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## **Chapter 3: Client Processes**

### **Section 4: First Nutrition Education Contact**

#### **Lesson: Referrals**

#### ***Objectives:***

Upon completion of this lesson the user will be able to:

- utilize the “Referrals” tab and print referrals.

#### ***Oregon Policies:***

- ◆ 470 Local Program Outreach
- ◆ 481 Immunization Screening and Referral Protocol
- ◆ 830 Nutrition Education: Documentation
- ◆ 880 Referrals: Alcohol, Tobacco and other Drug Use
- ◆ 885 Other Referrals: Required and Recommended

#### ***Overview:***

Referring clients to other services is an important part of WIC. In the “Nutrition Education Plan” function you can document all referrals given to a client and print the information for the client to take. This time-saving feature allows you to keep quality records of referrals and provides referral agency information that is available at the click of a button. In this lesson you will learn how to document referrals and print out referral information.

#### ***Instruction:***

#### ***Documenting Referrals***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. Click on the “Referrals” sub-tab at the bottom of the screen.

Client Processes - [CP3115 - Woman Certification State ID:1763 Name:Baker, First DOB:09/09/1977]

File Edit Window Help

Selection

WIC ID: 03450150-01 Name: Baker, First DOB: 09/09/1977 WIC Cat.: WOMAN PREGNANT Tr.Type: N

Medical Data Health History Diet Assessment NE Plan Progress Notes BF Tracking Food Pkg. Assignment

Referrals

| Visit Date | Referral Category          | Organization                   | Phone Number         | Status      | Date Ended |
|------------|----------------------------|--------------------------------|----------------------|-------------|------------|
| 09/12/2001 | EMERGENCY FOOD SOURCES     | Example                        | (426)518-4587 x0     | Recommended | 00/00/0000 |
| 09/12/2001 | CHILDREN WITH SPECIAL HEAL | Planned Parenthood Association | (123)123-1234 x12344 | Recommended | 00/00/0000 |

More Info.

Last Visit Summary Risks/Interventions NE Provided Goals Referrals Next Appointment

Change Transaction Type Determine Eligibility

Ready | September 17, 2001 03:40:28 PM | Jeff Waite | Hood River

Figure 1: “NE Plan – Referrals” Screen

2. Retrieve the client for whom you want to document referrals.
3. Click in the “Visit Date” field.

This field defaults to the current date but may be modified.

4. On the “Referral Category” field, select the type of referral you want to make.
  - The referral categories are state populated.
  - Referral categories include, but are not limited to “BreastfeedingServices,” “Food Resources,” and “Immunizations.”

🎵 NOTE: The referral information entered on the “Enrollment” screen will carry over to the “NE Plan – Referrals” screen.

5. **Tab to the “Organization” and select the appropriate organization.**

- The “**Phone Number**” is system generated if the organization information has been completed.
- More referral organizations can be added. Refer to Chapter 8 Lesson 102 *Referral/Outreach Organizations (SUT)*.

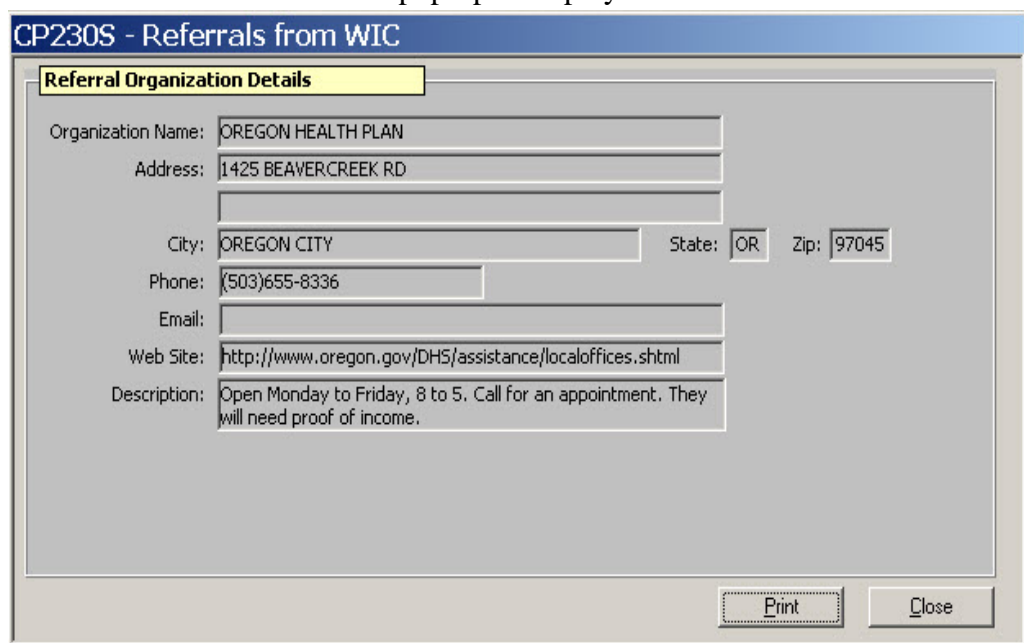
**On the “Status” field, select the current status of the referral.**

- The “**Date Ended**” field is grayed out until the “**Status**” is marked as “Completed.”
- When the “**Status**” is marked as “Completed,” “Not Addressed,” “No Longer Applicable,” “Participating,” or “Refused” this field defaults to today’s date but may be modified.

☺ **See Job Aid “Referral Statuses” for more information.**

6. **Save.**
7. **Select the organization for which you wish to print referral information.**
8. **Click the “More Information” button in the lower right hand corner of the screen.**

The “**Referrals from WIC**” pop-up is displayed.



The screenshot shows a window titled "CP230S - Referrals from WIC". Inside the window, there is a section titled "Referral Organization Details" with the following information:

|                    |   |        |       |
|--------------------|---|--------|-------|
| Organization Name: | OREGON HEALTH PLAN  |        |       |
| Address:           | 1425 BEAVERCREEK RD   |        |       |
| City:              | OREGON CITY   | State: | OR    |
| Phone:             | (503)655-8336   | Zip:   | 97045 |
| Email:             |   |        |       |
| Web Site:          | <a href="http://www.oregon.gov/DHS/assistance/localoffices.shtml">http://www.oregon.gov/DHS/assistance/localoffices.shtml</a> |        |       |
| Description:       | Open Monday to Friday, 8 to 5. Call for an appointment. They will need proof of income.                                       |        |       |

At the bottom right of the window, there are two buttons: "Print" and "Close".

**Figure 2: “Referrals from WIC” Pop-Up**

9. **Click “Print” to print the referral information.**
10. **Click “Close” to close the pop-up.**
11. **Exit.**

### **Tips and Shortcuts:**


- To add additional rows of information, click the “Insert” icon or press tab when in the “Date Ended” field.
- To remove a row of information, use the “Remove” icon.

### **Practice Activities:**

Use the client from your  Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ NE Plan ⇒ Referrals

1. Click on the “Open” icon to access “Client Search” and select the client from your  Activity Sheet.
2. Click the “Return with Client” button.
3. Leave the “Visit Date” field as **today’s date**.
4. Tab to “Referral Category” and select **Oregon Health Plan/Medicaid**.
5. Tab to “Organization” and select the appropriate organization.
6. Tab to “Status” and select **Completed** as the “Status.”
7. Enter **today’s date** in the “Date Ended” field.
8. Click the “More Info.” button.
9. Click “Print” to print the referral information and then close the pop-up.
10. Save your work.
11. Exit back to the “Client Processes” window.

You’re doing great! Let’s try one more set of referrals before we move on.

### **Skill Check:**

For this exercise you make two referrals for your client. Retrieve a postpartum client from client primary.

The client is a 20-year-old breastfeeding mother with a six-week-old infant. The mother has just lost her job at a local fast food restaurant, but is hoping to find part-time employment soon. She needs breastfeeding support after hours and weekends and financial support to help her through this difficult period. Make two appropriate referrals for her.

*Make printouts with the referral information to give to the client. Write your name on them before turning in to the instructor.*

 **Notes:**

