Chapter 13 – Client Referral

1. **Entry Steps: Client Profile, Client Intake.**

2. Go to **Client List** and select the desired client. Go to **Activity List sub-menu** and select **Referrals.**

3. **Client Referral List:** To create a new referral from this screen, click on the hyperlink for **Add New Client Referral Record.** This will take you to the **Client Referral** screen.

4. Information about your **Agency, Facility, and Staff Member** will come pre-populated and is read only.

5. **Referred By** - Select the **Program** from which the client is being referred and the **Reason** for the referral. Select Yes or No for **Is Consent Verification Required**, **Is Consent Verified** and **Continue this Episode of Care**?

   a. **Consent Verification Requested?:** This refers to the agreement between your agency and the agency to which you are referring the client. It asks if your agreement requires a paper consent verification.

   b. **Consent Verified?:** This states whether consent was verified or not if necessary due to your agency agreement.

   c. **Continue this Episode of Care:** Select yes/no as appropriate.

6. **Referred To - Signed Consents:** This field will list all the agencies for which the client has signed a consent. Select the Agency to which you are sending the referral. If you are referring the client to another Facility or Program within your own agency, then you can skip this field and go directly to Facility.

7. **Note: A signed Consent is required before sending a referral since you are disclosing the identity of the client through the referral. If no consent exists, you must go back to the consent screen and create one.**

8. **Agency:** This field comes pre-filled with the name of your agency. Once you select an agency under **Signed Consents t**his field will get filled with the name of that agency and gray out.

9. **Facility: Select the appropriate option** from the drop-down list. If you are referring to a specific staff at that Agency, select the name of the **Staff Member** from the drop-down box. When selecting an agency from the **Signed Consents** drop down, it will populate the **Consents Granted** box.

10. Select a **Program** to which you are referring and **State Reporting Category** will be populated.

11. You may provide **Comments.** Click **Finish** when done.

12. If you are sending the referral to a HI-WITS agency, once you complete and **Save** the **Client Referral** screen, the facility to which you have referred the client will see the referral appear in their **Referrals In** screen under **Agency> Referrals In.** Similarly, referrals sent to you by another HI-WITS using agency can be seen in your **Referrals In** screen.

13. As a receiving agency for the referral, you can review the record and make some changes to it by clicking on the **<u>Review</u>** hyperlink under **Actions**.

14. You will see referrals you have made in your **Referrals Out** screen.