

## **ADDING A SERVICE REFERRAL WITHIN A CASE SERVICE**

Navigate to the Case

1. Click the Case Services link in the navigation menu

The screenshot shows a web application interface. On the left is a navigation menu with links: Justification/Waiver, Case Services (highlighted with a red circle), Legal Actions, Legal Custody/Status, Living Arrangement, Initial Removal, Placement Request, Placement, Visitation Plans, Independent Living, AR Family Service Plan, AR Family Service Review, Case Plan, Case Review/SAR, Family Team Meeting, and Safety Reassessment. The main content area has a header with 'Manually Dispose of Ticket?' and links for 'View Case Status History' and 'View Assignment History'. Below this is the 'Assignment Information' section, which contains a table with columns 'Worker Name', 'Role', and 'Agency of Worker'. The table has one row: 'Training01, User', 'Screening Decision Maker', and 'DHS Training'. Below that is the 'Eligibility Assignment Information' section, which contains a table with columns 'Person Name' and 'Eligibility Specialist(s)'. The table has one row: 'No Assignment Information Found'. A 'Close' button is located at the bottom left of the main content area.

Worker Name	Role	Agency of Worker
Training01, User	Screening Decision Maker	DHS Training

Person Name	Eligibility Specialist(s)
No Assignment Information Found	

2. Click the referrals link next to the Case Service in which you are going to add the referral (Remember the case service member status must be either needed or referred)

The screenshot shows the 'Case Services' section of the web application. It has a 'Service:' dropdown menu and an 'Add Case Services' button. Below this is a table with columns: 'Case Member Name(s)', 'Service Category / Type', 'Service Classification', 'Effective Dates', and 'Actions'. The table has two rows. The first row is for 'Bob, Sponge, Squirrel, Sandy' with 'Case Management/Case Management Services', 'Case Member', and '04/23/2014 -'. The second row is for 'Bob, Sponge, Squirrel, Sandy' with 'Case Management/Information & Referral Services', 'Case Member', and '04/07/2014 -'. The 'referrals' link in the 'Actions' column of the second row is highlighted with a red circle. The 'delete service end' link in the 'Actions' column of the second row is also highlighted with a red circle.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	Actions
Bob, Sponge, Squirrel, Sandy	Case Management/Case Management Services	Case Member	04/23/2014 -	<a href="#">edit</a> <a href="#">referrals</a> <a href="#">delete service end</a> Not Linked
Bob, Sponge, Squirrel, Sandy	Case Management/Information & Referral Services	Case Member	04/07/2014 -	<a href="#">edit</a> <a href="#">referrals</a> <a href="#">delete service end</a> Linked

3. Click the Add Referral button (If the add referral button is grayed out, no case service members are available to add the service referral)

Referral History

Service Category / Type: Case Management / Information & Referral Services Effective Dates: 04/07/2014 -

Service Classification: Case Member

**Add Referral**

Members	Provider/Provider ID	Service Description	Referral Date	Referral Status
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**Close**

4. Enter the Referral Date, select the Case Service Members from the Available Case Service Members and click Add. To add a Provider, click the Link Provider button.

Service Referral Selection

Service Category / Type: Case Management / Information & Referral Services Effective Dates: 04/07/2014 -

Service Classification: Case Member

Referral Date:

Available Case Service Members: Bob, Sponge Squirrel, Sandy

**Add >>** **<< Remove**

Selected Case Service Members:

Provider Information

Provider	Service Description	Provider Address
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**Link Provider**

Narrative: (optional field but will display on referral report)

**Spell Check** **Clear** **ADD**

Referral Status: \* Draft

[Note: Upon Save of a Completed Referral, a Referred Member Service Status will be created for each case member, provider, and service description combination.]

**Apply** **Save** **Cancel**

5. The Provider Match Search Criteria screen displays. Click the Search button.

Provider Match Search Criteria

Provider Information

Service Category:  Search Date:

Service Type:

Agency Type:  Agency:

☐ By Available Capacity

Available Counties:

Selected and Nearby Counties:  OR School District:

☐ Additional Search Criteria

Child Information

Gender:  From Age:  To Age:  Language:

☐ Additional Search Criteria

Sort Results By:

6. The Provider Match Search Results appear. (If the provider cannot be found, the provider may need to be added to SACWIS.) Click the check box next to each provider you wish to link to the Service Referral and click OK.

Provider Match Search Results

Result(s) 1 of 1 Page 1 of 1

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies	Services	Agency
<input type="checkbox"/>	<a href="#">view</a> Montgomery Co. Children Services / 9064070	NONODIPS	ACTIVE	3304 N Main St Dayton, OH 45405-2709		Information & Referral Services	DHS Training

- The provider(s) are now linked to the Service Referral. Enter narrative text (optional but will display on the referral report). The narrative box provides detailed information to the provider or case service member. This narrative will display for either the provider or case service member depending on the version of the report selected. Change the Referral Status to Completed and click the Save button.

Provider Information

Provider	Service Description	Provider Address
<a href="#">View</a> Montgomery Co. Children Services	Information & Referral Services	3304 Main Dayton OH 45405-2709 <a href="#">unlink</a>

[Link Provider](#)

Narratives: (optional field but will display on referral report)

[Spell Check](#) [Clear](#) #000

Referral Status: \* Draft ▼

[Note: Upon Save of a Completed Referral, a Referred Member Service Status will be created for each case member, provider, and service description combination.]

[Apply](#) [Save](#) [Cancel](#)

- A Service Referral has been added. Click the Close button.

Referral History

Service Category / Type: Case Management / Information & Referral Services Effective Dates: 04/07/2014 -

Service Classifications: Case Member

[Add Referral](#)

Members	Provider/Provider ID	Service Description	Referral Date	Referral Status
<a href="#">View report</a> Bob, Sponge Squirrel, Sandy	Montgomery Co. Children Services/9064070	Information & Referral Services	01/23/2015	Completed

[Close](#)

9. A Service Referral Report can now be generated. Click the Referral link next to the Case Service in which you are going to generate the Service Referral Report. (A Service Referral can include more than one provider.)

Case Services

Service:  [Add Case Services](#)

Result(s) 1 to 2 of 2 Page 1 of 1

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Case Management/Case Management Services	Case Member	04/23/2014 -	<a href="#">delete</a>
<a href="#">referrals</a>					<a href="#">service end</a> Not Linked
+ Case Member / Caregiver / Caretaker History					
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Case Management/Information & Referral Services	Case Member	04/07/2014 -	<a href="#">delete</a>
<a href="#">referrals</a>					<a href="#">service end</a> Linked
+ Case Member / Caregiver / Caretaker History					

10. Click the report link to generate the report.

Referral History

Service Category / Type: Case Management / Information & Referral Services Effective Dates: 04/07/2014 -

Service Classification: Case Member

[Add Referral](#)

	Members	Provider/Provider ID	Service Description	Referral Date	Referral Status
<a href="#">view</a>	Bob, Sponge	Montgomery Co. Children Services/9064070	Information & Referral Services	01/23/2015	Completed
<a href="#">report</a>	Squirrel, Sandy				

[Close](#)

11 Click the Generate Report button

The screenshot shows a 'Document History' section with a table containing four columns: ID, Date Created, Employee ID, and Name. Below the table, there is a 'Generate Report' button circled in red. A 'Cancel' button is located at the bottom left of the interface.

12. The Service Referral Report parameters page appears. Enter the required information and click the Generate Report button. (Remember, when selecting the Referral Type, the narrative you entered on the provider information page will display on this report.) Example, if your narrative provides information to the provider then select Provider. If your narrative provides information to the case service member the select Case Service Member.

The screenshot displays the 'Service Referral Report' parameters page. It includes several input fields and lists:

- Caseworker Name:** A dropdown menu.
- Available Referral Members:** A list containing 'Squirrel, Sandy' and 'Bob, Sponge'.
- Selected Referral Members:** An empty list box.
- Available Providers:** A list containing 'Montgomery Co. Children Services'.
- Selected Providers:** An empty list box.
- Referral Type:** A dropdown menu.
- Agency Requests an Update:** A dropdown menu.
- To arrange service(s) please contact:** A text input field.
- Buttons:** 'Add >' and '< Remove' buttons are placed between the available and selected lists for both members and providers. At the bottom left, there are 'Spell Check', 'Clean', and 'USD' buttons. At the bottom right, there is a 'Generate Report' button circled in red and a 'Cancel' button.

13. Your report is being generated.

