organization, the Program will appear only for that Organization
    - If set to Region, the Program will appear for all Organizations in that Region
- If two Contacts are linked to a Program, two items will appear in the Grid

2 Program Component and Milestone

- Appear only on Program module Referral, not in Central Intake or Encounter

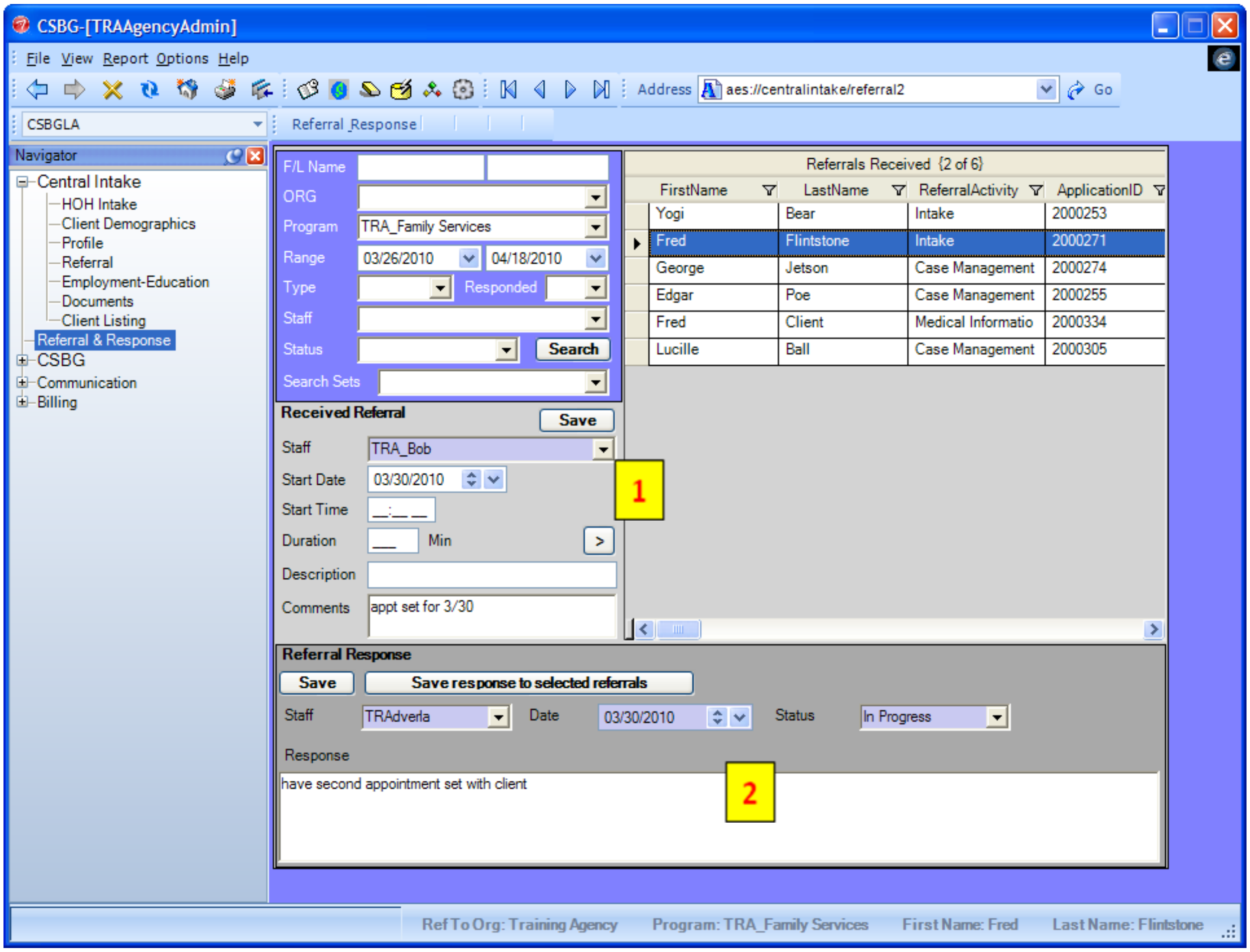
3 Ref Activity dropdown items include:

- External Programs – this is Program Name
- Internal Program – this will display Activities that have been setup with the Referral button in the Activities section on the Program Setup page

4 Top Line Standard Name listing

- Current selected STD Name shows in top gray section
- Select other STD Names by navigating with PREV or NEXT buttons or with dropdown
- Central Intake Referral page has a dropdown instead of PREV or NEXT buttons

Referral & Response information

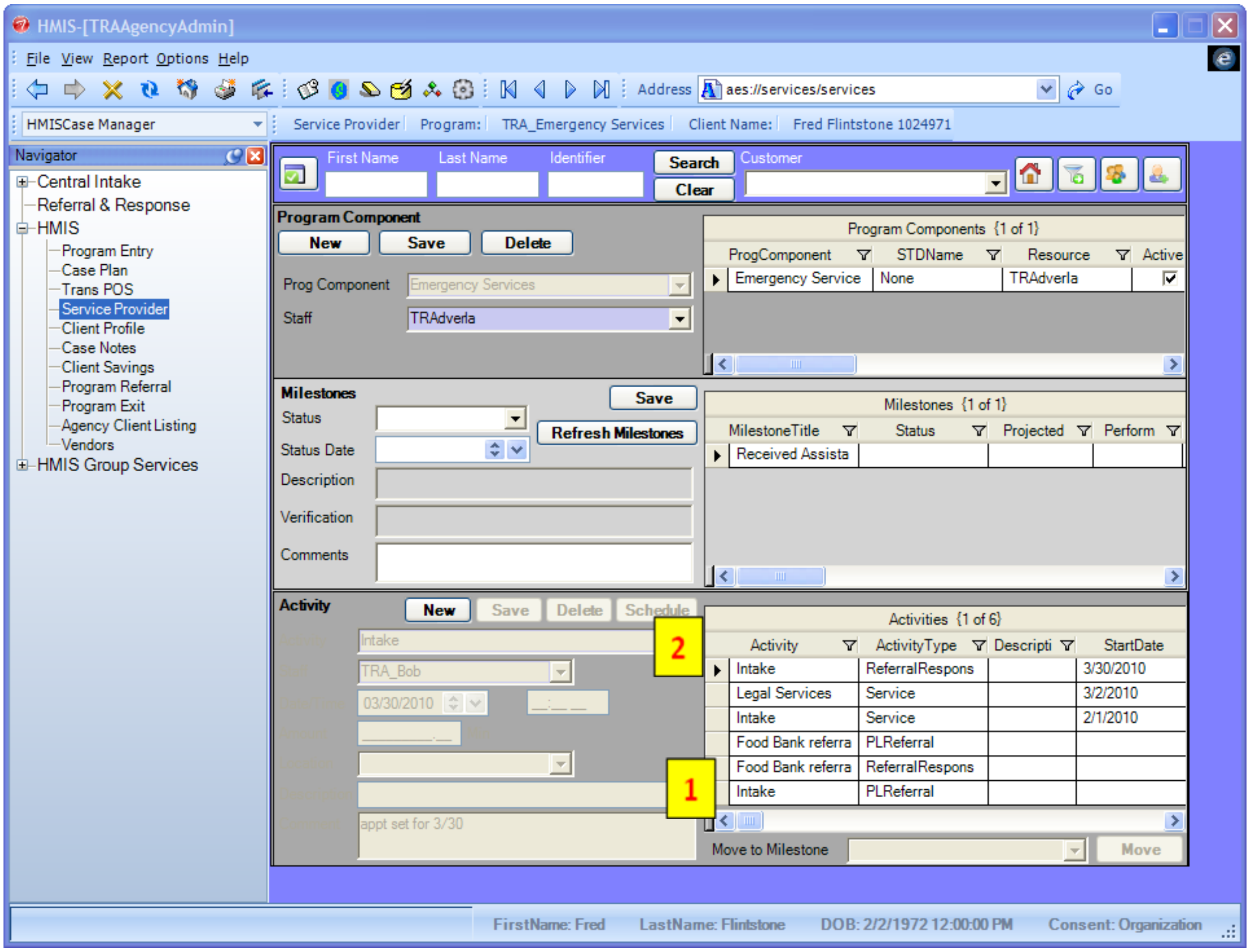


1 Middle (appt) section appears on Services page as Response item and will show staff member, date, description, comments
   - This section is not required

2 Response at bottom causes Date Confirm on Referral page to appear
   - The Staff, Date, Status and Response will all appear on the VIEW RESPONSE popup window when the button is clicked

Referrals will be displayed here whether they were created in Encounter, Central Intake or Program modules.

Services Page



1 Program Level Referral Activity appears in Activity section on Services page
- Activity information is grayed out because it was created on other page
- Staff, Date, Description, Comments all come from Referral page
- Activity Type = PLReferral (Program Level Referral)

2 Response Activity is created when Referral Activity is created
- Activity information is grayed out because it was created on other page
- Information will appear when middle section is created on Referral & Response page
- Staff, Date, Description, Comments all come from Referral & Response page
- Creating Response in bottom section on R&R page will not cause information to appear here
- Activity Type = ReferralResponse

Only Program Level Referrals will be displayed here. Central Intake and Encounter Referrals will not be displayed here.

The Referral appears in the Program, Program Component and Milestone FROM which the Referral was made, not in the Program the Referral was made TO.