Referrals

Battle Creek Community-Wide Non-Profit Database

Prepared and managed by Goodwill Industries of Central Michigan's Heartland

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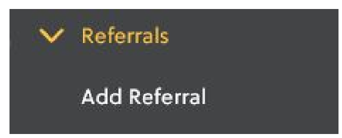
Introduction

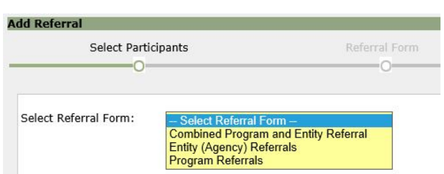
Making a Referral in ETO is a great way to document when, how, and why you refer a participant to another community partner or to any other outside agency. It's also the easiest and best way to get a participant enrolled in another program, particularly from *Community Pre-Enrollment* to the program they will work with, documenting the Referral as you go. Adding Referrals may seem daunting, but it is actually quite easy and once you've done it a few times will seem like second nature. In this chapter we'll look at the process first, describing it in detail, and then a step-by-step instruction guide (for reference) will follow.

The first thing to note is the Referrals section on the Navigation Menu Bar.



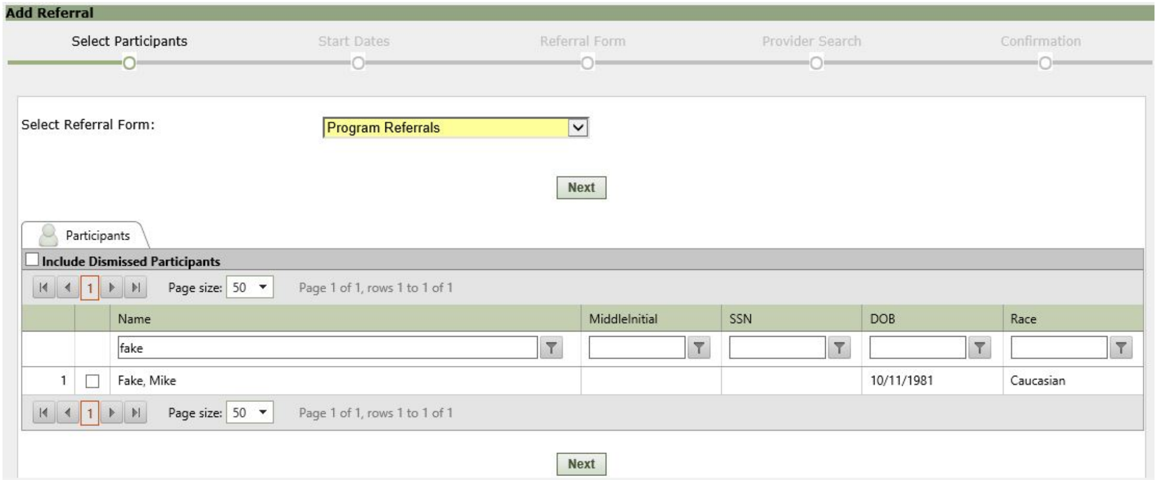
Add Referral

You can make a Referral in ETO at any time, either immediately after adding a new participant or later on when they are ready to move onto another program.



Begin the process by selecting "Referrals | Add Referral" from the Navigation Bar on the right side of the screen. ETO will go to the Add Referral screen, showing the first step. A drop-down list box will appear: "-- Select Referral Form --". If you want to refer only to another program in ETO, select "Program Referrals". For any outside agency, select "Entity (Agency) Referrals). If you want to refer to both other programs and to outside agencies, select "Combined Program and Entity Referral".

All participants currently enrolled in the program you're using will appear on the screen (you can add more, or make a Referral for a dismissed participant, by checking the "Include Dismissed Participants" box near the top of the list) from which you can select a participant to make a Referral for.



You can search by scrolling through names, or use the filters across the top to narrow down the choices.

To scroll through the names, use the navigation controls at the top or bottom

of the list. With these controls you can (in order) go to the first page (|◄), go to the previous page (◄), select a page number directly (1 2 3 4), show the next page number (…), go to the next page (►), go to the last page (►|), and change the number of names visible on the page (Page size). The page size choices are 10, 20, 50 (default), 75, 100, or All. The names are listed in alphabetical order by last name and include Address, DOB, and SSN to assist you in making a selection.

It's far easier and quicker to use the filters at the top of the list. Type part or

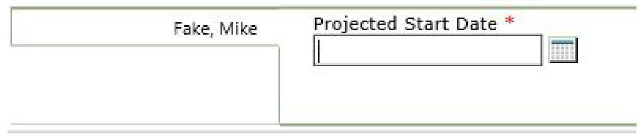
all of the participant's name, address, social security number, or date of birth in the appropriate filter box and either click the filter button  or hit the <Enter> key and ETO will display only the names that meet the criteria you entered (as in the example below).

When you've found the participant you want to make a Referral for, click the check-box to the left of their name (you can select only one participant)

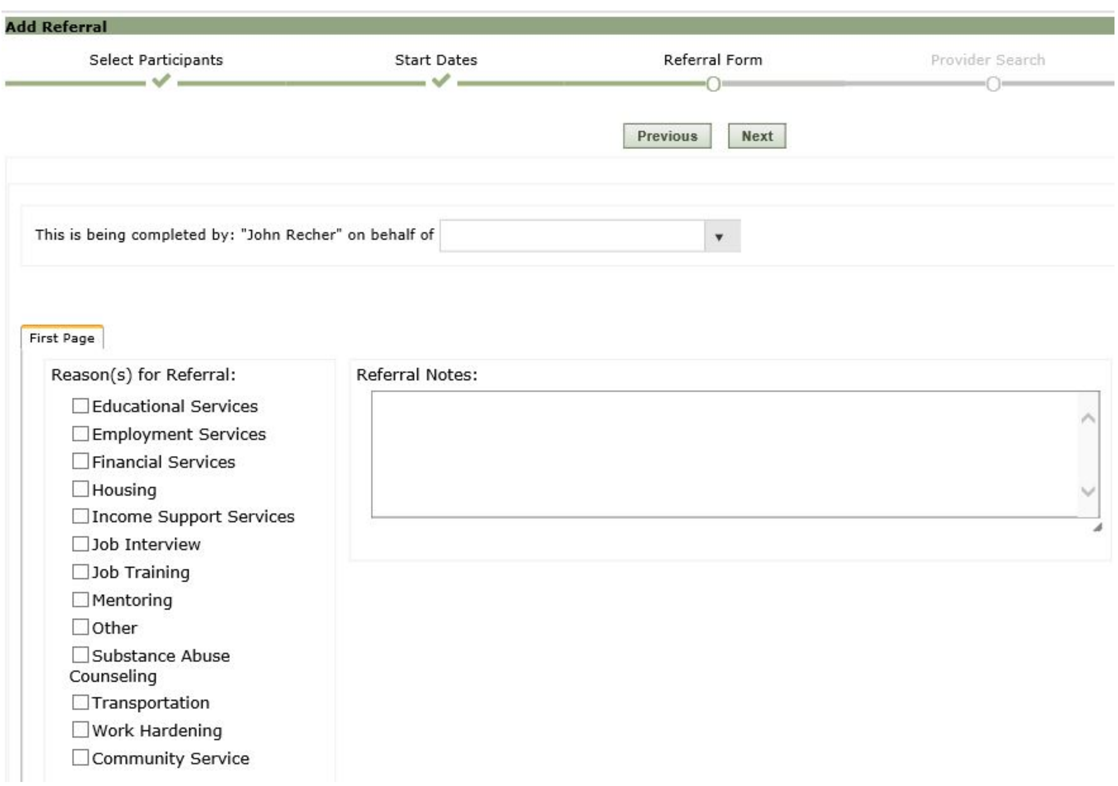
and then click the "Next" button at the top.

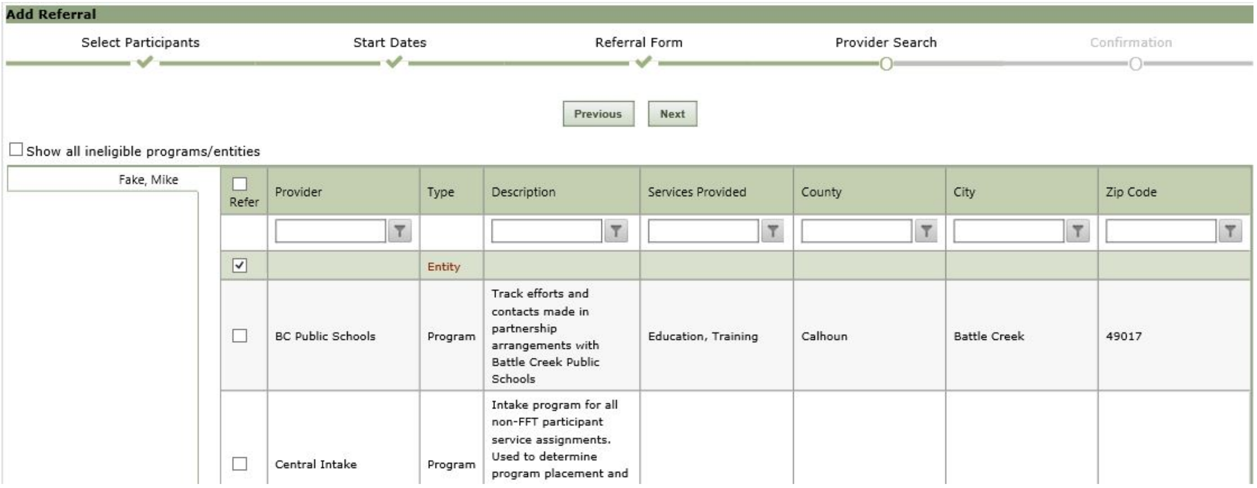
NOTE: There is a system lag once you click the "Next" button at the Participation Selection screen of 5-15 seconds. Though disconcerting, this is normal and should be accounted for.

ETO will advance to the next step, Start Dates. The selected Participant's name will appear on a tab next to a date control. This date control is named by the system—"Projected Start Date"—and cannot be changed, so it may not make sense in the context of this page on the form. This date is for programs that are set to automatically accept referred participants, as most do, and will become the Enrollment Date for the Participant in that ETO program. This field is blank by default and can be a future date or a past date (if using a future date, the Participant will be as if not enrolled until that date arrives, at which time they will automatically be enrolled in the program). Enter the date you want the Participant to be enrolled, whether they will be accepted or not, directly into the date box or use the calendar tool to the right to pick any date. Click "Next" to continue.



Next, ETO will display the basic Referral form. There are only two fields and both are optional. Complete the form with the appropriate Reason(s) for Referral (see step-by-step instructions for detailed description of the fields) and click the "Next" button. If you make a mistake, you can also click on "Previous" and ETO will go back to the Participant Search screen, with the same participant still checked. The "Previous" button is available on each step of the process.





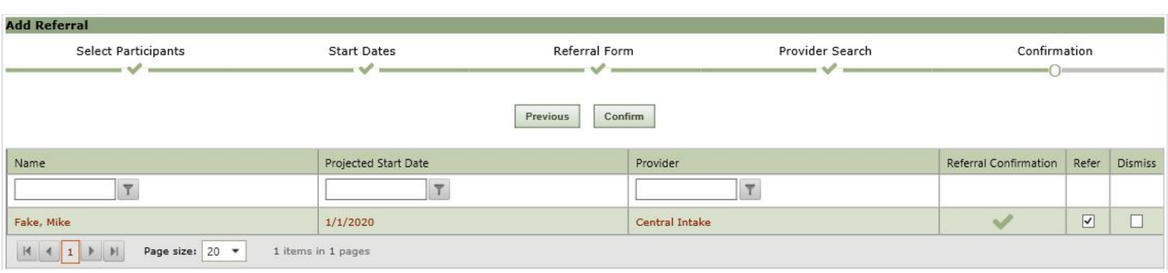
The next screen is the Provider Search screen. This screen shows all the entities that are listed in ETO for the current program for the two Referral Forms that include Entities. Only agencies and programs not previously referred to this participant will appear in this list.

The list of Entities to refer to is extensive, though not exhaustive. Program Managers should be able to add new Entities should one you need not be listed in ETO (or add the necessary attribute). If not, or if preferred, the ETO Administrator can make the changes or additions for you.

The same navigation controls are found at the bottom of the Provider list, or you can use the filter boxes at the top. You can check more than one entity and/or program to make a Referral to more than one at a time. Once you've found and checked the agency or programs, click the "Next" button at the top of the page to continue and ETO will take you to the Confirmation page.

The last step of the process is to confirm your choices. On the Confirmation page, ETO will show the participant's name and list the agency(s) and/or program(s) selected for referral.

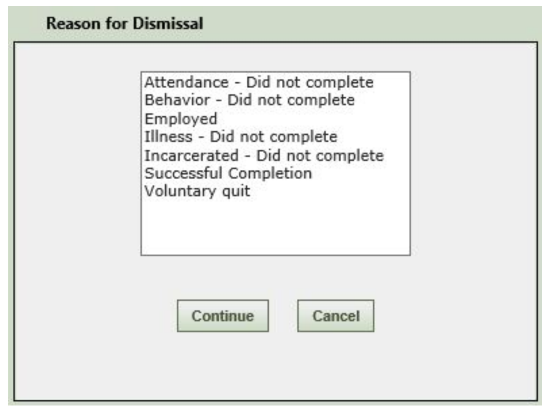
A green check mark should appear in the third column for each or the agencies listed. This indicates that ETO *can* make the referral. A red 'X' would



indicate that there is a problem with the referral and ETO will not be able to complete the Referral to that agency.

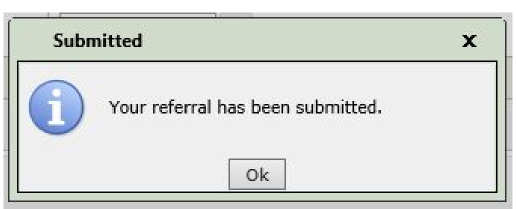
The fourth column contains a check-box to continue the Referral for that agency. This is used when you've selected more than one agency or program to refer to and you want to confirm confirmation for some but not others. The box is checked by default. To cancel the Referral for any one agency or program, uncheck the box.

If the agency is another ETO program, a check-box will appear in the fifth column giving you the option to automatically dismiss the participant from the program you are making the Referral *from*. For example, you've sent a participant over to Goodwill's FOC for job coaching and they have completed the program they were enrolled in with your agency. To dismiss them at the same time you are making the Referral, check the box in this column and click the "Confirm" button.



If you chose to dismiss the participant, a modal window will pop up asking for a reason for the dismissal. This gives you the chance to cancel, in case of error or if you've changed your mind. To dismiss, select a reason from the list and click on the "Continue" button.

Whether you chose to dismiss the participant or not, a modal window will pop up confirming the Referral. There is no confirmation of a dismissal when you select to do so. When you click on "Ok", ETO will return to the participant selection page where you can add another Referral if needed, or you are free to go on to another task from there.



If you made the Referral to another program, ETO will send an email to the listed Program Manager for the program you made the Referral to advising them of the Referral. Once they've accepted or rejected the Referral, ETO should also send an email back to you to let you know the status.

View Pending Referrals

It's good practice to check on a regular basis to see if you have any new pending Referrals for your program that you need to consider. This is up to your agency to determine when and if this is to be done regularly, daily, weekly, or another interval.

When a Referral is made to your agency, the Program Manager listed in ETO for the receiving program should receive an email advising of the Referral. To check for a new Pending Referral, click on View Pending Referrals under Referrals on the Navigation Bar to the right of the screen. The Pending Referrals screen will open.

Referrals to FFT Counseling

Pending Referrals

Name	Referring Program	Referring Site	Services Needed	Referring Date	Program Start Date	Approval Status	Take Action
Fake, Mickey M.	Community Pre-Enrollment	BC Community Access		12/3/2018	12/3/2018	None	

1 Page size: 20 1 items in 1 pages

The Pending Referrals screen will list the participant's name(s), the program they were referred from and the site they are part of, a column that will be blank, and the Referral date.

The sixth column, "Program Start Date" contains a control you can use to set the date they were enrolled in the program. This date will default to the current date, but can be set to a past or future date. There's also a column showing the Approval Status.

The last column, "Take Action" has four icons, the first three will accept (green check mark), reject (red X), or redirect (blue curved arrow) the Referral. The fourth icon, looking like a tiny bar chart, will open a report showing the details of the Referral (the answers to the questions answered on the Referral Form). See the step-by-step instructions for details on these actions.

If a future date was set when the Referral was made, a second tab—"Future dated acceptees"—will appear behind the "Pending Referrals" tab.

Referrals to Central Intake

Pending Referrals | Future dated acceptees

Name	Referring Program	Referring Site	Services Needed	Referring Date	Program Start Date	Approval Status	Take Action
No records to display.							

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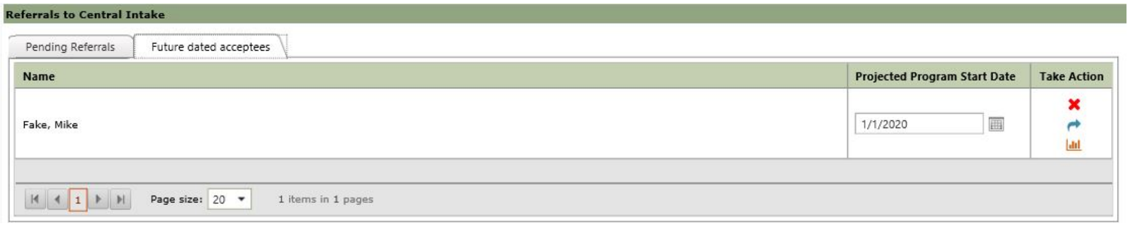
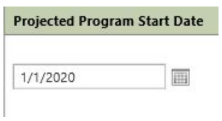
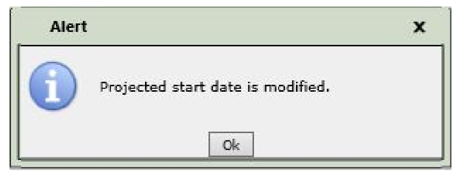
Even if the Referral was automatically accepted by the receiving ETO program you can see the information for the Referral by clicking on the new tab. While the same Take Action icons will appear on the page, the only other



information that will appear is the Participant name, the future program start date, and the action icons.

Again, though the Participant may have already been automatically accepted by the ETO program, you ***can*** still change the start date on this page. Tab into or click on the "Projected Program Start Date" and type the date you want to use as the new start date, or use the date control to select a date. ETO will update the enrollment information for the participant and a modal window will pop up to confirm success. If the new date is either the current date or previous, ETO will automatically enroll the participant as well.





Again, when the Referral is accepted or rejected an email is sent automatically by ETO to the person who made the Referral advising them of your action.

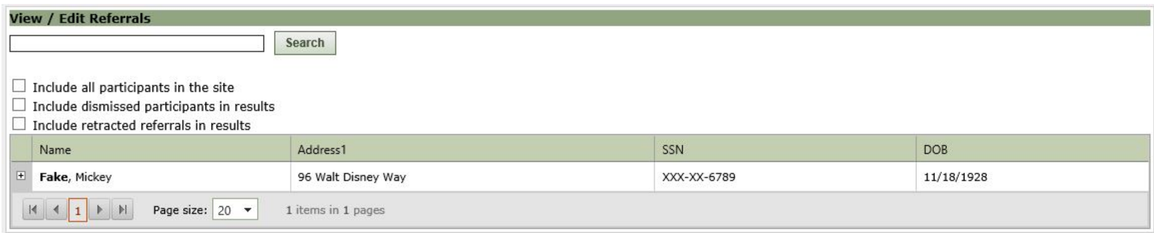
View / Edit Referrals

When you need to check the status of a Referral you or one of your staff have made, or show a Referral to an outside agency as accepted, you can do this through the View / Edit Referrals page. When you make a Referral to another ETO program, staff on the receiving end will mark them as accepted or rejected (or ETO will automatically accept them for some programs). For referrals to outside agencies (Entities), you will have to go back in and edit the Referral to show them accepted, rejected, or redirected if you want or require documentation of the result.

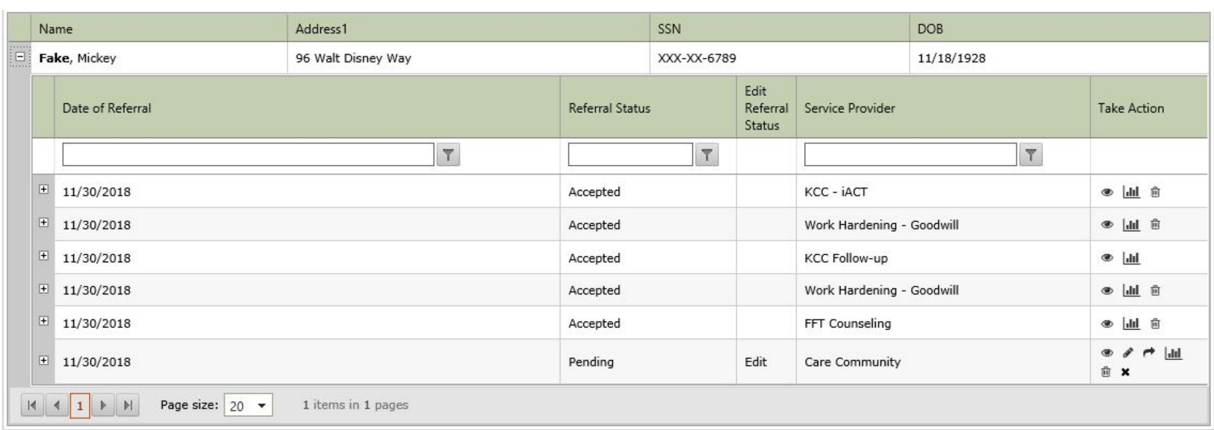
Showing the result can be helpful in a number of situations. For example, you send a participant to an employer for a job interview. When you find out the result of the interview you can go back into the Referral and show them accepted (they got the job) or rejected.

Select View / Edit Referrals from the Referrals heading on the Navigation Menu Bar to the right of the screen. ETO will open the View/Edit Referrals search page.

The search functionality is not as robust with this search as it is with other searches in ETO. Best practice is to enter most, or all, of the last name, particularly the beginning characters. Click on the "Search" button or press the <Enter> key. ETO should present a name or set of names that match the criteria entered (as shown below).



If the name you are looking for is not listed, change the search criteria until you locate the participant you need to work with. ETO will show the name, address, Social Security Number, and Date of Birth for the participants found. Click on the plus [+] symbol to the left of the name and the list will expand to show any and all Referrals made for the participant, as shown below.



On the expanded list, you can see the Date of Referral, Referral Status, an Edit link for any pending Referrals, the agency or program the Referral was made to, and some action icons.

In the Action column you can view, edit pending Referrals, delete (if you have security level to delete), re-direct pending Referrals, reject pending Referrals, and print a Referral report. See the step-by-step instructions to follow for more detailed information on these actions.

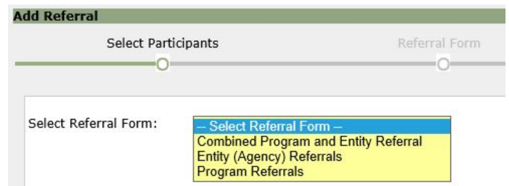
Step-By-Step Instructions

Add Referral

> Make sure you are logged into the ETO Program you are making the referral ***from***, especially if you going to be dismissing them from the program as part of the process.

1. Select Referrals | Add Referral from the Navigation Bar to the right of the screen. The Add Referral form will open, prompting you to select a Referral Form.

2. Select the desired and appropriate Referral Form from the pick list near the top of the page. The choices are self descriptive: "Program Referrals" shows a list of other ETO programs only (both Goodwill and BC Community sites), and only those that the participant is not already enrolled in, "Entity (Agency) Referrals" is a list only of outside agency Entities, and "Combined Program and Entity Referral" list both ETO programs *and* outside agency Entities. ETO will advance to the Select Participants screen.



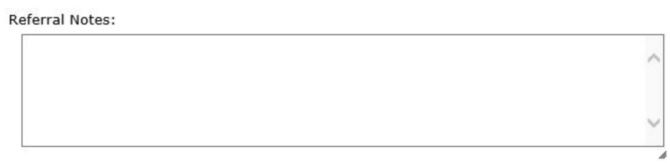
3. Search for the name of the participant you need to make a Referral for, either manually searching through the names using the navigation controls or by using the filters at the top of the list. To filter, enter part or all of the matching information in the appropriate filter box and either click on the filter  button to the right of the filter box or press the <Enter> key.

4. Click to check the box to the left of the correct name and click on the "Next" button. ETO will advance to the Start Dates part of the process.

5. Projected Start Date: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. Type a date directly into the date box or use the calendar tool to the right to select a date. If this is for a program referral, use the date you want to be the Program Enrollment Date. Besides the current date, you can enter a past date or even a future date. When a date has been set, again click on "Next" to continue and the Referral Form will open. (Expect a 5-15 second lag). *This is a required field.*

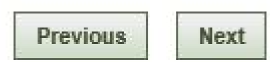
6. Reason(s) for Referral: This is a non-exclusive choice (can select more than one) option group with thirteen all-inclusive choices. If "Other" is selected, explain the reason in the Referral Notes field. Select the reason from the list that most fits the reason you are referring this participant to the agency or agencies you will be selecting. *This is an optional field*.

7. Referral Notes: This is a free text field (1000 characters). Enter any comments about the Referral, including—but not required—

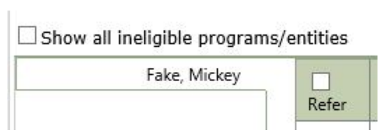


more specifically why you are making the Referral, the name of a person at the agency referred to, and any other pertinent information your agency requires to document. *This is an optional field*.

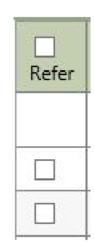
8. Click the "Next" button at the top. You can also click on the "Previous" button if you made a mistake or need to go back for any reason. ETO will go to the Provider Search screen.



9. In the upper left corner of the table the participant's name will appear in a tab projecting to the left as shown here. Note the check box immediately above the participant's name, labeled "Show all ineligible programs/entities". Currently, for outside agencies, there are no filters on the entities that populate the list, though they may be added in the future. If you do not find your agency listed, try checking this box to see if it adds to the number of available agencies.



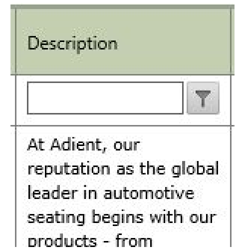
There are eight columns in the table of entities and programs. In the first column resides a check box you click to select an entity or program to make the Referral to. This is a non-exclusive choice (can select more than one choice) and you are able to select any combination of entities and programs as is appropriate. If you check the box in the column header, all of the entities and programs will be

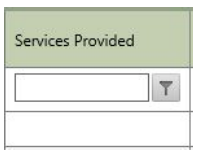


selected at once (or deselected, if all are selected).

The second column is the entity/program name under the header “Provider”. There is a filter control below the header at the top of the table that will allow you to search for the provider by name.

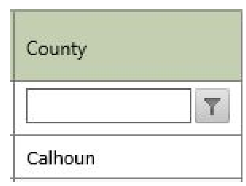
The third column, “Description”, shows the description of the agency as listed in ETO. If you know of a word or words in the description and it is somehow easier for you than another filter, there is a filter control below the header at the top of the table that will allow you to search for the provider by the description.

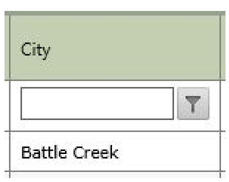




The fourth column, “Services Provided”, is currently blank.

The fifth column, “County”, lists the county the agency is located in. There is a filter control below the header at the top of the table that will allow you to search for the provider by county.





The sixth column, “City”, lists the city the agency is located in. There is a filter control below the header at the top of the table that will allow you to search for the provider by city.

The Last column, “Zip Code”, lists the zip codes of the agencies. There is a filter control below the header at the top of the table that will allow you to search for the provider by zip code.

Navigation controls are found at the bottom of the table. These are standard ETO navigation controls allowing you to go to the first page (|◄), the previous page (◄), select a specific page (1 2 3), go to the next page (►), or go to the last page (►|). There is also

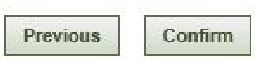
a page size control that will allow you to determine how many agencies you can see on one page. The default is 20, but the number can be changed to 10, 20, 50, or All. A line of text follows to the right of the page size control indicating the page number and how many records are to be shown.

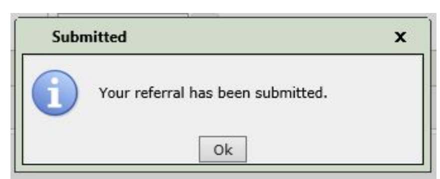
Using the navigation controls or filters, find the entity and/or program you want to make the Referral to, check the box in the first column, and click the "Next" button to continue. ETO will go the last page, Confirmation.

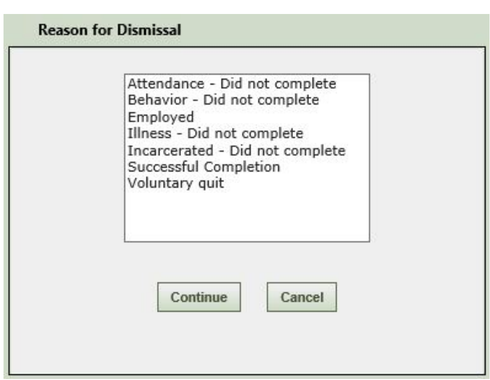
10. On the Confirmation page are five columns, the first of which should show the participant's name. The second column shows the

Projected Start Date you entered in a previous step. The third column lists the provider name(s). The fourth column, Referral Confirmation, will show either a large green check mark when the Referral can be completed by ETO, or a red "X" when there is a problem with the Referral and ETO cannot continue with that specific Referral (this should be rare). The fifth column contains a check box for each agency or program being referred to, giving you one last chance to remove one or more agencies from the Referral without having to start over (this box is checked by default). The sixth (last) column, Dismiss, will only be populated when the Referral is for another program. Normally, no action will be needed on this page other than to confirm.

11. When the Confirmation page is complete, click on "Confirm" at the top of the page. ETO will pop up a modal window confirming success.







12. Should you need to dismiss the participant from the program you are referring from, then you can check the Dismiss box and ETO will automatically process the dismissal when you confirm the Referral. A modal window will pop up with a list of the reasons for dismissal.

Select a reason from the list and click on the "Continue" button.

View/Edit Referral

1. Select Referrals | View / Edit Referrals from the Navigation Bar on the right side of the screen. ETO will bring up the View/Edit Referral search screen.

View / Edit Referrals

Search

- [ ] Include all participants in the site
- [ ] Include dismissed participants in results
- [ ] Include retracted referrals in results

2. Enter most, or all, of the last name in the search box. Using both first and last name will usually bring a negative result. If you can't find any record by the name, try checking one or more of the three optional boxes below the search box to broaden the search. Click the "Search" button. ETO should show a list of potential matches to the criteria entered.

View / Edit Referrals

Search

- [ ] Include all participants in the site
- [ ] Include dismissed participants in results
- [ ] Include retracted referrals in results

	Name	Address1	SSN	DOB
+	**Fake**, Mickey	96 Walt Disney Way	XXX-XX-6789	11/18/1928

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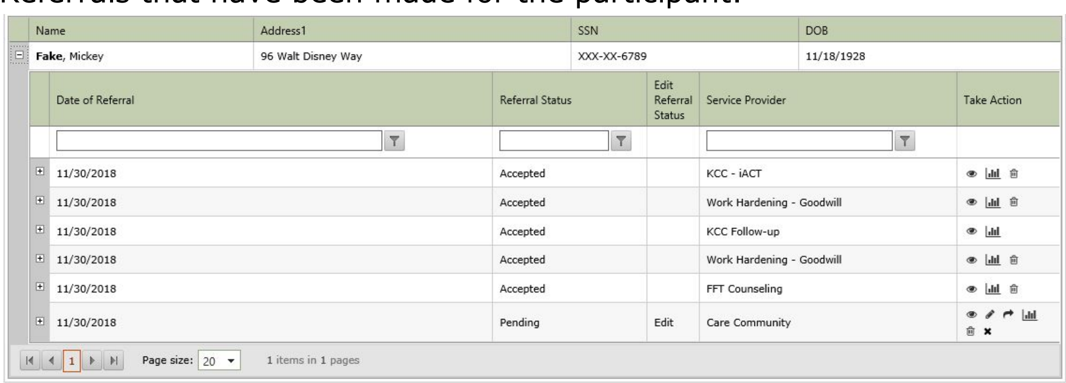
3. Click the Plus sign [+] to the left of the name to expand the list of Referrals that have been made for the participant.



	Name	Address1	SSN	DOB
−	**Fake**, Mickey	96 Walt Disney Way	XXX-XX-6789	11/18/1928

	Date of Referral	Referral Status	Edit Referral Status	Service Provider	Take Action
+	11/30/2018	Accepted		KCC - iACT	
+	11/30/2018	Accepted		Work Hardening - Goodwill	
+	11/30/2018	Accepted		KCC Follow-up	
+	11/30/2018	Accepted		Work Hardening - Goodwill	
+	11/30/2018	Accepted		FFT Counseling	
+	11/30/2018	Pending	Edit	Care Community	

1 Page size: 20 1 items in 1 pages

4. The Referral list has five columns in the table. The first column, Date of Referral, shows the date each Referral was made. The second column, Referral Status, will say "Accepted", "Pending", or "Rejected". The third column, Edit Referral Status, contains an "Edit" link for any pending Referrals to entities (see Step 5 for further). The fourth column, Service Provider, lists the name of the entity or program for each Referral. The fifth and last column, Take Action, contains icons for any actions you have access to make on that Referral (see Step 6 for further). There is a filter control below

the header at the top of the table that will allow you to search for the provider by date, the Referral Status, or the Service Provider.

5. Any Referrals to an entity will have link that says “Edit” in the third column, Edit Referral Status. If you need to record a change to the status, click on this link to make a control open immediately below and to the left. Select the status you need to change to and click on the “Update” link. The status should now show as the choice you selected.

6. The icons that appear in the fifth column, Take Action, will depend on the type and status of the Referral and on your security level in ETO. You may have any of five icons appear. Details for each appear below.

The “eye” icon opens the Referral Form in read-only format, allowing you to step through and see the information selected when the Referral was made.

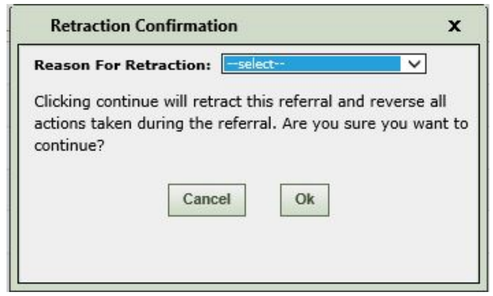
The “pencil” icon will open the Referral form in an editable format allowing you to alter the Referral from beginning to end.

The curved “arrow” icon will retract the original Referral and open the Referral again at the Provider Search stage of the process, allowing you to select a different agency or agencies to make the Referral to.

The “chart” icon will open a Referral Report listing the details of the Referral. This may be helpful if your agency requires a hard-copy of the Referral for your files. It also quickly and easily gives you the details without having to look through the Referral.

The “trash can” icon will delete the Referral, if you have access to do so.

The “X” icon will retract the Referral. When you click on this icon a confirmation modal will pop up on the screen with a list of reasons for the retraction. Select the most pertinent reason from the list and click the “Ok” button. ETO will reverse all actions taken while making the Referral and end the process.



View Pending Referrals

1. Make sure you are logged into the correct (receiving) program. Select <u>Referrals</u> | <u>View Pending Referrals</u> from the Navigation Bar on the right of the screen. ETO will open the Referrals to <program name> page and show a list of any Referrals to the program you’re signed into waiting for acceptance or rejection.

2. The Referrals to <Program Name> screen has eight columns.

   The first column, **Name**, shows the participant’s name.

   The second column, **Referring Program**, shows the name of the program from which the Referral was made to the receiving program.

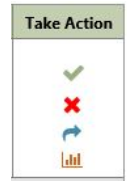
   The third column, **Referring Site**, shows the name of the site (either “BC Community Access” or “Goodwill Central Michigan Heartland”) the Referral originated in.

   The fourth column, **Services Needed**, is currently blank as selecting services during the Referral process is not currently configured.

   The fifth column, **Referring Date**, shows the date the Referral was made.

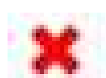
The sixth column, **Program Start Date**, has the first interactive control—a date with calendar tool allowing you to select the date you want them enrolled in the program (you can back date or set into the future, as needed).

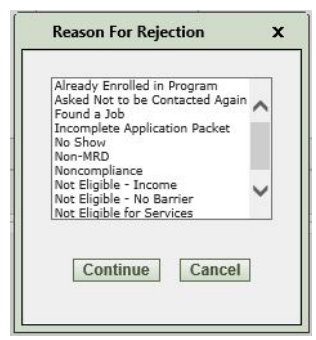
The seventh column, **Approval Status**, should say "None" as the Referral is waiting for action to be made on it.



The last column, **Take Action**, has four colorful icons that will allow you to accept, reject, or redirect the Referral, as well as bring up a Referral report if you want to see or print out the details of the Referral.

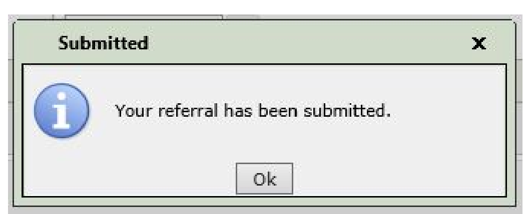
The green check mark icon will accept the Referral, enroll the participant into the receiving program, and send an email to the user that originated the Referral advising them the Referral was accepted. ETO will bring up a modal window confirming the Referral was successfully accepted.





The red 'X' icon will reject the Referral and send an email to the user that originated the Referral advising them the Referral was rejected and the reason you give for rejecting it. A modal window will pop up asking you to select a reason from the list for rejecting the Referral. Select the most pertinent reason from the list and click on "Continue".

The curved blue arrow icon will re-open the Referral Form at the Provider Search stage of the process, allowing you to re-direct the Referral to a different agency or program. This process does not outright reject the Referral but does cause the original Referral to be withdrawn as you select a different agency to make the Referral to. Select the agency you want to make the Referral to and click on "Next". On the confirmation



page, verify the Referral is correct and click on “Confirm”. ETO will open a pop-up modal advising of a successful Referral.

 The colorful chart icon will open a Referral Report if you need a hard-copy printout for your agency’s files. The Referral Report gives all the details of the Referral.

Appendix A

ETO Data Entry Standards

Capitalization:

Do not use caps lock, use lower case where appropriate.

Capitalize proper nouns, compass points (N, S, E, W, NW, SE, etc).

Period Usage

Use periods only in narrative fields to complete sentences. Do not use periods to close abbreviations.

Hyphenated Names

Do not leave a space before or after a hyphen in any hyphenated name.

Address Formatting

Always use standard address format.

Enter only the street address of the building or mobile home park in the *Address 1* field.

Apartment, lot, suite numbers, etc. belong in the *Address 2* field.

Do not enter city or state in either address field.

Do not spell out compass directions. Use standard abbreviations.

Place compass directions before the street name, not after. Although it is correct and proper to place it after Avenue, in the interests of consistency it should always be placed before the name in ETO. The one exception to this will be Capital Ave NW and SW in Battle Creek, because of the iconic nature of that street.

Do not spell out street types, use standard abbreviations (see appendix A). One exception to this is the Springfield Avenues (Avenue A, Avenue B, etc.), in this case the word should be spelled out.

Do not use periods after street type abbreviations or compass directions.

Use the abbreviation for apartment, suite, or the word lot whenever possible, but a pound sign (#) can be used when uncertain. The term "flat" is not used in this part of the country.

Use street types when possible, though in Battle Creek they are not necessary for more than two or three streets (Taft St and Taft Ct, for example).

Examples:

123 Main St
Apt 4B

1145 Harmonia Rd
Lot 145

15 Capital Ave NE
Ste 2

Appendix A

Standard	Abbreviation	Alternate
Avenue	Ave	
Apartment	Apt	
Boulevard	Blvd	
Drive	Dr	
Lane	Ln	
Parkway	Pkwy	Pky
Place	Pl	
Road	Rd	
Street	St	
Suite	Ste	Suite

Formatting standards:

Site names are **bolded**

Program Names are *Underlined and Italicized*

TouchPoint names are "Underlined and in Quotes"

Field names are Underlined with Special Characters?:- and two spaces following the name.

Answers for TP questions and demographics are "in quotes".

Date Format: ETO uses a standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses.

Non-required exclusive choice questions... Because this is not a required question, there is a "*Clear Selection*" button.

Navigation Bar items are Underlined.