Referrals - Introduction

Introduction

This HuBERT on-demand training module is provided by…

…the MN Department of Health WIC Program. It provides an overview of Referrals.

Referrals

Referrals1

Today, is November 6th. We are certifying Rob Banks and need to complete the Referrals/Other Programs section since it is required as part of the Certification Guided Script, or CGS.

<no audio> Click the **Referrals/Other Programs** link.

Referrals2

There are two sides of this screen that function independently of each other.

Referrals, on the left, allow us to document referrals that we make to other programs and we are **required** to provide at least one at each cert.

On the right, under Other Program Enrollment, we can choose to document other programs in which he is currently participating. This is **not** required to complete a cert.

Let's add a referral.

<no audio> Click the **Add** button.

AddReferrals

The **Contact Date** is the date we gave the referral. We can change this to a previous date as long as it is not before the date of the last referral.

The available referrals are managed by, and specific to, our agency.

ProgramTopics

They are organized based on a number of State-identified Program Topics.

<no audio> Click to Continue Module.

AddReferrals1

We can select referral organizations, but not program topics.

Let's start by selecting CHILD AND TEEN CHECKUPS.

<no audio> Click below the scroll bar.

<no audio> Click on the CHILD AND TEEN CHECKUPS referral organization to highlight it.

We can't multi-select from the list or double-click to select; we have to click the right arrow to move it from the Available list to the Selected list.

<no audio> Click the right arrow.

AddReferrals2

<no audio> Click below the scroll bar.

Go ahead and select the **CHILDREN'S DENTAL SERVICES** and **HOUSING INFORMATION LINE** referrals.

<no audio - hint> Click on the **CHILDREN'S DENTAL SERVICES** referral organization.

<no audio – hint> Click the **green arrow**.

<no audio – hint> Click on the **HOUSING INFORMATION LINE** referral organization.

<no audio – hint> Click the **green arrow**.

Let's click **OK** to save our changes.

Referrals3

Each contact has a created **on** date and **for** date.

The "for date" displays the Contact Date, or the date the referral was given, which as we mentioned could be a date before today.

We can edit our referral, but only on the **same date we created** it. To enable the edit button, we must first select the referral(s).

<no audio> Click on **Created on 11/06/2017 for 11/06/2017** to highlight.

<no audio> Click the **Edit** button.

EditReferrals

In the Edit screen, if we had changed our Contact Date, **that date** would display.

We've been talking with mom about smoking cessation so go ahead and add the MINNESOTA QUIT PLAN to our Selected referrals list.

<no audio - hint> Click on the **MINNESOTA QUIT PLAN** referral organization.

<no audio – hint> Click the **green arrow**.

Mom has also told us that both her children participate in C&TC so now let's remove CHILD AND TEEN CHECK-UPS referral.2

<no audio> Click on the **CHILD AND TEEN CHECKUPS** referral organization in the Selected list.

<no audio> Click the **green arrow.**

<no audio> Click the **OK** button to save the changes.

DeleteReferrals

We can also **delete** referrals, either the entire contact or a specific referral. Again, we can only do this on the **same date as the referral was created.**

Like the Edit button, we enable the delete button by selecting what we want to delete.

Let's select the entire referral by clicking on the dates of the contact.

<no audio> Click on **Created on 11/06/2017 for 11/06/2017** to highlight.

<no audio> Click the **Delete** button.

The confirmation message verifies whether we really want to delete our referrals, which we don't so go ahead and click **No.**

<no audio> Click the **No** button.

PrintReferrals

We can print a list of referrals by selecting any of the referral dates and clicking the Print button.

<no audio> Click the **Print** button.

PrintReferrals1

Like most HuBERT documents, the Participant Referral List contains private data, including the participant's name and address.

We always need to make sure that we pick it up from the printer as soon as possible after printing.

It lists the name of the referral, the addresses if available, and the contact numbers.

NoReferral

Sometimes, a participant doesn't need a referral.

When this occurs, we can select NO REFERRAL NEEDED to meet our certification requirement.

Other Program Enrollment

OtherPrograms

The Other Program Enrollment list is the same as our referral Program Topics.

OtherPrograms1

If enrollment is pertinent to WIC continuity of care, such as using breastfeeding or food shelf resources, then it may be best practice to document it.

However, our agency can choose whether to have us maintain this on-going list of programs the participant is currently enrolled in.

OtherProgram2

At our agency we collect this. So, Mom told us that Rob is currently enrolled in Child & Teen Checkups and that their family is receiving Financial Assistance so let's indicate that here.

<no audio> Select **Child & Teen Checkups.**

<no audio> Select **Financial Assistance**.

<no audio> Click on the **green arrow.**

Once they are selected, they no longer display in the Available list.

Since this is an on-going or active list, we can also remove programs at any time.

And let's save our referrals. Click the OK button.

<no audio> Click the **OK** button.

Referral 4

<no audio – description> Main CGS screen with checkmark next to Referrals/Other Programs.

Copy Referrals

CopyReferrals

Whether in the CGS or the Participant Folder, we can copy referrals from one household member to another on the **same date** the referral was created.

This comes in handy when we are certifying multiple members and have to satisfy the referral requirement.

Since no one else in the household is due for a cert, and referrals work the same in the CGS and the folder, we are going to take a look at this function in Mama's participant folder.

<no audio> Click on the **Referrals** tab.

CopyReferrals1

Once a referral has been added, the **Copy Referrals** button becomes enabled in other household members' Referral screens. Go ahead and click on it.

<no audio> Click the **Copy Referrals** button.

CopyReferrals2

The referrals we selected for Rob display in the list.

We can remove any that may not apply to the member with whom we are currently working by de-selecting the Include checkbox.

Let's remove CHILDREN'S DENTAL SERVICES…

<no audio> Click on the Include checkbox for CHILDREN'S DENTAL SERVICES to de-select it.

…and click OK to add the housing and quit plan referrals to Mama's record.

<no audio> Click the **OK** button.

CopyReferrals3

Notice that only referrals are copied, not Other Program Enrollments.

OK. So, now Mama has accepted our referral to the breastfeeding peer program. So, let's try to add this by clicking the Add button.

<no audio> Click the **Add** button.

This message reminds us that we've already added a referral contact for the current date, and we can **only add one per date**, which means we need to edit the referral we just copied.

Click OK on the message.

<no audio> Click the **OK** button.

The Edit button is disabled so do what we have to do to enable it.

<no audio – hint> Click on **Created on 11/06/2017 for 11/06/2017** to highlight it.

<no audio> Click the **Edit** button.

CopyReferrals4

Go ahead and add PEER COUNSELOR REFERRAL – ACCEPTED and save the change.

<no audio - hint> Click on ***PEER COUNSELOR REFERRAL – ACCEPTED.**

<no audio – hint> Click on the **green arrow**.

<no audio – hint> Click on the **OK** button to save the change.

CopyReferrals6

Now let's copy referrals into Sandy's folder. Go ahead.

<no audio – hint> Click on the **Referrals** tab.

CopyReferrals7

<no audio – hint> Click the **Copy Referrals** button.

CopyReferrals8

The Copy Referrals list will include **all referrals** added to other household members' referral's list, which is why both PEER COUNSELOR REFERRAL – ACCEPTED and CHILDREN'S DENTAL SERVICES display.

We're going to add all four referrals to Sandy's record.

<no audio> Click the **OK** button.

CopyReferrals9

<no audio – display> Sandy's referrals tab.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.