



The Referral Process – HVP Job Aid

Home Visiting Referrals can come from several sources for Home Visiting providers to view and respond to. Home Visiting providers must review their Referrals, document their response to the Referral, their progress with the client/consumer, and the Referral Closure. In the case of a Medical Referral, providers are expected – with the permission of the client – to send the completed follow up form to the medical referral source.

The Life Cycle of a Referral

1. A Referral is sent to the provider and appears in the provider's Pending Referrals list.
2. After all of the Referral information has been reviewed, the provider will update the Referral's Status to indicate the provider's response to the Referral.
3. Referral Status options and actions:

Status	Definition	Result	Next Actions for Provider to Complete
Pending	The default status when a Referral is sent to a program.	Referral remains on the Pending Referrals list.	Review and update the Referral's status.
Waitlist	The Client is conditionally accepted to the program but there is a waitlist for the program.	Referral remains on the Pending Referrals list.	Update the Referral's status when the Client/Family leaves the Waitlist.
In Progress	A program representative reaches out to the client and/or begins working on the Referral.	Referral remains on the Pending Referrals list.	Update the Referral's status when it has been determined whether the Client is Enrolled/Not Enrolled or placed on the Follow Up list.
Enrolled	The Referral is accepted and the Client is enrolled in the program.	Referral moves to the Accepted Referrals list.	Update the Referral's status when the Referral has closed. If the Source is Medical and the client gives permission, the Follow Up form must be sent to the Referral Source.
Follow Up	The Client/Family is potentially interested but not right now.	Referral remains on the Pending Referrals list.	Update the Referral's status when the Client is re-engaged or when it has been determined that the client will not be enrolled.
Not Enrolled	The Client is not interested or otherwise not enrolled in the program.	Referral is removed from the Provider's Dashboard.	No further action needed. If needed, these Referrals can be viewed using the Search screen.
Close Case	The Client has left and/or completed the program.	Referral is removed from the Provider's Accepted Referrals list.	If the Source is Medical and the client gives permission, the Follow Up form must be sent to the Referral Source.



4. **Referral Sources:** Sources include CYF, Medical, or Self. Medical Referrals require a Follow Up Form to be sent to the Referral Source (with the Client's permission).
 - a. A link to the Follow Up form can be found in the Concerns Pane on the Referral Details screen when the Referral's Source is "Medical".

Concerns			
☐ Critical Case	☐ Homeless Resources	☐ Child behavior support	☐ Prenatal support and education
☒ Authorized to Share Info with Referral Source Follow-Up Form	☐ Personal safety	☐ Education on child development	☐ Assessment of baby's growth
☐ Early Intervention Tracking Eligible	☐ Emotional Support	☐ Desire to meet other parents	☐ Help in accessing resources
☐ Early Intervention Program Info Provided	☐ Financial/Employment/Education goals	☐ Support with bonding	

Previews will open in a new window or tab. This window or tab may open in the background and may not be immediately visible. Close all other previews first.

5. **Critical Case Flag:** A Referral that has a Critical Case Flag [] indicates that this individual should be contacted as soon as possible. Referrals with these flags will appear at the top of your Referral list. A Referral can receive this status by virtue of information provided by the referring entity (for example, if a doctor calls the Allegheny Link with his/her patient and indicates that the family should be seen as soon as possible) or on the basis of what a parent indicates in their own conversation. In no situation will a provider receive a Critical Case referral if someone is in a true crisis, as the Link will assist these families in a different way.
6. **Email Reminders:** Providers can opt in the **Program Profiles** screen to receive the following email notifications:
 - a. An alert when your program has had one or more referrals in *Pending* status for 3 or more days.
 - b. A quarterly report listing clients listed as "Active" for greater than 6 months.

Both emails are meant to help remind providers to actively manage the status of Referrals.

7. **Important Notes regarding Referral Statuses and Updates:**
 - a. Providers are asked to actively manage the status of their Referrals as this information will be used for quality assurance monitoring and can potentially impact other system users (in those instances when a family has been referred to multiple programs).
 - b. It is not necessary to have completed a Home Visit in order to indicate that a consumer (client) has enrolled.
 - c. If the Referral includes information about the referring entity (who is not the consumer) home visitors are asked to follow up with this individual in order to "close the referral loop" and provide the opportunity for coordinated case management.



8. **Referral Closure:** Referrals can be closed in two locations
- From within the Referral: In the *Referral Summary* Pane, update the *Referral Status* drop-down to "Close Case" and click **Save**.
 - From the **Accepted Referrals** list screen: Click the Exit Icon [] for the specific Referral under the *Close Case* column.

Pending Referrals		Accepted Referrals		Search		Program Profiles	
Accepted Referrals						Search within Referrals:	
⬆️ Enrollment Date	⬆️ Referral ID	⬆️ Client First Name	⬆️ Client Last Name	⬆️ Referral Source	⬆️ Program Name Filter by ▾	⬆️ Status	⬆️ Close Case
5/3/2017	55061	Mason	Jones	Self	EHS (COTRAIC)	Enrolled	
Show 10 entries				First Previous 1 Next Last			

9. **Case Closure Confirmation:** This pop-up will appear when "Case Closure" Status has been selected and saved or the Exit Icon [] has been clicked.

Case Closure Confirmation

Please confirm client's date of departure from your program*



Reason for Departure*

-Select-

▼



Cancel

Confirm



- Please confirm client's date of departure from your program:* Enter the date of closure/departure.
- Reason for Departure:* Select the reason for closure/departure from the drop-down.
- Click **Confirm** to complete the Closure.
Clicking **Cancel** will close the pop-up without will cancel the action and the Referral will not be closed.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>