

# **Adding a Service Referral within Case Services**



**Knowledge Base Article**

# Adding a Service Referral within Case Services

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## Adding a Service Referral within Case Services

### Overview

This Knowledge Base Article discusses steps for adding a **Service Referral** for a **Case Member** from within the **Case Services** link of a Case record in the Ohio SACWIS system. Users can also generate a **Referral for Service** report that can be used to refer a **Case Member** for a **Service**. Any user with access to the **Case Services** link within the **Case** can add a **Service Referral** for a case member and generate a **Referral for Service** report.

A **Service Referral** can be created for **Case Service Members** with a **Case Member Service Status** of 'Needed' or 'Referred'. The **Service Referral** will automatically create a **Case Member Service Status** of 'Referred'.

The user may select multiple **Case Service Members** for the **Service Referral** and may link multiple **Providers** to the **Service Referral** record. The **Referral History** screen displays information for each **Service Referral** record.

After adding a **Service Referral**, the user can generate a **Service Referral Report**, which is formatted as a business letter and can be used to refer a **Case Member** for a **Service**. The report pulls in data elements from the **Child's Case**, the **Person Profile** record, and information entered by the user on the **Parameters** page. The Business Address displayed on the report is based on the user's selected **Referral Type** of either **Provider** or **Case Member**.

**Note:** This Knowledge Base Article does not apply to **Help Me Grow** Service Referrals. For information on adding a **Help Me Grow** Service Referral, please refer to the Knowledge Base Article "Creating a Help Me Grow Referral from Case Services".

To add a **Service Referral** and generate a **Service Referral Report**, complete the following steps.

# Adding a Service Referral within Case Services

## Viewing Case Service Information

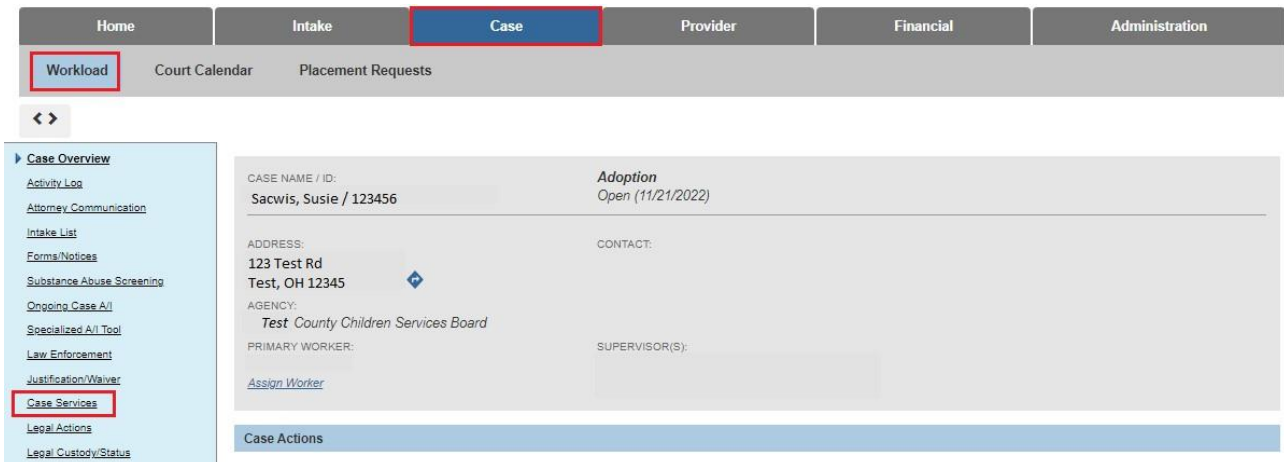
To view case service information, complete the following steps.

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case ID** link of the appropriate case.

**Note:** If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen to navigate to the **Case Overview** screen.



The **Case Overview** screen appears.



4. From the **Navigation** menu, click the **Case Services** link.

# Adding a Service Referral within Case Services

The **Case Services Filter Criteria** screen appears.

The screenshot shows the 'Case Services Filter Criteria' screen. The navigation menu on the left has 'Case Services' highlighted. The main area displays filter criteria for Case Services, including fields for From Effective Date, To Effective Date, Case Member, Service Category, End-dated services, Status, Service Type, Service, and Linked Status. A 'Filter' button is highlighted in red. Below the filter criteria, there is a table of Case Services with columns for Case Member Name(s), Service Category / Type, Service Classification, Effective Dates, and actions (edit, delete, service\_end, Linked). The 'edit' link in the first row is highlighted in red.

5. Select the **Filter Criteria** and click the **Filter** button to limit the **Case Services** search results that appear at the bottom of the screen. (Optional)
6. Click the **View** link to view the **Case Service**.
7. Click the **Edit** link to edit the **Case Service**, if needed.

# Adding a Service Referral within Case Services

## Adding a Service Referral

Complete the following steps to add a new **Service Referral** for a case member.

1. Click the **Referrals** link beside the appropriate **Case Service** record for which you wish to create a **Service Referral**.

The screenshot shows the 'Case Services' interface. At the top, there is a 'Service:' dropdown menu and an 'Add Case Services' button. Below this, it says 'Result(s) 1 to 15 of 15 / Page 1 of 1'. A table with the following columns is displayed: Case Member Name(s), Service Category / Type, Service Classification, Effective Dates, and a column with links. The table contains one row for 'Sacwis, Susie' with service category 'Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly', classification 'Case Member', and effective dates '09/15/2022 -'. The 'referrals' link in the bottom row of the table is highlighted with a red box. Below the table, there is a checkbox for 'Case Member / Caregiver / Caretaker History'.

The **Referral History** screen appears.

The screenshot shows the 'Referral History' interface. It displays 'Service Category / Type: Case Management / Family Search and Engagement', 'Effective Dates: 04/05/2023 -', and 'Service Classification: Case Member'. Below this information, an 'Add Referral' button is highlighted with a red box. At the bottom, there is a table with the following columns: Members, Provider/Provider ID, Service Description, Referral Date, and Referral Status.

2. Click the **Add Referral** button.

**Important:** Ohio SACWIS will not allow the creation of duplicate **Case Member Service Statuses**. If the **Case Member Service Status** is **'Referred'** and the user attempts to create a Referral with the same **Case Member** and **Provider ID** combination, a validation message will appear stating, **"A Referred Member Service Status already exists for <Child, Provider>"**. The **Add Referral** button is disabled (grayed out) if no **Case Service Members** are available to add the service referral. The **Add Referral** button is also disabled if the **Case Service** is end dated, as a referral record cannot be added to an end dated case service.

The **Service Referral Selection** screen appears.

## Adding a Service Referral within Case Services

**Service Referral Selection**

Service Category / Type: Case Management / Family Search and Engagement      Effective Dates: 04/05/2023 -  
Service Classification: Case Member

Referral Date: \*

**Available Case Service Members:**

Search [Add All](#) Add

Sacwis, Susie

**Selected Case Service Members:**

Remove Remove All Search

**Provider Information**

Provider	Service Description	Provider Address
<a href="#">Link Provider</a>		

3. Enter the **Referral Date**. (Required)

**Hint:** Click the **Calendar** icon beside the field to select the date.

4. Select the name of a **Case Service Member** in the **Available Case Service Members** list. You must select at least one Case Service Member for the Service Referral.

**Reminder:** The **Available Case Service Members** list only displays **Case Members** whose most recent **Case Member Service Status** is **'Needed'** or **'Referred'**.

5. Click the **Add** button to add the selected **Case Service Member(s)** to the **Selected Case Service Members** list.

**Note:** To de-select a member, select the member in the **Selected Case Service Members** list. Then click the **<< Remove** button to move the member back to the **Available Case Service Members** list.

6. Click the **Link Provider** button to link the **Provider(s)** to the **Service Referral** record.

## Adding a Service Referral within Case Services

The **Provider Match Search Criteria** screen appears.

**Note:** The **Service Category**, **Service Type**, and **Search Date** (outlined in green) are pre-populated based on the information from the case service. The **Service Category** and **Service Type** fields cannot be modified.

**Search For Provider Match**

Service Category: Case Management Service Type: Family Search and Engagement

Search Date: 09/05/2023  With Available Vacancies  Child has a kinship relationship with the provider

Available Counties: Selected Counties:

Provider ID:

*Note: If Provider ID is entered, criteria such as Provider Name, Member Name, Counties, School District, and Provider Skills will be ignored*

Provider Name: OR Member Last Name: Member First Name: Member Middle Name:

[Child Information & Characteristics](#)

[Provider Skills](#)

Name Match Precision: Returns results matching entered names including AKA names/nicknames

Sort By: Provider Name (A-Z)

+ AKA/Nicknames

7. Enter additional **Search Criteria** if needed.



## Adding a Service Referral within Case Services

**Note:** If you know the **Provider ID** you wish to link, click the **Additional Search Criteria** expand and enter the **Provider ID** in the appropriate field.

8. Click the **Search** button.

The **Provider Match Search Results** list appears.

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies
<a href="#">view</a>	Test, Provider / 123	NONODJFS	ACTIVE		

[View Services](#) ^

Test County Children Services Board:

- [select](#) Family Counseling

9. Click **Select** beside the **Provider Name / ID** you wish to link to the **Service Referral** record.

- Multiple **Providers** may be linked to the **Service Referral** record if you are making multiple referrals for the same **Case Service**.

10. Click the **OK** button.

**Note:** At least one **Provider** must be linked to the **Service Referral** record. If you did not select a **Provider**, the validation message, “**At least one provider must be linked to complete the record**” displays.

The **Service Referral Selection** screen appears.

Provider	Provider Address
<a href="#">view</a> Test, Provider	<a href="#">unlink</a>

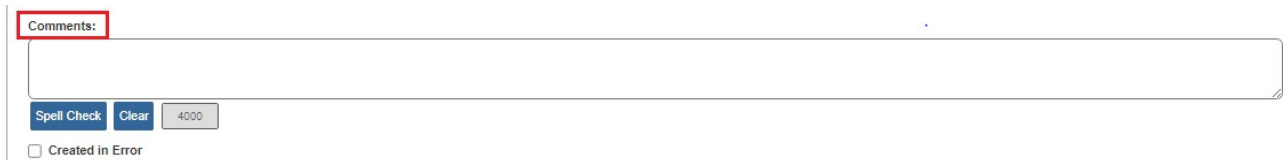
[Link Provider](#)

**Note:** To **Unlink** a provider, click the **Unlink** link beside the appropriate provider.

## Adding a Service Referral within Case Services

11. Enter **Narrative** in the text box provided. (Optional but will display on referral report).

**Important:** The **Narrative** from the text box will appear in the **Service Referral Report**. The **Narrative** box is designed to provide detailed information to the **Provider** or **Case Member** that is pertinent to the service being referred. This narrative will be displayed for either Provider or Case Member depending on the version of the report chosen.



Comments:

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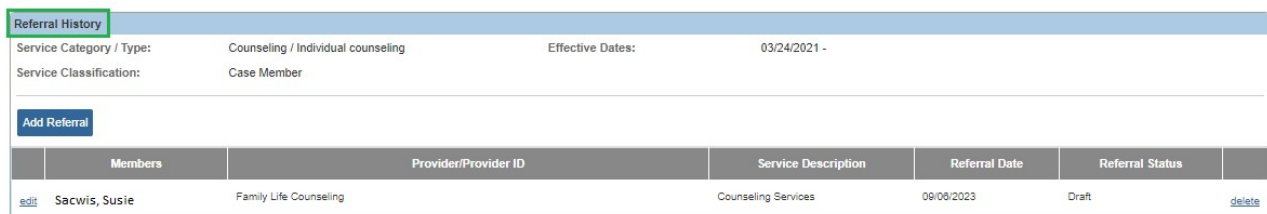
Created in Error

12. To complete the service referral record, select **Save** at the bottom of the screen.



Save Cancel

The **Referral History** screen appears with the message, **'Your data has been saved'**.



Referral History						
Service Category / Type:	Counseling / Individual counseling	Effective Dates:	03/24/2021 -			
Service Classification:	Case Member					
<a href="#">Add Referral</a>						
	Members	Provider/Provider ID	Service Description	Referral Date	Referral Status	
<a href="#">edit</a>	Sacwis, Susie	Family Life Counseling	Counseling Services	06/06/2023	Draft	<a href="#">delete</a>

[Close](#)

13. Click the **Close** button.

The **Case Services Filter Criteria** screen appears.

# Adding a Service Referral within Case Services

## Generating a Service Referral Report

1. On the **Case Services Filter Criteria** screen, click the **Referrals** link beside the appropriate **Case Member Name(s)**.

Case Services

Service:  [Add Case Services](#)

Result(s) 1 to 15 of 15 / Page 1 of 1

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
<a href="#">edit</a>	Sacwis, Susie	Independent Living & Transitional Living/Mentor with trained adult 1-1 meet regularly	Case Member	09/15/2022 -	<a href="#">delete</a> <a href="#">service end</a> <a href="#">Linked</a>

[referrals](#)

Case Member / Caregiver / Caretaker History

The **Referral History** screen appears.

**Note:** Each **Referral** record is displayed on a separate line. A **Referral** record can include multiple **Providers**.

Referral History

Service Category / Type: Case Management / Monitoring Case Progress      Effective Dates: 03/24/2021 -

Service Classification: Case Member

[Add Referral](#)

	Members	Provider/Provider ID	Service Description	Referral Date	Referral Status
<a href="#">view</a> <a href="#">report</a>	Test, Member	Test County Children Services Board/10004	Monitoring Case Progress	09/08/2023	Completed

2. Click the **report** link beside the service for which you wish to generate the report.

The **Document Details** screen appears.

## Adding a Service Referral within Case Services

**Document Details**

Document Category:	CASE	Document Title:	Service Referral Report
Work-Item ID:		Work-Item Reference:	
Task ID:		Task Reference:	

**Document History**

ID	Date Created	Employee ID	Name
----	--------------	-------------	------

**Document History**

[Generate Report](#)

3. Click the **Generate Report** button.

The **Service Referral Report** parameters page appears.

**Service Referral Report**

Caseworker Name: \*

<b>Available Referral Members:</b>	<b>Selected Referral Members:</b>
<input type="text"/> <a href="#">Add All</a> <input type="button" value="Add"/>	<input type="text"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/>
Test, Member	
<b>Available Providers:</b>	<b>Selected Providers:</b>
<input type="text"/> <a href="#">Add All</a> <input type="button" value="Add"/>	<input type="text"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> <input type="text"/>
Test County Children Services Board	

4. Select the **Caseworker Name** from the drop-down list. (Required)
5. Select the name(s) of the **Available Referral Member(s)** you wish to include in the report from the **Available Referral Members** list.
6. Click the **Add** button to add the selected **Available Referral Member(s)** to the **Selected Referral Members** list.

## Adding a Service Referral within Case Services

**Important:** At least one **Available Referral Member** must be selected to generate the report.

**Note:** To de-select a referral member, select the member in the **Selected Referral Members** list. Then click the **Remove** button to move the member back to the **Available Referral Members** list.

7. Click the **Add** button to add one or more **Available Providers** to the **Selected Providers** list.
8. Select the **Referral Type** from the drop-down list. (Required)

**Important:** You can select a **Referral Type** of **Provider** or **Case Member**. The application will generate one or more reports based on your selection:

- If you select **Provider**, the application will generate a separate referral report for each provider linked.
- If you select **Case Member**, the application will generate one report listing all linked providers.
- If the **Service Referral** includes multiple **Case Members** and multiple **Providers**, you will still generate the report with a **Referral Type** of either **Provider** or **Case Member**:
  - If you select **Provider**, the application will generate a separate report for each **Provider**, with each report listing all referred Case Members.
  - If you select **Case Member**, the application will generate a separate report for each **Case Member**, with each report listing all **Providers**.

Referral Type: \*

Agency Requests an Update: \*

To arrange service(s) please contact: \*

Spell Check Clear 150

Generate Report Cancel

9. Select the appropriate time frame for updates from the drop-down list in the **Agency Requests an Update** field. (Required)
10. Enter the **Contact Information** in the **To arrange service(s) please contact** text box. (Required)

## Adding a Service Referral within Case Services

**Note:** The **Contact Information** that is entered in the **Narrative** text box will display in the body of the report below the **Referral Information** and **Requested Service(s)** sections.

11. Click the **Generate Report** button.

The message **Your report is being created** appears while the report is generating.

The **Referral for Service** report appears.

### Understanding the Referral for Service Report Letter

The following example shows a report generated for the **Referral Type** of **Provider**.

- The **Provider Contact Information** displays at the top left of the report.
- The report is addressed to the **Provider** using the **Provider Name**.
- The **Case Member(s)** connected to the Service Referral are displayed in the body of the report under **Referral Information**.
- The **Case Services** being referred are displayed in the body of the report under **Requested Service(s)**.
- The **Narrative** information is displayed in the body of the report below the **Referral Information**.
- The **Agency Requests an Update** time frame and the **Contact Information** are displayed below the **Referral Information** and **Requested Service(s)**.
- The signature lists the **Contact Information** for the user generating the report. This information is pulled from the **Person Profile**.

## Adding a Service Referral within Case Services

**Referral for Service**

Test County Children Services Board  
456 Test Rd  
Test, OH 12345

Referral Date: 09/06/2023

Dear Test Services

Our agency is referring you to the following for the service(s) identified below.

<p><b>Referral Information:</b></p> <p>Susie Sacwis 123 Test Rd Test, OH 12345 (123) 456-7890</p>	<p><b>Requested Service(s):</b></p> <p>Monitoring Case Progress</p>
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To arrange services, please contact:  
TEST

Test County Children Services Board requests an update monthly from the provider. It is our hope that you will find this service beneficial to you and your family. If you have any questions, please contact me at

Sincerely,

<p>Test, Caseworker Test County Children Services Board 456 Test Rd Test, OH 12345</p>	<p>Test, Caseworker Child Welfare Supervisor</p>
--	--

The following example shows a report generated for the **Referral Type** of **Case Member**.

- The **Case Member Contact Information** displays at the top left of the report.
- The report is addressed to the **Case Member** using the name on the **Person Profile**.
- The **Provider Contact Information** is listed in the body of the report under **Referral Information**.
- The **Case Services** being referred are displayed in the body of the report under **Requested Service(s)**.
- The **Narrative** information is displayed in the body of the report below the **Referral Information**.
- The **Agency Requests an Update** time frame and the **Contact Information** are displayed below the **Referral Information** and **Requested Service(s)**.
- The signature lists the **Contact Information** for the user generating the report. This information is pulled from the **Person Profile**.

# Adding a Service Referral within Case Services

## Referral for Service

Sacwis, Susie  
123 Test Rd  
Test, OH 12345

Referral Date: 09/06/2023

Dear Susie Sacwis:

Our agency is referring you to the following provider(s) for the service(s) identified below.

### Referral Information:

Test County Children Services Board  
456 Test Rd  
Test, OH 12345  
(123) 456-7890

### Requested Service(s):

Monitoring Case Progress

To arrange services, please contact:  
TEST

Test County Children Services Board requests an update monthly from the provider. It is our hope that you will find this service beneficial to you and your family. If you have any questions, please contact me at

Sincerely,

Test, Caseworker  
Test County Children Services Board  
456 Test Rd  
Test, OH 12345

Test, Caseworker  
Child Welfare Supervisor

**Important:** The user cannot modify the completed report after it has been **Printed** or **Saved**. Prior to **Printing** or **Saving** the generated report, review it for errors and click the **Review Parameters** button, if needed, to make modifications.

To **Save** the generated report to the application, click the **Save** button.

**Note:** To **Print** the PDF or to **Save** the PDF to your computer, hover the mouse over the screen until the **Task Bar** (outlined in red below) appears. Click the **Disk** button to **Save** the report or the **Printer** button to **Print** the report.



## Adding a Service Referral within Case Services

The screenshot shows a software window with a toolbar at the top. The main content area displays a form titled "Referral for Service". The form includes the following text:

**Referral for Service**

Sacwis, Suzie  
123 Test Rd  
Test, OH 12345

Referral Date: 09/06/2023

Dear Suzie Sacwis:

Our agency is referring you to the following provider(s) for the service(s) identified below.

Referral Information:	Requested Service(s):
Test County Children Services Board 456 Test Rd Test, OH 12345 (123) 456-7890	Monitoring Case Progress

To arrange services, please contact:  
TEST

County Children Services Board requests an update monthly from the provider. It is our hope that you will find this service beneficial to you and your family. If you have any questions, please contact me at (780)

Sincerely,  
Test, Caseworker  
Test County Children Services Board  
456 Test Rd  
Test, OH 12345

Test, Caseworker  
Child Welfare Supervisor

At the bottom left of the window, there are three buttons: "Save", "Cancel", and "Review Parameters". A red box highlights the "Save" button.

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).