UWITS Tip Sheet

Client Referral

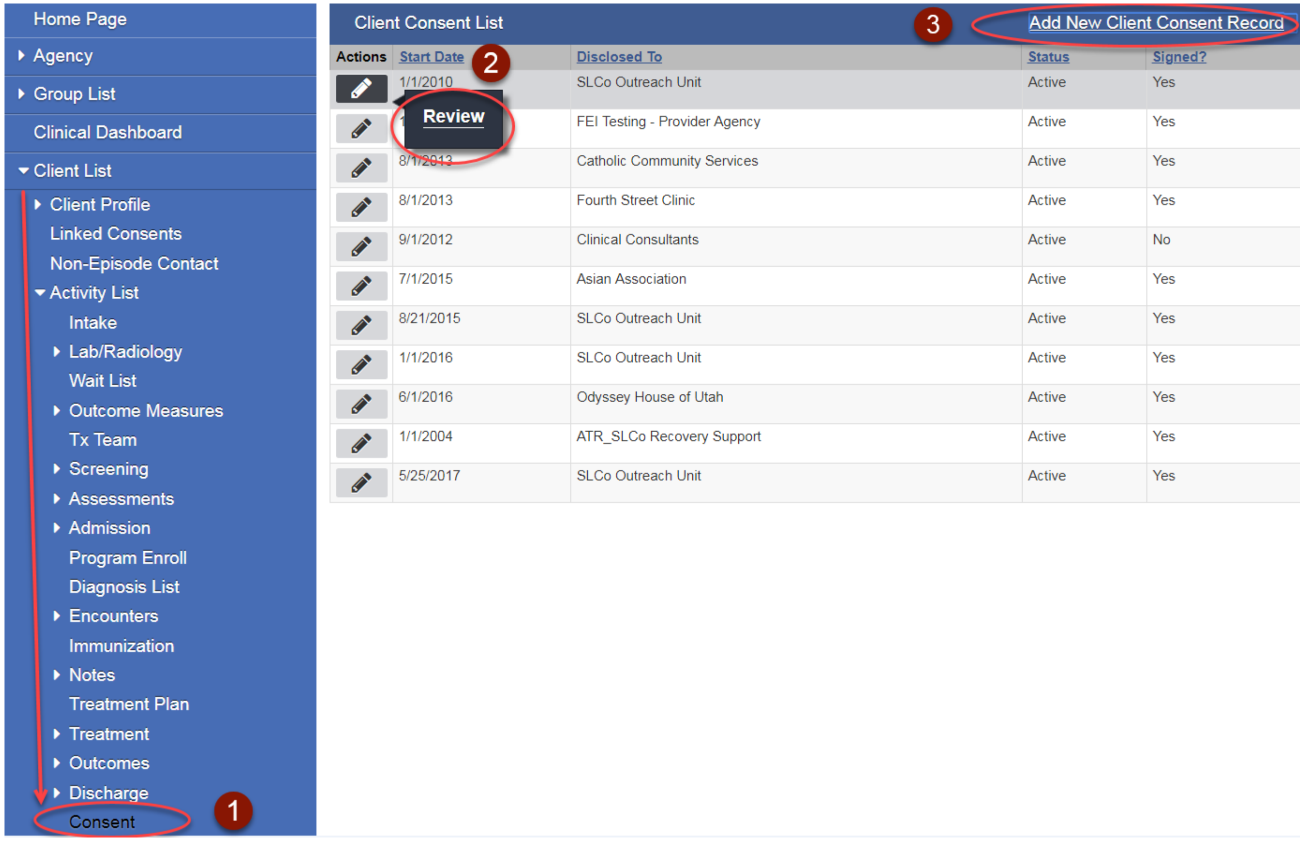
Consent **Referral** **Accepting Referrals**

This tip sheet focuses on how to share client records and make client referrals using UWITS.

Total Pages: 6

UWITS

Client Referral Consent



Entry Steps: Client Profile, Intake. Additionally, if your agency has a standard set of information that is regularly shared with one or all agencies when making a referral, an Agency Disclosure Agreement(s) should be established prior to initiating client consent. Consents are required before sharing any information about a client with anyone outside the agency. In UWITS, an independent consent/ disclosure must be established before information can be shared.

1. Navigate to client's Activity List. Click **Consent** from the Left Menu. Existing consents will be listed in the Client Consent List.

2. Review Existing Consents: There may be several consents already on record. Click **Review** to review any existing consents. ***Note***: make sure there is no active existing consent with the agency you are about to initiate consent to. If a client consent has been revoked, it will be noted in the Status.

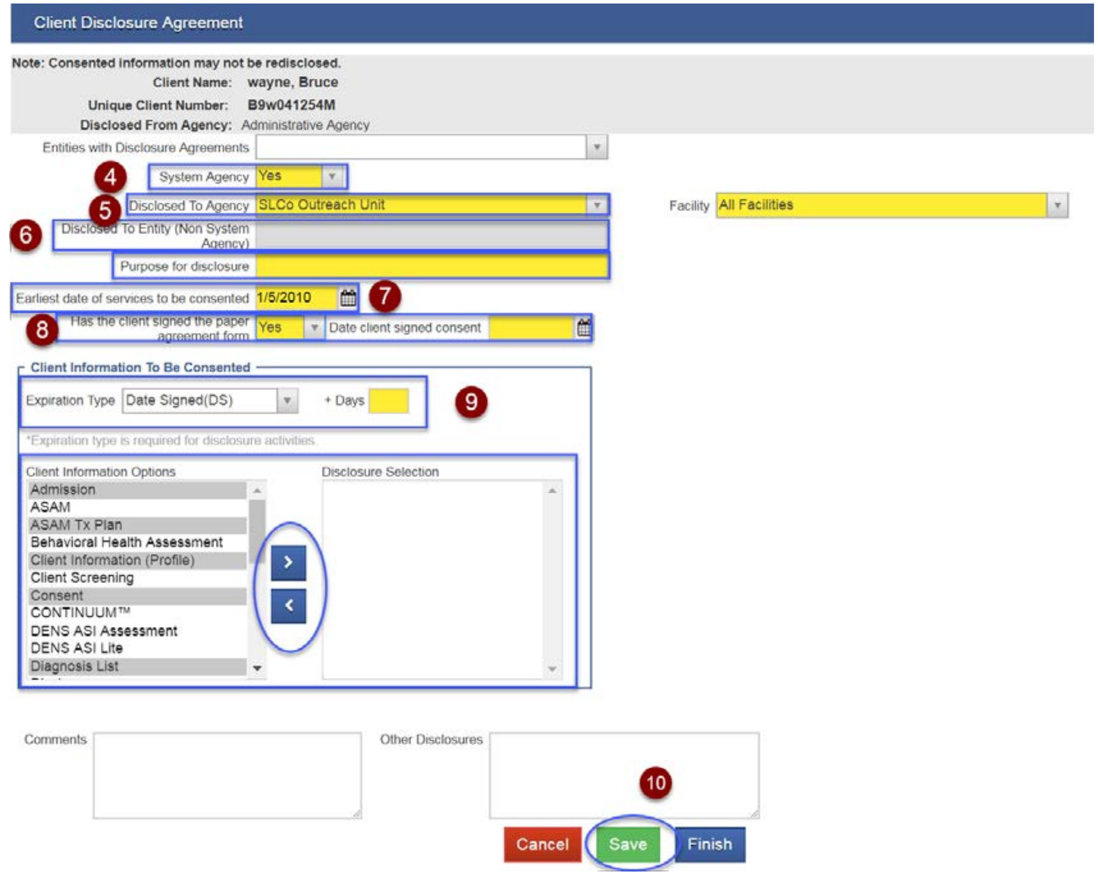
3. To initiate client consent, click **Add New Client Consent Record** hyperlink.

4. <u>System Agency</u>: Select this if you will be sharing this information with an agency that is using or not using WITS. **Note**: If you select yes, "Disclosed to Entity (Non-System Agency)" will be grayed out.

5. <u>Disclosed To Agency</u>: Select the agency you will share information with (only one agency per consent is allowed). You will get a warning message if you have not established a Disclosure Agreement with this Agency in red that says "No Agency Consent Policy Exists.

6<u>. Disclosed To Non System Agency</u>: Document the sharing of information with agencies not using WITS, you may select "Non System Agency" and enter the agency. If System agency is yes, then "Disclose to Agency" will be grayed out) **<u>Enter the Purpose For Disclosure.</u>** Type the reason for disclosure. For example, "court records" "police investigation**."**

7<u>. Earliest Date of services to be consented</u>: The consent date is the date that triggers the sharing of information (i.e., if a user enters 1/15/10, only information entered on 1/15/10 and forward from the client's episode will be shared-nothing entered prior to 1/15/10 will be shared.



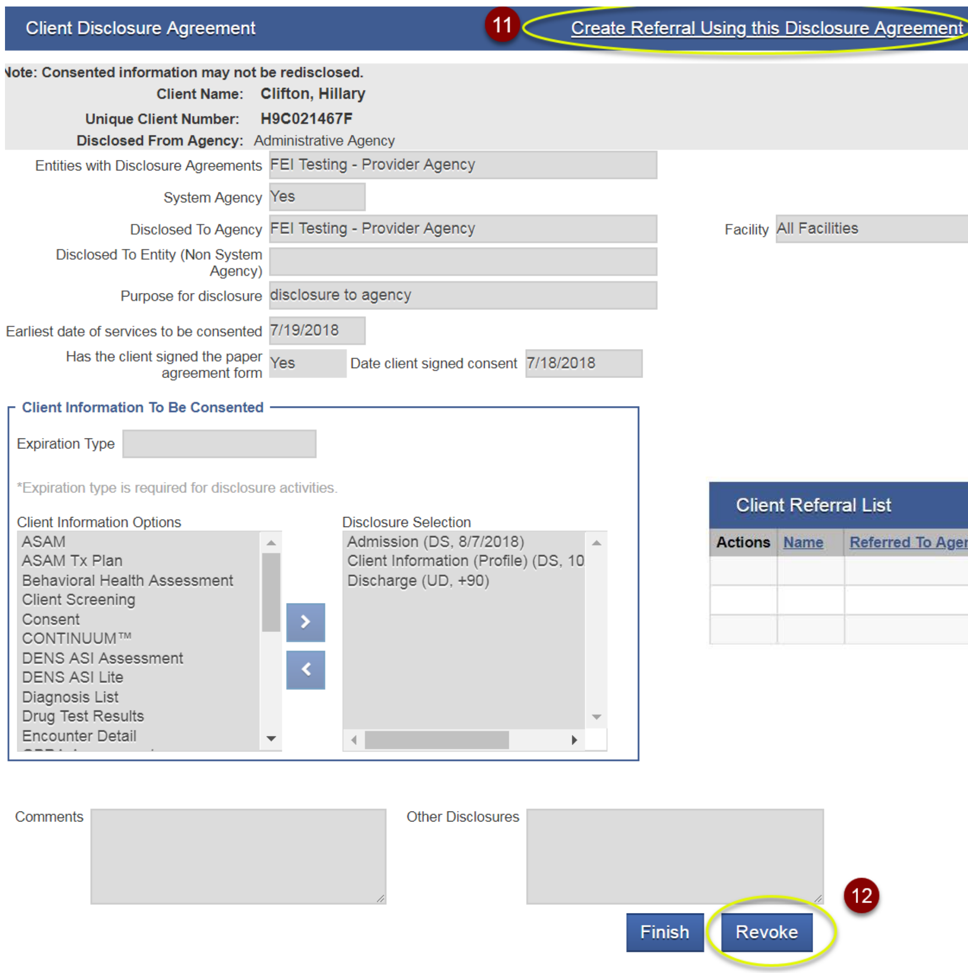
8. <u>The "Has the client signed the paper agreement form"</u>. If client has signed the paper form select **"<u>Yes</u>".** If this is not marked "**<u>Yes</u>**" the agency you are consenting to will not be able to view the consented data.

9. **<u>The Client Information Options</u>** may be included on a client by client basis using the mover boxes to add information to be shared. Elements selected need to be moved to the **Disclosure Selection** with the arrow buttons**. Note:** an expiration type must be associated with each element of information selected in the consent.

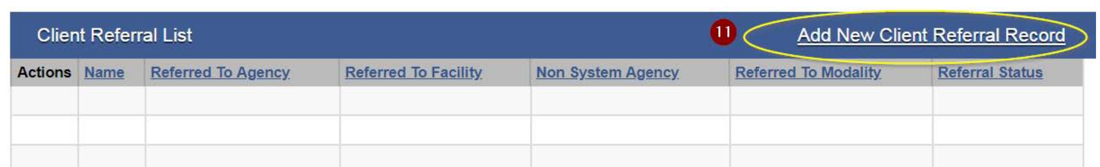
10. Once the Screen is completed click "**<u>Save</u>**". ***Note:*** By clicking **<u>"Save"</u>** the record becomes un-editable and this consent must be revoked and a new consent must be created if any changes need to be made. At this point, information has been disclosed to the other agency.

11. Create a Referral using this Consent: Click on the link **Create Referral Using this Disclosure Agreement** or go to the Left Menu and click **Referrals** to access the Referral List.

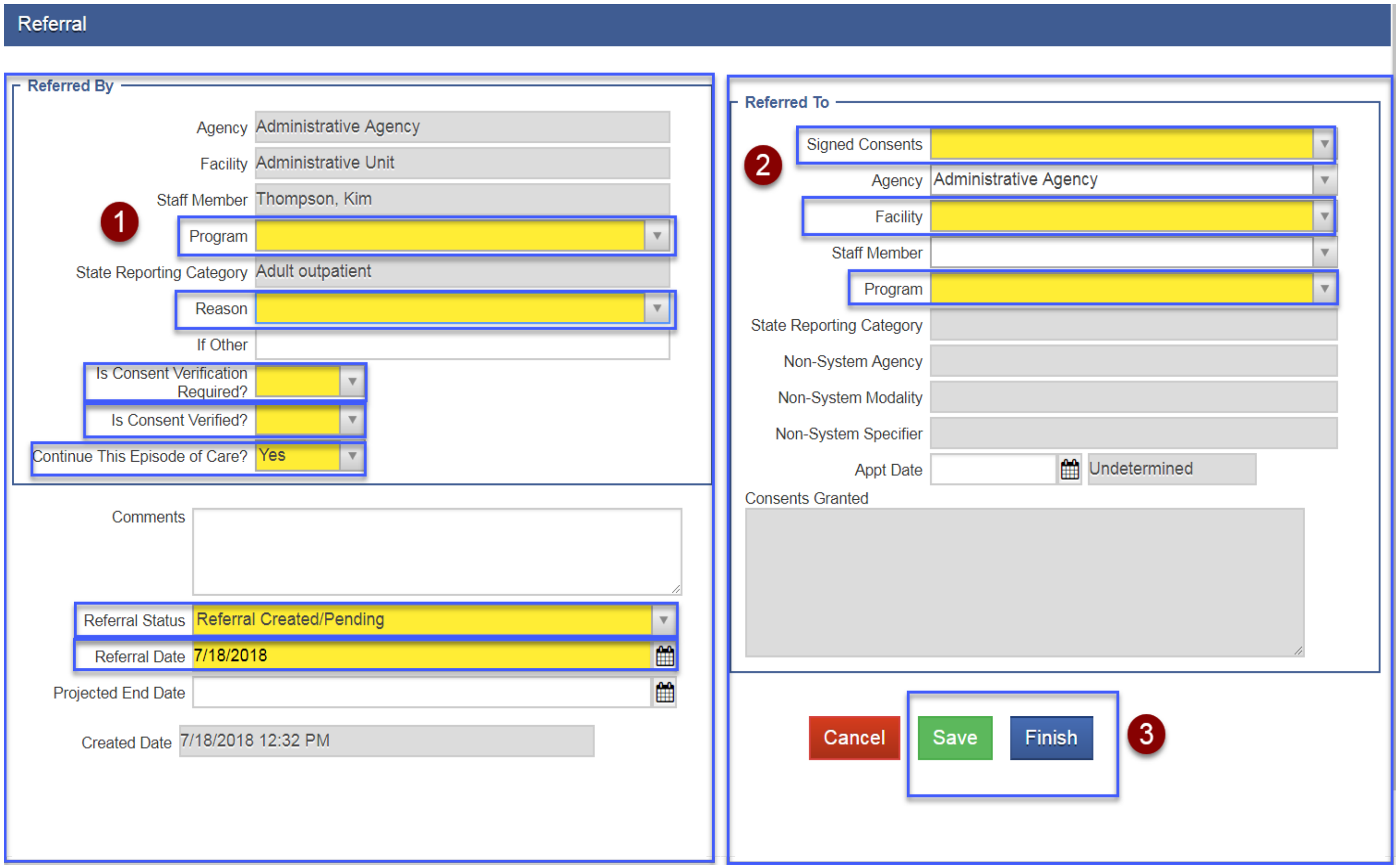
12. Revocation: A client may revoke consent prior to its expiration. To revoke a consent, click the **Revoke** button at the bottom of the screen. The status of the consent will change to 'Revoked' on the Activity List.



Note: Revocation is not retro-active. Any information that was already shared prior to revocation will continue to be shared.



Referrals



The client disclosure agreement allows you to create a referral for the client. Many of the fields on the referrals screen are pre-populated.

1. 'Referred By' column: Select a 'Reason' for the referral from the drop-down box. Select 'Yes' for "**Is Consent Verification Required**?" Select 'Yes' for **"Is Consent Verified**?" Select 'No' if client is not enrolled in a Program for **"Continue this Episode of Care**"? Enter any comments you wish to share with the agency you are making the referral to in the '**Comments**' box. Referral Status is pre-populated with **'Referral Created/Pending'** **do not change.**

2. 'Referred To' column: Enter the Facility, the Program, and the Appointment Date (if known). Review the '**Consents Granted**' to ensure this is the correct consent.

3. Click the '**Save'** button then **'Finish"** button. Once you have clicked the '**Finish'** button the referral is automatically sent, and you will be taken to the Client Referral Status screen.

Accepting Referrals (Referrals In)

*Referrals coming into and leaving your agency can be tracked by accessing 'Referrals' from the 'Agency' section of the Left Menu. (**Referrals In** or **Referrals Out**).

1. Accepting client referrals is considered an Agency function. Select '**Agency'** from the left menu.

2. To view referrals made to your agency, click **Referrals In**.

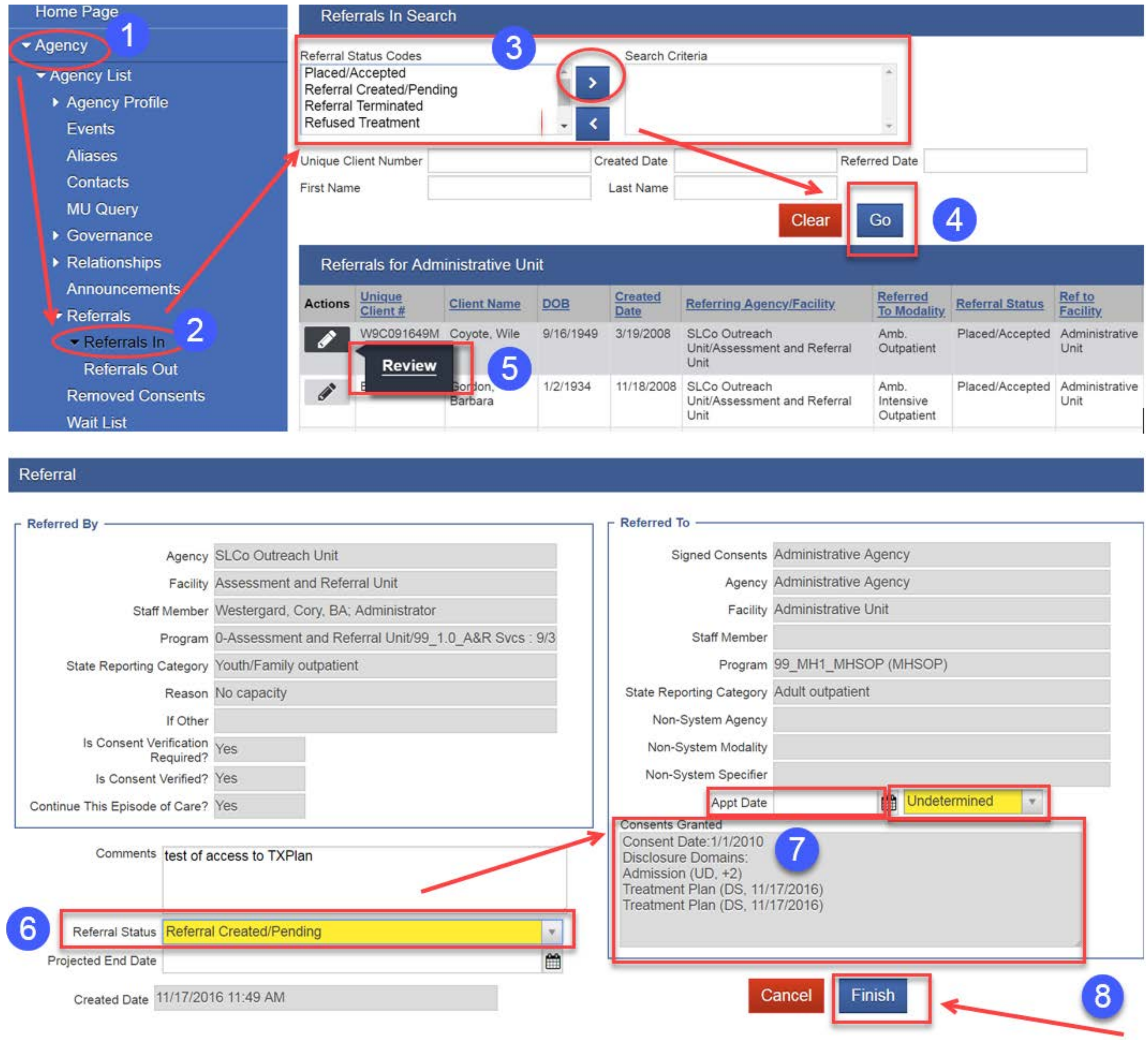
3. To begin, select the **Referral Status Codes** and move them to the **Search Criteria** box(using the arrow). **Note**: Searching with no criteria selected will show results with all status codes.

4.Then click **Go**. This will generate a list of clients referred in to your facility by status code.

5. To view a referral, click **Review** next to the appropriate client. This will generate the Referral screen displaying the referral information, including any comments entered by the referring agency.

6. To accept a referral, select **Placed/Accepted** for **Referral Status**.(locks down the referral and no changes can be made). Enter the Appointment Date and status (if known). Or you may select another **Referral Status**. **Note:** If the client already exists in your agency, select **Rejected by Program**. This removes the referral from the Referrals **Created/Pending** list and notification from the home page. Screen. However, you will still be able to view the consented information by the referring agency

7. To view the information the referring agency agreed to share with you, use the scroll bar to view consented information under **'Consents Granted'**.



8. Click **Finish**. This will take you immediately to the Client Profile screen. Once a case is accepted, follow the procedures for entering client data in your agency.