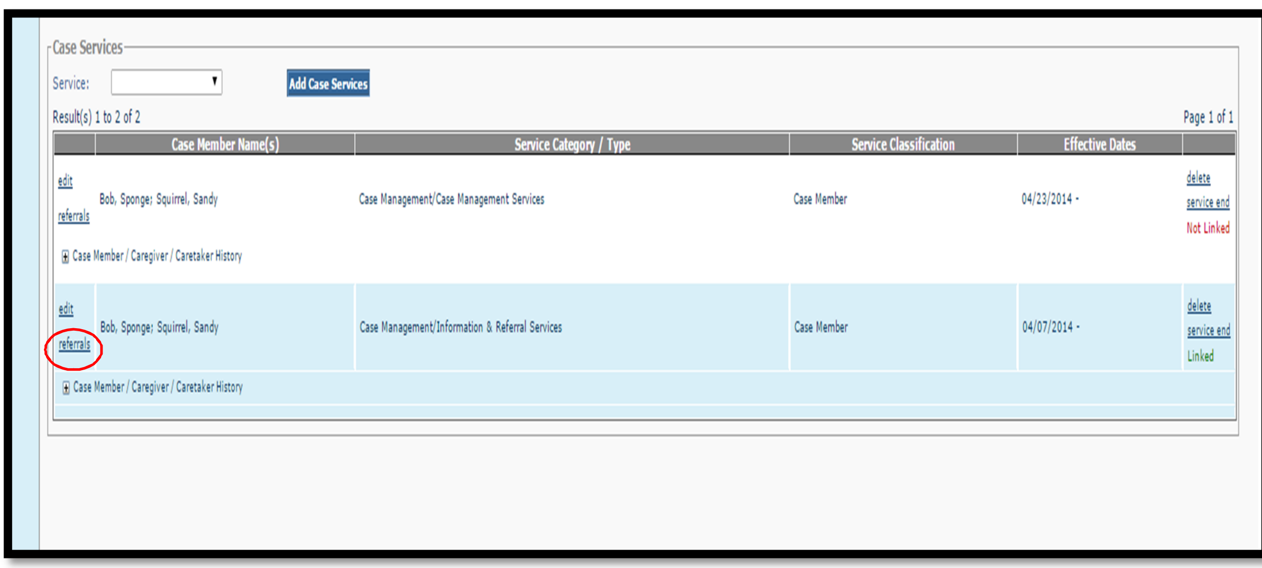
ADDING A SERVICE REFERRAL WITHIN A CASE SERVICE

Navigate to the Case

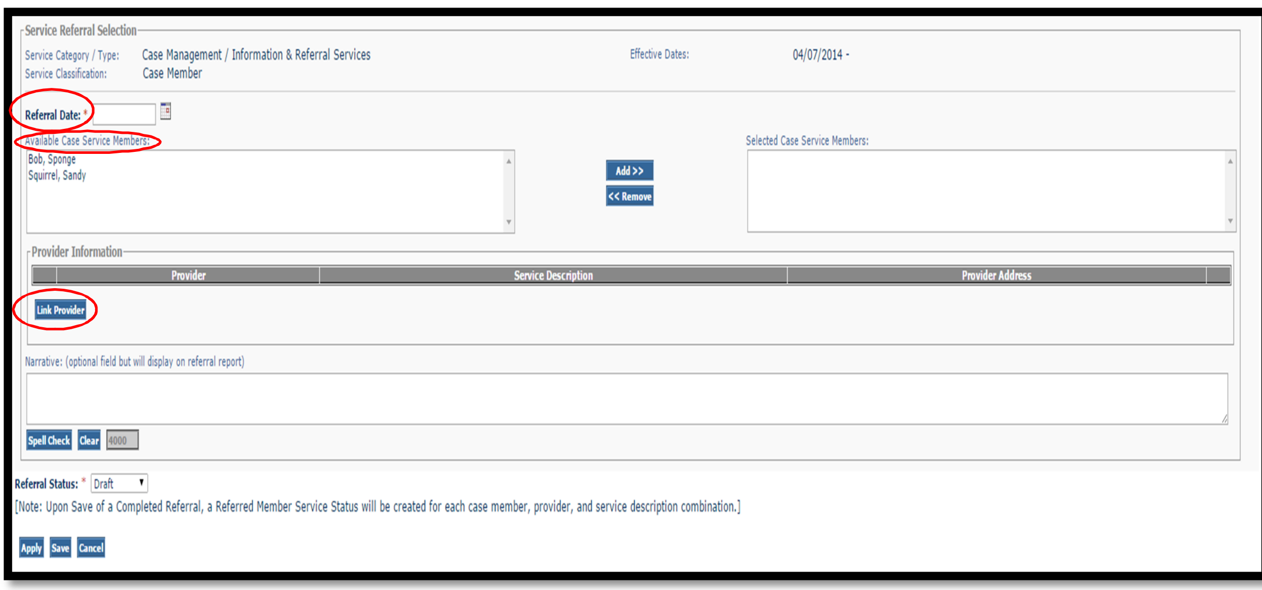
1. Click the Case Services link in the navigation menu

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)



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)

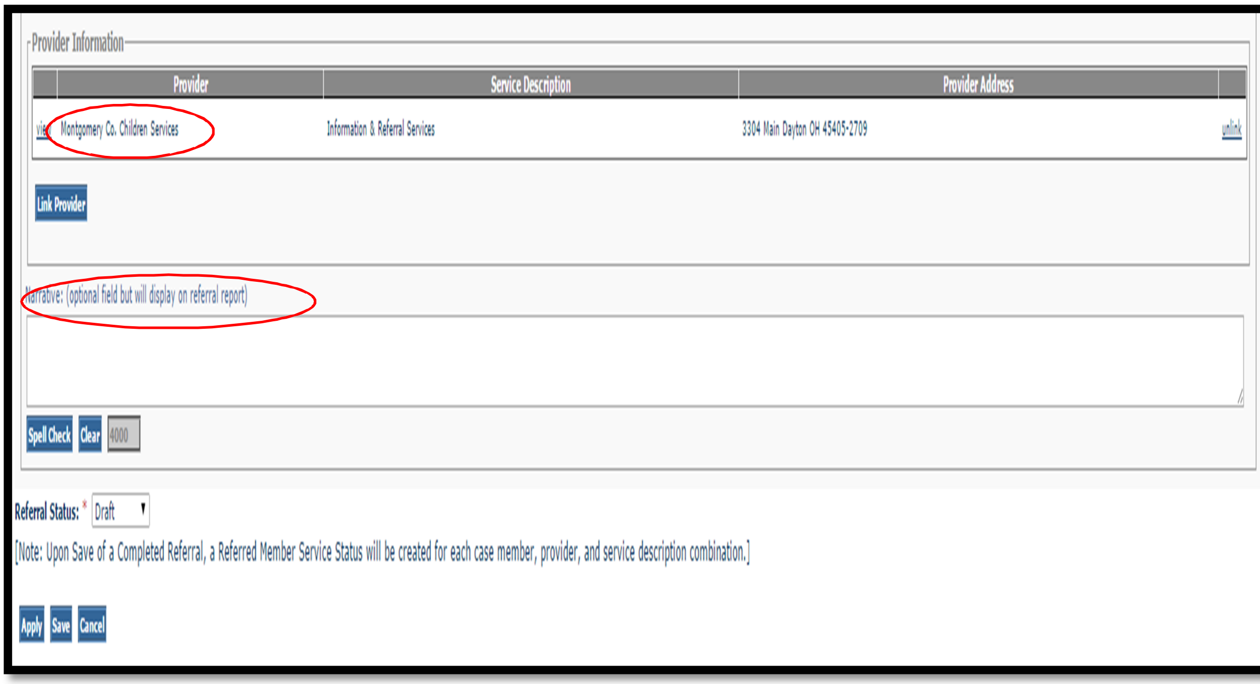
4. Enter the Referral Date, select the Case Service Members from the Available Case Service Members and click Add. To add a Provider, click the Link Provider button.



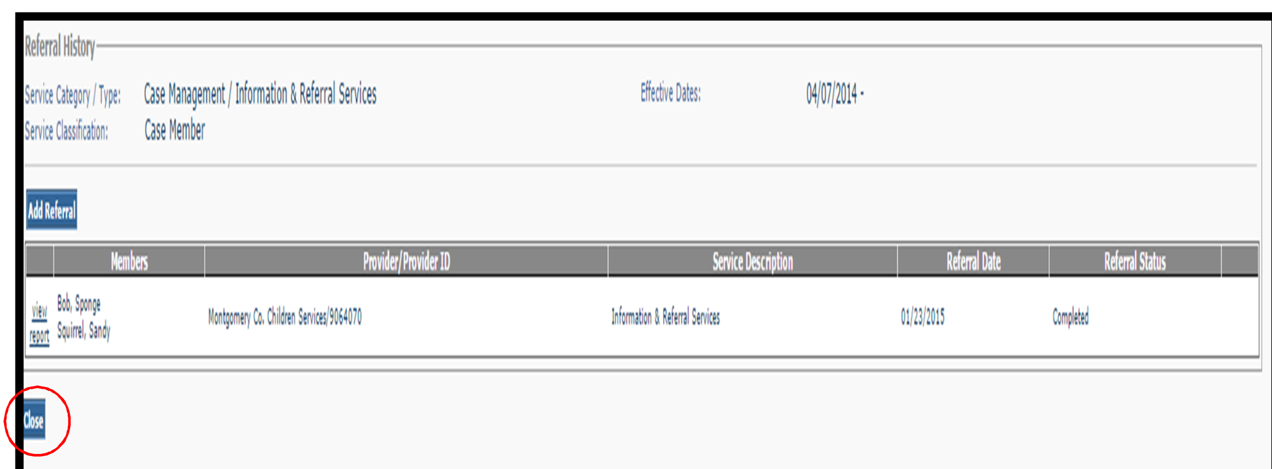
5. The Provider Match Search Criteria screen displays. Click the Search button.

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.

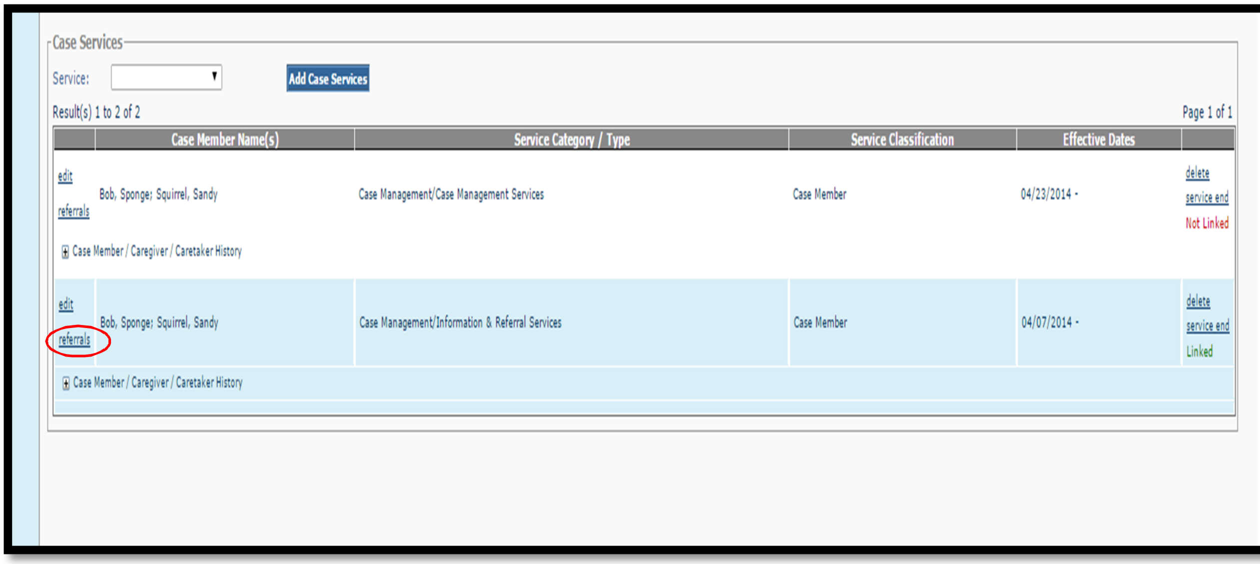
7. The provider(s) are now linked to the Service Referral. Enter narrative text (optional but will display on the referral report). The narrative box provides detailed information to the provider or case service member. This narrative will display for either the provider or case service member depending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



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



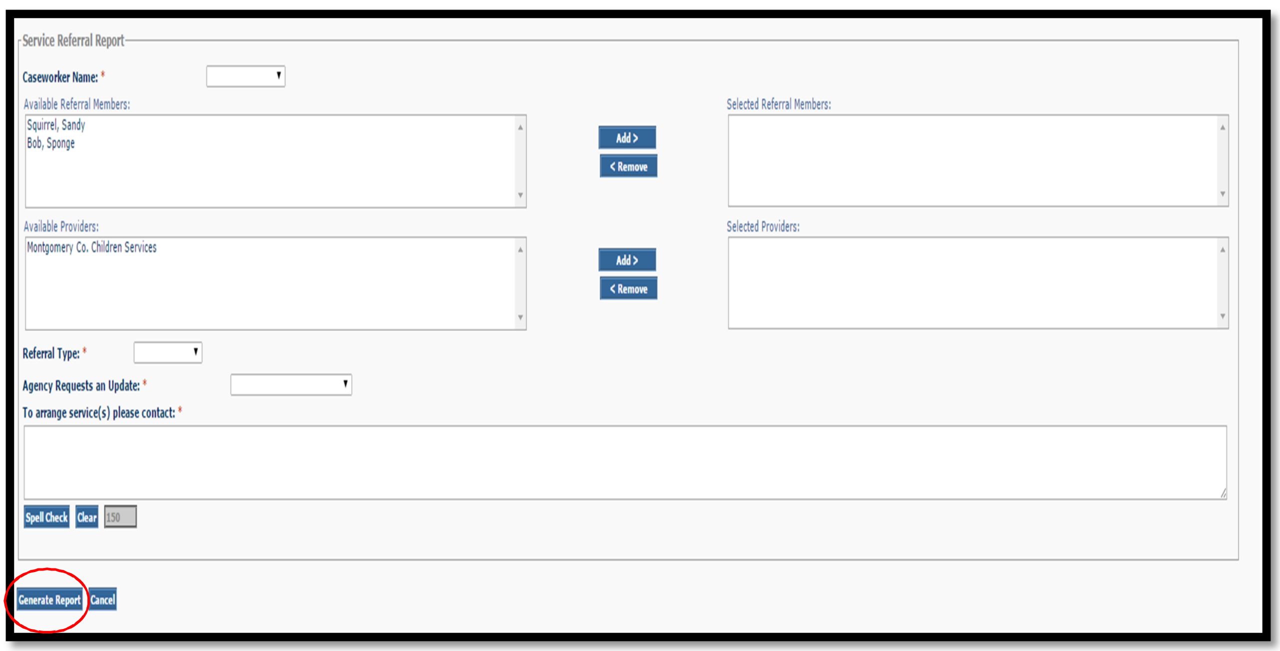
9. A Service Referral Report can now be generated. Click the Referral link next to the Case Service in which you are going to generate the Service Referral Report. (A Service Referral can include more than one provider.)



10. Click the report link to generate the report.

11. Click the Generate Report button

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.



13. Your report is being generated.