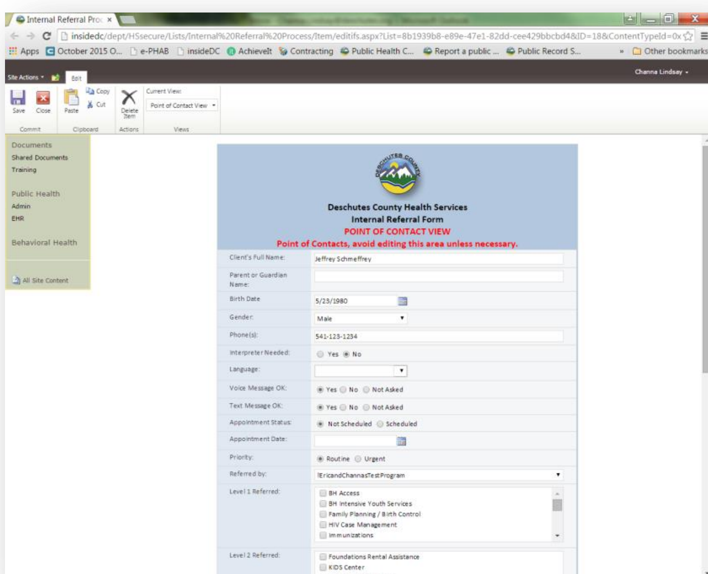
Point of Contact “How To” Workflow

As the Point of Contact (POC) for the referred to program, you will follow your program or team specific guidelines for handling referrals. This guide explains how to use the internal referral form.

What to do when you receive the following e-mail…

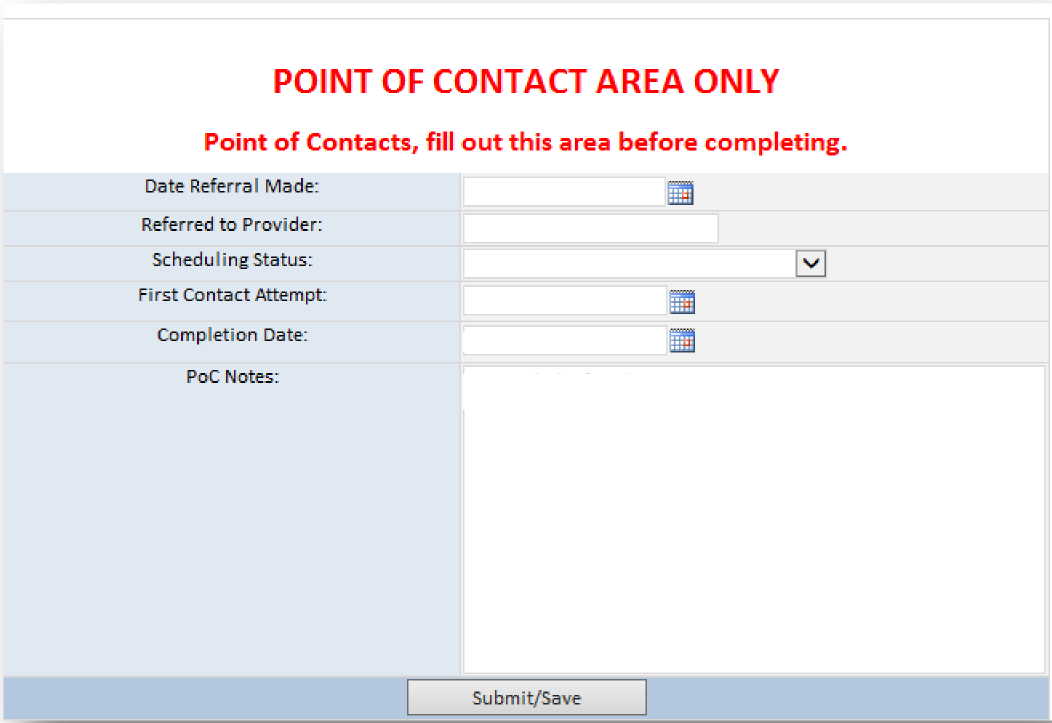
> *****This is an automated email, please not not reply*****
>
> An Internal Referral Request has been submitted to you and needs your attention.
>
> Brief Summary:
> Who submitted the referral: Eric Ballinger
> Submission date: 9/29/2015 2:32:46 PM
> Client Name: Jeffrey Schmeffrey
>
> For privacy and compliance, no further details will be displayed in this email. Please go to the SharePoint Form >>HERE<< for more information, and to process this referral.
>
> **Internet Explorer is REQUIRED.**
>
> You are receiving this email because you have been designated as a Point of Contact for the Internal Referral Process. If you feel this is an error, please contact the program administrator.
>
> *****This is an automated email, please not not reply*****

1) Click on the button that says >>HERE<<
2) You will be presented with the following page



3) **Please follow your program specific guideline for processing referrals**

- Copy and paste the referral reason and outcome of the referral into your electronic database (ex: EPIC, Twist, etc.) for our records. Once you have scheduled or attempted to schedule the client, scroll down to the bottom of the page



POINT OF CONTACT AREA ONLY

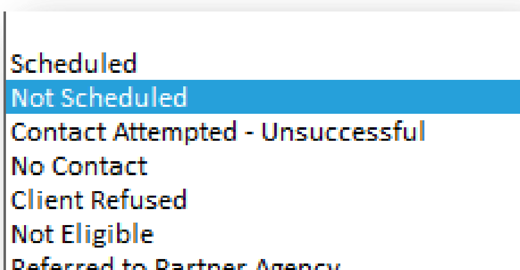
Point of Contacts, fill out this area before completing.

Date Referral Made:	
Referred to Provider:	
Scheduling Status:	
First Contact Attempt:	
Completion Date:	
PoC Notes:	

Submit/Save

4) In the row, “Referred to Provider”, please indicate who the client is scheduled with (only if the client is scheduled)

5) In the row, “Scheduling Status” select the dropdown option, as appropriate



Scheduled= the client has a scheduled appointment
Contact attempted- unsuccessful= followed programs procedure for making contact with the client, but could not reach them
No Contact = Client did not call to schedule appointment in the designated time frame
Client Refused= Client refused to be scheduled these services
Not Eligible= Client is not eligible for this program
Referred to partner agency= Client was referred to a partner agency

6) In the row, “First Contact Attempt,” enter the date you first tried to contact the client, if applicable.

7) Only fill in the row, “Completion date” if you have completed the referral.

- If you want to return to the referral at a later time, select “Submit/Save” but do not fill out completion date.

- To return to your referrals:
    - Returning to the email, and select the >>HERE<< link (step 1)
    - Use the following link:
      http://insidedc/dept/HSsecure/Lists/Internal%20Referral%20Process/My%20Items%20Dashboard.aspx
- Once the referral has a completion date and you click “complete this referral”, an email will be sent to the referring provider with the referral outcome

Please use Internet Explorer when editing referrals