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...

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.

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:
  o Returning to the email, and select the >>HERE<< link (step 1)
  o Use the following link:

• 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