Referral - Quick Guide

Referral Client Intake Entry
This function can be accessed through the Quality and Credentialing menu.

Enter a New Referral Intake
- Select the menu option New Referral Client from the Quality menu to access the Referral Client Intake – Search and Validate Parent page.
- Once you have searched for the Parent, you will need to either select Create New Party or Use Selected.
- The New Referral Client page will be presented for entry. If you selected a person already existing in the database, many of the following fields will already be filled in with data. Click on the Submit button when you have completed your entries. A new Referral Case will be created automatically, and it will be assigned to you.
- A referral can be completed without entering any child information. Click on Children Information in the Sub Nav bar. On the Children Information page, click on the Add Child button. The process for adding a child is the same as when you performed Search and Validate for the parent.

Provider Referral
In the Referral case, click on the Provider Referrals tab. Select a Query Type to perform and click on Go:
- If you selected Custom search, the only fields that will be completed on access of this page will be that there will be checkmarks in the Age Categories matching the ages of the children you entered. Select the parameters on which you want to search and then click the Search button.
- If you selected Town as one of your search parameters, the Search Results will contain a Town Distance column. The distance displayed is not exact from the Provider Address to the Referral.

Referral Document
The Referral Document is created on the Provider Referral Search page.
- To create the printed Referral Document, click the Select checkbox next to all the providers you wish to include on the document. If you want to view information about a provider before selecting that provider for inclusion in the Referral Document, click on the Details link.
- Since there may be several pages of providers returned in the search results, be sure to view all pages and make your selections.
- Once you have done that, click on the Generate Referral Document button.
- The referral you just performed will be listed in the Previous Referrals table. To print the Referral Document, click on the Referral Document link. A PDF will be presented. Click on the Print icon.

View Referral Details
To view the Search Criteria Used and the provider matches:
- Click on the Provider Referrals tab. Click on Details of the desired Referral you wish to view.
- The Provider Matches page displays the data used to create the referral and its output.
- By clicking on the Run Search with Criteria button, you can rerun this search for this family or modify it to produce different results. There will be a field entitled Search Providers Updated Since on the search screen so that if desired, you can only search for providers meeting the criteria entered that have been updated and thus did not appear in your previous search.

Other Referrals
CDD encourages you to record other services/referrals you may have performed for your clients. To do so, click on the Other Referrals tab in the sub nav bar.
- To add an Other Referral, click on the Add Other Referral button on the presented page.

Referral Follow-Up
As a matter of measuring quality, your agency may decide to perform follow-up on a selected number of Referrals.
- To do so for a particular family, access the Provider Referrals page. Click on the Follow-Up link for the desired referral.
- Since Follow-Up can be performed multiple times for the same referral, you will be presented with the Provider Referral Follow-Up table. Click on the Record Follow-Up button.
- The Date and Time of Referral will be automatically completed by the system with the date and time you accessed this page. The remaining fields are similar to the satisfaction surveys you do now. Select the appropriate values for each field and make comments as desired. Click on the Submit button.

Record Service Gap
The purpose the Service Gap function is to provide CDD with information about the types of services that are unavailable for varying reasons for programming planning and budgeting purposes.
- The Record Service Gap function is accessed from the Account Summary page by clicking on Record Service Gap under Additional Account Options.
- Services can be recorded individually by child or for the family as a whole. If appropriate, select a Child from the drop-down list. Enter a Service Gap Date and indicate a Preferred Service, Secondary Service and Service Gap Reasons as appropriate to this family. Click on the Submit button.

Find Existing Referral Clients
The same Referral Case should be used to record multiple searches for the same family. This can be done if the searches are performed the same day or even at a much later time due to a change in family circumstances. Each Referral performed is listed separately and can have Follow-Up recorded separately.
Should you need to add to a Referral case either to perform a new referral search or record a referral follow-up:

- Access Search Referral Clients from the Quality and Credentialing main menu.
- To use an existing case for new referrals, you should review the existing client demographic data with the client to be sure that it is still correct. To update information, click on Referral Client Profile. You do not need to perform the Referral Client Intake process again.
- Click on the Edit Profile button to change the client’s address or contact information. Once you have updated the information, click on the Save Updates button.

Provider Referral Agreement

The Provider Referral Agreement is used to record data that will be searched or available to staff and parents when a Referral Search is performed. The information contained in Referral Agreement can be updated at any time to reflect changes and provide the most current information for referral searches. The provider can also opt out of being included in referrals and you will need to change their Referral Status to Inactive.

- Under Provider Management, click on Search Providers. Search for your desired provider and select it from the search results list.
- Once you have selected the appropriate provider from the search, the Account Summary for that provider will be presented. Click on Referral Agreement under Additional Account Options.
- The Provider Referral Agreement page will be displayed. It consists of five functions: Additional Fees, Program Information, Provider Schedule and Services, Vacancy and Capacity, and Update Referral Status. These functions can be performed in any order; however, you must change the Referral Status to Active so that the provider will show up in the Provider Referral Search. Some information will be prefilled on the pages from data collected during the provider’s licensure-registration process.

Provider Referral Agreement – Additional Fees

On the Provider Referral Agreement page, click on Additional Fees in the Referral Agreement Section Menu.

- On the Additional Fees page, click on Add Additional Fee.
- Select Fee Type and Frequency of Fee and then enter Fee Amount.
- Click on Submit.
- This process can be performed multiple times to enter all fees.

Provider Referral Agreement – Program Information

On the Provider Referral Agreement page, click on Program Information in the Referral Agreement Section Menu.

- On the Program Information page, click on Update Information.
- Enter or modify selections as appropriate, and click on Submit.

Provider Referral Agreement – Provider Schedule and Services

On the Provider Referral Agreement page, click on Provider Schedule and Services in the Referral Agreement Section Menu.

- On the Provider Schedule and Services page, click on Update Information.
- Enter or modify selections as appropriate, and click on Submit.

Provider Referral Agreement – Vacancy and Capacity

On the Provider Referral Agreement page, click on Vacancy and Capacity in the Referral Agreement Section Menu.

- On the Vacancy and Capacity page, click on Update Information.
- Enter or modify selections as appropriate, and click on Submit.

Provider Referral Agreement – Update Referral Status

On the Provider Referral Agreement page, click on Update Referral Status in the Referral Agreement Section Menu.

- On the Change Referral Participate Status page, change Status and enter Notes as appropriate. Click on Submit. Only those providers whose status is indicated as Active will be considered for inclusion during Provider Referral Searches.