HI WITS Training: Consent and Referral Process

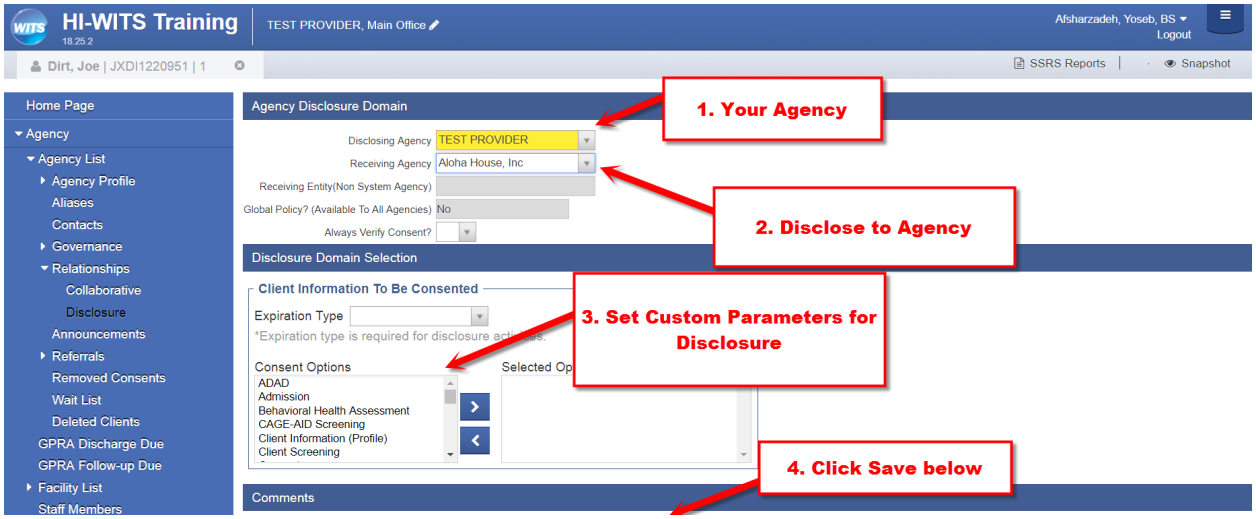
Lesson 6

Situation: When an Agency needs to refer a Client to Another Agency for Services

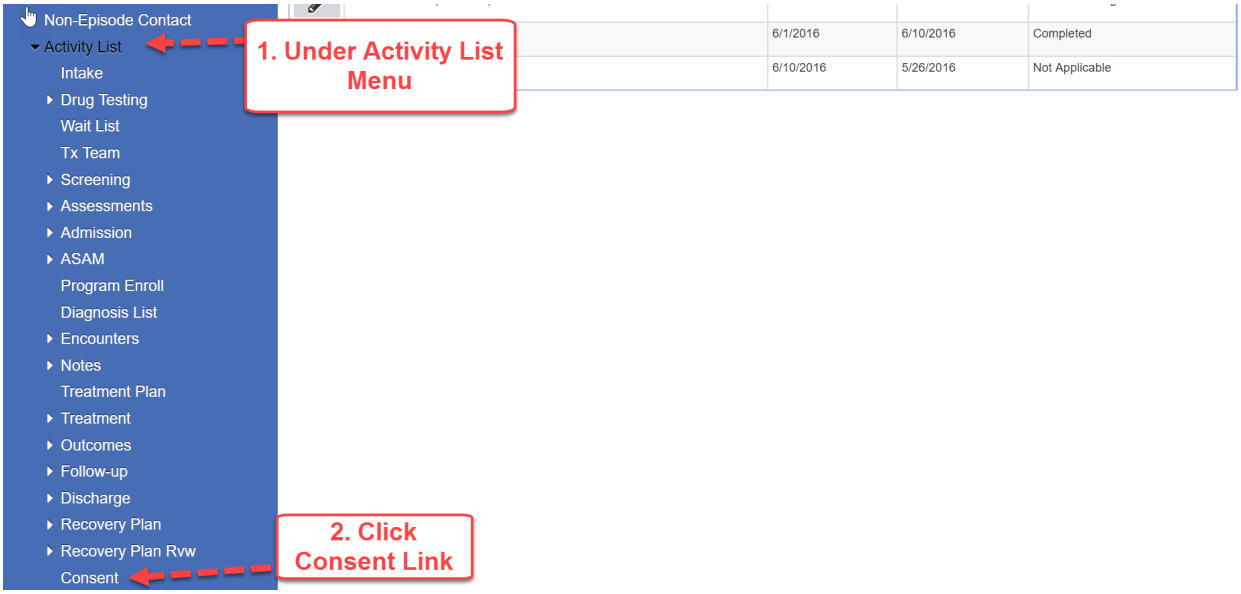
Note: Disclosure Agreement will only need to be Completed once (1) per Agency. Referrals will need to be Accepted and Placed by receiving Agency.

1. Under Agency, Choose Relationships and Select Disclosure

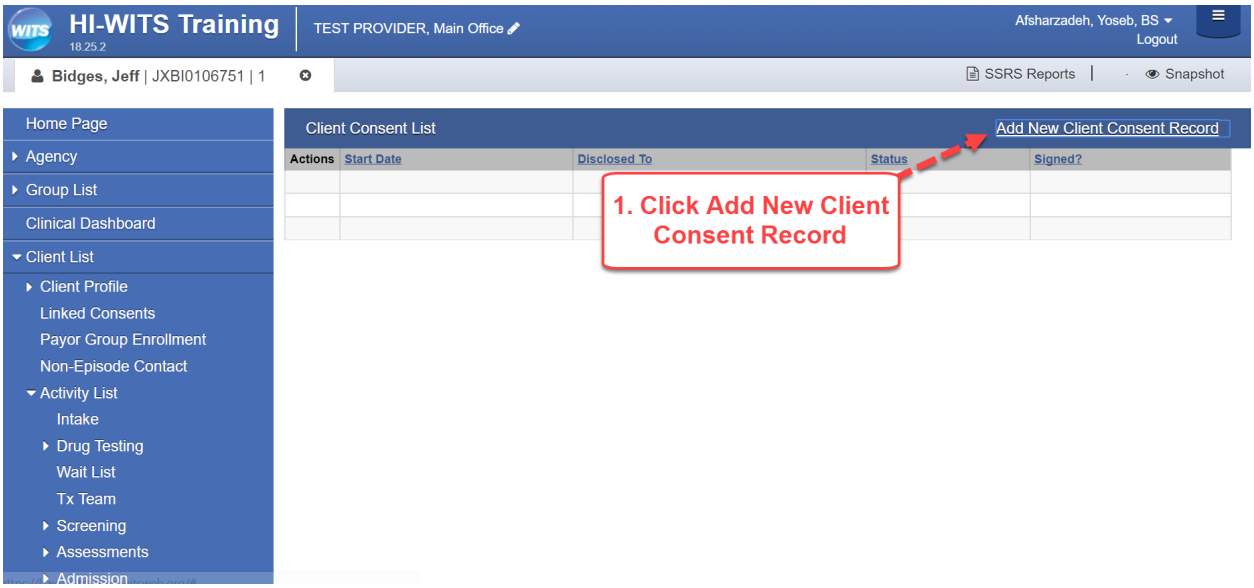
2. Set Disclosure Parameters



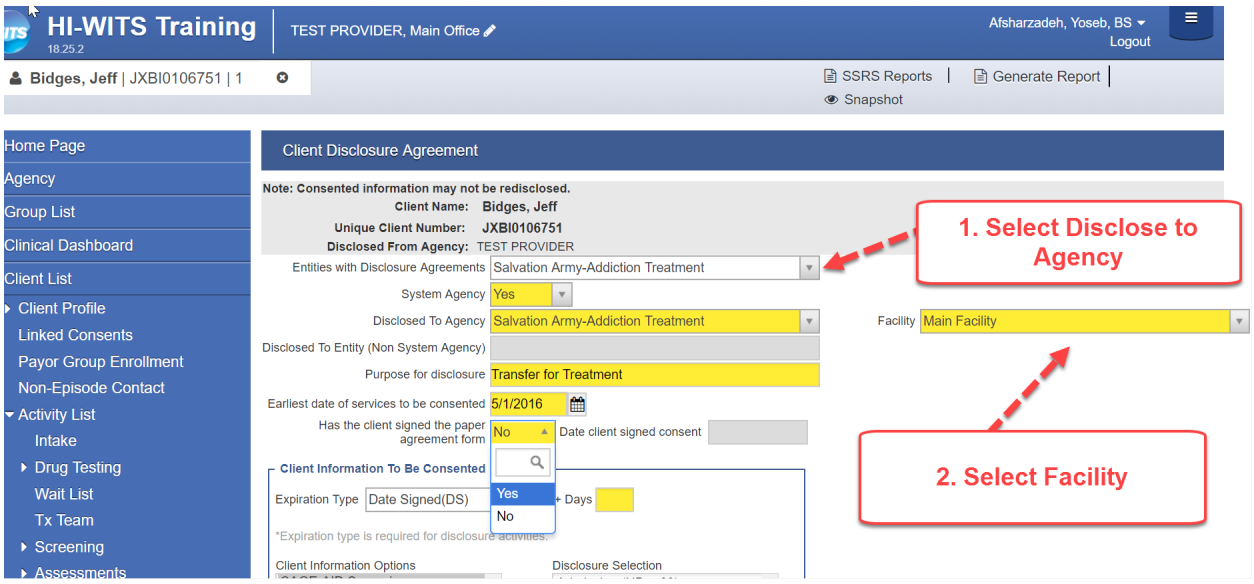
3. Under Activity List select Consent from the Left Menu Pick.



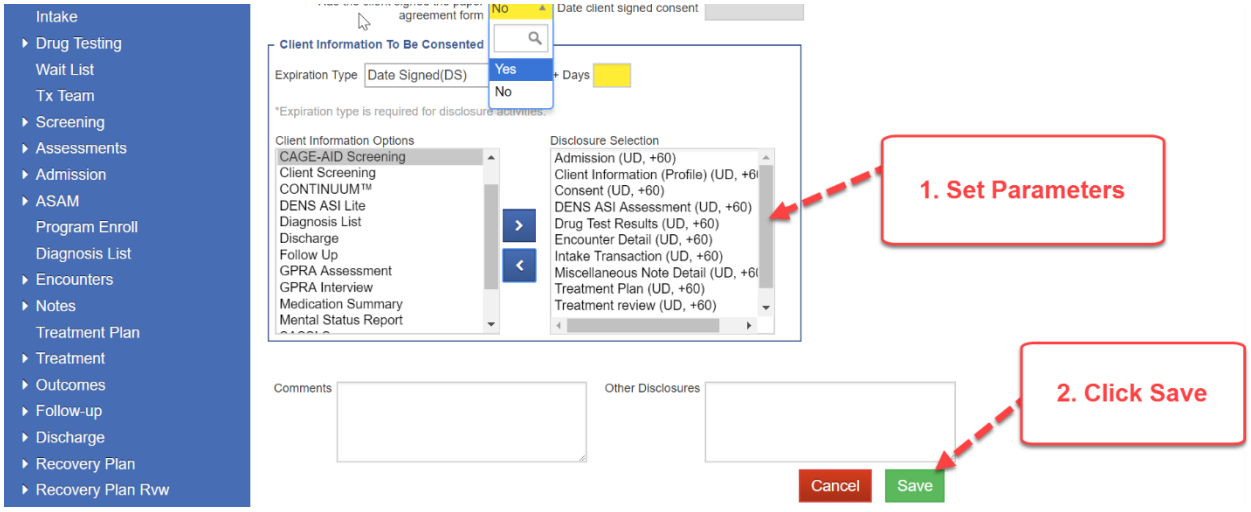
4. Click Add New Consent Record



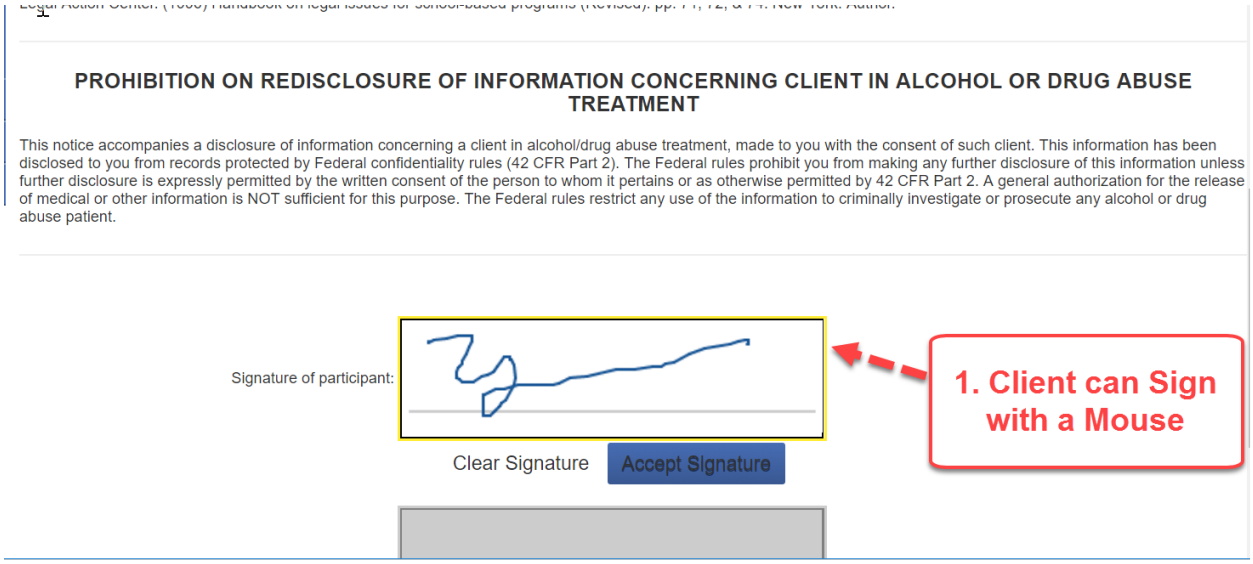
5. Select Disclose to Agency, Select Facility



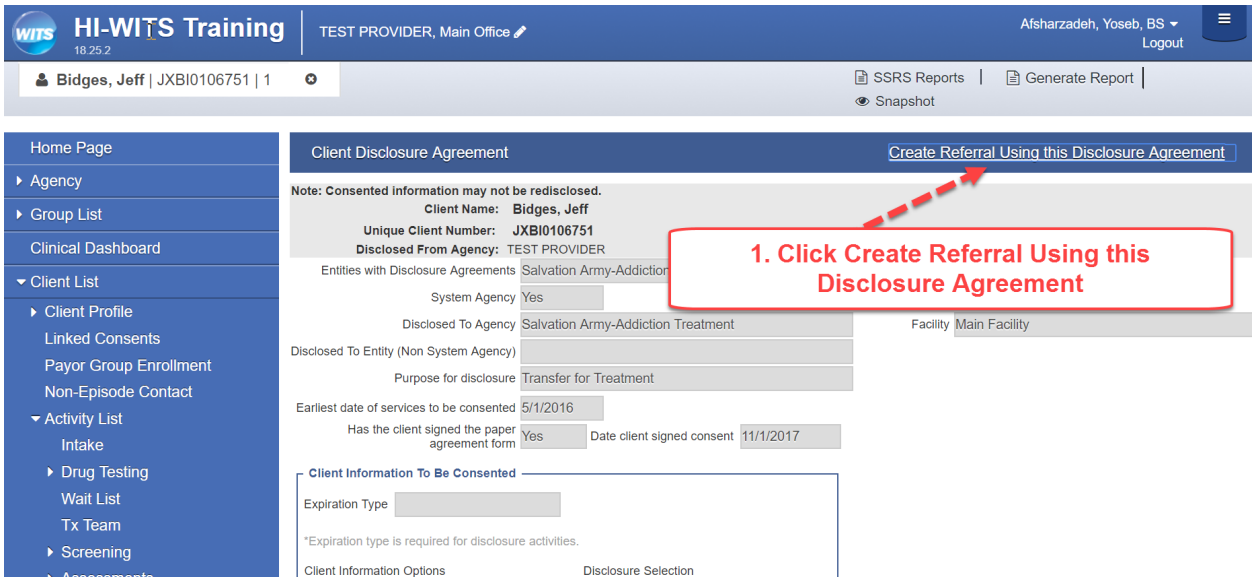
6. Set Parameters for Information to be Consented, Click Save



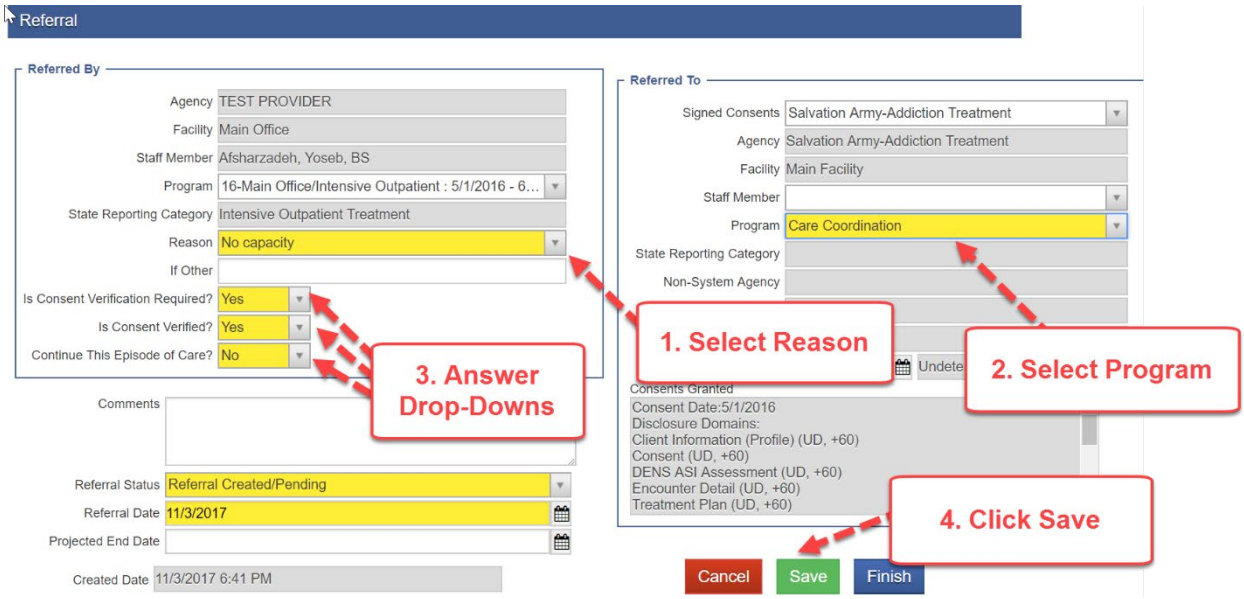
7. Have Client Sign the Consent click Save, a Mouse can be Used to Sign



8. Click Create Referral Using this Disclosure Agreement Link

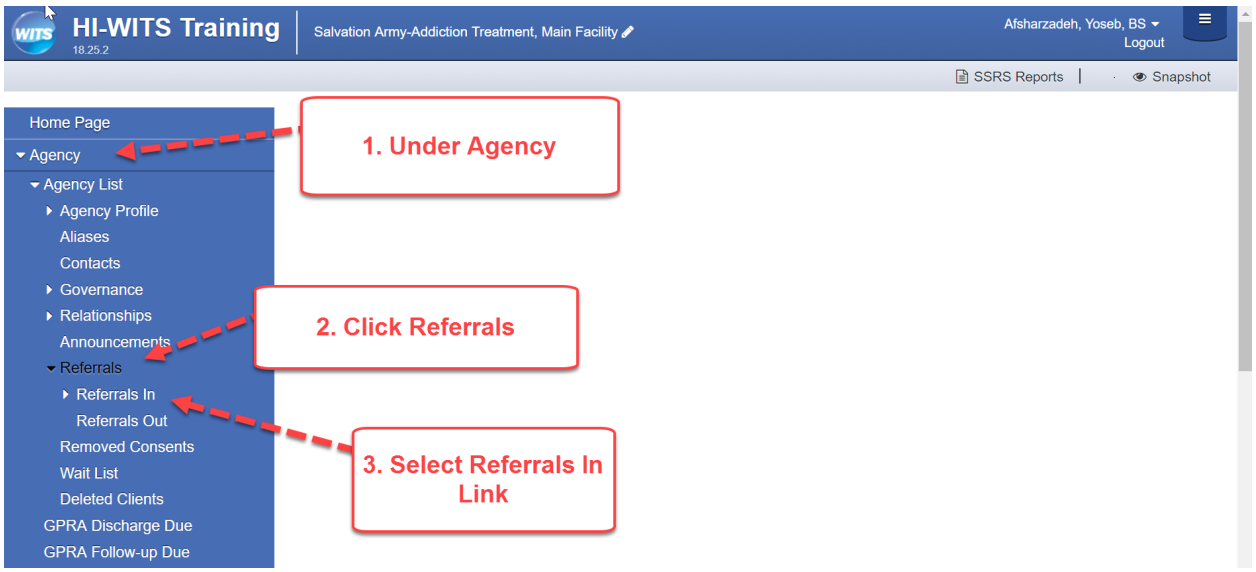


9. Set Referral Parameters

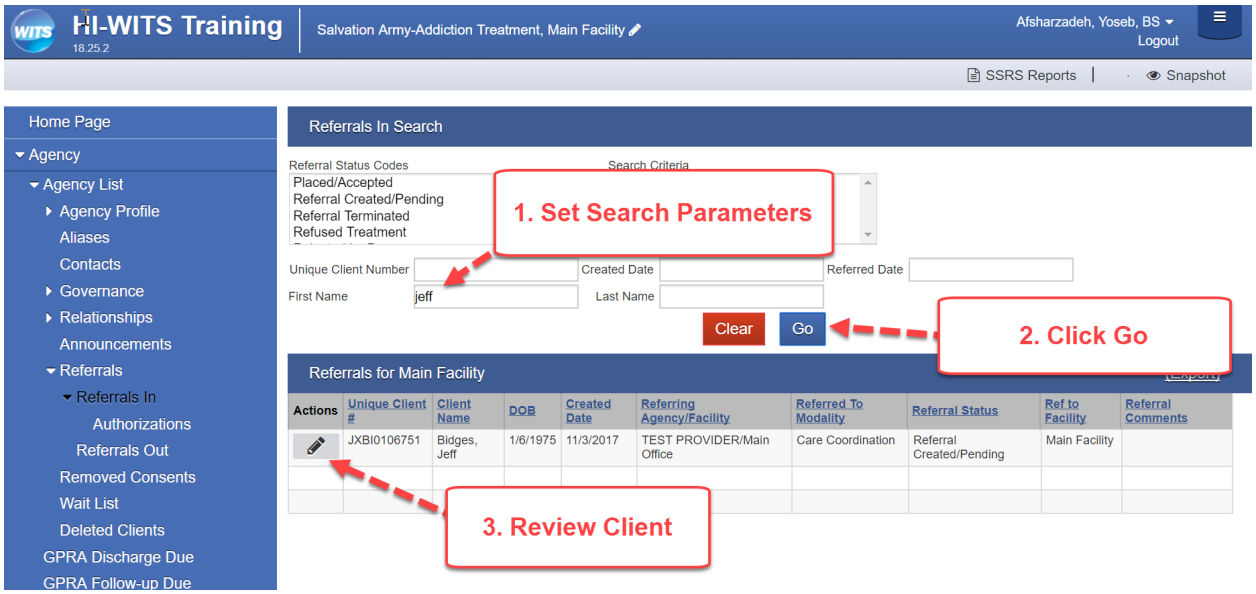


Accepting and Placing a Referral:

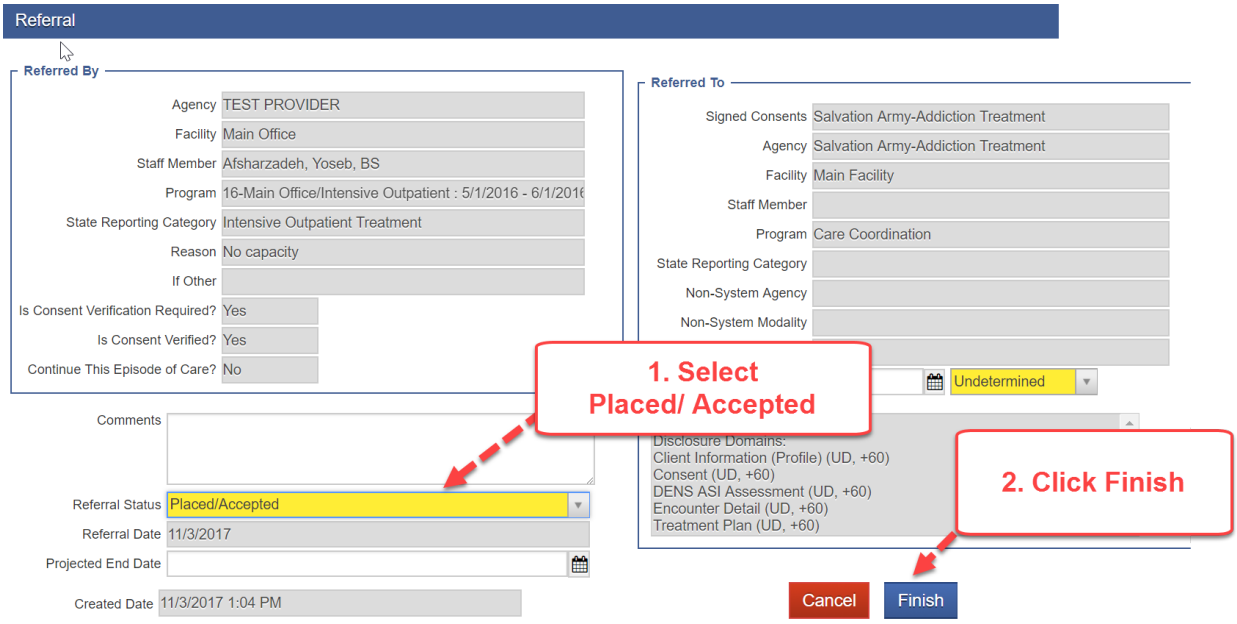
10. Under Agency, Click Referrals and Choose Referrals In Link



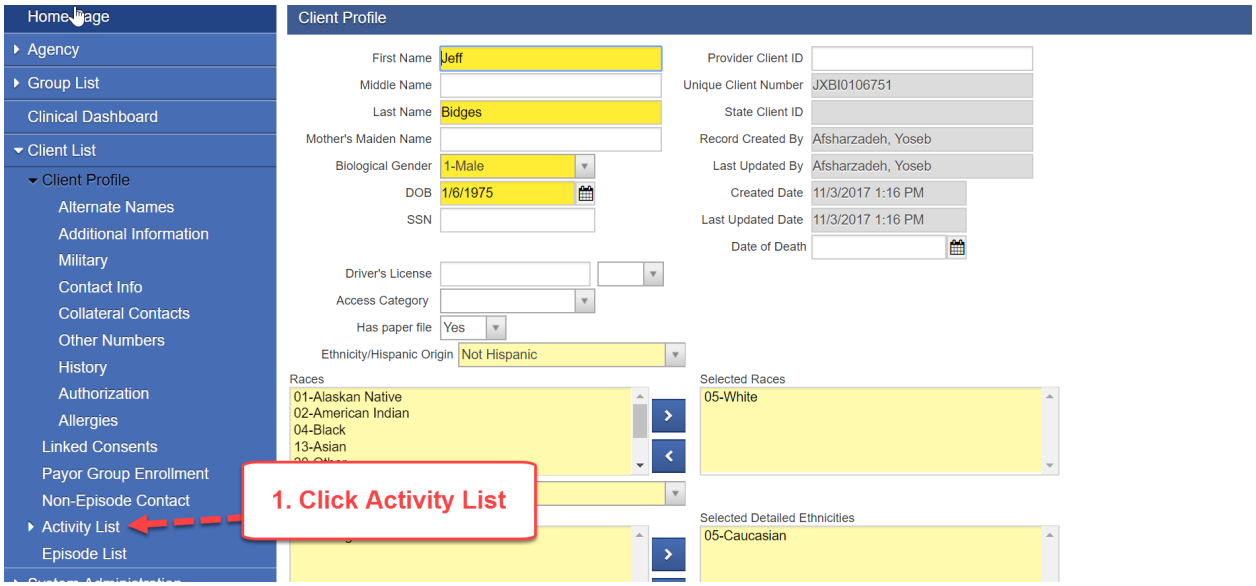
11. Set Search Parameters, Click Go then Click Review on the Fly-Out Menu for the Client



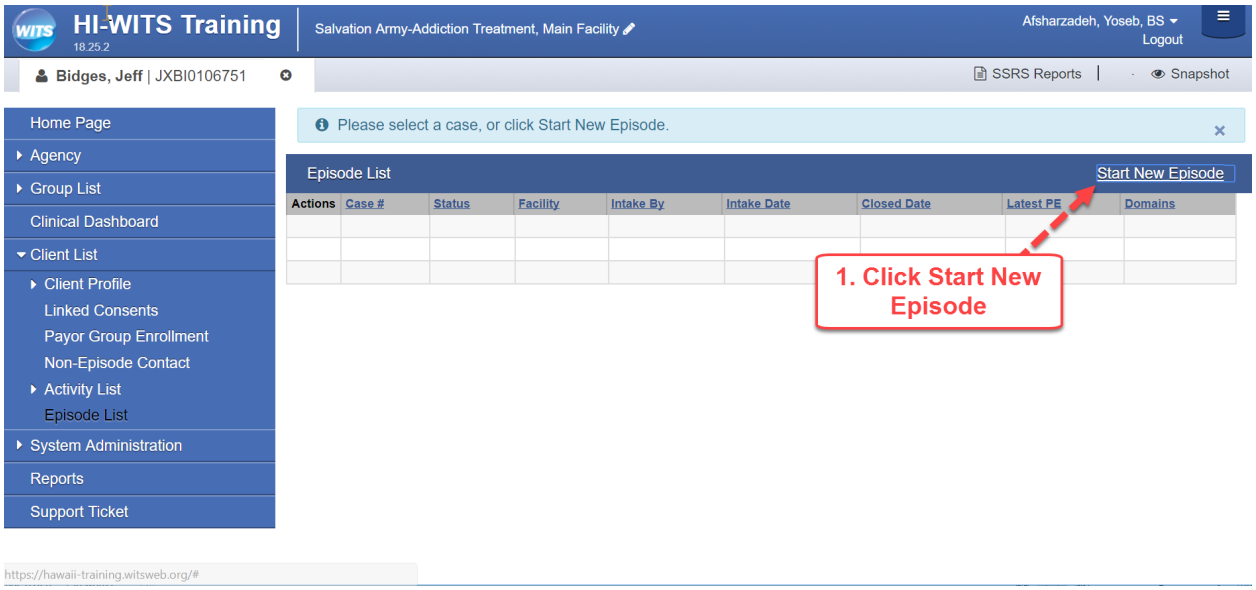
12. Select Placed/ Accepted from the Drop-Down, Then Click Finish



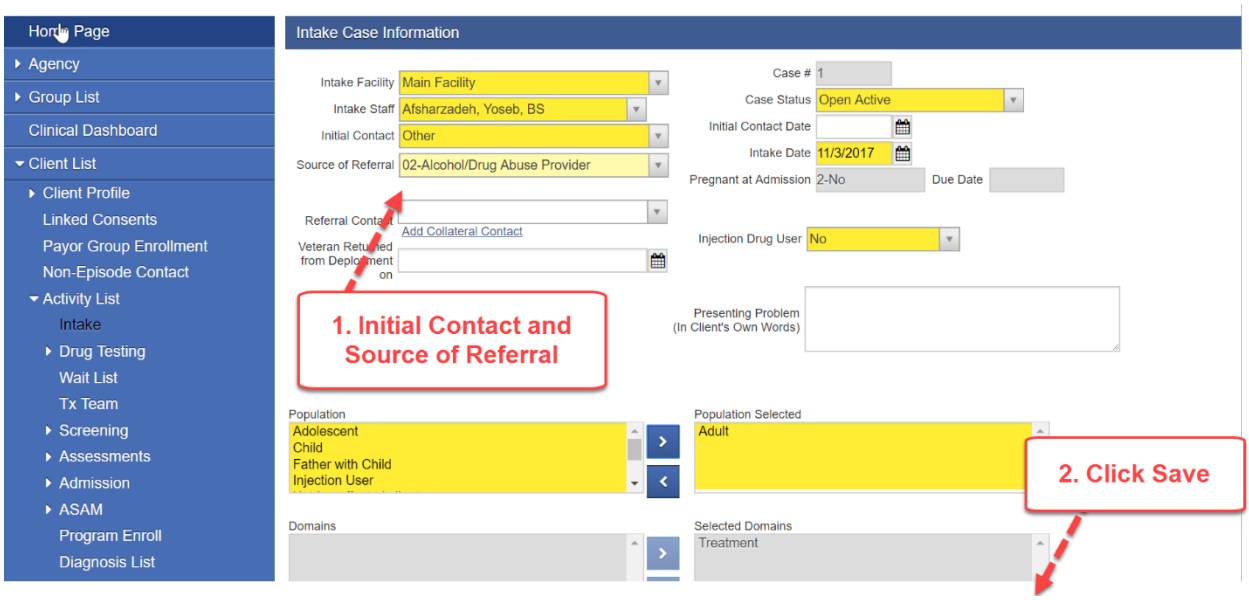
13. Once Clients Profile is Available Click Activity List



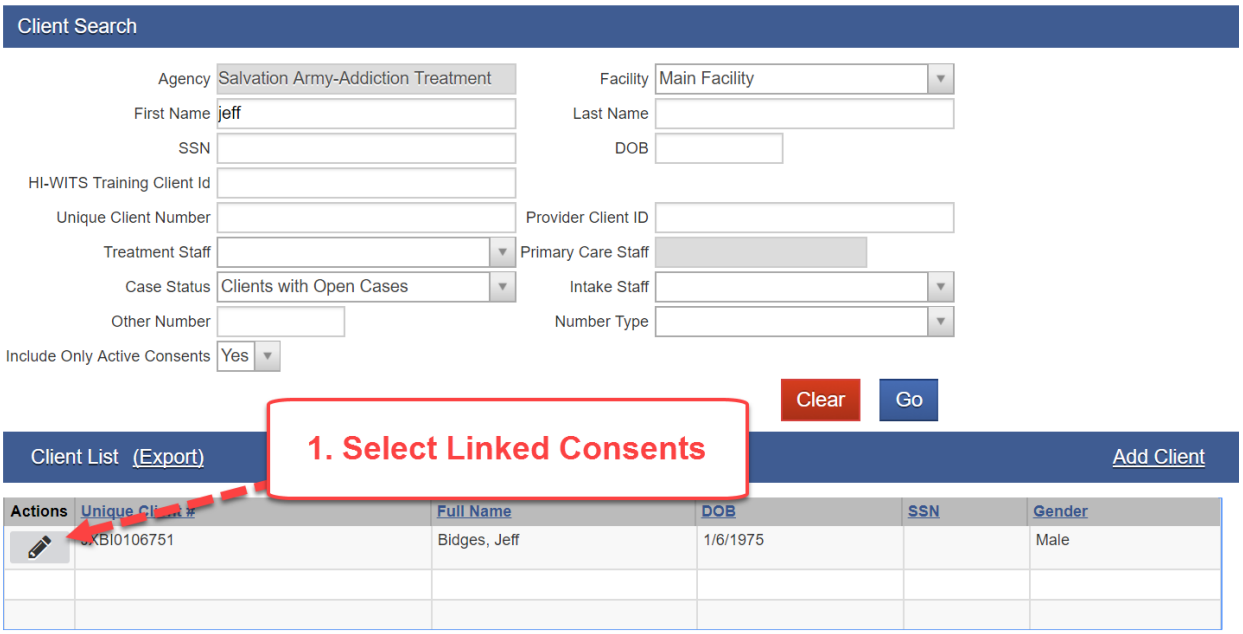
14. Click Start New Episode



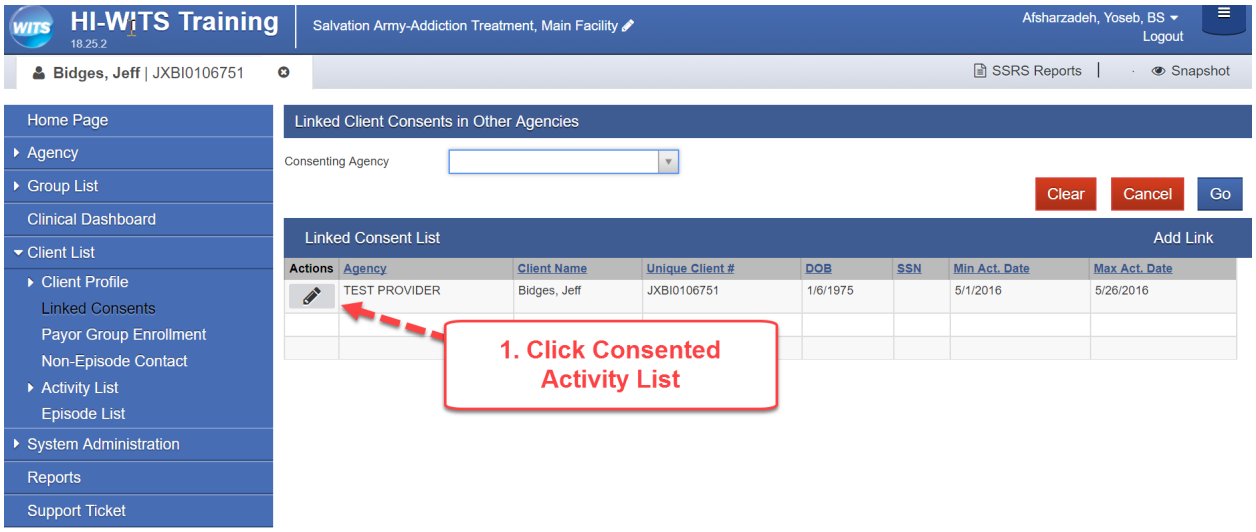
15. Set Parameters for Intake Screen, Click Save



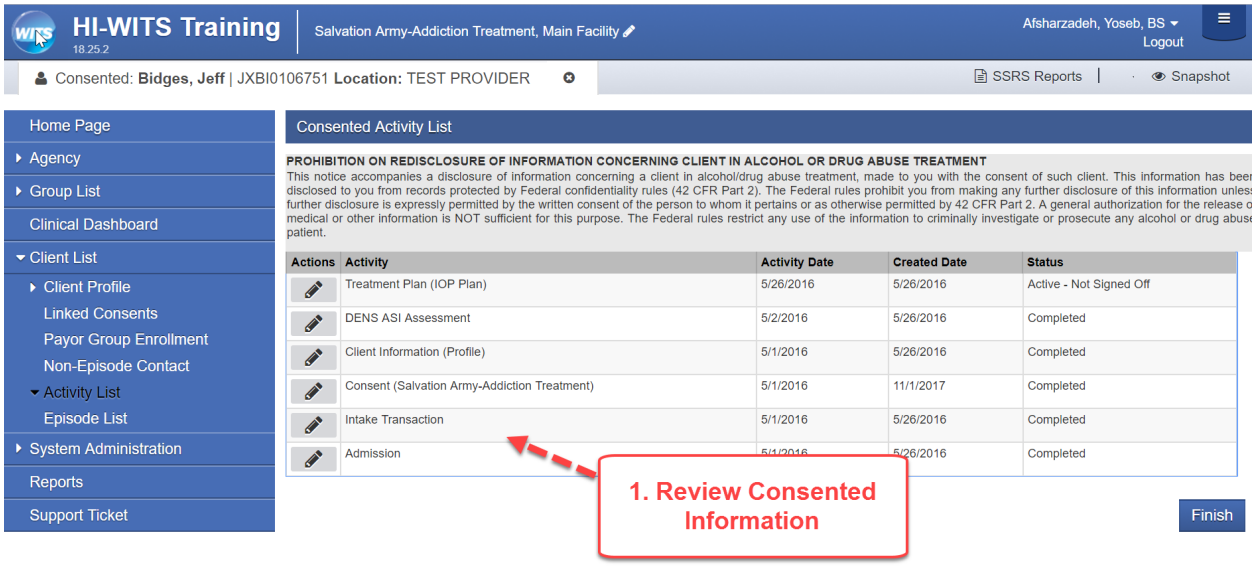
16. Select Linked Consents from the Fly-Out Menu



17. Select Consented Activity List from the Fly-Out Menu



18. Review Consented Information



If you have any questions, please call the WITS Staff or email WITSHELP@doh.hawaii.gov.