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 $\xrightarrow{>>HERE<<}$ 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 sa	ays >>HERE<<

2) You will be presented with the following page

Apps 🖸 October 2015 O 🗋 e-PHAB 🗋 inside	DC 🔞 Achievelt 🐐 Co	ntracting 🐵 Public Health C 🗳 Report a public 🗳 Public Record S	 Other bookmarks
ctors • 📷 Eoit			Channa Lindsay -
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nin		Deschutes County Health Services	
		Internal Referral Form	
avioral Health	Point	POINT OF CONTACT VIEW of Contacts, avoid editing this area unless necessary.	
	Client's Full Name:	Jeffrey Schmeffrey	
All Site Content	Parent or Guardian		
W alle Colleges	Name: Birth Date		
		5/23/1980	
	Gender:	Male	
	Phone(s):	541-123-1234	
	interpreter Needed:	O Yes ® No	
	Language:		
	Voice Message OK:	🛞 Yes 💿 No 💿 Not Asked	
	Text Message OK:	🛞 Yes 💮 No 💿 Not Asked	
	Appointment Status	Not Scheduled Scheduled	
	Appointment Date:		
	Priority:	Routine Urgent	
	Referred by:	It ricand Channas Test Program	
	Level 1 Referred:	BH Access	
		Family Planning / Bith Centrol HIV Case Management immunizations	
	Level 2 Referred	Foundations Rental Assistance KDS Center Still - Mental Health	-

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

	aves before completing			
	Point of Contacts, fill out this area before completing.			
Date Referral Made:				
Referred to Provider:				
Scheduling Status:	~			
First Contact Attempt:				
Completion Date:				
PoC Notes:				

- 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	
Not Scheduled	
Contact Attempted - Unsuccess	sful
No Contact	
Client Refused	
Not Eligible	
Referred to Partner Agency	

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