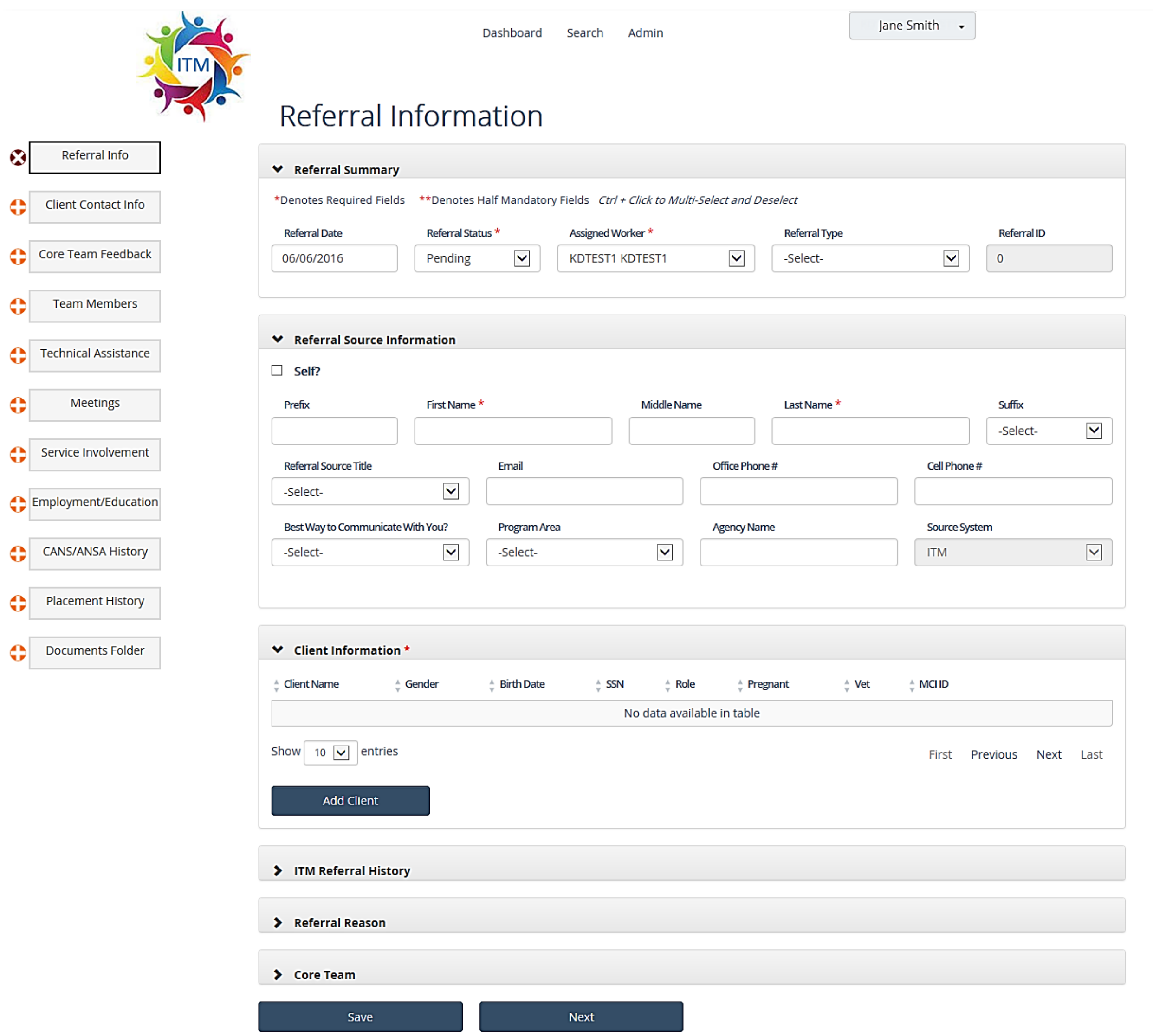
Referral Information – ITM Job Aid

Integration and Teaming Meeting (ITM) Referrals can be received from the KIDS system or created within the ITM system. The *Referral Information* screen is the first screen that must be completed on a new referral, regardless of origin. Core Team Members are also documented on the *Referral Information* screen.

Referral Information screen



Navigation

1. To access an existing Referral (Pending or Active): On the Dashboard, locate the desired Pending or Active Referral in Pending Referrals or Active Referrals and click on the *Referral ID*. This will open the *Referral Information* screen.

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source
4/15/2016	1938	JIYA	HILLOW	Jane Smith	Intellectual Disability Residential/Family Living	KIDS

Link to Referral Screen View

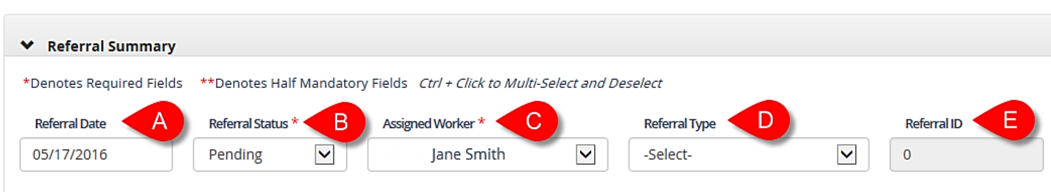
Show 10 entries First Previous 1 Next Last

1. To create a new Referral: On the Dashboard, click New Referral located in Pending Referrals. This will open a blank *Referral Information* screen.

Referral Summary

Tip: *The Referral Summary can only be edited from the Referral Info screen.*

1. Referral Summary: This pane will be displayed at the top of every screen and contains the following information:



a. *Referral Date*: When creating a new Referral this date will default to today's date but can be changed if necessary.

b. *Referral Status*: Pending or Accepted. In order to change the *Referral Status* to Accepted the *Referral Source*, *Client Information*, and *Reason for Referral* must be completed first.

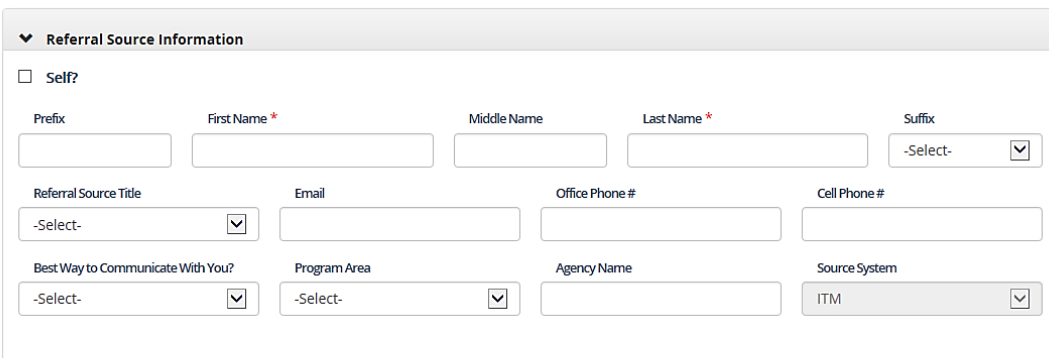
c. *Assigned Worker*: Referrals can only be assigned to ITM Admins. When creating a new Referral the *Assigned Worker* will default to the user who created the new Referral but can be changed.

d. *Referral Type*: When accepting a Referral the user can select the type of Referral from this drop-down.

e. *Referral ID*: Once the Referral Information screen has been saved for the first time a *Referral ID* will be generated. The *Referral ID* cannot be changed.

Referral Source Information

1. Referral Source Information: If the Referral was created in KIDS this pane will have the CYF Caseworker's information already entered. When creating a new referral, the ITM user must complete this pane. If the ITM user is the Referral Source checking the ☑ *Self?* checkbox will automatically add the ITM user's information.

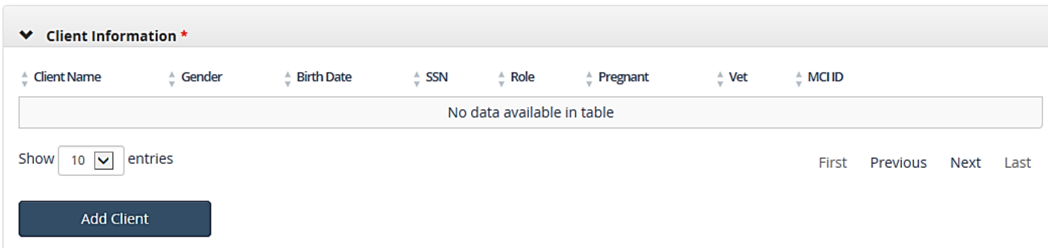


The following information can be documented in Referral Source Information:

a. Name: *Prefix, First Name, Middle Name, Last Name,* and *Suffix*.
b. *Referral Source Title*
c. *Email* address
d. *Office Phone #*
e. Cell Phone #
f. *Best Way to Communicate With [Referral Source]?*
g. *Program Area*
h. *Agency Name*
i. *Source System*: Indicates what system the Referral was generated in (KIDS or ITM) and is not editable.

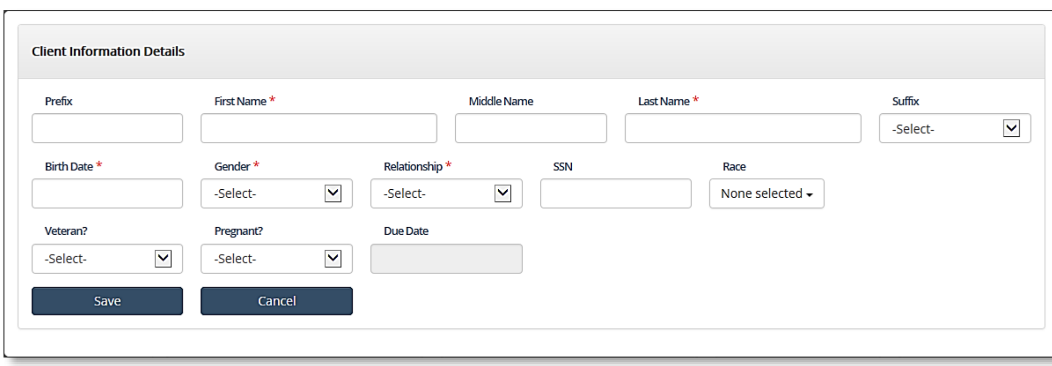
Client Information

2. Client Information: There can be only one client per Referral. If the Referral was created in KIDS the Client Information will already be completed.



Click Add Client to add a new client. The *Client Information Details* pop-up will appear.

3. *Client Information Details*: Complete all of the known information for the client in the *Client Information Details* pop-up. Note that *First Name, Last Name, Birth Date, Gender* and *Relationship* are mandatory.



The following information can be documented in the *Client Information Details* pop-up:

a. Name: *Prefix, First Name, Middle Name, Last Name,* and *Suffix*.
b. *Birth Date* .
c. *Gender* .
d. *Relationship*: Self (Youth) or Self (Adult)
e. *SSN*: Social Security Number
f. *Race*: This drop-down is a MultiSelect. Choose all that apply.
g. *Veteran?*: Yes or No
h. *Pregnant?*: Yes or No
i. *Due Date*: If "Yes" is selected in the Pregnant? drop-down the *Due Date* can then be entered if known.

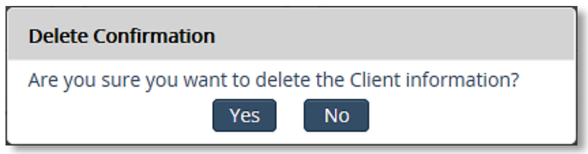
Click Save to preserve the information entered.

Clicking Cancel will close the *Client Information Details* pop-up without saving any information entered.

4. Once the *Client Information* has been entered the Client will appear in the *Client Information* grid.

   To edit the Client click the to the right of the Client in the *Client Information* grid.

   To delete the Client click the to the right of the Client in the *Client Information* grid. A *Delete Confirmation* pop-up will appear: Clicking Yes will delete the Client. Clicking No will cancel the action and the client will not be deleted.

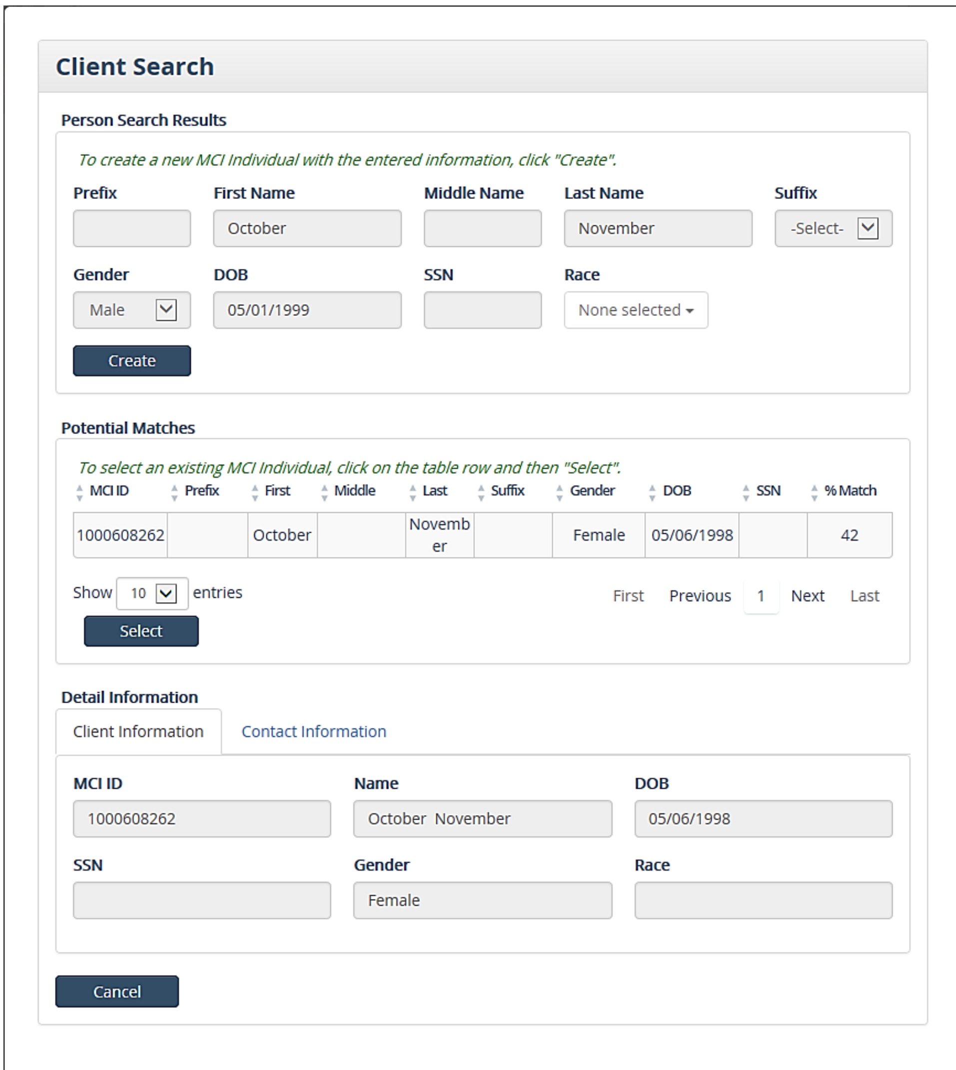


Clients must be MCI Cleared. If a Client has already been MCI Cleared there will be a to the right of the Client in the *Client Information* grid. If the Client has not been MCI Cleared there will be an .

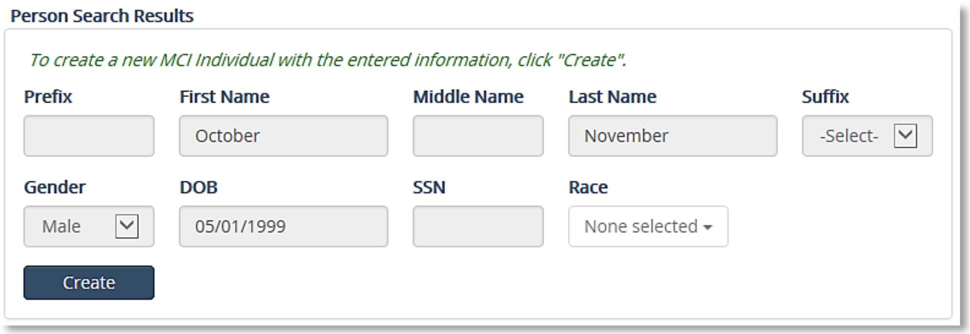
MCI (Master Client Index) Clearing the Client

DHS' goal is to ensure that all services, connections, and information for an individual is connected to one ID, the Master Client Index ID (MCI ID). The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

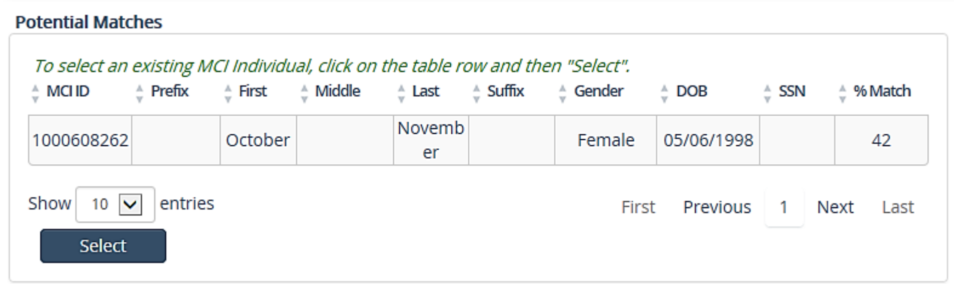
1. Clearing or Re-Clearing an MCI ID: Click the or (if re-clearing the Client) to the right of the Client in the *Client Information* grid. The *Client Search* pop-up will appear:



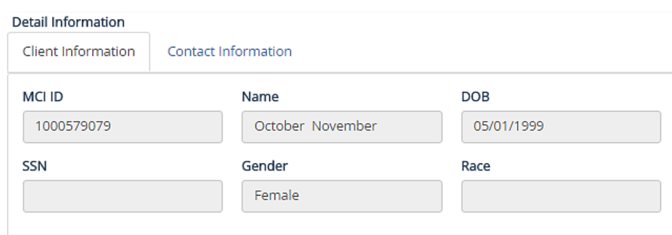
a. The *Person Search Results* section contains the information that has been entered in this Referral (or received from KIDS) for the Client. Compare this information to the information of the individuals in the *Potential Matches* section.

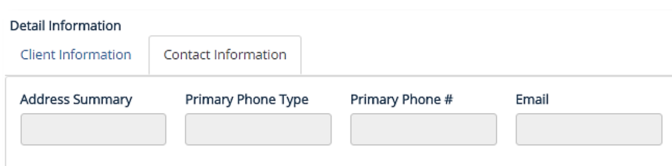


b. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that your Client is this person based on the demographic data entered.

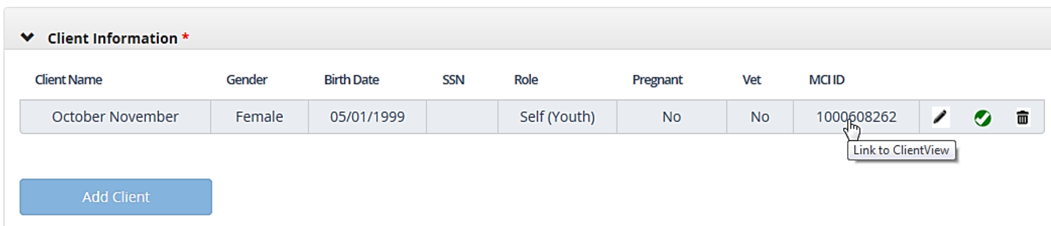


i. To view more information on the Potential Match click on the person's name in the grid. The *Detail Information* tabs will update to include that person's information.



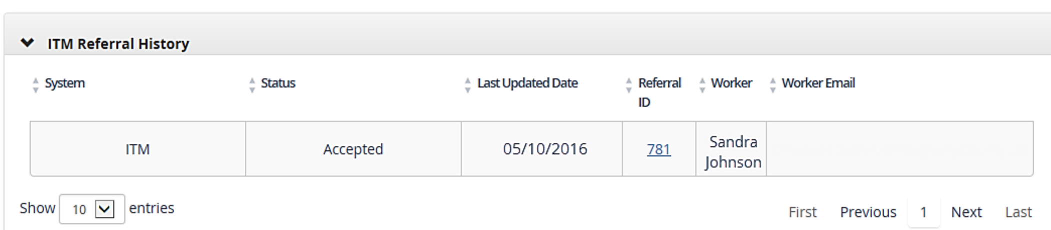


2. After reviewing the *Person Search Results*, determine whether the Client is one of the potential matches.
   a. If the Client is one of the potential matches select that Potential Match in the grid and click **Select**.
   b. If the Client is NOT one of the potential matches click **Create** to create a new MCI ID for this Client.
   c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID click **Cancel**.
3. Accessing ClientView information connected to the MCI ID. Clicking on the *MCI ID* in the *Client Information* grid will open ClientView and display the Client's information in ClientView.



ITM Referral History

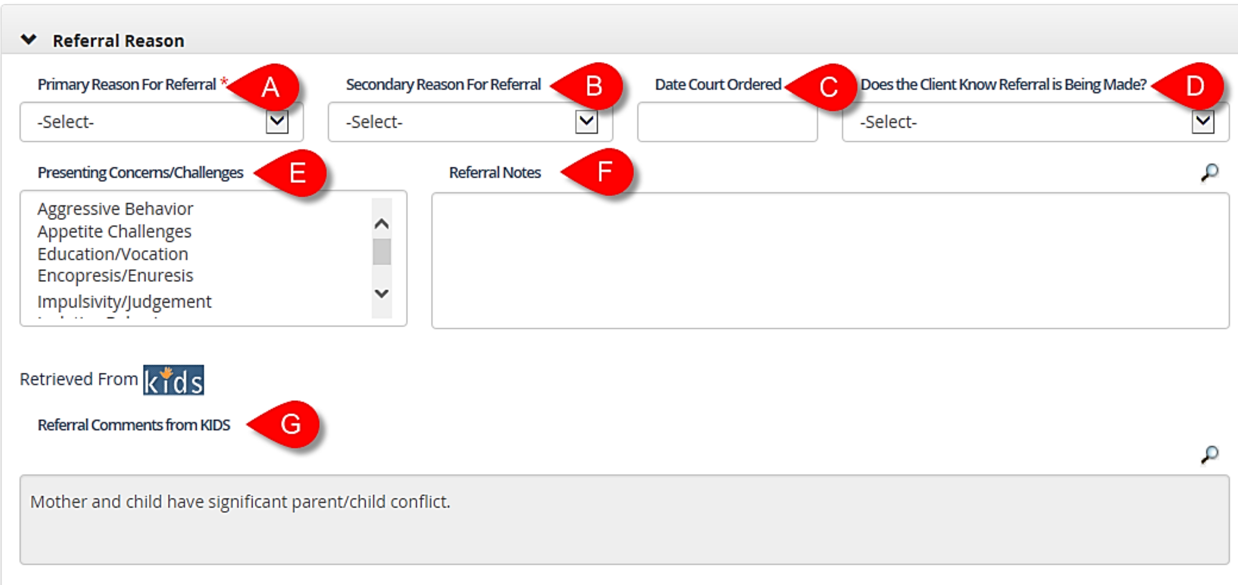
1. **ITM Referral History**: If there are other current or past ITM referrals for this client these referrals will be displayed in the **ITM Referral History** pane.



Clicking on the *Referral ID* will navigate the user to that Referral's *Referral Information* screen.

Referral Reason

1. Referral Reason: The reason(s) for the ITM Referral are documented in the Referral Reason pane. If the Referral was created in KIDS some or all of the information (with the exception of *Referral Notes*) may already be entered. All of the Referral Reason fields can be entered or edited except for the *Referral Comments from KIDS*.



The following information can be entered or updated in Referral Reason:

a. *Primary Reason For Referral*: Select the primary reason from the drop-down.

b. *Secondary Reason For Referral*: Select the secondary reason from the drop-down (if applicable).

c. *Date Court Ordered*: Enter the court ordered date (if applicable).

d. *Does the Client Know Referral is Being Made?*: Yes or No

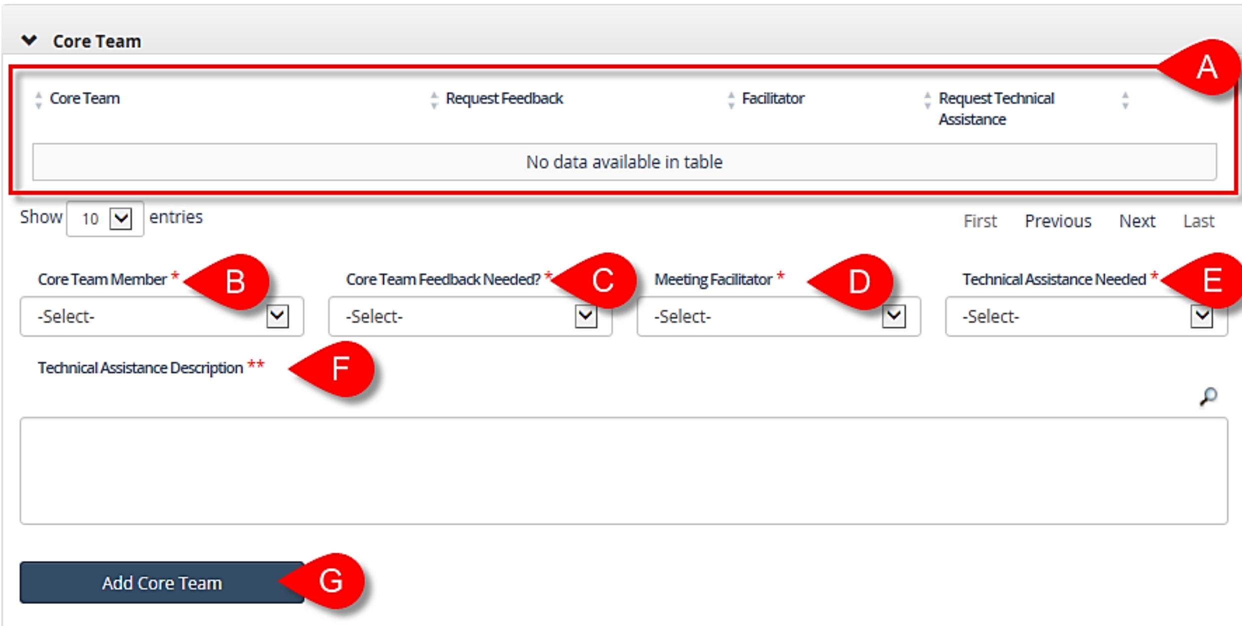
e. *Presenting Concerns/Challenges*: Select all applicable concerns/challenges from the MultiSelect.

f. *Referral Notes*: Enter notes about the Referral here.

g. *Referral Comments from KIDS*: This field is read-only and displays the Comments entered in KIDS.

Core Team

1. Core Team : Core Team Members are added to the Referral in this pane.



a. The *Core Team* grid displays all of the Core Team Members entered in this pane.
b. *Core Team Member*: Select the name of the desired Core Team Member from the drop-down.
c. *Core Team Feedback Needed?:* If "Yes" is selected the Referral will appear in the Core Team Member's Dashboard → Pending Feedback pane.
d. *Meeting Facilitator*: If "Yes" is selected the Core Team Member will lead and document the Meeting in Synergy – ITM.
e. *Technical Assistance Needed*: Select Yes or No from the drop-down.
f. *Technical Assistance Description*: If "Yes" is selected in the Technical Assistance Needed drop-down a description of the nature of the Technical Assistance needed must be entered.
g. Click **Add Core Team** to add the Core Team Member to the *Core Team* grid.

Important Note: *After adding the Core Team Member(s) the save button at the bottom of the screen MUST be clicked before leaving the screen. Otherwise the Core Team Member(s) will not be saved when the user leaves the Referral Information screen.*

Completing the Referral Information screen

1. After all applicable fields have been completed on the *Referral Information* screen click **Save** at the bottom of the screen. Clicking **Save** for the first time will automatically accept the Referral. The Referral will now appear on the assigned user's Dashboard under Active Referrals.

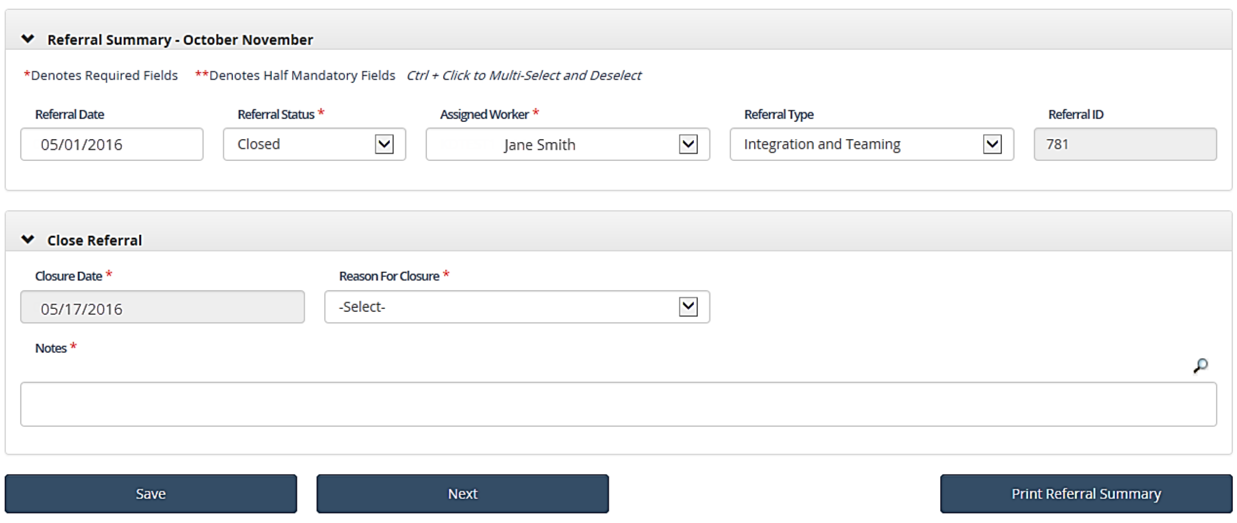
2. When returning to the *Referral Information* screen to edit or update any information always click **Save** to preserve any changes made before leaving the *Referral Information* screen.

3. To continue on to the next screen, *Client Contact Info*, click **Next** at the bottom of the screen.

4. Clicking **Print Referral Summary** will generate a printable PDF version of the all of the information currently entered throughout the entire Referral.

5. Once the *Referral Information* screen has been completed and saved the [Screen Status: Mandatory, Incomplete/No Information entered] to the left of the **Referral Info** tile will change to a [Screen Status: Complete/Information entered]

Closing the Referral



1. The Referral can only be closed after it has been accepted.

   a. In the [Referral Summary] pane at the top of the *Referral Information* screen select "Closed" from the *Referral Status* drop-down.

   b. Click [Save] at the bottom of the screen.

   c. The [Close Referral] pane will appear. The *Closure Date* will default to today's date and cannot be edited.

   d. Select the *Reason for Closure* and enter the Closure *Notes*.

   e. Click [Save] at the bottom of the screen to close the Referral.

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 the Self Service Tool go to http://servicedesk.alleghenycounty.us