CONNECT Referral System

Quick Reference Guide 2017

For assistance, contact:
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1. Incoming Referral

- Gatekeeper logs in to CONNECT and either accepts or rejects incoming referral.
- If referral is accepted, assign it to the appropriate provider.

2. Referral Management

ASSIGNED REFERRALS

-Log in to CONNECT and click on **Referral** tab on top menu.
-Click on **Assigned Referrals** button on left.

- All of your assigned referrals are listed here.
- You can open a referral by clicking on the specific name (highlighted in blue).
- All the referral information can be reviewed by clicking through **Personal Info, Parent/Guardian Info,** and **Referral Info** tabs at the top of the referral form.

UPDATING REFERRALS

Once in the referral you wish to update, click the gray **Edit** button in the upper right corner of the blue menu bar. Update the status of a referral by clicking on **Referral Status** tab at the top of the referral form.

- Document when initial contact was made by inserting the date in **Initial Contact** section.
- If unable to reach, document attempts to contact in the notes section. Insert date and how contact was attempted. A historical log will be kept of the attempts.
- Once contact is made, document whether client enrolled or declined services in the **Service Status** section. Continue to update the **Referral Status** as the referral status changes.

SERVICE UPDATES

Once in the referral you wish to update, click the gray **Edit** button in the upper right corner of the blue menu bar. Update the **Service Status** by clicking on **Referral Status** tab at the top of the referral form. This will let the referring agency know how the client is progressing in services.

- Under the **Service Update** section, select the option that describes the client's progress in service.
- You can add a brief note also to tell the referring agency how things are going. If you need to make an additional referral, you can put that information here, too.

3. Making a Referral

- Provider or Gatekeeper logs in to CONNECT.
- Step 1, search for your subject; build a profile if subject is not currently in CONNECT.
- Step 2, complete a Release of Information (ROI) .
- Step 3, make the referral.

SEARCHING FOR/CREATING A SUBJECT

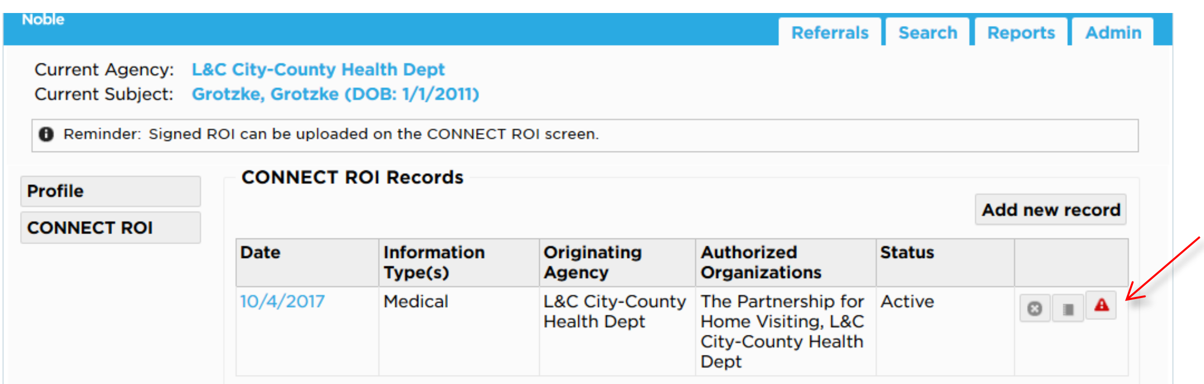
Click on search tab on top menu:

- Enter Last, First name & DOB – click **Search Subjects**. If the client does not already exist in the system, you will be prompted to add a new subject.
- Once you have added the demographics, the system will create a profile for the client – always perform a search first in order to prevent duplicates.

COMPLETING A RELEASE OF INFORMATION (ROI)

- With subject's **Profile** screen open, click **CONNECT ROI** button on upper left.
- Click **Add New Record** button on upper right of **CONNECT ROI Records** screen.
Client/Parent/Guardian fills out ROI and signs. Keep hard copy in the client file.
- Fill out electronic ROI and click **Complete** in upper right of **CONNECT ROI** screen.

- ROI is good for one year and then must be renewed if the referral is still open. A reminder email will be sent prior to the renewal date.
- When an ROI is set to expire, the provider must add a new ROI, but the need to create a new referral each year has been eliminated as the system now extends the original referral.
- The client/parent/guardian can revoke the ROI at any time.
  **If the existing ROI has been revoked, it is no longer valid*



New **optional** feature: Scanned copy of the original signed ROI can be uploaded at this time. Simply enter the ROI electronically and have it signed by the client/guardian as usual, then scan the document. Click on the red triangle button next to the **ROI Report** button and **Attach ROI** as a PDF. **Must complete electronic ROI before upload option is available.*

- ***Important tip:*** You may notice that once you input the ROI, instead of the screen that used to display (where you could begin your referral), you remain on the **CONNECT ROI screen**. The reason for this is the new *optional* feature described above that allows the upload of the signed ROI. Now, in order to create the referral after inputting the ROI, simply click on the subject's name to get to their **Profile screen** and click **Create Referral**.

MAKING THE REFERRAL

From the subject's **Profile** screen, enter a new ROI. Once the ROI has been captured, you will be able to start a new referral by clicking the subject's name to get back to the **Profile** screen, then clicking the **Create Referral** button. .

- Select the agency/agencies for the referral and click **Create**. Complete the referral form that appears and click **Submit**. **Referral forms may differ from agency to agency.*
- If multiple agencies were selected, a referral form must be filled out for each agency. An email is automatically sent to the agency you referred the subject to.

  - You may monitor the status of the referral by viewing it on the **Profile** screen or dashboard.
  - See the **User's Manual** found at the top next to **Log Off [?]** for detailed instructions.