Service Referrals

AWARDS INSTRUCTION SHEET

The Service Referrals feature in the AWARDS Services module enables case managers and counselors to quickly and easily record referrals being made for a consumer. Service referral reports can also be viewed using this feature.

Permissions required to work with Service Referrals records are as follows:

- *CHART ACCESS – You must have chart access permission for each program for which service referral records are to be entered, updated, deleted and/or viewed.*
- *DATA ENTRY / ACCESS – You must have the "Display Any Chart Records Buttons," and "Display Chart Records Services Button" permissions.*

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of working with service referrals in both data entry and report modes. Specific topics covered are:

ENTERING SERVICE REFERRALS

To enter a service referral, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the service referral is to be entered.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.
5. If the service referral to be entered is for a former (discharged) consumer, click the **Roster Archives** check box.
6. Click **Service Referrals**. The *Service Referrals Preliminary Selections* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the service referral is being entered.

8. The date of the service referral to be entered must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **From** and **To** field values.

   The default date range is the previous six months.

   Service referrals can be entered for future dates.

9. Click **CONTINUE**. The *Service Referrals Listing* page is displayed. This page contains a list of existing referrals for the selected consumer that have dates which fall within editing date range shown at the top of the page. The referrals can be sorted by clicking on the column headers.

10. Click the **ADD NEW SERVICE REFERRAL** link. The *Referral Out Selection Settings* page is displayed.

11. To limit agency selection by name, type the first letter of the agency's name in the **Agency/Initial** field. If this field is left blank, all agencies will be included in the service referral selection process.

12. Click **CONTINUE**. The *Referral Source Agency Selection* page is displayed, with "Add New Agency" as the default list selection. DO NOT CLICK CONTINUE.

13. Click on the drop-down arrow and select the agency to which the client is being referred. If the agency is not listed, select "Add New Agency."

   IMPORTANT! *The referring out agency list is shared by all programs using AWARDS. If a new agency is added to the list using the "Add New Agency" selection, that agency will be available for selection as a referral out by all programs moving forward. Likewise, if an existing agency is selected here and changes are made to its information in later steps in this process, those changes will be seen by all programs.*

   Be sure to check all possible start letters before selecting "Add New Agency." For example, check under "T" and elsewhere for agencies that start with "The."

   Even if you are entering a referral for a test client, you should select a real agency, as ANYTHING you enter in this list will become a part of the master list seen by all programs.

14. Click **CONTINUE**. The *Referral Source Agency & Contact Update* page is displayed.

15. Make changes or additions to the referring out agency information as necessary using the following fields and options: **Agency** (name), **Program Type**, **Street Address**, **City**, **State**, and **Zip** (code).

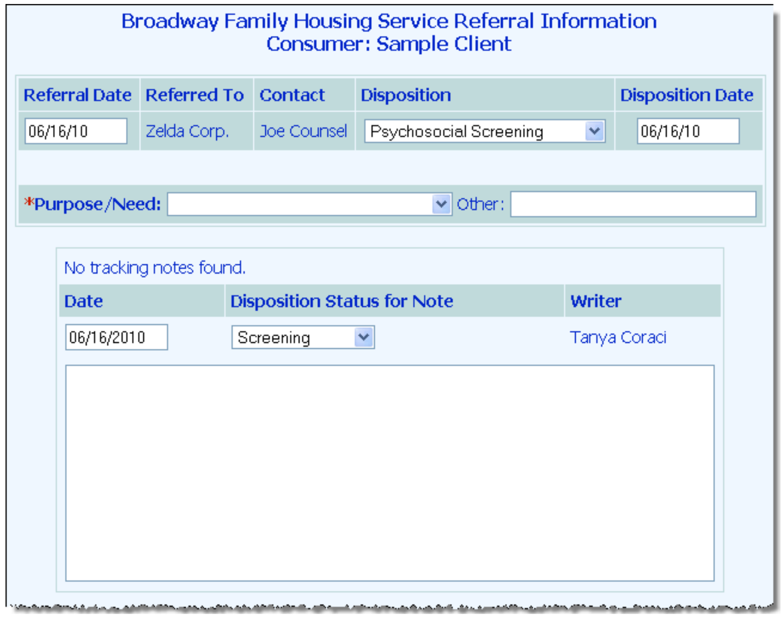
   Updates made to these fields will apply to all referrals, past and future, to this agency. If the agency has multiple locations, you may wish to create a New Agency record with the alternate address. However, if an agency has moved, you would most likely want to merely update the address on the existing record.

16. Click the **Contact Person** drop-down arrow and select the name of the contact person. If the details about that contact person need to be added or updated, make changes to the **Name**, **Phone**, **Title**, and **Phone/Fax** fields as necessary.

    If the appropriate contact person for this referral is not listed in the Contact Person selection list, select "New Contact Person" from the list, and enter his or her information in the **Name**, **Phone**, **Title**, and **Phone/Fax** fields.

    New contacts added to the record will display in the database every time this Referral Source Agency is displayed for a referral. Even if you are entering a referral for a test client, do not add fake names into the database, as ANYTHING you enter in this list will become a part of the master list seen by all programs.

17. Click **APPLY CONTACT UPDATE & CONTINUE REFERRAL UPDATE.** The *Service Referral Information* page is displayed.



18. The **Referral Date** defaults to today's date. Update the date in this field if necessary.

19. Click the **Disposition** drop-down arrow and select the appropriate disposition of the referral.

20. The **Disposition Date** defaults to today's date. Change the date in this field if necessary.

21. Click the **Purpose/Need** drop-down arrow and select the reason for the referral. If "Other" is selected, enter a Purpose/Need in the **Other** text box provided.

22. If a tracking note on the referral is necessary, enter the date of the note in the **Date** field. Then select a **Disposition Status for Note** from the drop-down list, and enter the note in the text box below.

23. Click **CONTINUE**. The service referral is saved and the updated *Service Referral Information* page is displayed in report mode.

    *If edits are needed, click **Return to Data Entry** to open the service referral in data entry mode.*

The process of entering a service referral record is now complete.

UPDATING SERVICE REFERRALS

To update a service referral, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the service referral is to be updated.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.

5. If the service referral to be updated is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Service Referrals**. The *Service Referrals Preliminary Selections* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the service referral is being updated.

8. The date of the service referral being updated must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **From** and **To** field values.

   The default date range is the previous six months.

   Service referrals can be entered for future dates.

9. Click **CONTINUE**. The *Service Referrals Listing* page is displayed. This page contains a list of existing referrals for the selected consumer that have dates which fall within editing date range shown at the top of the page. The referrals can be sorted by clicking on the column headers.

10. Locate the referral to be updated and click the link (consumer's name) for that referral. The *Service Referral Information* page is displayed.

11. Make updates to the fields on the page as necessary, using the **Referral Date**, **Disposition**, **Disposition Date**, and **Purpose/Need** fields and options.

    If the Disposition is updated, the previous Dispositions will not be retained. Only one disposition is associated with each referral record. If it is important to maintain a history of the consumer's disposition in regards to this referral (e.g. If it is desirable to know that the 1st Intake Interview was on 10/1/2009, and the 2nd Intake Interview was on 11/2/2009), create an entirely new referral to this same agency so that the original Disposition Status and its date can remain intact. Both referrals will then display on the service referrals listing.

12. Make updates to the disposition tracking note as necessary, using the **Date**, **Disposition Status for Note** and note text box fields and options.

    Notes can only be edited by the author who originally entered the note.

    If the existing note(s) on the service referral were written on a date other than the current date, there will also be an option to add a new note with today's date (or a different date). Only one note can be entered for any given day.

13. Click **CONTINUE**. The updated service referral is saved and the *Service Referral Information* page is displayed in report mode.

The process of updating a service referral record is now complete.

DELETING SERVICE REFERRALS

To delete a service referral, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the service referral is to be deleted.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.
5. If the service referral to be deleted is for a former (discharged) consumer, click the **Roster Archives** check box.
6. Click **Service Referrals**. The *Service Referrals Preliminary Selections* page is displayed.
7. Click the **Consumer** drop-down arrow and select the consumer for whom the service referral is being deleted.
8. The date of the service referral being deleted must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **From** and **To** field values.

   The default date range is the previous six months.
9. Click **CONTINUE**. The *Selected Service Referrals Listing* page is displayed. This page contains a list of existing referrals for the selected consumer that have dates which fall within editing window date range shown at the top of the page. The referrals can be sorted by clicking on the column header.
10. Locate the referral to be deleted and click the link (consumer's name) for that referral. The *Service Referral Information* page is displayed.
11. Click the **Delete?** check box at the bottom of the page so that it appears checked.
12. Click **CONTINUE**. The service referral record is deleted and the *Service Referrals Preliminary Selections* page is displayed.

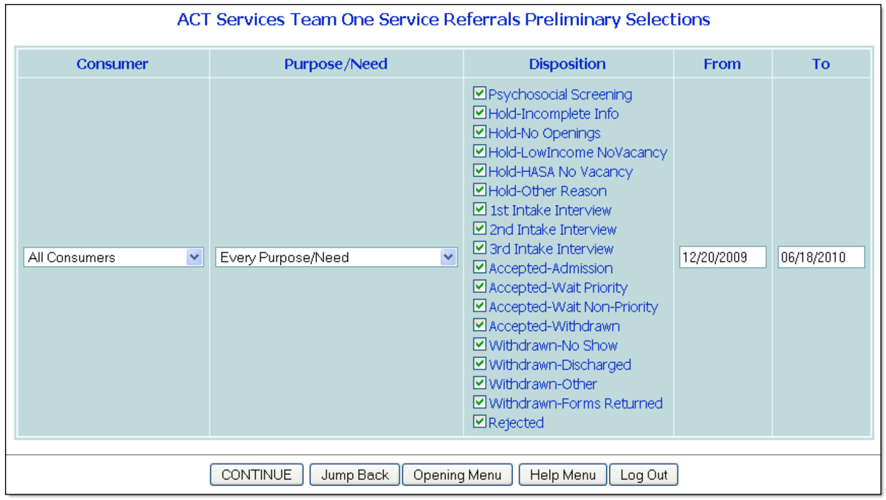
The process of deleting a service referral is now complete.

VIEWING A SERVICE REFERRALS REPORT

To view a service referrals report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the service referrals report to be viewed.
3. Click the **Database** drop-down arrow and select "Reports."

4. Click **Service Referrals**. The *Service Referrals Preliminary Selections* page is displayed.



5. Click the **Consumer** drop-down arrow and select the consumer for whom the report is to be viewed. The default selection is "All Consumers."

6. Click the **Purpose/Need** drop-down arrow and select the purpose/need for which the report is to be viewed. The default selection is "Every Purpose/Need."

7. Review the **Disposition** checklist and check/uncheck the dispositions that are to be included in the report. By default, all dispositions on the list are checked to be included in the report.

8. To limit the report's content by date so that only referrals which occurred during a specific time period are included, type a date range in the **From** and **To** fields. The default date range is the previous 6 months.

9. Click **CONTINUE**. The *Service Referrals Listing* page is displayed. This page contains a list of existing referrals for the selected consumer(s) with the selected Purpose/Needs(s) and selected Disposition Status(es) that have dates which fall within date range shown at the top of the page. The referrals can be sorted by clicking on the column headers.

   To view the details of a listed referral, click the link (consumer's name) for that referral. The Service Referral Information form is displayed in report mode.

The process of viewing a service referrals report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Service Referrals feature can be a useful reference when you have your own questions about the functionality.

HOW DO I DELETE A SERVICE REFERRAL FOR WHICH THERE IS NO PURPOSE/NEED ENTERED? THERE IS NO "DELETE?" CHECK BOX IN IT.

In the case of service referrals without a purpose/need, the referral must be opened, a purpose/need must be selected, and the referral must be updated. The referral can then be re-opened and the "Delete?" check box will be seen above the navigation buttons as expected and can be used to remove the referral.

HOW DO I DETERMINE WHICH STAFF INITIATED SERVICE REFERRALS FOR CONSUMERS?

If you would like to track which staff initiate service referrals for consumers in your program, it is recommended that you have staff people enter a tracking note for each of those referrals. Doing so records the note writer as part of the referral record. For more information on entering tracking notes, see step 22 of "Entering a Service Referral" on page 1.

WHY DOES THE SOURCE AGENCY LIST CONTAIN AGENCIES TO WHICH WE NEVER REFER CONSUMERS? HOW DID THEY GET THERE?

The Source Agency List is a list that is in use throughout your agency. Anytime a worker at any program within your agency adds a new referral agency to the list, your program will see that referral agency on your list. Also, this is the same list that is in use in the Intake/Admission module, as a list of referral source agencies that have referred your consumers to you.

WHY DOESN'T THE MOST CURRENT DISPOSITION STATUS APPEAR WHEN I RUN A SERVICE REFERRALS REPORT?

In order for the most current disposition status to show on the Service Referrals report, the "Disposition" information at the top of the consumer's *Service Referral Information* page must be updated. Changing the "Disposition Status for Note" does not automatically update the "Disposition."