Referrals In

Referrals In is a way to search for and accept or reject a Client Referral from another agency and to access the disclosed client information if the referral is accepted.

WITS TIPS

The Client Profile of the client that is referred to the agency will display only one time when the Referral Status is changed to "Placed/Accepted" and the FINISH button is clicked. The Client Profile is a direct copy of the Client Profile information in the Referred By agency.

The Client Profile may be updated.

If the Client is transferred to the Referred To agency, the Intake will be created and the Admission will be copied. In addition, the current Treatment Plan, Fee Determination, and Mental Health Assessment will be transferred has read only.

The Unique Client ID is carried over from the first agency. It is not recreated.
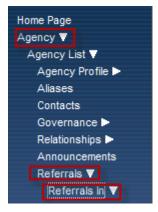
To view the information that has been disclosed to the Referred To agency prior to accepting or rejecting the referral, search for the Client in the Clients for Consents from Outside Agencies located on the Client Search Screen.

Reviewing a Client Referral

1. The Home page displays a message indicating the number of Referrals into the agency.

2. To review a Client Referral, use the Navigation Pane to go to Agency > Referrals > Referrals In.

2. Click [Referrals In ▼] on the Navigation Pane.

3. The "Referrals for <Agency Name>" Search Screen displays.

4. Search for the Client Referral using the Guidelines below

GUIDELINES FOR CLIENT REFERRAL SEARCH

To Search By:
- Referral Status– Select the appropriate Referral Status Code and move it to the Search Criteria box using the forward arrow. Click GO.
- Client ID – Enter the Client ID. Click GO.
- Created Date –Enter the Date the Client Referral was created. Click GO.
- Referred Date – Enter the Date the Client Referral was sent to the Referred To agency. Click GO.
- First Name – Enter the Client's first name. Click GO.
- Last Name – Enter the Client's last name. Click GO.
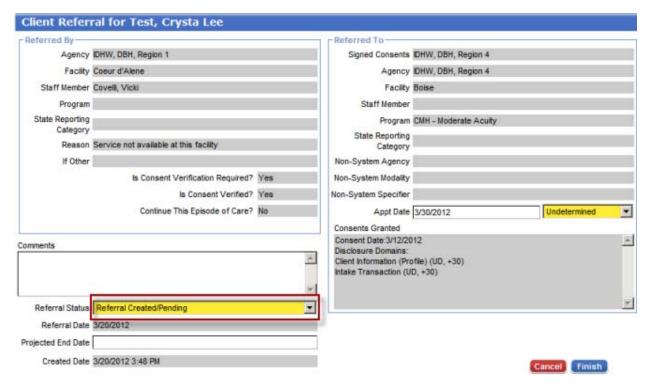 **OR**
- Enter any combination of search criteria. Click GO.
  OR
- Click GO without entering any search criteria to access all Client Referrals for the Referred By agency.

- Click CLEAR to clear all search criteria and results from the search screen.

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5. Search Results display.

6. Click on Review for the selected Client.

7. The Client Referral for <Client Name> displays.

Client Referral for Test, Crysta Lee

Referred By	
Agency	IDHW, DBH, Region 1
Facility	Coeur d'Alene
Staff Member	Covell, Vicki
Program	
State Reporting Category	
Reason	Service not available at this facility
If Other	
Is Consent Verification Required?	Yes
Is Consent Verified?	Yes
Continue This Episode of Care?	No

Referred To	
Signed Consents	IDHW, DBH, Region 4
Agency	IDHW, DBH, Region 4
Facility	Boise
Staff Member	
Program	CMH – Moderate Acuity
State Reporting Category	
Non-System Agency	
Non-System Modality	
Non-System Specifier	
Appt Date	3/30/2012 Undetermined

Consents Granted
Consent Date:3/12/2012
Disclosure Domains:
Client Information (Profile) (UD, +30)
Intake Transaction (UD, +30)

Comments

Referral Status	Referral Created/Pending
Referral Date	3/20/2012
Projected End Date	
Created Date	3/20/2012 3:48 PM

Cancel   Finish

The Referral Status is "Referral Created/Pending" and must be changed to accept or reject the Client Referral.

Reviewing Disclosed Information for a Referred Client

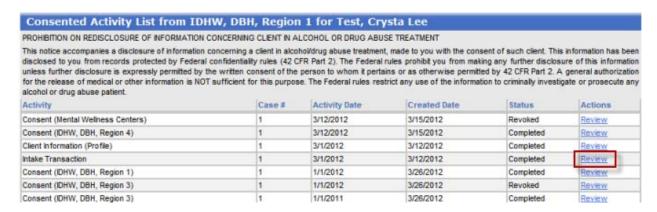1. To review the disclosed information for the referred client, use the Navigation Pane to go to Client List.

2. Click **Client List ▼** on the navigation pane.

3. The Client Search screen displays.
4. Click **Go**.

5. The Clients with Consents from Outside Agencies List displays on the Client Search screen.

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
IDHW, DBH, Region 4	10615197000003H	A, Child	6/15/1997	000-00-0000	Male	Activity List | Link | Remove
IDHW, DBH, Region 1	10115151236513O	A, Mouse	1/15/1951	547-84-2365	Male	Activity List | Link | Remove
IDHW, DBH, Region 4	10702181812507A	Anderson, Gary	7/2/1981	524-95-8125	Male	Activity List | Link | Remove
IDHW, DBH, Region 1	212052007634101	B'nai, J'nai	12/5/2000	518-99-7634	Female	Activity List | Link | Remove
IDHW, DBH, Region 1	207011801234190U	Baby, Suga	7/1/1980	123-33-1234	Female	Activity List | Link | Remove
IDHW, DBH, Region 1	20214165615613A	Barbie, Malibu	2/14/1964	263-58-6156	Female	Activity List | Link | Remove
IDHW, AMH Training Agency	10417162998905A	Bunny, Easter	4/17/1962	331-45-9989	Male	Activity List | Link | Remove
IDHW, DBH, Region 4	101191657859040	Duck, Donald	1/19/1965	524-63-7859	Male	Activity List | Link | Remove
IDHW, DBH, Region 1	20220170334503R	Test, Crysta Lee	2/20/1970	338-98-3345	Female	Activity List | Link | Remove
IDHW, DBH, Region 4	20101141898926A	Zebra, Zany	1/1/1941	123-64-8989	Female	Activity List | Link | Remove

6. Select the referred client and click on Activity List

7. Consented Activity List from <Referred By Region> for <Client Name> displays.

Consented Activity List from IDHW, DBH, Region 1 for Test, Crysta Lee

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Case #	Activity Date	Created Date	Status	Actions
Consent (Mental Wellness Centers)	1	3/12/2012	3/15/2012	Revoked	Review
Consent (IDHW, DBH, Region 4)	1	3/12/2012	3/15/2012	Completed	Review
Client Information (Profile)	1	3/1/2012	3/12/2012	Completed	Review
Intake Transaction	1	3/1/2012	3/12/2012	Completed	Review
Consent (IDHW, DBH, Region 1)	1	1/1/2012	3/26/2012	Completed	Review
Consent (IDHW, DBH, Region 3)	1	1/1/2012	3/26/2012	Revoked	Review
Consent (IDHW, DBH, Region 3)	1	1/1/2011	3/26/2012	Completed	Review

8. Click Review for a selected activity to access the disclosed information.

Accepting a Client Referral

1. To Accept a Client Referral, use the Navigation Pane to go to Agency>Referrals> Referrals In.

Home Page
Agency ▼
    Agency List ▼
        Agency Profile ▶
        Aliases
        Contacts
        Governance ▶
        Relationships ▶
        Announcements
        Referrals ▼
            Referrals In ▼

2. Click **Referrals In ▼** on the Navigation Pane.

2. The "Referrals for <Agency Name>" Search Screen displays.

Referrals for Boise (Export)

Referral Status Codes   **Search Criteria**

Placed/Accepted
Referral Created/Pending
Referred Terminated
Refused Treatment

| Client Id | | Created Date | | Referred Date | |
| First Name | | Last Name | | | |

Clear   Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments

4. Search for the Client Referral using the Guidelines below

<div style="border:1px solid black; background-color:#d9ead3; padding:10px;">
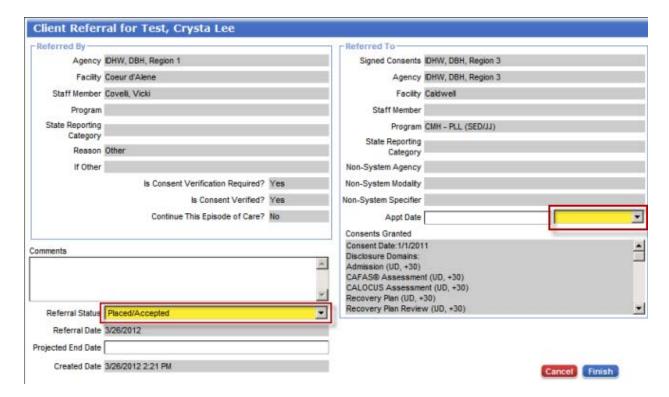
GUIDELINES FOR CLIENT REFERRALSEARCH

To Search By:
- Referral Status– Select the appropriate Referral Status Code and move it to the Search Criteria box using the forward arrow. Click GO.
- Client ID – Enter the Client ID. Click GO.
- Created Date –Enter the Date the Client Referral was created. Click GO.
- Referred Date – Enter the Date the Client Referral was sent to the Referred To agency. Click GO.
- First Name – Enter the Client's first name. Click GO.
- Last Name – Enter the Client's last name. Click GO.
  OR
- Enter any combination of search criteria. Click GO.
  OR
- Click GO without entering any search criteria to access all Client Referrals for the Referred By agency.

- Click CLEAR to clear all search criteria and results from the search screen.

</div>

5. Search Results display.

6. Click on Review for the selected Client.

7. The Client Referral for <Client Name> displays.

8. Change the Referral Status to "Placed/Accepted"

9. Enter an Appointment Status.

10. Click Finish .

11. The Client Profile displays. (Client Profile information can be updated)

WITS TIPS

When accepting a referral from an agency outside of the Idaho Department of Health and Welfare, the Access Category must be completed at the time that the referral is Placed/Accepted.
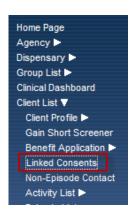
12. Click **Finish** .

13. The Client Search Screen displays.

14. The client now displays in the Client List and no longer displays in the Clients with Consents from Outside Agencies List.

Reviewing Linked Consents

1. Select the client if necessary by clicking Activity List under Actions on the Client List screen (how to select a client).

2. Click **Linked Consents** in the Navigation Pane.

3. Click **Consented Activity List** under Actions to view Consented Activity List.
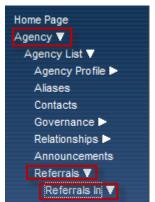
Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Idaho Department of Corrections	De Vil, Cruella	20615170000003R	6/15/1970	000-00-0000	8/4/2009	9/8/2009	Consented Activity List

4. Click **Review** under Actions to view the consented item.

Consented Activity List from Idaho Department of Corrections for De Vil, Cruella

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Activity	Case #	Activity Date	Created Date	Status	Actions
GAIN-SS	1	9/8/2009	9/8/2009	Completed	Review
Intake Transaction	1	8/4/2009	8/4/2009	Completed	Review
Client Information (Profile)	1	8/4/2009	8/4/2009	Completed	Review

Rejecting a Client Referral

1. To Reject a Client Referral, use the Navigation Pane to go to Agency>Referrals> Referrals In.

2. Click on the Navigation Pane.

3. The "Referrals for <Agency Name>" Search Screen displays.

4. Search for the Client Referral using the Guidelines below
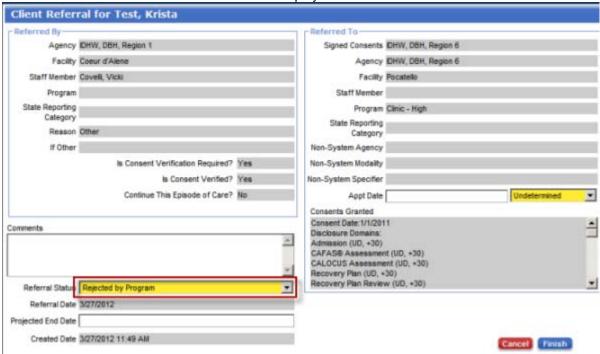
> **GUIDELINES FOR CLIENT REFERRALSEARCH**
>
> **To Search By:**
> - Referral Status– Select the appropriate Referral Status Code and move it to the Search Criteria box using the forward arrow. Click GO.
> - Client ID – Enter the Client ID. Click GO.
> - Created Date –Enter the Date the Client Referral was created. Click GO.
> - Referred Date – Enter the Date the Client Referral was sent to the Referred To agency. Click GO.
> - First Name – Enter the Client's first name. Click GO.
> - Last Name – Enter the Client's last name. Click GO.
> **OR**
> - Enter any combination of search criteria. Click GO.
> **OR**
> - Click GO without entering any search criteria to access all Client Referrals for the Referred By agency.
>
> - Click CLEAR to clear all search criteria and results from the search screen.

5. Search Results display.

6. Click on Review for the selected Client.

7. The Client Referral for <Client Name> displays.

4. Change the Referral Status to one of the following: Referred Terminated; Refused Treatment; Rejected by Program.

5. Click Finish.

6. The Referrals for <Referred To Region> screen displays.

7. The client that has been rejected by the Referred To agency no longer displays on the Referrals for <Referred To Agency> screen.

8. Select and move "Rejected by Program" to the Search Criteria box.

9. Click [Go].

10. The client that has been rejected displays in the Referrals for <Referred To Agency> list box.

11. The Client that has been rejected displays in the Referrals from <Referred By Agency> list box. The Referral Status is "Rejected by Program".

12. The Consent to Disclose Information may be "Revoked" by the Referred By Agency.