

Receive a Social Services Referral

Desktop Procedure



09.22.14 (v3)

OCCRN Program Description

Powered by AXEIUM, the Orange County Community Referral Network is a cloud-based, electronic referral system that is the result of a collaborative program to facilitate referral relationships by and between organizations that serve our safety net population.

It's as easy as 1, 2, 3 ... **Find → Review → Take Ownership!**

Step-by-Step

Login

ARS Login - Build 1.0.5142.37282

Orange County Community Referral Network
Innovation and Tools to Improve the Referral Process

Login:

Password:

Logon

FIND

Quick filters allow you to select from the most common criterion, i.e., who sent it; open/closed status; date ranges; taxonomy; and service area.

Grid filters allow additional and complex sorting on all available columns,

Right click, to see who sent the referral; export to Excel; change which rows show; and save or reset your layout.

- 1 Quick Filters
- 2 Grid Filters
- 3 Right Click, Context Menu

The screenshot shows a web application interface with filters and a data table. The filters include 'Referring Agency' (set to ALL), 'Status' (radio buttons for Open, Closed, All), 'Scope' (Referral Type: Social Svcs, Service, City), and 'Date Range' (radio buttons for All Dates, Specify Range; From: Mon 09/1/2014, Thru: Tue 09/30/2014). The table has columns: CreateDate, DaysOld, Client, ClientAge, Gender, Language, County, City, WorkflowLastStepName. A red circle '1' is over the 'Status' filter. A red circle '2' is over the 'Language' column header. A red circle '3' is over a context menu for the row with Client 'Maya, Karl' and Status 'Submitted'. The context menu includes: Created By: Karen Hoffman (714) 771-8000 x13920, karen.hoffman@stioe.org; Export to Excel; Show Chooser; Save Layout; Reset Layout.

CreateDate	DaysOld	Client	ClientAge	Gender	Language	County	City	WorkflowLastStepName
=	=	A	A	A	A	Orange	A	A
09/10/2014	3	Menendez, Kristine	33 Y	Male	English	Orange	Santa Ana	eMail Notification Se
09/10/20...	3	Maya, Karl	33 Y	Male	English	Orange	Santa Ana	Submitted

Double click a row to open the details page

The screenshot shows a data table with columns: CreateDate, DaysOld, Client, ClientAge, Gender, Language, County, City. A mouse cursor is double-clicking on the row with Client 'Maya, Karl'.

CreateDate	DaysOld	Client	ClientAge	Gender	Language	County	City
=	=	A	A	A	A	Orange	A
09/10/2014	3	Menendez, Kristine	33 Y	Male	English	Orange	Orange
09/10/2014	3	Maya, Karl	33 Y	Male	English	Orange	Orange

REVIEW & TAKE OWNERSHIP

REVIEW the information, and if candidate appears to be eligible, TAKE OWNERSHIP

Referral Information 9/12/2014 Screen Number

PM55b PM43 PM3

Karl Maya 01/01/1981 Age: 33, Social Svcs for Health Insurance Enrollment, from: St Joseph Hospital of Orange to: Social

Referral Information | Activity

Referral Type: Social Svcs

Demographic

Client Identification

First Name: Karl Middle: Last Name: Maya Gender: Male Date of Birth: 01/01/1981 Age: 33

Client Information

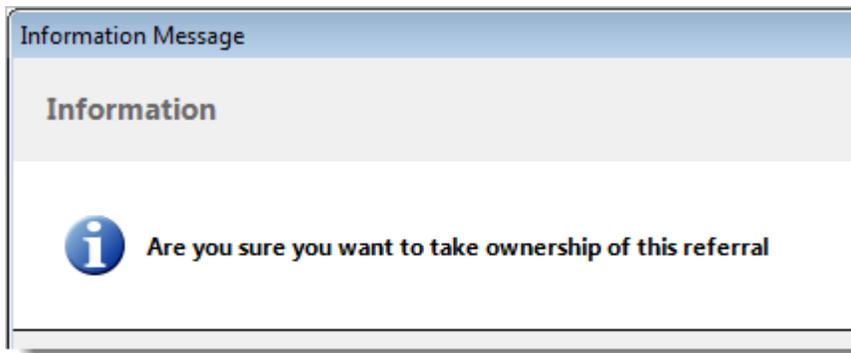
Home Phone: (111) 222 - 3333 x [] ! ?
 Work Phone: () - x []
 County: Orange CA
 City: Santa Ana
 Language: English
 Ethnic: Hispanic or Latino
 Race: White

Veteran
 Homeless
 eMail: []
 Reference #: [] (e.g., your MRN, Chart, Account ...)
 Authorization #: []
 Your Tracking #: [] (e.g., your system's referral number)
 Case Manager: Amy Vuong

Service

Service Requested: Health Insurance Enrollment Priority: Normal
 Reason for Referral: needs insurance. appears to quality for aca
 Priority Comment: []

Confirm your intent



NOTE that your action is recorded in the workflow activity log

ActivityDisplayDate	Activity Date	Referral Step	Comment
09/10/2014 8:45 PM	09/10/2014	Submitted	
09/10/2014 8:45 PM	09/10/2014	Submitted	Activity: eMail Notification Sent sent to: bmelgar@lestonnacfre...
09/10/2014 8:45 PM	09/10/2014	Submitted	Activity: eMail Notification Sent sent to: ibecerra@coccc.org
09/12/2014 6:32 PM	09/12/2014	Clinic Took Ownership	Took Ownership on: 09/12/2014 06:32, UserName: Maggie.M...

CASE MANAGEMENT

Referrals for which you take ownership, will now appear in your **Inbound Referral** queue.

The screenshot shows the 'Inbound Referrals' section of a software interface. On the left, there are three buttons: 'Create Referral', 'Outbound Referrals', and 'Inbound Referrals' (highlighted with a red box). The main area contains several filter sections: 'Clinic' (Coalition of OC Community Health Centers), 'Status' (Open, Closed, All), 'Date Range' (All Dates, Specify Date Range), and 'Scope' (Referral Type: ALL, Specialty, County: ALL). Below these filters is a table with columns: Status, Referral Type, Service Requested, Patient, Gender, Language, and a partial 'C' column. The table contains one row with a green status icon, 'Social Svcs' referral type, 'Health Insurance Enroll...' service, and patient 'Maya, Karl'.

Open the referral, and navigate to the Case Manager tab, assign a case manager ... and perhaps, use the note box to keep track of your progress

This screenshot shows the 'Case Manager' tab for a referral. At the top, the patient information is displayed: 'Karl Maya 01/01/1981 Age: 33, Social Svcs for Health Insurance Enrollment'. Below this are two tabs: 'Referral Information' and 'Activity'. Under 'Referral Information', there are sub-tabs for 'Demographic' and 'Case Manager' (the latter is highlighted with a red circle '1'). The 'Case Manager' field shows 'Maggie Moreno' with a dropdown arrow (circled with a red circle '2'). Below this is a 'Notes' section with a yellow background, containing the text '9/21/14 called Karl and left message' (circled with a red circle '3').

Now that you have assigned a case manager, when you open your Inbound Referrals, you have the option to filter the list.

This screenshot shows the 'Inbound Referrals' list with a filter dropdown menu open. The dropdown is titled 'Case Manager' and shows two options: 'Maggie Moreno' and 'Ed Gerber'. The table below has columns: Status, Docs, msgs, Referral Type, Specialty, Service Requested, and Patient. It contains two rows of referral data.

	Status	Docs	msgs	Referral Type	Specialty	Service Requested	Count	Patient
1	●	0	0	Social Svcs	Health Insurance, Enro...	Health Insurance Enrollment	1	Maya, Karl
2	●	0	0	Social Svcs	Health Insurance, Enro...	Health Insurance Enrollment	12	Morales, Javier

Return Ownership

If you later find out that this person is not qualified for your service you can return ownership

The screenshot shows the 'Referral Information' window for Karl Maya. The 'Return Ownership' button is highlighted with a red box. Below it, an 'Information Message' dialog box asks 'Are you sure you want to return ownership?'. To the right, a 'Question Message' dialog box prompts for a 'Reason for return' with the comment 'Karl does not have transportation perhaps'.

After you return ownership, the referral is back in the Social Services queue ...

Activity		
Activity Date	Referral Step	Comment
09/10/2014	Submitted	
09/10/2014	Submitted	Activity: eMail Notification Sent sent to: bmelgar@lestonnacfreeclinic.or...
09/10/2014	Submitted	Activity: eMail Notification Sent sent to: ibecerra@coccc.org
09/12/2014	Clinic Took Ownership	Took Ownership on: 09/12/2014 06:32. UserName: Maggie Moreno. Use
09/17/2014	Clinic Released Ownership	Karl does not have transportation, perhaps someone closer can help him

Please keep in mind that when you return ownership that your case management notes are not deleted and will be there for the benefit of the next person



Reminder: The notes follow the referral, so do not write anything that you do not want somebody else to read

Decline Referral

However, you can also choose from – and record – a different workflow activity, for example, *if the candidate is not eligible for this service – from anybody* the better choice would be to DECLINE the referral, and provide a comment.

The screenshot shows a 'Referral Activity' dialog box overlaid on a table. The table has columns for 'ActivityDisplayDate', 'Activity Date', 'Referral Step', and 'Comment'. The dialog box has a 'Save' button and a 'Cancel' button. The 'Activity Date' is set to 09/12/2014. The 'Referral Step' dropdown menu is open, showing options: 'Referral Reviewed by Provider', 'Appointment Set', 'Appointment was Cancelled', 'Referral was Completed', 'Referral was Cancelled', and 'Referral was Declined'. A red arrow points to the 'Referral was Declined' option.

This is a close-up of the 'Referral Activity' dialog box. The 'Activity Date' is 09/12/2014. The 'Referral Step' dropdown menu is set to 'Referral was Declined'. The 'Comment' field contains the text: 'Karl does not qualify for ACA because combined income exceeds maximum allowable'.

Activity		
Activity Date	Referral Step	Comment
09/10/2014	Submitted	
09/10/2014	Submitted	Activity: eMail Notification Sent sent to: bmelgar@lestonnacfre...
09/10/2014	Submitted	Activity: eMail Notification Sent sent to: ibecerra@coccc.org
09/12/2014	Clinic Took Ownership	Took Ownership on: 09/12/2014 06:32, UserName: Maggie.M...
09/12/2014	Referral was Declined	Karl does not qualify for ACA because combined income excee...

Complete Referral

Lastly, and VERY IMPORTANT, when you complete the referral, record the good news.

Statistical reports keep track of open/closed, how long open, how many sent/received, from whom/to whom, and so forth ... i.e., information that is typically requested by funders.

The screenshot displays a software interface for managing referrals. At the top, there are buttons for '+ New', 'Cancel Referral', 'Delete Activity', and 'Reopen Referral'. Below these is a patient header for Kristine Menendez, born 01/01/1981, age 33, with a referral for 'Social Svcs for Health Insurance Enr'. The main area is divided into 'Referral Information' and 'Activity' tabs. The 'Activity' tab shows a table of activities:

ActivityDisplayDate	Activity Date	Referral Step	Comment
09/10/2014 6:44 PM	09/10/2014	Submitted	
09/10/2014 6:44 PM	09/10/2014	eMail Notification Sent	Activity: eMail Notification Sent sent to
09/10/2014 6:44 PM	09/10/2014	eMail Notification Sent	Activity: eMail Notification Sent sent to
09/12/2014 7:25 PM	09/12/2014	Clinic Took Ownership	Took Ownership on: 09/12/2014 07:25

A 'Referral Activity' dialog box is open, showing the date 09/12/2014, the step 'Referral was Completed', and a comment 'CalOptima approved Karl.'.

Contact Information

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Document Information

Document is available for general distribution

Information is current as of September 22, 2014

