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USER BULLETIN: Receiving and Responding to a Referral
3-Sept-13

This User Bulletin will explain how to receive and respond to a referral.

Step 1: Receiving a Referral
If your provider is set up to receive referrals, when an agency has referred a client to your agency, you will get an e-mail from DoNotReply@bowmansystems.com stating the following:

> *"This is an automated referral notification.*
>
> *[Referring Agency] has referred members of a household to your agency, [your agency], on [Date] at [time].*
>
> *Please check your Outstanding Referral Report for additional details. "*

Step 2: Checking your Outstanding Referrals Report
This e-mail provides very little information about the client or the needs of the client. To access the referral, you will need to log into ServicePoint. Then go to the "Reports" tab as indicated by the red arrow in Figure 1-1.

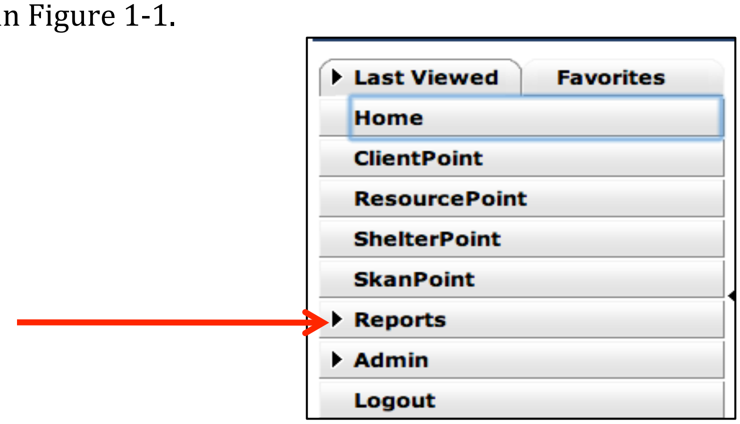

Figure 1-1

On the "Provider Reports" page, you will see a button as shown in Figure 1-2. You will need to click this button.

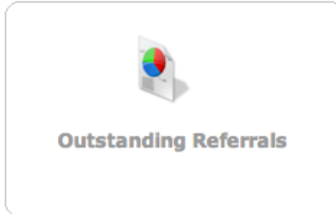

Figure 1-2

You will then be taken to the "Report Options" page as shown in Figure 1-3. Please select the appropriate report options. For "Referral Type" you can select "Cases referred to my provider" or "Referrals my provider has made."*

In this instance, you are going to choose "Cases referred to my provider."

*** "Referrals my provider has made" is a helpful feature you can use to check on the status of the referrals you have made to other agencies.**

You can select a specific date range by inputting the date, or if you would like to view all referrals, leave the date boxes blank.

When you have finished filling out this form, please click "Build Report" as indicated by the red arrow in Figure 1-3.

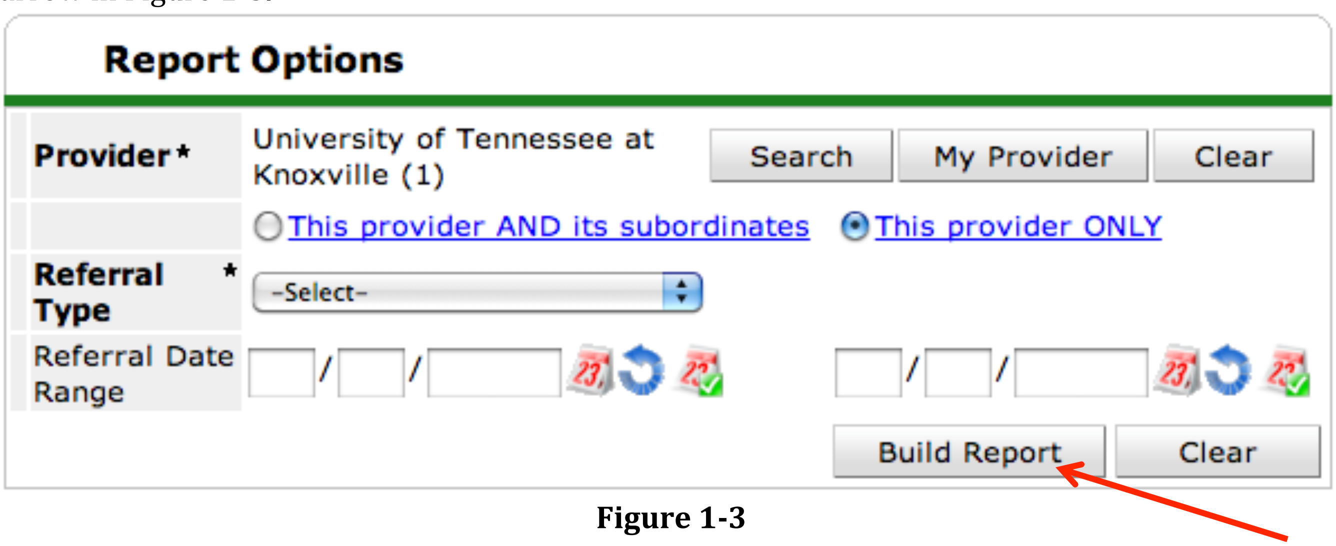

Figure 1-3

You will then be taken to the following screen. This screen will show you your outstanding referrals. To access the referral, you can click on the "Need Type." For this demonstration, click on "Health Care" since it is the oldest referral as indicated by the red arrow in Figure 1-4.

Outstanding Referrals

Name	Group ID	Referral Date	Need Type	Referred By	Referred To
(24092) McTest, Testy		01/16/2013	Wilderness Training	University of Tennessee at Knoxville	University of Tennessee at Knoxville
(25131) McTest, Quizz	1059808	10/04/2011	Orienteering	University of Tennessee at Knoxville	University of Tennessee at Knoxville
(24092) McTest, Testy		06/10/2011	AIDS/HIV	Child and Family: Pleasantree	University of Tennessee at Knoxville
(24092) McTest, Testy		05/31/2011	Substance Abuse Services	Child and Family: Pleasantree	University of Tennessee at Knoxville
(21788) Test, Testy		05/26/2011	Health Care	Child and Family: Pleasantree	University of Tennessee at Knoxville

Figure 1-4

Step 3: Responding to a Referral

The first section on the "Edit Referral" page will show what clients are being referred to your program. You can see in Figure 1-5 that a couple with no children is being referred to your program. If only Testy McTest, as a single person, was being referred to you for health care, you would see "No Household members were originally associated."

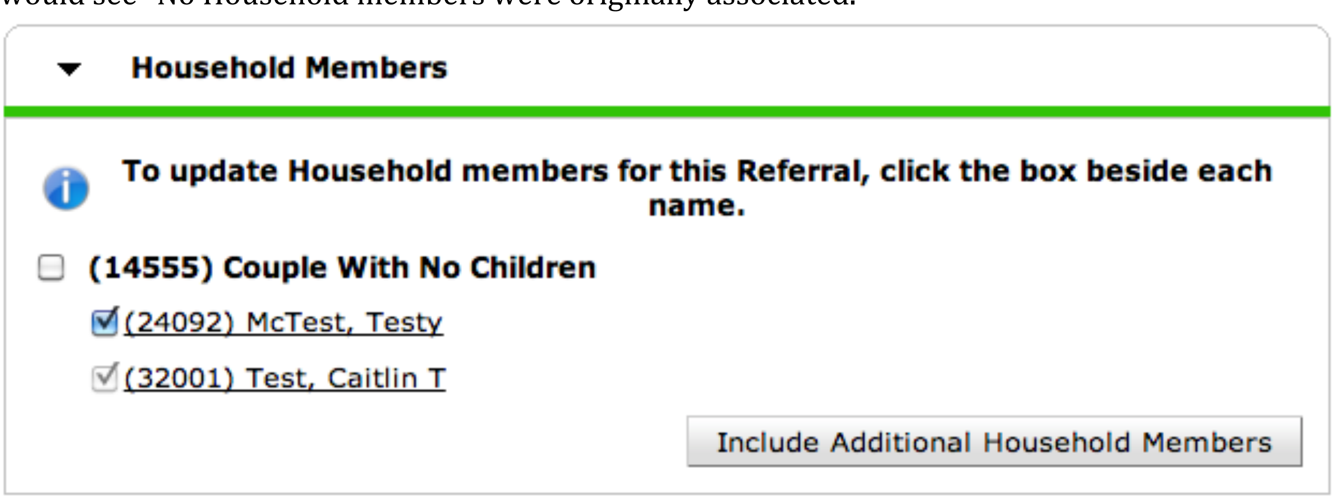

Figure 1-5

The next area on the "Edit Referral" page is titled "Need Information," and is pictured in Figure 1-6. It is here that we can get more information on a referral.

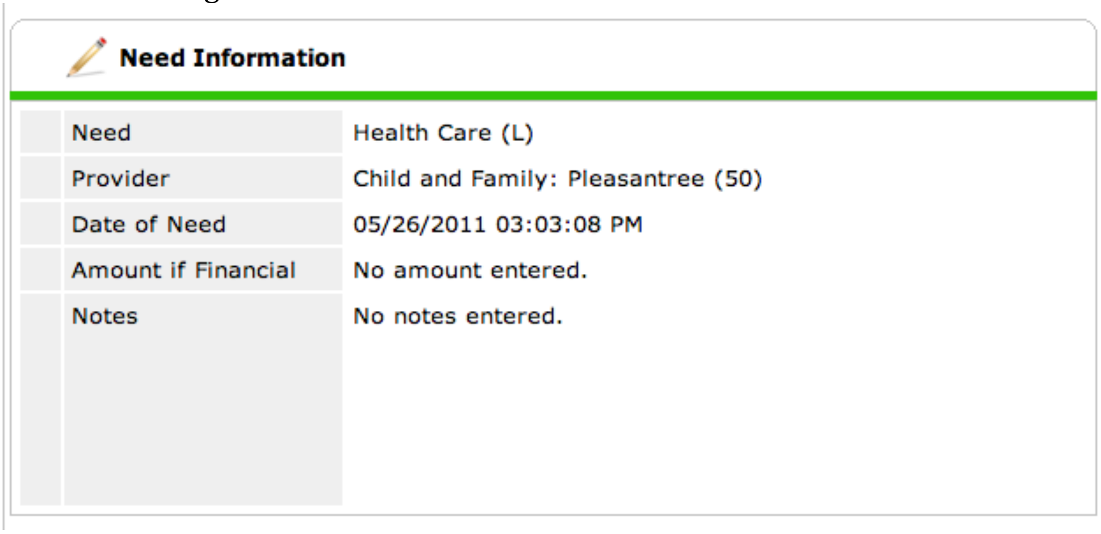

Figure 1-6

The next part of the screen, see Figure 1-7, shows several key pieces of information included in the "Referral Data", including the "Referred-To Provider" and the "Needs Referral Date." The provider who referred to you fills out this section. Do not change any of this information.

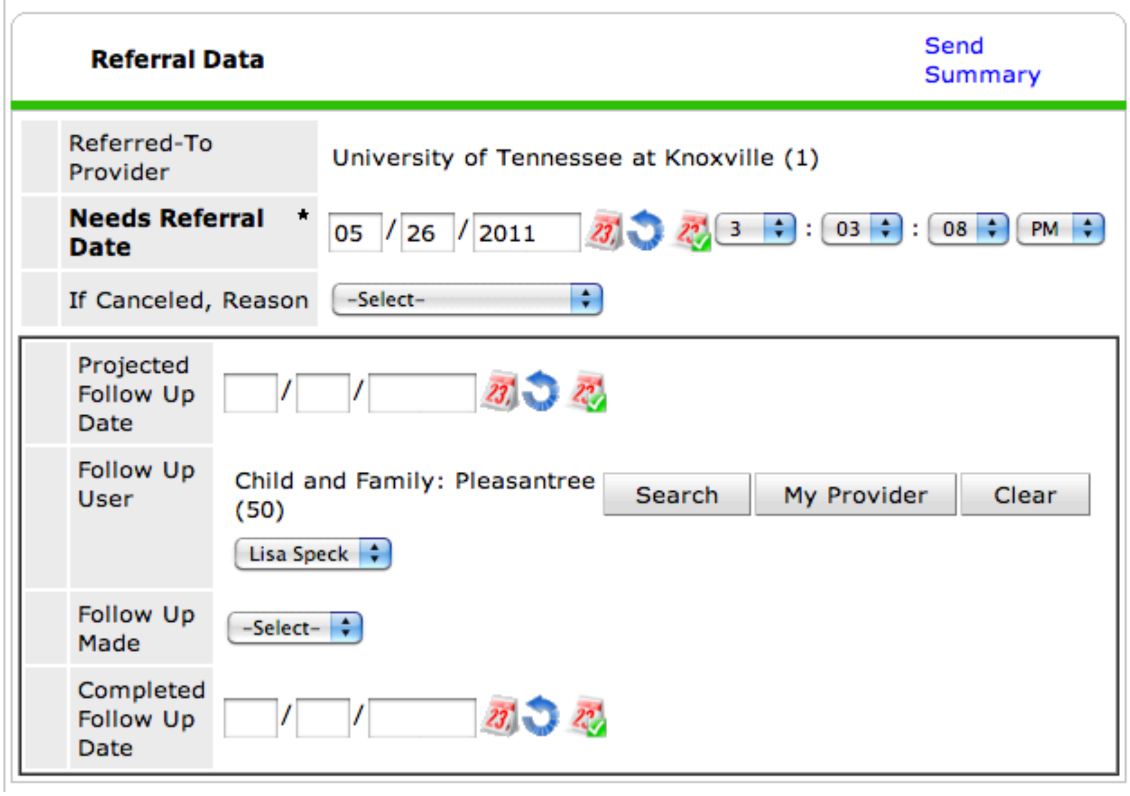

Figure 1-7

You will respond to the referral under the “Need Status and Outcome” section as shown in Figure 1-8.

If the need has been met or you cannot meet the need, you will change the “Need Status” to “Closed.” If the service is an ongoing process, please select “In Progress.”

Under “Outcome of Need,” you will specify if the identified need has been “Fully met, not met, partially met, or service pending.” If you select that the need has not been met, proceed to the drop-down menu “If Need is Not Met, Reason” and select the appropriate answer. Please only do this in the case that all services are full, the client is not eligible for services, the client refused service, the service does not exist, or the service is not accessible.

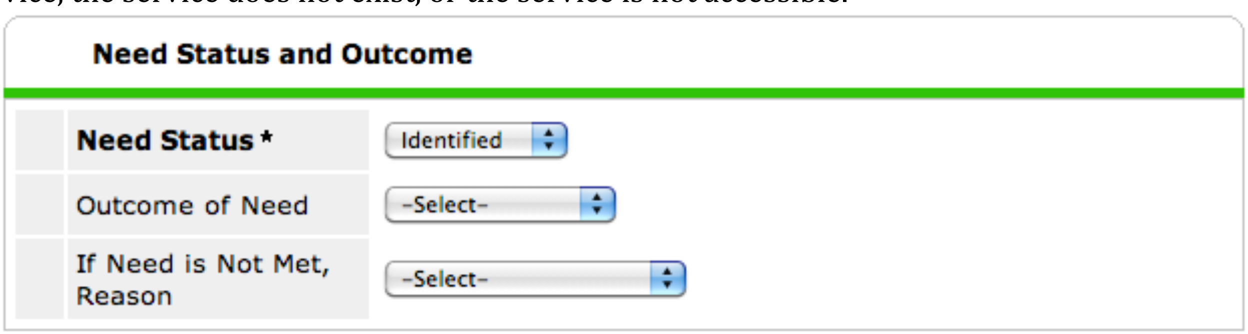

Figure 1-8

<u>Step 4: Provide Service</u>

To document the service you provided, select “Provide Service” as indicated in Figure 1-9.

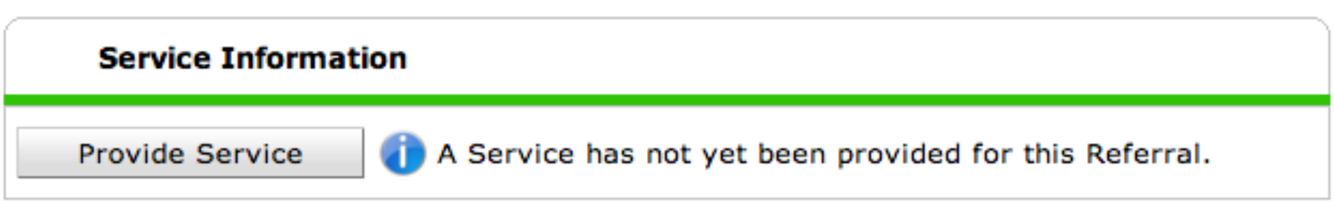

Figure 1-9

You will then be taken to the “Referral Information” screen shown in Figure 1-10. You need to provide the date the service was provided. If the service has been completed, please input the same date for “End Date” as you did “Start Date.” Next you will select the “service type,” which will be the same as the identified need from the previous screen, “Need Status and Outcome” as shown in Figure 1-8. In this demonstration example case, you will select “Health Care.” Then click “Save & Continue.”

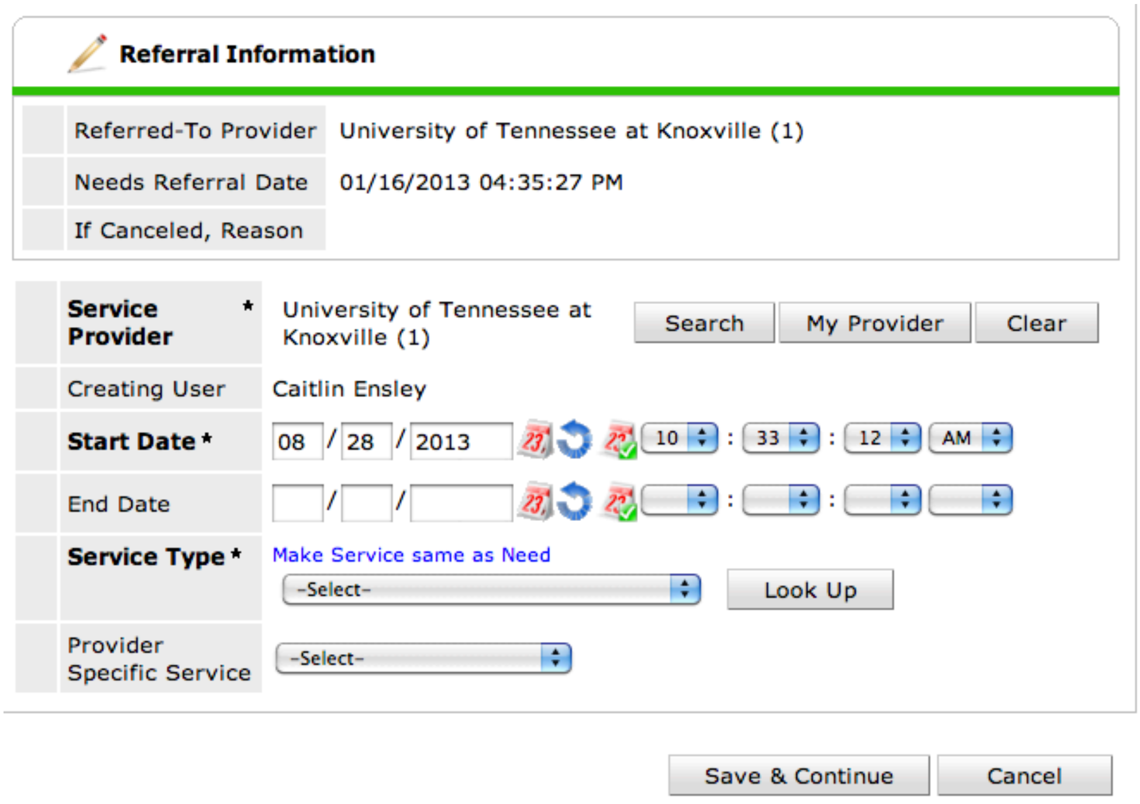

Figure 1-10

On the "Edit Service" page, you can add more service detail. There is a place to add "Service Notes" as well as a place to add service costs, as indicted in Figure 1-11. To add cost of service, type the number of units and cost per unit.

Figure 1-11

Then proceed the bottom of the page to the "Need Information" as shown in Figure 1-12. Since the need has been met, you will change the need status to "Closed." If the service is an ongoing process, please select "In Progress."

Under "Outcome of Need," you will specify if the identified need has been "Fully met, not met, partially met, or service pending." Since you have provided a service, the need should either be "Fully Met" or "Partially Met." Then click "Save & Exit."

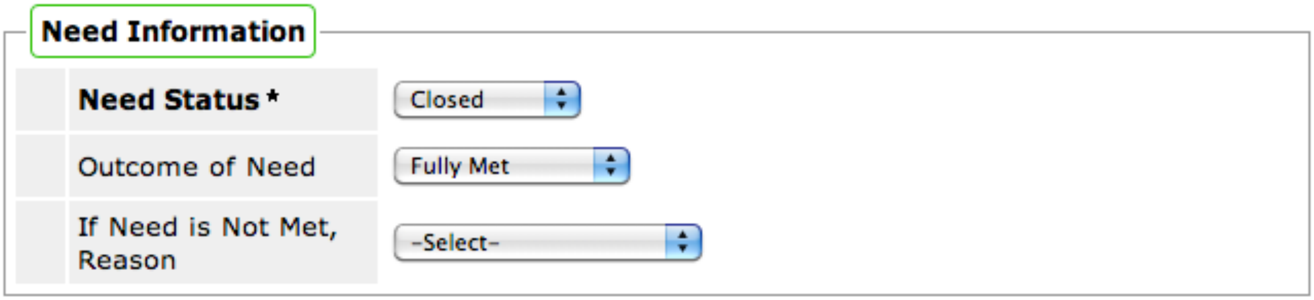

Figure 1-12

This concludes how to respond to a referral and provide a service.