



Oregon
Health
Authority



STANDARDS OF CASE MANAGEMENT SERVICES

Training modules

1. Introduction to the Standards of Service
2. Intake & Eligibility
3. Screening & Assessment
4. Acuity Scales
5. Care Planning
6. Information & Referral
7. Follow Up & Monitoring
8. Changes in Enrollment Status



*Training modules are meant to be watched in order



MODULE 6:

Information & Referral

Objectives:

1. Introduction to the provision of referral and advocacy.



Purpose of referral

I'd like more
information about...

I need a referral...





Purpose of referral

I can help you with that





Purpose of referral

Referral and advocacy are integral to the delivery of quality case management





Referral

Direct a person to service in-person or through telephone, written, or other type of communication.

Referrals must be completed in full and may be made

- From one clinical provider to another
- Within the HIV case management system
- By other Care Coordinators
- By program staff
- As part of an outreach program



Referral

Direct a person to service
Maintain working knowledge of
community services





Referral

Direct a person to service

Maintain working knowledge of
community services

Assess referral agencies for
appropriateness for client





Referral

Direct a person to service

Maintain working knowledge of community services

Assess referral agencies for appropriateness for client

Provide relevant information

Provide referral info that is

- **Relevant to needs**
- **Up to date**
- **In format/language they understand**





Referral

Direct a person to service

Maintain working knowledge of community services

Assess referral agencies for appropriateness for client

Provide relevant information

Encourage client to make their own appointments, act on their own behalf, and report back on status of referrals





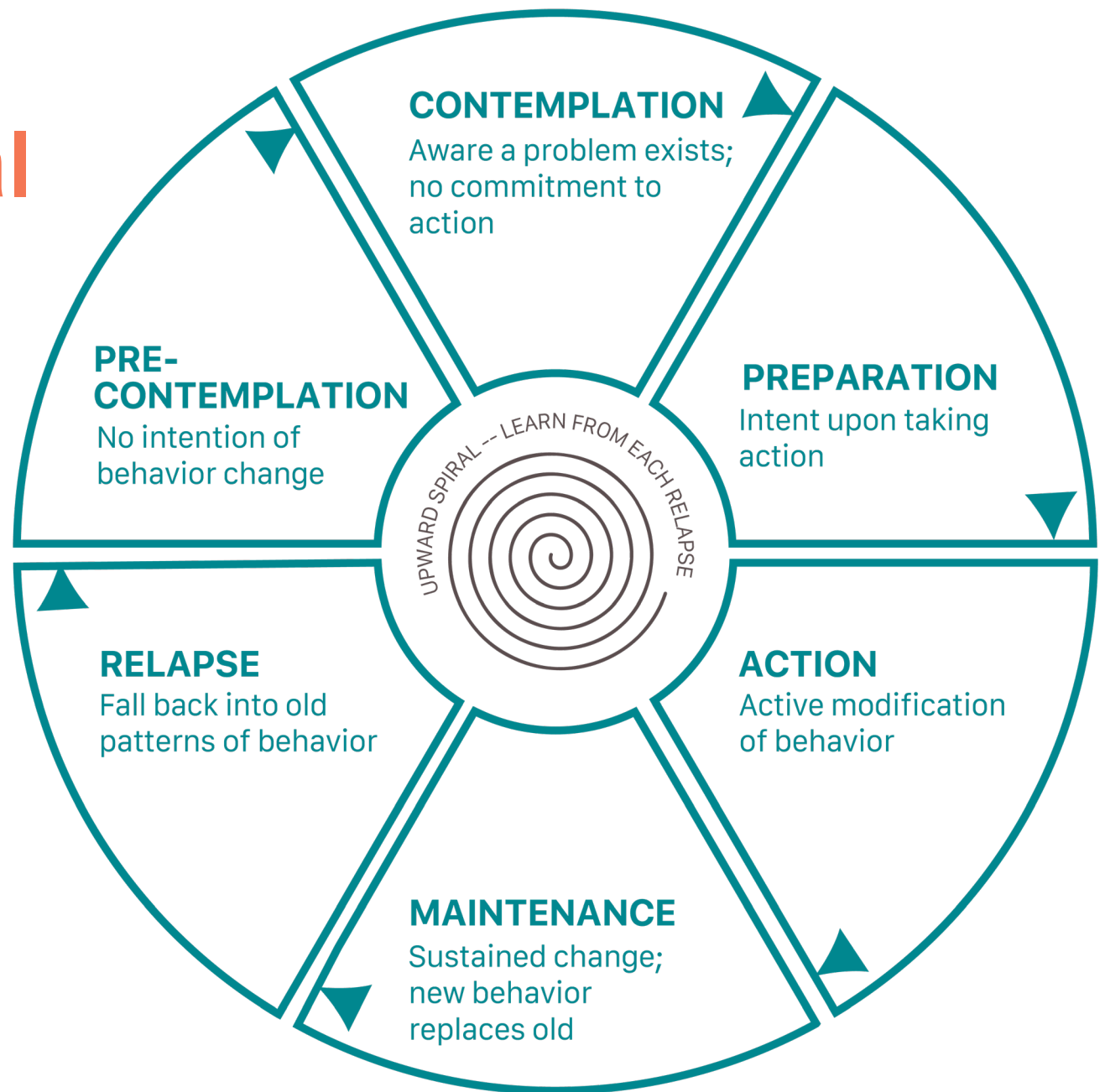
Referral follow-up

Determine with client when and how follow-up will occur

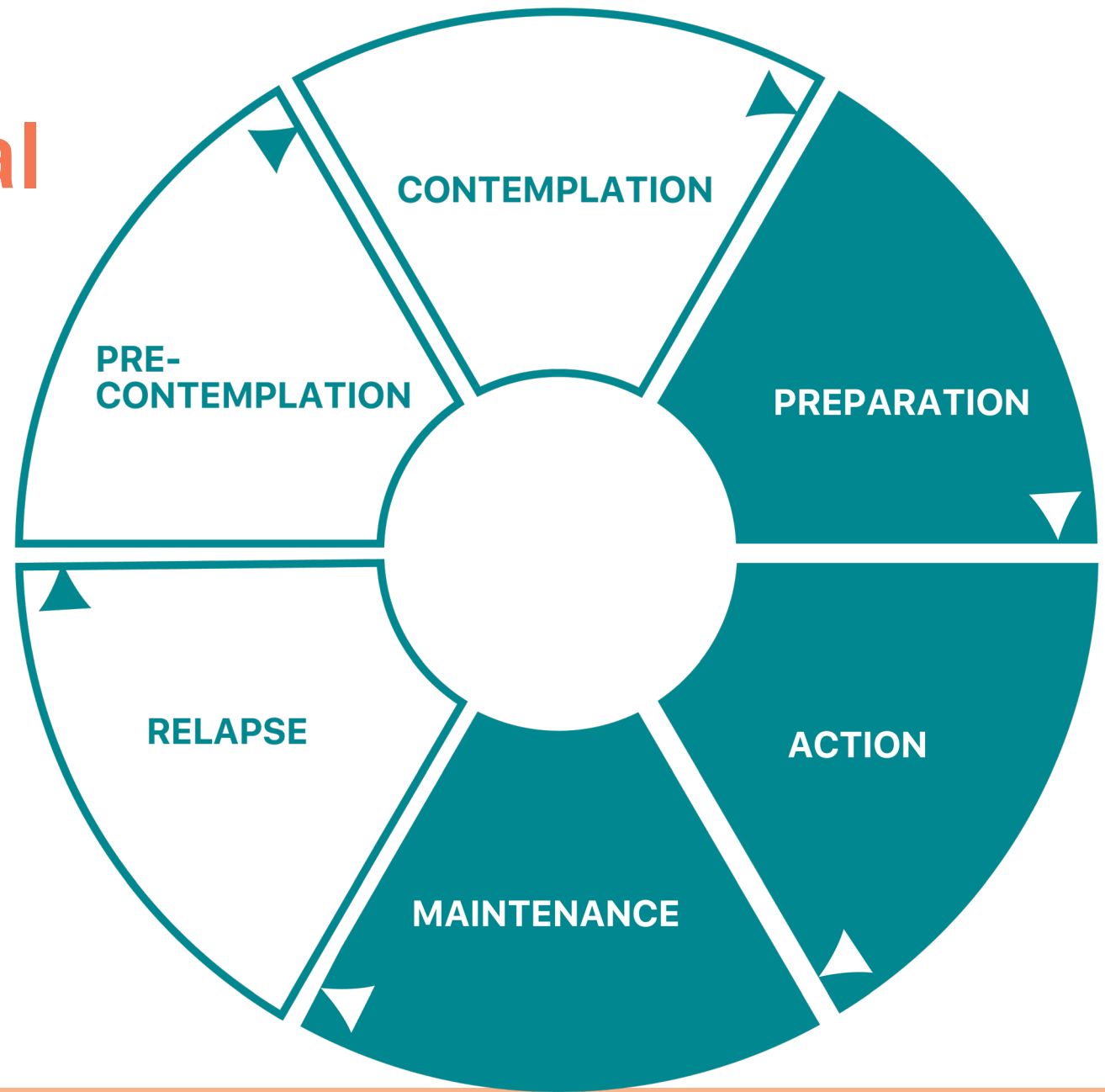


Theory of referral

Keep in mind the stages of change when making referrals for a client.



Theory of referral





Theory of referral

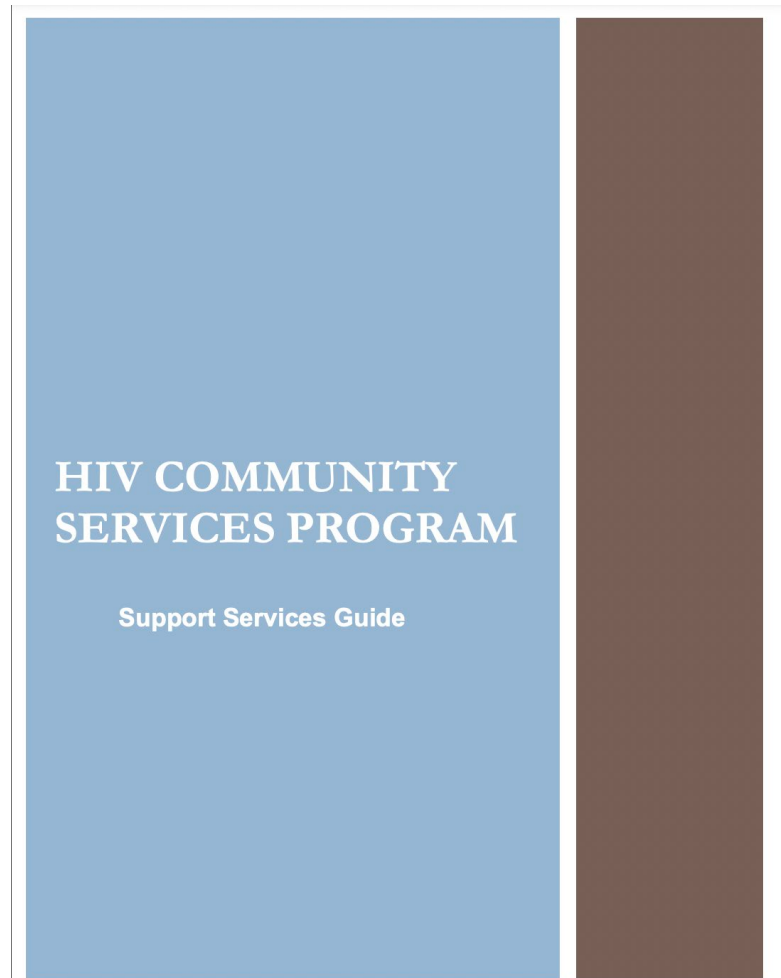
Making a referral before the client is ready may create resistance and lack of follow-up





Theory of referral

Review the [Support Services Guide](#) and CAREWare case note template



Quiz: Ready for referral?

Your client tells you that they use methamphetamine daily. When you talk to them about a referral to a substance use treatment program, they are adamant that their use is a not a problem.

Is this client ready for a referral? Select the best approach.

- A. Don't offer a referral at this time since they are pre-contemplative about their use
- B. Even though they are pre-contemplative, let them know you can offer them a referral when they are ready for treatment
- C. Give them information about a support group and a number to call for outpatient treatment
- D. Tell them how concerned you are about their use and why you'd really like them to stop



Quiz: Ready for referral?

Your client has SSDI because of a severe anxiety disorder. They've mentioned wanting a part time job to help them stay busy but tell you that they can't afford to work because they will lose their benefit.

Is this client ready for a referral? Select the best approach.

- A. Client is contemplative. With their permission, offer information about work incentive programs for people on Social Security, and then offer a referral if they're ready.
- B. Client is in preparation stage. They said they want to get a part time job, so no further action is needed here.
- C. Give them a number to the local Work Incentives Network, even though your client has anxiety in these types of situations.
- D. Even though the client has an interest in work, you don't see them being successful in a work environment. Their anxiety is too much of a disability, and it took so long for them to get on SSDI.





Advocacy

Act of assisting someone in obtaining needed good, services, or benefits





Advocacy

Act of assisting someone in obtaining needed good, services, or benefits

Assess client's ability to address the issues





Advocacy

Act of assisting someone in obtaining needed good, services, or benefits

Assess client's ability to address the issues

When necessary, advocate on behalf of the client

- Denied services
- Unable to communicate needs
- Complaint about services





Advocacy

Act of assisting someone in obtaining needed good, services, or benefits

Assess client's ability to address the issues

When necessary, advocate on behalf of the client

Build on agency cooperation and collaboration

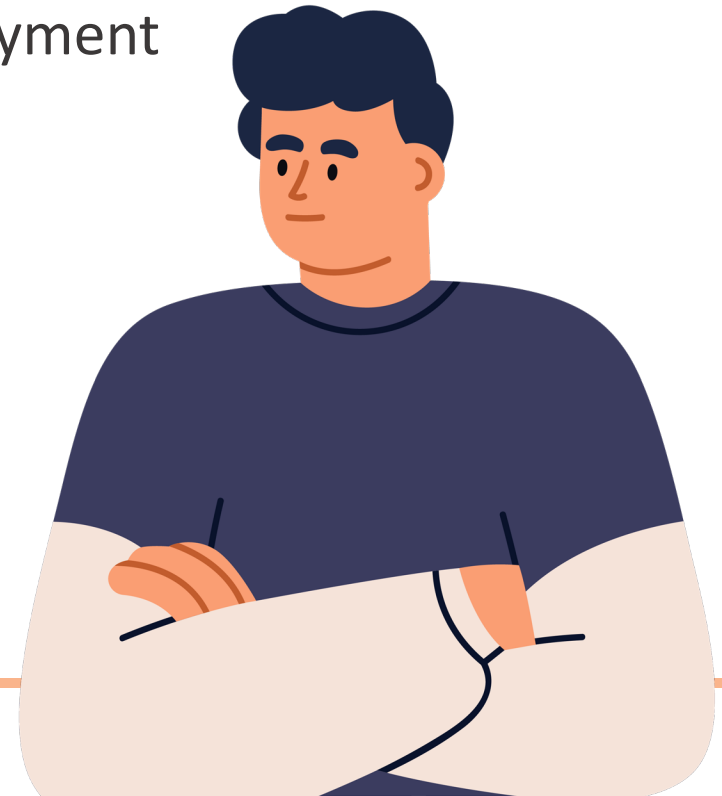




Referrals for Miguel

Three recommended services:

- CAREAssist
- HIV Alliance Dental Case Management
- HIV Alliance Vital Purpose employment





CAREWare

Referrals require final status within 6 months

See the [CAREWare training](#), [CAREWare quick guides](#) and the [Standards of Service](#)





Module overview

- Introduction to the provision of referral and advocacy.

Conclusion

Thank you!

We recommend that you review the Standards of HIV Case Management, bookmark and explore the [OHA website](#) for helpful resources, and continue your training.

