

PRA | SPECT IPO CI/CHV/CHW

Referrals, Appointments, Resources

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Resources, Appointments and Referrals

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•Definitions

- Resource** - General service and agency information that has been given or sent to the client.
- Referral** - Information given to client to contact or make appointments with a provider, social service agency or program.
- Appointment** - Specific dates and times that have been set up for a client to meet with a provider or agency.

•Referrals, Appointments, and Resources can be added and updated at any level of client contact or enrollment status:

- Initial Contacts
- New Referred Clients
- Pending Enrolled Clients
- Enrolled Clients
- Pending Closed Clients
- Closed Clients

Add New Referral, Appointment, or Resource

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- **Add New Referral, Appointment, or Resource**

- Search appropriate client list (Initial contacts, New referrals, Enrolled, etc.)
- Search and Select Patient Profile Select Patient Profile
- Select the Participant name from the appropriate list to open the Patient Profile

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 - Newly Assigned Patients List
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 - MINOR Patients List
 - Closed Patients List
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- Logoff

Enrolled Patient Search Results

NFP Training

Referral Date	Patient Name	Patient DOB	Program Status	Program Status Date	Staff	Assignment Date
07/18/13	Wunpage, Winnie	08/05/95	Enrolled	01/23/14	Smith	05/06/14
09/05/13	Jolly, Jessie	09/26/90	Enrolled	12/12/13	Smith	02/20/14
10/14/13	Nabbit, Dag	07/08/98	Enrolled	04/24/14	Staff	12/18/13
11/04/13	Electra, Carman	07/01/97	Enrolled	05/06/14	Smith	11/07/13
01/13/14	Kane, Candy	04/26/85	Enrolled	04/24/14	Staff	01/23/14
01/22/14	Needy, Nancy	04/26/98	Enrolled	04/24/14	Staff	04/24/14
01/23/14	Smith, Sally	06/09/95	Enrolled	05/22/14	Staff	05/22/14
01/24/14	Prada, Patty	04/26/90	Enrolled	02/28/14	Staff	02/28/14

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Patient Profile

•From the Patient Profile Screen:

- To add a new contact, click the green “plus sign” to add a new contact, resource or referral provided, or appointment made.
- To view an existing contact, select [View](#)
- To open an existing contact, select the [Date](#)

Patient Profile: NFP Training

Sally Smith

Client Status	Enrolled
Status Assignment Date	05/22/2014
Is Client MIHOPE Participant	No
MIHOPE Client ID	Missing Required Information
Referral Date	01/23/2014
EDC Date	07/01/2014
Birth Date	06/09/1995

Patient Information

Street	56 Elm Street
City, Zip	Camden 98765
County	Camden County
Home Phone	856-598-5565
Cell Phone	

Other Information

Language	Spanish
Race	Hispanic

Referring Agency Information

Referring Agency	System Training
Agency Address	2500 McClellan Pennsauken, NJ
Agency Phone	(856) 665-6000

Patient Encounters

Date	Method	Outcome	Appt/Ref
05/22/14	Home Phone	Contacted	View
Appointment Date	05/23/2014	Agency Type	Home Visiting
Outcome	Appointment Kept	Outcome Date	05/23/2014
Notes	client enrolled.		
05/06/14		Other	N/A

Program / Status History

Program	Status	Pending Enrollment	Enrollment	Pending Close	Closed	Closed Reason
NFP Training	Enrolled	05/22/14	05/22/14	N/A	N/A	N/A

Callouts:

- Click the date to open and update outcomes.
- Click + to add a new Resource, Referral or Appointment.

Add Encounter/Engagement

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- Encounters or Engagements (Client Contacts) must be entered and saved prior to adding any referrals, appointments, or resources.
 - A contact date must be entered in order to save and later retrieve the encounter/engagement record.

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Central Intake Encounter/Engagement

Sammy Sunshine

Program	CHW Training
Contact Date	05/22/2014
Contact Method	Cell Voice
Contact Outcome	Contacted
Contact Notes	

[Back to List](#) [Save Contact](#)

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Annotations:
- A callout bubble points to the Contact Date field: "A contact date MUST be entered"
- A callout bubble points to the Save Contact button: "Enter Contact and click 'Save Contact'"

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Central Intake Encounter/Engagement

The contact/encounter record was successfully added. Select the link below to add a referral, appointment, or resource

Sally Smith

Program	NFP Training
Contact Date	05/22/2014
Contact Method	Cell Voice
Contact Outcome	Contacted
Contact Notes	made referral to prenatal care

[Add New Referral, Appointment, or Resource](#)

[Back to List](#) [Save Contact](#)

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Annotation:
- A callout bubble points to the Add New Referral, Appointment, or Resource link: "Once Saved, Add New Referral/Resource/Appt will appear. Click here."

Service Type and Service Provider Information

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- Add all Referrals, Appointments, or Resources individually
- You must “Save” after each entry before adding the next record
- There is no limit on the number of Referrals, Appointments, or Resources that can be made/entered for a client.

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Service Type and Service Provider Information	
Date	<input type="text"/>
Type	<input type="radio"/> Resource - General service information has been given/sent. <input type="radio"/> Referral - Information to contact/make appointment with a Provider. <input type="radio"/> Appointment - A date/time has been set up with a Provider.
Service Programs / Providers	Type <input type="text" value="- Select -"/>
	Program <input type="text" value="- Select Service Type First -"/>
	Provider <input type="text" value="- Select Program First -"/>
Status and Outcome Information	
Status	<input type="text" value="-Select Status-"/>
Outcome	<input type="text" value="-Select Outcome-"/>
Outcome Date	<input type="text"/>
Notes / Comments	
General Notes - Information seen by any user with access to patient record	
<input type="text"/>	
Internal Notes - Information seen by the user and individuals in the same agency	
<input type="text"/>	
<input type="button" value="Return/Cancel"/> <input type="button" value="Save"/>	

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Service Programs/Providers - Types

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- **Service Programs/Providers**
 - Community Based Agency Support
 - Basic Needs/General
 - Behavioral Health
 - Child Care
 - Community Centers
 - Domestic Violence
 - Early Head Start/Head Start
 - Early Intervention System
 - Education
 - Emergency Housing
 - Family Success Center
 - Fatherhood Services
 - Food Centers
 - Housing
 - Insurance Services
 - Job Training Program
 - Parenting Groups
 - School Based services
 - Smoking Cessation
 - Substance Abuse
 - Transportation
 - WIC/Nutrition
 - Community Home Visiting
 - Healthy Families
 - Infant and Family Development
 - Local Health Department IPO
 - Nurse Family Partnership
 - Other social service
 - Out-of-Service Area
 - Parents as Teachers

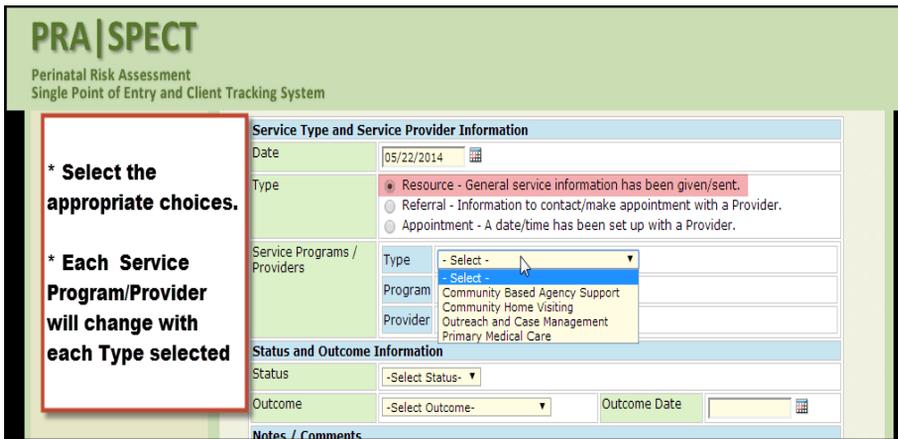
Service Programs/Providers - Types

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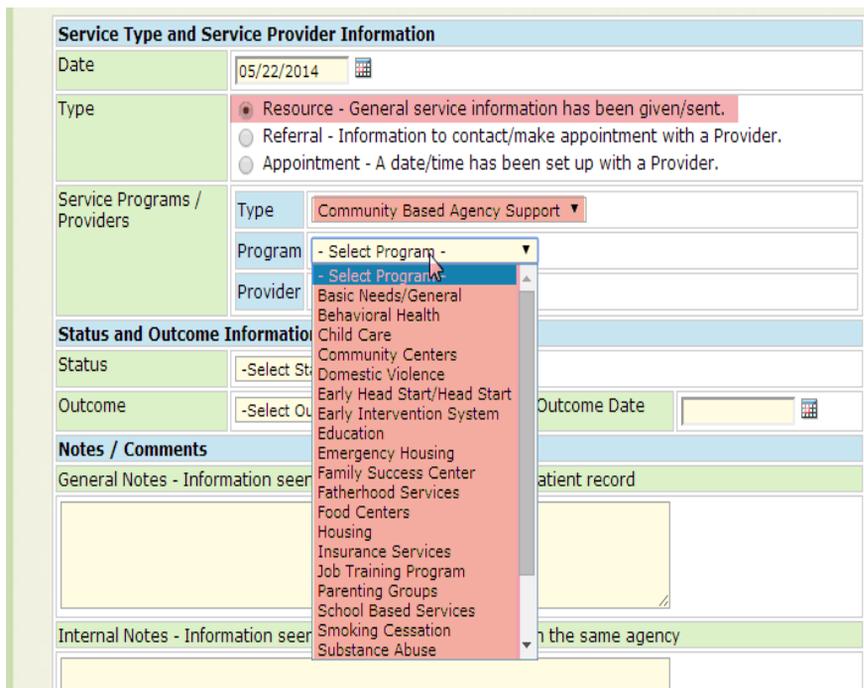
- **Service Programs/Providers - Continued**
 - Outreach and Case Management
 - ACA Navigators
 - Community Health Worker
 - CP&P Child Protective Services
 - DCP&P
 - Health Related Case Management
 - IPO Outreach and Case Management
 - Special Child Health Care
 - Primary Medical Care
 - Dental Services
 - Family Health
 - Hospitals
 - Pediatric
 - Pregnancy Testing
 - Prenatal
 - Primary Medical Care - Children
 - Primary Medical Care - Mother
 - Primary Medical Care - Other
 - Women's Health

Add Resource

- Adding a Resource provided to client:
 - Selection options will change as you select the different types of programs



- Select Type = Resource
- Select Service Program / Provider
- Select Provider



Status and Outcome Information

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- Recording and Tracking Status and Outcome Information:
 - Select Status
 - Open
 - Pending
 - Closed
 - Other
 - Select Outcome
 - Appointment Specific
 - Appointment Kept
 - Appointment Cancelled
 - Appointment rescheduled
 - Referral Specific – by Participant
 - Attempted Contact
 - Contacted
 - Made Appointment
 - Met with
 - Referral Specific – by Provider
 - Attempted Contact
 - Contacted
 - Made Appointment
 - Met with
 - General
 - Did not meet need
 - Unknown Outcome
 - Outcome N/A
 - Enter Outcome Date
 - Add Notes/Comments
 - General Notes – Information seen by any user with access to the patient/client record
 - Internal Notes – Information seen by the user and individuals within the same agency.

Status and Outcome Information

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Service Type and Service Provider Information

Date: 05/22/2014

Type:

- Resource - General service information has been given/sent.
- Referral - Information to contact/make appointment with a Provider.
- Appointment - A date/time has been set up with a Provider.

Service Programs / Providers:

- Type: Community Based Agency Support
- Program: Basic Needs/General
- Provider: - Select Provider -

Status and Outcome Information

Status: Open

Outcome: -Select Outcome- Outcome Date:

Notes / Comments

General Notes - Inform: Appointment Specific
 Appointment Kgd
 Appointment Cancelled
 Appointment Rescheduled
 Referral Specific - by Participant
 Attempted Contact
 Contacted
 Made Appointment
 Met with

Internal Notes - Inform: Referral Specific - by Provider
 Attempted Contact
 Contacted
 Made Appointment
 Met with
 General
 Did not meet need
 Unknown Outcome
 Outcome N/A

Return/Cancel **Save**

- Once saved, you will be brought back to Encounter/Engagement
- Additional records may be added without exiting the patient profile.

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Central Intake Encounter/Engagement

Sammy Sunshine

Program: CHW Training

Contact Date: 05/22/2014

Contact Method: Cell Voice

Contact Outcome: Contacted

Contact Notes:

[Add New Referral, Appointment, or Resource](#)

Resource			
Date	05/22/2014		
Service Programs / Providers	Community Based Agency Support --> Basic Needs/General		
Status: Open			
Outcome	N/A	Outcome Date	05/22/2014
General Notes			
Internal Notes			

Back to List Save Contact

Add Referral

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- Adding a Referral provided to client:
 - Selection options will change as you select the different types of programs

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Single Point of Entry and Client Tracking System

Service Type and Service Provider Information

Date: 05/23/2014

Type:
 Resource - General service information has been given/sent.
 Referral - Information to contact/make appointment with a Provider.
 Appointment - A date/time has been set up with a Provider.

Service Programs / Providers:
Type: Outreach and Case Management
Program: DCP&P
Provider: - Select Provider -

Status and Outcome Information

Status: - Select Status -
Outcome: - Select Outcome - Outcome Date:

Notes / Comments

General Notes - Information seen by any user with access to patient record

Internal Notes - Information seen by the user and individuals in the same agency

Return/Cancel Save

- Select Type = Referral
- Select Service Programs/ Providers
 - Select Type
 - Select Program
 - Select Provider (if specified)
- Select Status
- Select Outcome
 - Enter Outcome Date
- Add Notes/Comments
 - General Notes
 - Internal Notes
- Remember to Click "Save" after each entering each service.

Saved Referral Screen

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Central Intake Encounter/Engagement

Sally Smith

Program	NFP Training
Contact Date	05/22/2014
Contact Method	Cell Voice
Contact Outcome	Contacted
Contact Notes	

[Add New Referral, Appointment, or Resource](#)

Referral			
Date	05/23/2014		
Service Programs / Providers	Outreach and Case Management --> DCP&P		
Status: Closed			
Outcome	Appointment Kept	Outcome Date	05/26/2014
General Notes			
Internal Notes			

Resource			
Date	05/22/2014		
Service Programs / Providers	Community Based Agency Support --> Basic Needs/General		
Status: Open			
Outcome	N/A	Outcome Date	N/A
General Notes	Client given resource to receive diapers		
Internal Notes			

[Back to List](#) [Save Contact](#)

Add Appointments

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- Adding an Appointment made for or with the client:
 - Selection options will change as you select the different types of programs

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Service Type and Service Provider Information

Date: 05/22/2014

Type: Resource - General service information has been given/sent. Referral - Information to contact/make appointment with a Provider. Appointment - A date/time has been set up with a Provider.

Service Programs / Providers: Type: Primary Medical Care (selected) | Program: - Select Program - | Provider: - Select Program -

Status and Outcome Information

Status: Closed

Outcome: Appointment | Outcome Date: 05/23/2014

Notes / Comments

General Notes - Information seen by other users in the parent record

Internal Notes - Information seen by the user and individuals in the same agency

Return/Cancel Save

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- Select Type = Appointment
- Select Service Programs/ Providers
 - Select Type
 - Select Program
 - Select Provider (if specified)
- Select Status
- Select Outcome
 - Enter Outcome Date
- Add Notes/Comments
 - General Notes
 - Internal Notes
- Remember to Click "Save" after each entering each service.

Saved Appointment Screen

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Central Intake Encounter/Engagement

Sammy Sunshine

Program	CHW Training
Contact Date	05/22/2014
Contact Method	Cell Voice
Contact Outcome	Contacted
Contact Notes	

[Add New Referral, Appointment, or Resource](#)

Resource			
Date	05/22/2014		
Service Programs / Providers	Community Based Agency Support --> Basic Needs/General		
Status: Open			
Outcome	N/A	Outcome Date	05/22/2014
General Notes			
Internal Notes			

Appointment			
Date	05/22/2014		
Service Programs / Providers	Primary Medical Care --> Prenatal		
Status: Closed			
Outcome	Appointment Kept	Outcome Date	05/23/2014
General Notes	Attended Prenatal Care Appt		
Internal Notes			

[Back to List](#)

[Save Contact](#)

Update Outcomes

- Staff members are responsible for recording, tracking and entering/updating outcomes for all referrals, resources, and appointments provided.
- Remember - the outcome date must always be added.

Patient Profile: CHW Training

Sammy Sunshine

Client Status: []
 Status Assignment Date: []
 Referral Date: 03/14/2014
 EDC Date: []
 Birth Date: 07/09/1990
 Client Engagement Event?: Informal Meeting

Patient Information

Street: 99 Bright Way
 City, Zip: Camden 98765
 County: Camden County
 Home Phone: 877-898-8899
 Cell Phone: 877-898-8899

Other Information

Language: English
 Race: Multi-Racial

Referring Agency Information

System Training Institute
 2500 McClellan Ave.
 Pennsauken, NJ 08109
 (856) 665-6000

Date	Method	Outcome	Appt/Ref
05/22/14	Cell Voice	Contacted	N/A
05/22/14	Cell Voice	Contacted	Visit

Program / Status History

Program	Status	Pending Enrollment	Enrollment	Pending Close	Closed	Closed Reason
CHW Training	Enrolled	05/09/14	N/A	N/A	N/A	N/A

Central Intake Encounter/Engagement

Sammy Sunshine

Program: CHW Training
 Contact Date: 05/22/2014
 Contact Method: Cell Voice
 Contact Outcome: Contacted
 Contact Notes: []

Resource

Date: 05/22/2014
 Service Programs / : Community Based Agency Support --> Basic Needs/General

Date	Outcome Date
N/A	05/22/2014

Program: Basic Needs/General
 Provider: - Select Provider -

Status and Outcome Information

Status: Open
 Outcome: -Select Outcome-
 Outcome Date: 05/22/2014

Notes / Comments

- Appointment Specific
 - Appointment Kept
 - Appointment Cancelled
 - Appointment Rescheduled
- Referral Specific - by Participant
 - Attempted Contact
 - Contacted
 - Made Appointment
 - Met with
- Referral Specific - by Provider
 - Attempted Contact
 - Contacted
 - Made Appointment
 - Met with
- General
 - Did not meet need
 - Unknown Outcome
 - Outcome N/A

Return/Cancel Save

Outcome Types

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• Outcome Types:

• Appointment Specific

- Appointment Kept – Client attended scheduled Appt.
- Appointment Cancelled – Client cancelled appointment without rescheduling
- Appointment Rescheduled – Appointment cancelled and rescheduled for another time/date

• Referral Specific – by Participant

- Attempted Contact
- Contacted
- Made Appointment

• Referral Specific – by Provider

- Attempted Contact
- Contacted
- Made Appointment
- Met with

• General

- Did not meet need
- Unknown Outcome
- Outcome N/A

Delete Records

- Deleting a saved record of a Resource, Referral or Appointment:
 - Records should ONLY be deleted if the INCORRECT Referral, Appointment, or Resource was entered.
 - If a client has declined the service, update the outcome rather than deleting the record.
 - To delete a record, click “Delete this record” and “Save”

