PRA | SPECT IPO CI/CHV/CHW

Referrals, Appointments, Resources

Rev 053014

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Resources, Appointments and Referrals

4

•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

• Home	Enrolled P	atient Search Resu	ilts				
• User Administration	NFP Traini	ng					
► CHW Training		- -					
▶ HF Training	Referral Date	Patient Name	Patient DOB	Program Status	Program Status Date	Staff	Assignment Date
▼ NFP Training	07/18/13	Wunpage, Winnie	08/05/95	Enrolled	01/23/14	Smith	05/06/14
Deferrale	09/05/13	Jolly, Jessie	09/26/90	Enrolled	12/12/13	Smith	02/20/14
Referrals	10/14/13	Nabbit, Dag	07/08/98	Enrolled	04/24/14	Staff	12/18/13
Newly Assigned Patients	11/04/13	Electra, Carman	07/01/97	Enrolled	05/06/14	Smith	11/07/13
List	01/13/14	Kane, Candy	04/26/85	Enrolled	04/24/14	Staff	01/23/14
Enrolled Patients List	01/22/14	Needy, Nancy	04/26/98	Enrolled	04/24/14	Staff	04/24/14
MINOPE Patients List	01/23/14	Smith, Sally	06/09/95	Enrolled	05/22/14	Staff	05/22/14
 Closed Patients List 	01/24/14	Prada, Patty	04/26/90	Enrolled	02/28/14	Staff	02/28/14
 Forms PAT Training Logoff 							

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

• Home	Patient Profile:	NFP Trainin	ıg				
User Administration							
CHW Training	Sally Smith						
HF Training	Sully Shirth						
NFP Training							ø
	Client Status			Enrolled			
PAT Training	Status Assignmen	t Date		05/22/2014			
• Logoff	Is Client MIHOPE	Participant		No			
	MIHOPE Client ID			Missing Requir	ed Informatio	n	
	Referral Date			01/23/2014			
	EDC Date			07/01/2014			
	Birth Date			06/09/1995			
	Patient Informati	on					
	Street		56	Elm Street			
	City, Zip		Ca	mden 98765			
	County		Ca	mden County			
	Home Phone		85	6-598-5565			
	Cell Phone						
	Other Informatio	n					
	Language		Spanis	h			
	Race		Hispan	ic			
	Referring Agency	Information					
	Referring Agency		System	Trainii CI	ick 😳 to a	adda	
	Agency Address		2500 M Pennsa	IcClella n	ew Resou Referral	irce, or	
	Agency Phone		(856) 6	65-600	nnointm	ent	
					ppontan		-0
	Datient Encounter						-0
Click the date to	Date	Methy	od.	01	tcome		Appt/Ref
open and update	05/22/14	Homo	Dhono	00	ntactod		View
outcomes.	00/22/14	Home	(22/2244		T	11	view
	Apppintment Date	e 05,	/23/2014	Agency	Type Doto	Home Vis	iting
	Notes	clie	ent enrolled	Outcon	le Date	03/23/20	14
	05/06/14	Circ	ine enroneen	Ot	hor		N/A
	05/00/14			01			N/A
	Program / Status	History					
	Program	Status	Pending Enrollment	Enrollment	Pending Close	Closed	Closed Reason
			Enformente				

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.

PRA SPECT Perinatal Risk Assessment Single Point of Entry and Client	Tracking System		
	Central Intake E	ncounter/Engagement	
	Sammy Suns	hine	
	Program	CHW Training	Enter Contact and click
A contact date	Contact Date	05/22/2014	"Save Contact"
MUST be entered	Contact Method	Cell Voice V	
	Contact Outcome	Contacted •	
	Contact Notes		
			Back to List Save Contact

Central Intake E	ncounter/Engagement	
The contact/encou appointment, or re	nter record was successfully source	added. Select the link below to add a referral,
Sally Smith		
Program	NFP Training	Once Saved, Add New
Contact Date	05/22/2014	will appear. Click here.
Contact Method	Cell Voice •	In appear ener nore
Contact Outcome	Contacted •	
Contact Notes	made referral to prenatal ca	rel
Add New Referral Ar		
ADD DEW SEICHAL, B	ANAMERIC, OF RESOURCE	

Service Type and Service Provider Information

8

- 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.

PRA SPECT Perinatal Risk Assessment Single Point of Entry and Client	Tracking System	
	Service Type and Se	ervice Provider Information
	Date	
	Туре	 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 - Select -
	FIONGEIS	Program - Select Service Type First - 🔻
		Provider - Select Program First - V
	Status and Outcome	e Information
	Status	-Select Status-
	Outcome	-Select Outcome- Outcome Date
	Notes / Comments	
	General Notes - Info	rmation seen by any user with access to patient record
		I
	Internal Notes - Info	rmation seen by the user and individuals in the same agency
		Return/Cancel Save

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

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•Adding a Resource provided to client:

•Selection options will change as you select the different types of programs

PRA SPECT Perinatal Risk Assessment Single Point of Entry and Client Tra	icking System	
	Service Type and Se	ervice Provider Information
	Date	05/22/2014
* Select the appropriate choices.	Туре	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.
* Each Service	Service Programs / Providers	Type - Select -
Program/Provider		Program Community Based Agency Support
will change with		Provider Community Home Visiting Outreach and Case Management Primary Medical Care
each Type selected	Status and Outcome	Information
	Status	-Select Status- T
	Outcome	-Select Outcome-
	Notes / Comments	

Select Type = Resource
Select Service Program / Provider
Select Provider

Date	05/00/001	4	
	05/22/201	.4	
Туре	Resou	rce - General service information to contact/m	ation has been given/sent.
	 Appoint 	ntment - A date/time has be	en set up with a Provider.
Service Programs / Providers	Туре	Community Based Agency Su	pport 🔻
	Program	- Select Program -	•
	Provider	- Select Programs Basic Needs/General Bebavioral Health	^
Status and Outcome	Informatio	Child Care	
Status	-Select St	Community Centers Domestic Violence	
Outcome	-Select O	Early Head Start/Head Start Early Intervention System	Outcome Date
Notes / Comments		Emergency Housing	
General Notes - Infor	mation seer	Family Success Center Fatherhood Services	atient record
		Food Centers Housing Insurance Services	
		Parenting Groups School Based Services	
Internal Notes - Infor	mation see	Smoking Cessation	h the same agency

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

Service Type and Se	ervice Provi	ider Information		
Date	05/22/201	14 🏢		
Туре	 Resou Referred Appoi 	urce - General service info ral - Information to contac ntment - A date/time has	rmation has been given, t/make appointment wit been set up with a Prov	/sent. th a Provider. rider.
Service Programs / Providers	Туре	Community Based Agency	Support 🔻	
	Program	Basic Needs/General	¥	
	Provider	- Select Provider - 🔻		
Status and Outcome	Informatio	on		
Status Outcome Notes / Comments	Open	•		
	-Select O	utcome-	Outcome Date	
	-Select O	utcome- ment Specific		
General Notes - Infor	m Appoin	tment Kept	to patient record	
	Appoin Referral Attemp Contac Made A	Specific - by Participant sted Contact ted Appointment th		
Internal Notes - Infor	m Referral	Specific - by Provider	als in the same agency	
	Attemp Contac Made A Met wit General Did no Unkno	ted Appointment th t meet need wn Outcome pe IV/A		

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

	Central Intake En	ncounter/Engagemer	it		
	Sammy Sunst	hine			
3	Program	CHW Training			
	Contact Date	05/22/2014			
	Contact Method	Cell Voice 🔻			
	Contact Outcome	Contacted •			
	Contact Notes				
	Add New Referral, Ap	pointment, or Resource			<i>•</i>
	Resource				
	Date	05/22/2014			
	Service Programs / Providers	Community Based Ag	gency Support> Basic N	leeds/General	
	Status: Open				
	Outcome	N/A	Outcome Date	05/22/2014	
	General Notes				
	Internal Notes				

Add Referral

14

•Adding a Referral provided to client:

•Selection options will change as you select the different types of programs

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 Outceech and Case Management * Provider Select Provider - Status and Outcome Information Status -Select Status - * Outcome -Select Outcome Service / 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	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 • Program DCP&P • • Provider - Select Provider - Select Provider - Outcome Date • • Status and Outcome Information • Status Select Status - Outcome Date • • Outcome • Select Outcome - Outcome Date • • Researce • • • Appointments • • • 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 •	Service Type and Se	ervice Prov	vider Information			
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 Program DCP&R Provider Status and Outcome Information Status Select Status Outcome Select Outcome 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	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. Providers Type Outreach and Case Management * Providers Provider Status and Outcome Information Status -Select Drovider - Outcome Outcome -Select Outcome- Outcome Date Seneral Notes - Information seen by any user with access to patient record	Date	05/23/20	14			
Service Programs / Type Outreach and Case Management T Providers DCP&P T Provider - Select Provider - T Status and Outcome Information Status - Select Status - Outcome Date Outcome Date Outcome - Outcome - Outcome Date	Service Programs / Type Outreach and Case Management Providers 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	Туре	Reso Refer Appo	urce - General service info ral - Information to contac intment - A date/time has	rmation has been giv t/make appointment been set up with a P	en/sent. with a Provider. rovider.	
Program DCP&P Provider Select Provider Status and Outcome Information Status Select Status Outcome Select Outcome Outcome Select Outcome 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	Program DCP&P Provider - Select Provider - Status - Select Status - Outcome - Select Outcome - Outcome - General Notes - Information seen by the user and individuals in the same agency	Service Programs / Providers	Туре	Outreach and Case Manag	ement 🔻		
Status and Outcome Information Status	Status and Outcome Information Status Status Status Outcome Outcome Votes / 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		Program Provider	DCP&P	T		
Status -Select Status- Outcome Outcome Date Outcome Outcome 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	Status -Select Status Outcome 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	Status and Outcome	e Informatio	on La			
Outcome 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	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	Status	-Select S	Status- 🔻			
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	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	Outcome	-Select C	Dutcome-	Outcome Date		
General Notes - Information seen by any user with access to patient record	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	Notes / Comments					
Internal Notes - Information seen by the user and individuals in the same agency	Internal Notes - Information seen by the user and individuals in the same agency	General Notes - Info	rmation see	n by any user with access	to patient record		
Internal Notes - Information seen by the user and individuals in the same agency	Internal Notes - Information seen by the user and individuals in the same agency					<i>4</i>	
		Internal Notes - Info	rmation see	en by the user and individ	uals in the same ager	icy	

•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

PRA | SPECT Perinatal Risk Assessment Single Point of Entry and Client Tracking System Central Intake Encounter/Engagement Sally Smith Program NFP Training Contact Date 05/22/2014 Contact Method Cell Voice • Contact Outcome v Contacted Contact Notes Add New Referral, Appointment, or Resource 2 0 Referral 05/23/2014 Date Service Programs / Outreach and Case Management --> DCP&P Providers Status: Closed Outcome Appointment Kept Outcome Date 05/26/2014 **General Notes** Internal Notes (all Resource Date 05/22/2014 Service Programs / Community Based Agency Support --> Basic Needs/General Providers Status: Open Outcome N/A Outcome Date N/A General Notes Client given resource to receive diapers Internal Notes Back to List Save Contact

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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

Service Type	and Service Prov	ider Information		
Date	05/22/201	14 🔳		
Туре	 Resource Referration Appoint 	urce - General service information ral - Information to contact/make ntment - A date/time has been se	has been give appointment v et up with a Pr	n/sent. vith a Provider. ovider.
Service Progra Providers	ams / Type	Primary Medical Care	- Select - Community Ba	sed Agency Support
	Program	- Select Program -	Outreach and O	Case Management
	Provider	- Select Program - Dental Services Family Health		
Status and O	utcome Informatio	Hospitals		
Status	Closed	Pregnancy Testing		
Outcome	Appointm	Prenatal 9 Primary Medičal Care - Children 9 Primary Medical Care - Nother	come Date	05/23/2014
Notes / Com	nents	Primary Medical Care - Other		
General Notes	s - Information see	N Women's Health	ont record	
	atar Care Appt		/	
	s - Information see	n by the user and individuals in t	ne same ayen	-y
				6

•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

PRA SPECT Perinatal Risk Assessment Single Point of Entry and Client	Tracking System						
	Central Intake En	ncounter/Er	ngagement				
	Sammy Sunst	hine					
	Program	CHW Trainir	na				
	Contact Date	05/22/2014					
	Contact Method	Cell Voice	T				
	Contact Outcome	Contacted					
2	Contact Notes						
	Add New Referral, Ap	pointment, or	Resource				
							<i>~</i>
	Resource						
	Date	05/22/20	14				
	Service Programs / Providers	Communi	ty Based Age	ncy Support	> Basic Needs/Ger	heral	
	Status: Open						
	Outcome		N/A	Outcome	e Date	05/22/2014	
	General Notes						
	Internal Notes						
							1
	Appointment						
	Date		05/22/2014				
	Service Programs / Providers		Primary Med	lical Care>	Prenatal		
	Status: Closed						
	Outcome		Appoint	ment Kept	Outcome Date	05/23/2014	
	General Notes		Attended Pr	enatal Care /	Appt		
	Internal Notes						
					Back	to List Save Cont	tact

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Update Outcomes

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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.

TRAJECT						E PERSON NUMBER OF		
Perinatal Risk Assessment						PRAISPE	CT	
Single Point of Entry and Client 1	Tracking System					- undare		
+ Home	Patient Profile: CHW T	raining				Perinatal Risk Assess Single Point of Entry	ment and Client Tracking System	
User Administration							Central Intake Fr	counter/Engagement
CHW Training	Sammy Sunshine							
+ Logoff	Summy Summire							***
N	Clearl Status				2		Sammy Sunsi	ane
- HE	Chefric Scattus				4			
	Status Assignment Date				4		Program	CHW Training
	Keterral Date		03/14/2014				Contact Date	05/22/2014
	EDC Date		and the second second				Contact Mathead	Particular B
	Birth Date		07/09/1990		1		Contact Method	Les voice
	Client Engagement Event?		Informal Meeting		1		Contact Outcome	Contacted
								Click Pencil 🖉 to
	Patient Information						Contact Notes	undate outcome
	Street	99 Brig	ht Way					update outcome.
	City, Zip	Camder	n 98765				Add New Feferral, Ap	pointment, or Resource
	County	Camder	n County					
	Home Phone	877-89	8-8899					NO.
	Cell Phone	877-89	8-8899				Resource	
	Other Information						Date	05/22/2014
	Language	English					Service Programs /	Community Based Apency Support> Basic Needs/General
	Race	Multi-Racial					Service Programs /	Compared on the standard of th
	Referring Agency Informa	ation						
Click Encount	ter date in	System Trai	ning Institute					N/A Outcome Date 05/22/2014
Patient Pro	ofile to	2500 McCle	lan Ave.					
Futurit Fit	outcomo	Pennsauker	n, NJ 06109					
view/update d	outcome.	(856) 665-6	5000		1			
				1				A
	Da at Encountage							
	Orton	Method	Outcome	Acot Rel			Delete this record 📄	05/22/2014
	05/22014	Call Voice	Contacted	N/A				Primary Medical Care> Prenatal
	UNICED AN	Call Voice	Contacted					
	VILLAN	Cervore	Contacted	AISH				
	Program / Status History							Appointment Kept Outcome Date 05/23/2014
		Pending .	Pending clus	. Closed	rvice in	formation has been giv	en/sent.	Attended Prenatal Care Appt
	Program sca	Enrolment	Close Close	ed Reason	to cont	act/malka appaintment	with a Dravidar	
	CHW Training Enro	olled 05/09/14	N/A N/A N/A	N/A	to conc	acquiake appointment	with a Provider.	and the second
					time ha	as been set up with a P	rovider.	Back to List Save Contact
					d Agen	cy Support 🔻		
		and and a second				-		114 PRA SPECT
				Program	Basic Needs/General	•		
				Provider	- Select Provider - V			
			Status and Outsome	Information				
			Status and Outcome I	Information	-			
			Juitus	Open				
			Outcome	-Select Ou	tcome-	Outcome Date	05/22/2014	
			Notes / Comments	Appointm	ent Specific			
		General Notes - Inform. Appointment		ment Kept	to patient record			
				Appoint	ment Rescheduled			
				Referral :	Specific - by Participa	nt		
				Attempt	ed Contact			
				Contact	ed			
				Made A	ppointment		le le	
			Internal Notes - Inform	n Referral Specific - by Provider Attempted Contact		als in the same agency		
				Contact Made A	ea			
				Mat with	ppontenent			
				General				
				Did not	meet need			
				Unknow	n Outcome			
				Outcom	e N/A			
							Return/Cancel Save)	
							Return/Cancel Save	
							Return/Cancel Save	
							Return/Cancel Save	
							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

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•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"

		elete this reco
Service Type and Service Type	vice Provider Information	
Date	05/22/2014	$1 \sim$
Туре	 Resource - General service information has been given/se Referral - Information to contact/make appointment with Appointment - A date/time has been set up with a Provide 	a Provider. er.
Service Programs / Providers	Type Community Based Agency Support ▼ Program Basic Needs/General ▼	