



HOW TO:

**Make Referrals for
“Sexually Transmitted Infections”
(STIs)**

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INTRODUCTION:

Contracts that are funded to provide HIV/STI/Hepatitis Testing/Screening and/or Treatment (either directly or through referrals) are *required* to ensure that the services are documented and entered into AIRS. To accommodate this, AIRS has recently been updated to include the **STI Screening/Testing & Treatment Referral Category**.

[Referral information should be documented via the Service Encounters once a client's intake is entered into AIRS.](#)

Additionally, the AIDS Institute Aggregate Reports - *Summary of Referrals* report is available and must be submitted to the Contract Manager as part of the monthly report.

This document provides step-by-step guidance on entering and utilizing the STI Referrals. Additional information and technical assistance is available through your Contract Manager.

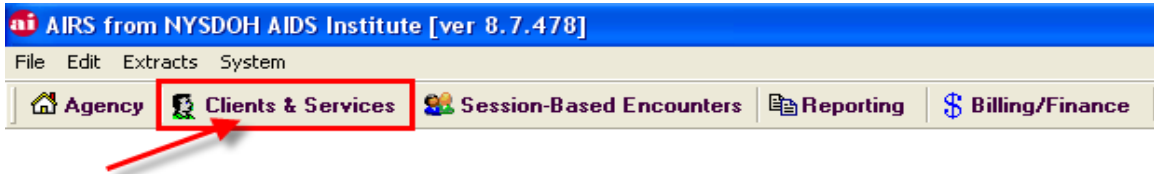
[Based on Prevention contracts, client Referrals may occur in the following scenarios.](#)

- [1. Agency provides *STI Referral for Screening and Treatment* after the client has participated in an IDI or IDG](#)
- [2. Agency provides a *Referral for Treatment* after the client has received an STI Screening under Primary Care](#)

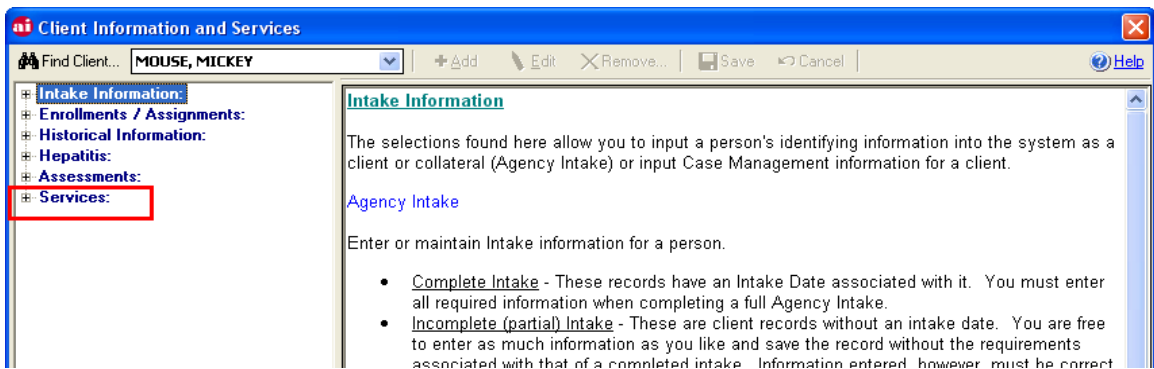
A) MAKING A REFERRAL: Via ENCOUNTERS

(The following example is for the "IDI" Service Category)

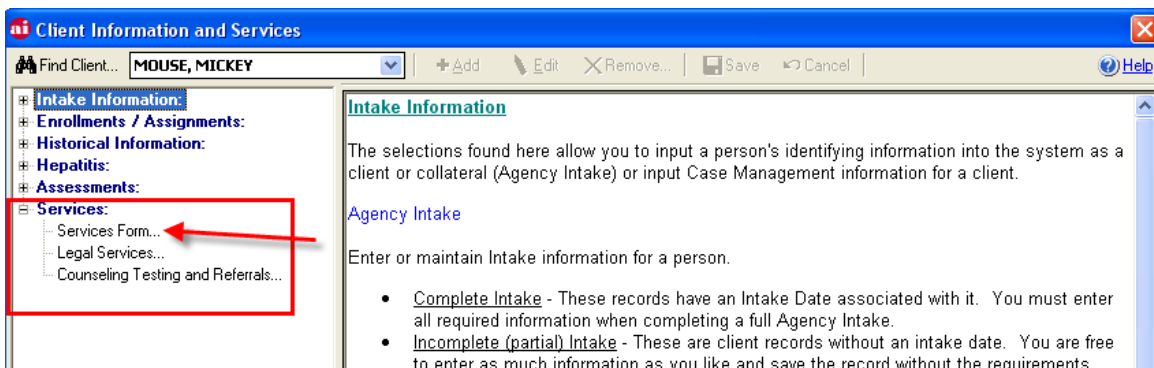
1. Once you are logged into AIRS, click on the **CLIENTS & SERVICES** Module.



2. Click on the [+] to the left of the **Services** to expand the option.



3. When the menu is expanded, you see the following.



4. Click on **Services Form** and enter the Encounter and Service(s).

Service Encounters

Find Existing Encounter

Encounter Information | progress note | Additional Information

Actual Date 05/01/2011 **Program** KZAAC BCBS MSA HIV-/unk - not enrolled...
Contract C016164G 07/01/2007 - 06/30/2015 [35357]
Service Category 00014 Interventions Delivered to Individ (IDI) Start Time :
Model 35111 Transtheoretical (Stages of Change Model) End Time :
Intervention 3536 ILI neg/unknown Time Spent: n/a
Encounter 215 HIV/STD Risk Reduction Counseling and Referral

Staff FWAAF LIBRE, NACHO **Site** FWAAB SITE 1
Team
Location
Encounter With **Date Completed** //

Planning File Related Information **Next Scheduled Appointment**
Session Number 1 Incentive Provided **Date** //
Unit of Delivery **Location**

Services Provided
 *Discussion of Condom/Barrier Use
 *Discussion of HIV Testing
 *Discussion of Other STDs
Referrals Provided Not Entered
 View All Referrals...

- **Note:** AIRS contains Service 705 which is “Referral”. Please be aware of the following.
 - a) AIRS does not force you to enter a record in the *Referrals Provided* when Service 705 is entered.
 - b) If your agency is mapped to Service 705, the expectation is that the Referral information should be entered in the **Referrals Provided** section.
 - **Note:** Based on your Planning Data mappings, you could see Service 705 but it will only occur as a client-level service. Therefore, it is not found in Session-based Service Categories (Prevention Outreach, CLI, etc.).

5. **Right-click the mouse** over the blue bar that currently says “Not Entered” to get the **Referrals Provided** options.

The screenshot displays the 'Service Encounters' form. The 'Encounter Information' tab is active, showing fields for Actual Date (05/01/2011), Program (KZAAC), Contract (C016164G), Service Category (00014), Model (35111), Intervention (3536), and Encounter (215). The 'Referrals Provided' field is currently set to 'Not Entered'. A right-click context menu is open over this field, with the 'Add Referrals Provided' option selected. A callout box with an arrow points to the menu, stating 'Right-click Mouse to get menu.'.

Field	Value
Actual Date	05/01/2011
Program	KZAAC
Contract	C016164G
Service Category	00014
Model	35111
Intervention	3536
Encounter	215
Staff	FWAAB LIBRE, NACHO
Site	FWAAB SITE 1
Session Number	1
Unit of Delivery	
Referrals Provided	Not Entered

6. Select **Add Referrals Provided**.

7. Referral(s):

- **Note:** The Referral Date (**Date Referral Made**) is not seen here but is automatically loaded in the client's Referral with the date of the Encounter.
- You can make as many Referrals from this encounter as you need. Each Referral, however, will need to be entered in its own screen.

8. For STI Referrals, enter the **STI Screening/Testing & Treatment Category**.

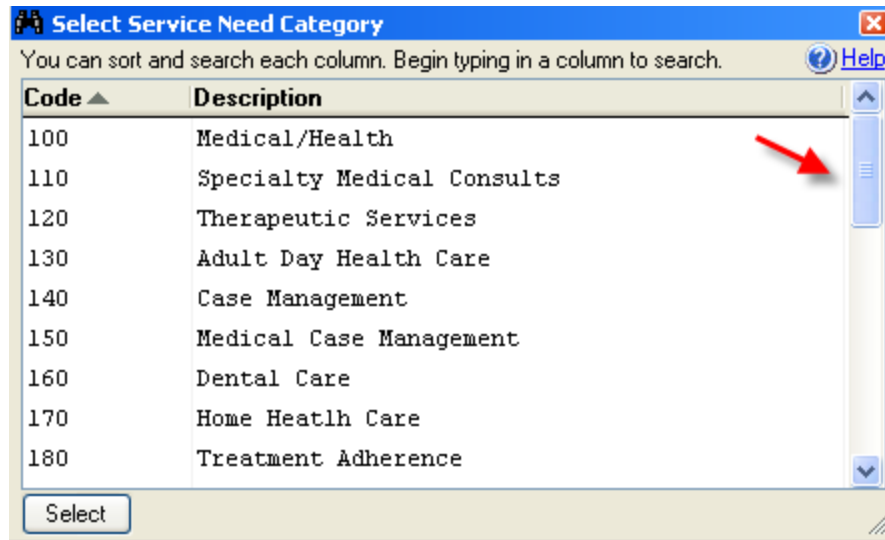
The screenshot shows a web-based form titled "Referral". The form is organized into three main sections:

- Service Need:** Contains a dropdown menu labeled "Category" (highlighted with a red arrow), a text field for "Service", and a text field for "Priority".
- Referral Information:** Includes a checkbox for "On site", a text field for "Referred To", two date fields for "Date Need Identified" and "Appointment Date", and a "Follow-up Method" section with radio buttons for "Active referral", "Passive referral-agency verification", "Passive referral-client verification", and "None".
- Referral Verification:** Includes a date field for "Date Service Verified", a text field for "Status", a text field for "# Appointments Per Week" (set to 0), and a checkbox for "Appointments Being Kept".

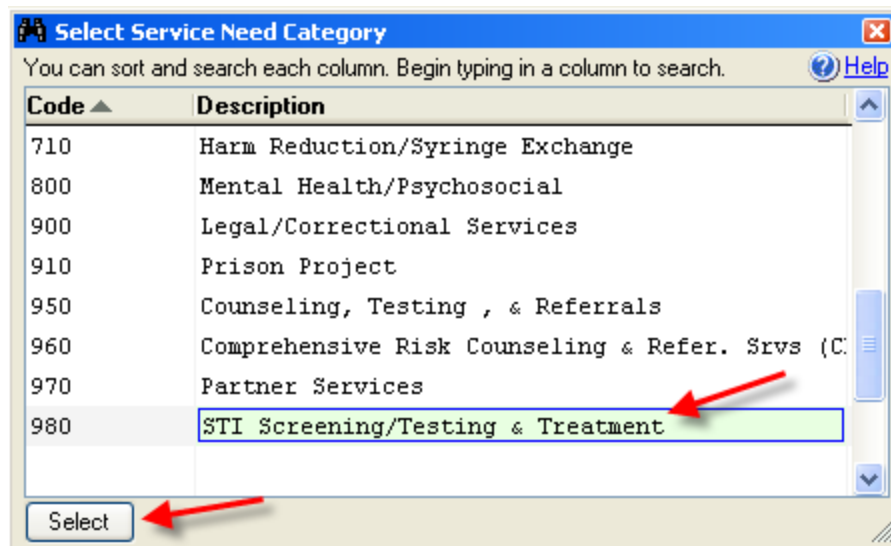
At the bottom of the form are "Done" and "Cancel" buttons.

- You have the following 2 choices when entering the **Category**.
 1. Position the cursor in the field and enter '980'.
 2. Use the Category pick list by clicking on **Category** (see next page).
 - a. Click directly on the **Category** label to pull up the pick list.
 - b. Scroll down to the select **STI Screening/Testing & Treatment** which is Code 980.
 - c. Double-click OR Highlight and click on [Select].

→ Here is what you first see. This is only a partial list, however.



→ But, you can scroll down to the end to select 980.



- For any pick list, you could click on the column heading to set the order. In this case, the list could be ordered by *Code* or *Description*.
- You can also click and drag the bottom border to extend the display of the list.
- See next page for all the Referral Category options ordered by Description.

REFERRAL CATEGORIES

Select Service Need Category

You can sort and search each column. Begin typing in a column to search. [Help](#)

Code	Description ▲
130	Adult Day Health Care
700	Alcohol/Substance Use Services
400	Basic Living Needs
510	Care Coordination
140	Case Management
960	Comprehensive Risk Counseling & Refer. Svcs (CRCS)
950	Counseling, Testing , & Referrals
160	Dental Care
200	Education/Employment
600	Family/Child Care Services
300	Financial/Entitlements
710	Harm Reduction/Syringe Exchange
210	Health Education/Risk Reduction
170	Home Health Care
410	Housing
900	Legal/Correctional Services
150	Medical Case Management
100	Medical/Health
800	Mental Health/Psychosocial
420	Nutrition and Food
650	Other
970	Partner Services
910	Prison Project
110	Specialty Medical Consults
980	STI Screening/Testing & Treatment
500	Supportive Services
120	Therapeutic Services
520	Transportation
180	Treatment Adherence

Select

9. Click on **Service**.

Referral

Service Need

Category: 980 STI Screening/Testing & Treatment

Service: []

Priority: []

Referral Information

On site

Referred To: []

Date Need Identified: [/ /] Appointment Date: [/ /]

Follow-up Method

Active referral

Passive referral-agency verification

Passive referral-client verification

None

Referral Verification

Date Service Verified: [/ /]

Status: []

Appointments Per Week: [0]

Appointments Being Kept

Done Cancel

- Available choices in the Pick List include:

Select Service

You can sort and search each column. Begin typing in a column to search.

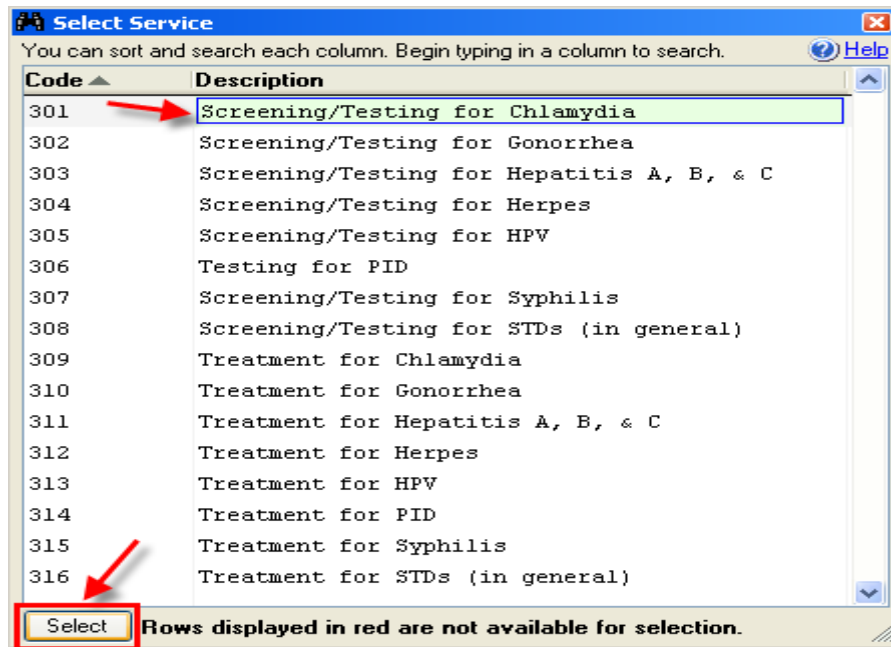
Code	Description
301	Screening/Testing for Chlamydia
302	Screening/Testing for Gonorrhea
303	Screening/Testing for Hepatitis A, B, & C
304	Screening/Testing for Herpes
305	Screening/Testing for HPV
306	Testing for PID
307	Screening/Testing for Syphilis
308	Screening/Testing for STDs (in general)
309	Treatment for Chlamydia
310	Treatment for Gonorrhea
311	Treatment for Hepatitis A, B, & C
312	Treatment for Herpes
313	Treatment for HPV
314	Treatment for PID
315	Treatment for Syphilis
316	Treatment for STDs (in general)

Select

Rows displayed in red are not available for selection.

10. **Select** the Referral Need **Service**. You can either:

- Double-click -OR-
- Highlight and click on [Select].



→ In this example, choose “Screening/Testing for Chlamydia”.

Service Need

Category: 980 STI Screening/Testing & Treatment

Service: 301 Screening/Testing for Chlamydia

Priority:

Referral Information

On site

Referred To:

Date Need Identified: Appointment Date:

Follow-up Method

Active referral

Passive referral-agency verification

Passive referral-client verification

None

Referral Verification

Date Service Verified:

Status:

Appointments Per Week:

Appointments Being Kept

Done Cancel

11. Entry is Optional in the following fields.

- A) *Priority*: If you like, you can select a priority.
- B) *On Site*: Identifies that the Referral will occur at the Service Site.

12. Enter where the client is being referred using the **Referred To**.

Referral

Service Need

Category 980 STI Screening/Testing & Treatment

Service 301 Screening/Testing for Chlamydia

Priority

Referral Information

On site

Referred To

Date Need Identified // **Appointment Date** //

Follow-up Method

Active referral

Passive referral-agency verification

Passive referral-client verification

None

Referral Verification

Date Service Verified //

Status

Appointments Per Week 0

Appointments Being Kept

- NOTE: The Pick List displays the items entered in the *Referral Library* that have been flagged as “Referral Out”.

→ In this example, we choose “Community Wellness Center”.

Select Referral Library

You can sort and search each column. Begin typing in a column to search.

Code **Name and Address**

FWAAC	St. Ambrose Hospital 5 East 6th Street, New York, NY 10003-9
FWAAD	Community Wellness Center
FWAAE	Best Health Agency 123 West Street, New York, NY 10009

13. Entry is Optional in the following fields.

- A) *Date Need Identified*: This could be prior to the Referral Date (which is the Encounter Date) but should not be after.
- B) *Appointment Date*: This is defined as the “First Appointment Date”. If an appointment is set up at the agency where the client is referred, you can enter the Appointment Date in this field. ([Requested by Prevention](#))

14. Select the **Follow-up Method**, which is required.

The screenshot shows the 'Referral' form with the following details:

- Service Need:**
 - Category: 980 STI Screening/Testing & Treatment
 - Service: 301 Screening/Testing for Chlamydia
 - Priority: []
- Referral Information:**
 - On site:
 - Referred To: FWAAD Community Wellness Center
 - Date Need Identified: [//]
 - Appointment Date: [//]
 - Follow-up Method:**
 - Active referral
 - Passive referral-agency verification
 - Passive referral-client verification
 - None
- Referral Verification:**
 - Date Service Verified: [//]
 - Status: []
 - # Appointments Per Week: 0
 - Appointments Being Kept:

Buttons: Done, Cancel

Where,

- *Active Referral*: Your agency will communicate directly with the agency that the client was referred to track the status of the client’s appointment(s) and status. ([Preferred method for Prevention contracts.](#))
- *Passive Referral-agency verification*: The client schedules an appointment based on recommendations your agency provides. Your agency will confirm that a) the client has made the appointment(s) and in some cases, b) that additional appointments are being kept.
- *Passive Referral-client verification*: The client schedules an appointment based on recommendations your agency provides. The client will keep your agency informed of their appointment(s) and status.
- *None*: There is no plan for follow-up.

15. Since the *Referral Verification* section is part of the future follow-up, you will not be entering anything in this section at this time.

16. Click on **[Done]**.

17. You will be brought back to the Encounter screen.

- Note the Referral at the bottom of the screen.
- **Note:** The Referral is not saved until the entire Encounter is Saved.

18. Before Saving (Step 19), determine if there is anything else that needs to be entered.

A) **If there are other Referrals to add:** Go to Step 5 and right-click over the blue part of the *Referrals Provided* to get the menu to add more Referrals.

- There is no limit to the number of Referrals that can be added to individual Encounters.

→ A 2nd Referral was added in the example below.

The screenshot shows the 'Service Encounters' form for 'HIV/STD Risk Reduction Counseling and Referral at 05/01/2011 (Interve)'. The 'Encounter Information' tab is active. The 'Referrals Provided' section is highlighted with a red box and contains two entries:

- Discussion of Condom/Barrier Use
- Discussion of HIV Testing
- Discussion of Other STDs
- STI Screening/Testing & Treatment - Screening/Testing for Chlamydia to Community Wellnes
- STI Screening/Testing & Treatment - Screening/Testing for Hepatitis A, B, & C to St. Ambros

B) **Optional:** Do any *Progress Notes* need to be entered?

The screenshot shows the 'Service Encounters' form for the same encounter. The 'progress note' tab is active and highlighted with a red box. The text area contains the following text:

05/20/2011 12:15:39 PM, DOC T HOLIDAY
I'll enter my notes here...

C) Optional: Any other Additional Information need to be entered?

19. When Finished: Click on **[SAVE]** at the top of the screen.

20. **OPTIONAL:** You can **Print** a client **Referral Form** (with entered information) for the Client and/or the Agency where the client is being referred. To see a sample form, go to Page 17.

A) Navigate to the **Referral Tracking** screen located under the **Historical Information** option (of the “Clients & Services” module).

- *Note:* This is also the screen where you would record the follow-up information (presented in Section C (Referral Tracking – Follow-up) starting on Page 22.)

B) *Highlight* the Referral.

C) Click on **[PRINT]**.

Referral Tracking

Date	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepatitis A,	St. Ambrose Hospital	
05/01/2011	Screening/Testing for Chlamydia	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment
 Service: 301 Screening/Testing for Chlamydia
 Priority: []

Referral Information

Date Referral Made: 05/01/2011
 On site
 Referred To: FWAAD Community Wellness Center
 Date Need Identified: [/ /] Appointment Date: [/ /]

Follow-up Method

Active referral
 Passive referral-agency verification
 Passive referral-client verification
 None

Referral Verification

Date Service Verified: [/ /]
 Status: []
 # Appointments Per Week: 0
 Appointments Being Kept

D) The **Printout** (sample on next page) can be provided to the client and/or agency the client is being referred.

REFERRAL / REQUEST FOR CONSULTATION

Referring Agency: Supreme Care Hospital
Address: 90 Church Street 13th Floor
 New York, NY 10007
Phone: (212) 555-1212 **Fax:** (212) 555-1213

Referring Staff: LIBRE, NACHO

Referral To: Community Wellness Center
Address:
 New York, NY 10128

Date of Referral/RFC: 05/01/2011

Re: Client Name: MOUSE, MICKEY

Date of Birth: 01/01/1994

Social Security Number:

Dear Colleague:

This letter is to refer our client, whose name appears above, for the following services at your agency:

<u>Service Need Category</u>	<u>Specific Service</u>
STI Screening/Testing & Treatment	Screening/Testing for Chlamydia

Other Needs: _____

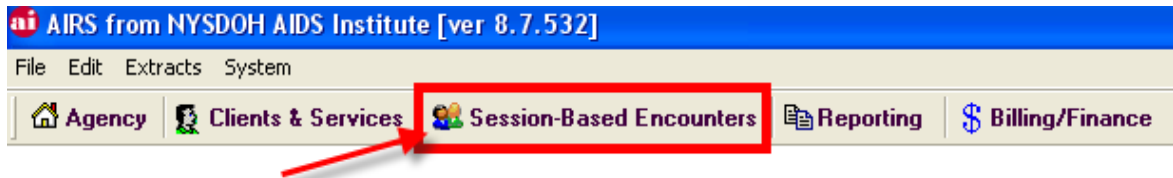
If you have any questions regarding this referral, or require further information, please contact me at the number listed above. Thank you for your assistance.

Sincerely,

B) MAKING A REFERRAL: Via GROUP ACTIVITIES

(The following example is for "IDG" Service Category)

- Once you are logged into AIRS, click on the **SESSION-BASED ENCOUNTERS** Module.

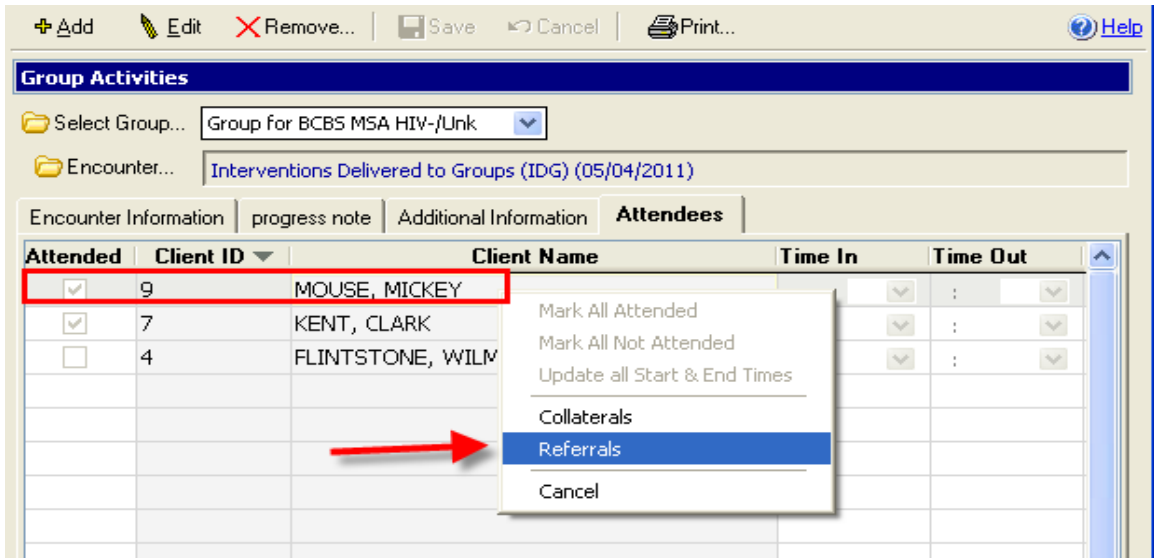


- Click on the [+] to the left of the **Group Activities** to expand the option.
- When the menu is expanded, click on **Group Activities**.

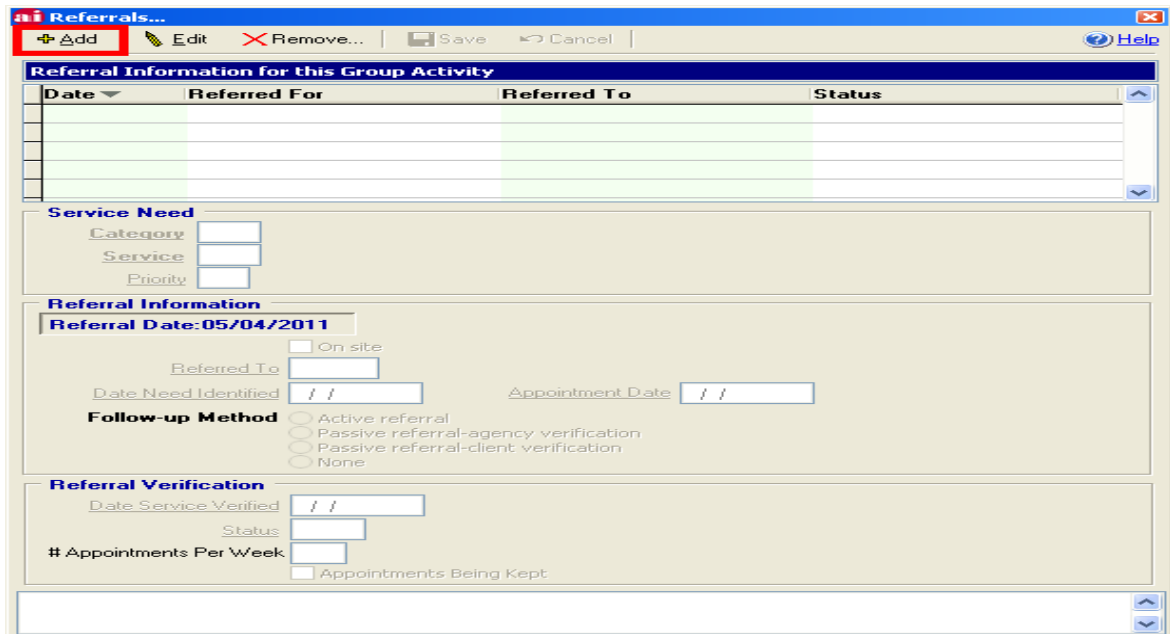
 A screenshot of the "Session-Based Encounters" application window. The window title is "Session-Based Encounters". On the left is a tree view with "Group Activities:" expanded, showing sub-items: "Batch-Group Enrollments...", "Group Activities..." (highlighted), "Fast Track Data Entry:", "Session:", and "Syndrome Exchange:". The main area shows the "Group Activities" form. At the top of the form are buttons for "+ Add", "Edit", "Remove...", "Save", "Cancel", and "Print...". Below these is a "Select Group..." dropdown menu. The form is divided into tabs: "Encounter Information", "Progress Note", "Additional Information", and "Attendees". The "Encounter Information" tab is active, showing fields for Date (//), Program, Contract, Service Category, Model, Intervention, Encounter, Staff, Site, CDC Setting Type, Location, and Off Site ZIP Code. There are also "Start Time" and "End Time" dropdowns, and "Time Spent: n/a". A "Services/Activities Provided..." list shows "Not Entered". A "Planning File Related Information" section includes "Incentive Provided" (checkbox), "Cycle Number" (0), "Session Number" (0), and "Unit of Delivery" (checkbox). A "Locate Clients..." button is at the bottom right.

- Enter the Group Activity information (*Encounter Information* and *Attendees* tabs).

5. Click on [SAVE].
6. In the Attendees screen, click (highlight) the client that you want to make a Referral.
7. On this client's line, right-click to get a menu that contains the "Referrals" option.
 - The "Referrals" option will only be available to clients marked as "Attended".



8. Click on [Referrals].



9. Click on [ADD].

10. Enter the Referral Information

11. Click on [SAVE].

The screenshot shows a software window titled "Referrals...". At the top, there is a toolbar with buttons for "+ Add", "Edit", "Remove...", "Save" (highlighted with a red box), and "Cancel". Below the toolbar is a table titled "Referral Information for this Group Activity" with columns for "Date", "Referred For", "Referred To", and "Status". The table contains one row with slashes in the "Date" column. Below the table are three sections: "Service Need" with fields for "Category" (980), "Service" (303), and "Priority"; "Referral Information" with a "Referral Date" field (05/04/2011), a "Referred To" field (FWAAE), and radio buttons for "Follow-up Method" (Active referral, Passive referral-agency verification, Passive referral-client verification, None); and "Referral Verification" with fields for "Date Service Verified", "Status", "# Appointments Per Week", and a checkbox for "Appointments Being Kept".

- You can make other Referrals for this client by clicking on [Add].

12. When finished, close the screen by clicking on the [X] to return to the Attendees screen.

- You can change the client and make referrals OR change to another AIRS screen.

The screenshot shows the 'Referrals...' application window. At the top, there is a toolbar with buttons for '+ Add', 'Edit', 'Remove...', 'Save', and 'Cancel'. A red arrow points to the 'Help' button in the top right corner. Below the toolbar is a table titled 'Referral Information for this Group Activity' with columns for Date, Referred For, Referred To, and Status. The first row is highlighted with a red border and contains the following data: Date: 05/04/2011, Referred For: Screening/Testing for Hepatitis A, Referred To: Best Health Agency, and Status: (empty). Below the table are several form sections: 'Service Need' with fields for Category (980), Service (303), and Priority; 'Referral Information' with fields for Referral Date (05/04/2011), On site checkbox, Referred To (FWAAE), Best Health Agency 123 West Street, New York, NY 10009, Date Need Identified, and Appointment Date; 'Follow-up Method' with radio buttons for Active referral, Passive referral-agency verification, Passive referral-client verification, and None; and 'Referral Verification' with fields for Date Service Verified, Status, # Appointments Per Week, and an Appointments Being Kept checkbox.

13. OPTIONAL: You can **Print** a client **Referral Form** (with entered information) for the Client and/or the Agency where the client is being referred.

- Navigate to the **Referral Tracking** screen located under the **Historical Information** option (of the “Clients & Services” module).
 - *Note:* This is also the screen where you would record the follow-up information (presented in Section C (Referral Tracking – Follow-up) starting on Page 22.)
- See Pages 16 – 17 for the steps and a sample form.

C) REFERRAL TRACKING (Follow-Up)

The recommended method for entering the follow-up information is to go to the client's Referral Tracking screen (Option 1). Be aware that the Referral can also be accessed via the longer (and more complicated) method of first pulling up the Encounter or Group Activity (Option 2).

OPTION 1: REFERRAL TRACKING Screen

1. Go to the Historical Information – **Referral Tracking** screen for the client to see all the client's referrals.

Client Information and Services

Find Client... **MOUSE, MICKEY** +Add **Edit** X Remove... Save Cancel Print... Help

Referral Tracking

Date	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepatitis A, St. Ambrose Hospital		
05/01/2011	Screening/Testing for Chlamydia	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment
 Service: 303 Screening/Testing for Hepatitis A, B, & C
 Priority: []

Referral Information

Date Referral Made: 05/01/2011
 On site
 Referred To: FWAAC St. Ambrose Hospital 5 East 6th Street, New York, NY 10003-9999
 Date Need Identified: // Appointment Date: //

Follow-up Method

Active referral
 Passive referral-agency verification
 Passive referral-client verification
 None

Referral Verification

Date Service Verified: // Status: []
 # Appointments Per Week: 0
 Appointments Being Kept

Client Information:

Status: Active 09/09/2004 12:00 AM
 Intake: 09/09/2004
 Agency ID#: 9
 Full Name: Mickey Mouse (Male)
 DOB: 01/01/1994 Current Age: 17
 Contact By: *Not Allowed*
 Social Security Number: n/a
 Case Number: n/a

2. **Highlight** the Referral record in question to enter the follow-up information.

3. Click on [EDIT].
4. Enter the *Referral Verification* information which includes the **Date Service Verified**, **Status**, **# Appointments Per Week**, and the **Appointments Being Kept** flag.

Referral Tracking			
Date ▼	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepatitis A,	St. Ambrose Hospital	
05/01/2011	Screening/Testing for Chlamydia	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment

Service: 303 Screening/Testing for Hepatitis A, B, & C

Priority:

Referral Information

Date Referral Made: 05/01/2011

On site

Referred To: FWAAC St. Ambrose Hospital 5 East 6th Street, New York, NY 10003-9999

Date Need Identified: // Appointment Date: //

Follow-up Method

Active referral

Passive referral-agency verification

Passive referral-client verification

None

Referral Verification

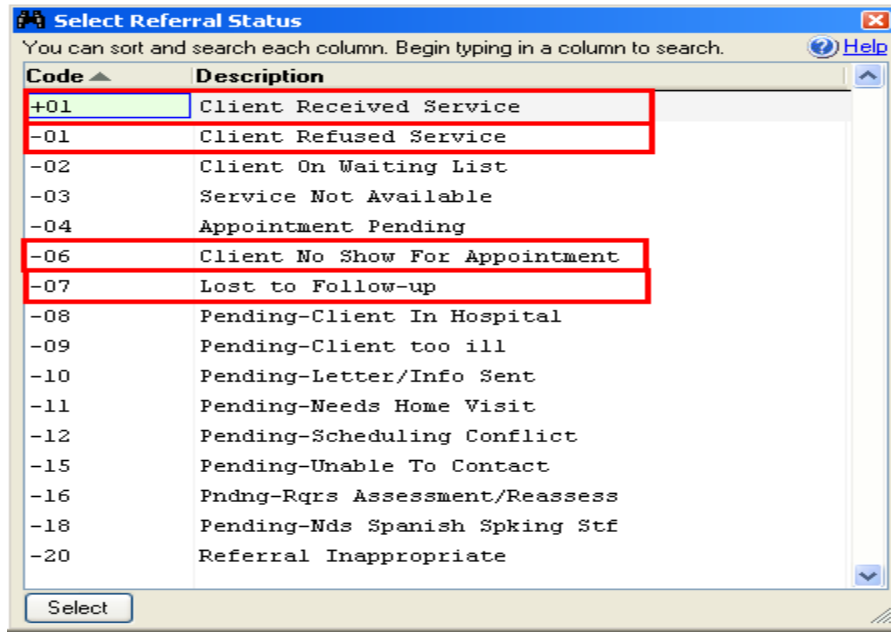
Date Service Verified: //

Status:

Appointments Per Week: 0

Appointments Being Kept

- Where the options for **Status** include the following.
 - ➔ Note: You should **only select among the 4 Statuses (code +01, -01, -06, or -07)** that are boxed (below) for your Prevention contract(s).



Referral Tracking

Date	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepatitis A,	St. Ambrose Hospital	
05/01/2011	Screening/Testing for Chlamydia	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment
 Service: 303 Screening/Testing for Hepatitis A, B, & C
 Priority: []

Referral Information

Date Referral Made: 05/01/2011
 On site
 Referred To: FWAAC St. Ambrose Hospital 5 East 6th Street, New York, NY 10003-9999
 Date Need Identified: / / Appointment Date: / /

Follow-up Method

Active referral
 Passive referral-agency verification
 Passive referral-client verification
 None

Referral Verification

Date Service Verified: 05/19/2011
 Status: +01 Client Received Service
 # Appointments Per Week: 1
 Appointments Being Kept

- Click on [**SAVE**].
 - Notice that the “Status” is displayed in the Grid.

Referral Tracking			
Date ▼	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepatitis A	St. Ambrose Hospital	Client Received Service
05/01/2011	Screening/Testing for Chlamydia	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment

Service: 303 Screening/Testing for Hepatitis A, B, & C

Priority:

Referral Information

Date Referral Made: 05/01/2011

On site

Referred To: FWAAC St. Ambrose Hospital 5 East 6th Street, New York, NY 10003-9999

Date Need Identified: / / Appointment Date: / /

Follow-up Method

Active referral

Passive referral-agency verification

Passive referral-client verification

None

Referral Verification

Date Service Verified: 05/19/2011

Status: +01 Client Received Service

Appointments Per Week: 1

Appointments Being Kept

OPTION 2: Referral from ENCOUNTER or GROUP ACTIVITY Screen

Note: Although you could come back to the Encounter or Group Activity to edit the Referral (see below), the faster and easier way is to go directly to the **Referral Tracking** screen (Option 1).

A) ENCOUNTER Screen:

1. Find the Encounter.
2. Click on [**View All Referrals**].

Service Encounters

Find Existing Encounter HIV/STD Risk Reduction Counseling and Referral at 05/01/2011 (Interve

Encounter Information progress note Additional Information

Actual Date 05/01/2011 Program KZAAC BCBS MSA HIV-/unk
 Contract C016164G 07/01/2007 - 06/30/2015

Service Category 00014 Interventions Delivered to Individ (IDI) Start Time :
 Model 35111 Transtheoretical (Stages of Change Model) End Time :
 Intervention 3536 ILI neg/unknown Time Spent: n/a
 Encounter 215 HIV/STD Risk Reduction Counseling and Referral

Staff FWAAB LIBRE, NACHO Site FWAAB SITE 1
 Team
 Location
 Encounter With Date Completed

Planning File Related Information **Next Scheduled Appointment**
 Session Number 1 Incentive Provided Date
 Unit of Delivery Location

Services Provided Discussion of Condom/Barrier Use
 Discussion of HIV Testing
 Discussion of Other STDs

Referrals Provided STI Screening/Testing & Treatment - Screening/Testing for Chlamydia to Community Wellnes
 STI Screening/Testing & Treatment - Screening/Testing for Hepatitis A, B, & C to St. Ambros

View All Referrals...

3. **Highlight** the Referral record in question and enter the follow-up information.

The screenshot shows the 'Referrals...' application window. At the top, there is a menu bar with 'Add', 'Edit', 'Remove...', 'Save', and 'Cancel' buttons. A red box highlights the 'Edit' button, and a red arrow points to the 'Help' icon in the top right corner. Below the menu bar is a table titled 'Referral Tracking' with columns: Date, Referred For, Referred To, and Status. The second row is highlighted with a red box: 05/01/2011, Screening/Testing for Chlam, Community Wellness Center, Client Received Service. Below the table are three sections: 'Service Need' with fields for Category (980), Service (301), and Priority; 'Referral Information' with fields for Date Referral Made (05/01/2011), Referred To (FWAAD Community Wellness Center), Date Need Identified, and Appointment Date; and 'Referral Verification' with fields for Date Service Verified, Status, # Appointments Per Week (0), and Appointments Being Kept.

Date	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepat	St. Ambrose Hospital	Client Received Service
05/01/2011	Screening/Testing for Chlam	Community Wellness Center	Client Received Service
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment
 Service: 301 Screening/Testing for Chlamydia
 Priority: []

Referral Information

Date Referral Made: 05/01/2011
 On site
 Referred To: FWAAD Community Wellness Center
 Date Need Identified: // Appointment Date: //

Follow-up Method

Active referral
 Passive referral-agency verification
 Passive referral-client verification
 None

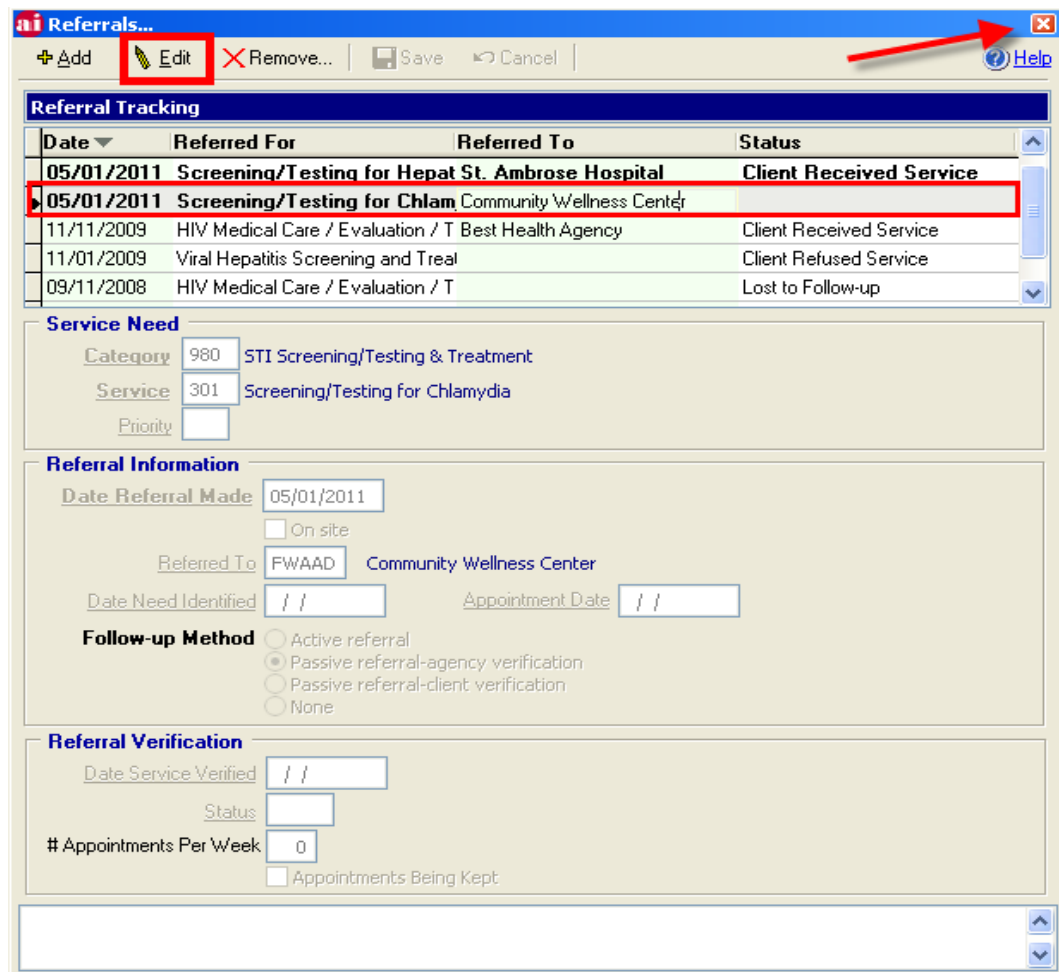
Referral Verification

Date Service Verified: // Status: []
 # Appointments Per Week: 0
 Appointments Being Kept

4. Click on [EDIT].
5. Enter the *Referral Verification* information which includes the **Date Service Verified, Status, # Appointments Per Week**, and the **Appointments Being Kept** flag.
6. Click on [SAVE].
7. You can update other Referrals or close the screen out by clicking on the [X] in the top right corner. This brings you back to the Encounter screen.

B) GROUP ACTIVITY Screen:

1. Find the Group Activity.
2. Click on **Attendees** tab.
3. Click (highlight) the client that you want.
4. Right-click to get a menu that contains the “Referrals” option.
5. Click on [**Referrals**].
6. **Highlight** the Referral record in question.



Referrals...

+ Add **Edit** X Remove... Save Cancel Help

Referral Tracking

Date	Referred For	Referred To	Status
05/01/2011	Screening/Testing for Hepat	St. Ambrose Hospital	Client Received Service
05/01/2011	Screening/Testing for Chlam	Community Wellness Center	
11/11/2009	HIV Medical Care / Evaluation / T	Best Health Agency	Client Received Service
11/01/2009	Viral Hepatitis Screening and Treat		Client Refused Service
09/11/2008	HIV Medical Care / Evaluation / T		Lost to Follow-up

Service Need

Category: 980 STI Screening/Testing & Treatment
Service: 301 Screening/Testing for Chlamydia
Priority: []

Referral Information

Date Referral Made: 05/01/2011
 On site
Referred To: FWAAD Community Wellness Center
Date Need Identified: [/ /] Appointment Date: [/ /]

Follow-up Method

Active referral
 Passive referral-agency verification
 Passive referral-client verification
 None

Referral Verification

Date Service Verified: [/ /]
Status: []
Appointments Per Week: 0
 Appointments Being Kept

7. Click on [**EDIT**].

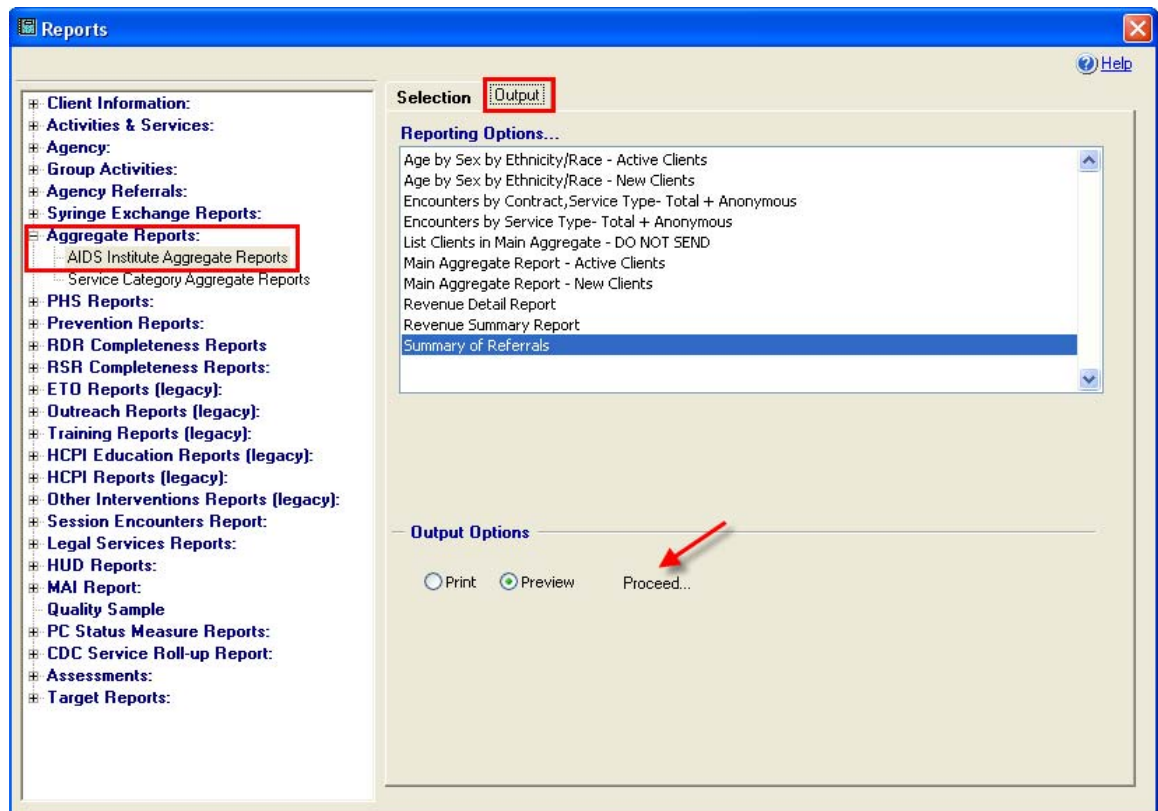
8. Enter the *Referral Verification* information which includes the **Date Service Verified, Status, # Appointments Per Week**, and the **Appointments Being Kept** flag.
9. Click on [**SAVE**].
10. You can update other Referrals or close the screen out by clicking on the [**X**] in the top right corner. This brings you back to the “Attendees” screen.

D) REPORTING

- ➔ The AIDS Institute requests that each agency send them the [Summary of Referrals](#) Report which contains counts. There are no client names or identifying information. See *item 1*.
- ➔ At your agency, you could run the *Client/Agency Referral Report* to help manage the status of referrals for clients in each Program. This report contains the client names and details about the Referral. See *Item 2*.

1) [AIDS Institute Aggregate Reports – Summary of Referrals](#)

- 1) Go the **Reporting** Module.
- 2) Click on the **Aggregate Reports** option.
- 3) Click on **AIDS Institute Aggregate Reports**.
- 4) Make selections in the **Selection** tab.
- 5) Click on the **Output** tab.
- 6) Highlight the **Summary of Referrals**.
- 7) Determine whether you are Printing or Previewing.
- 8) Click on **Proceed**. (See next page for the example.)



AIDS Institute Aggregate Reports
Summary of Referrals

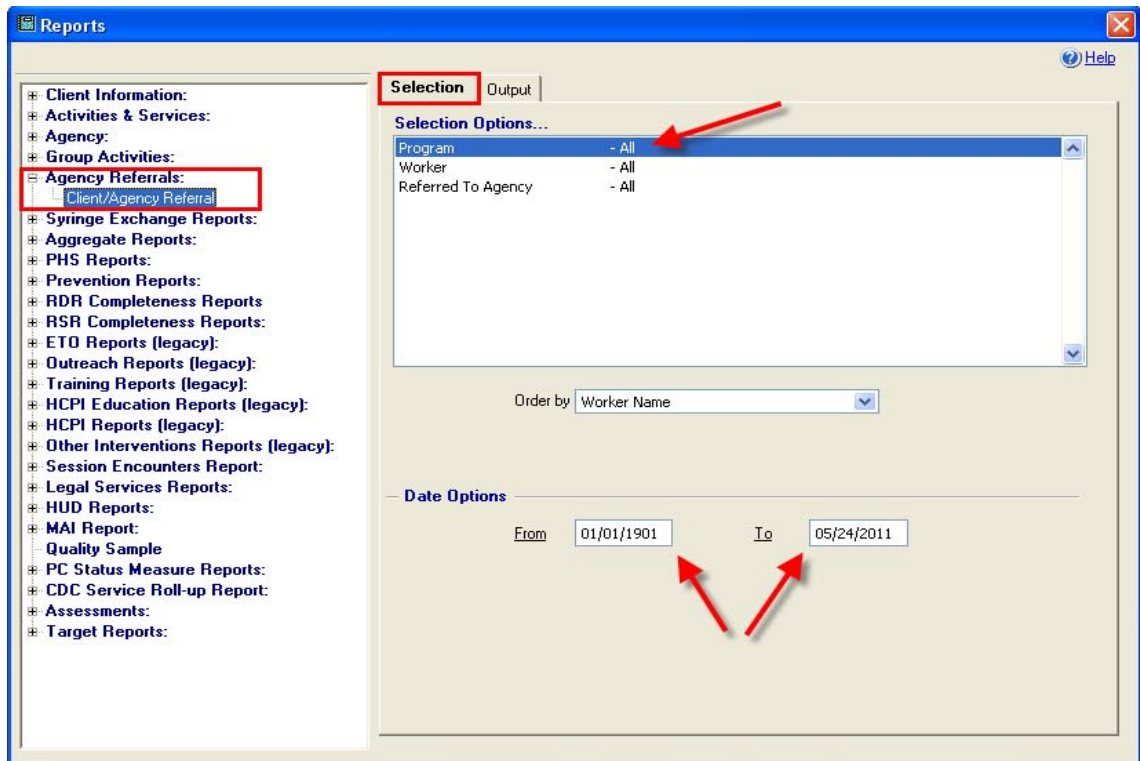
Agency: AIRS Test System
 Report Period: 05/01/2011 To 05/31/2011
 Version: 8.7.532 Version Date: 05/18/2011

Selection Criteria: All

Program: BCBS MSA HIV-Junk (4Planning)				
Service Need Category	Service	Status	# of Referrals	Unduplicated Clients
STI Screening/Testing & Treatment	Screening/Testing for Chlamydia	Client Refused Service	1	1
	Screening/Testing for Hepatitis A, B,...	Client Received Service	1	1
	Screening/Testing for Herpes	~Status Not Reported	1	1
Category Totals			3	1
Program Totals			3	1

2) Agency/Client Referral

- 1) Go the **Reporting Module**.
- 2) Click on the **Agency Referrals** option.
- 3) Click on **Agency/Client Referral**.
- 4) Make selections in the **Selection** tab.



- 5) Click on the **Output** tab.
- 6) Determine whether you are Printing or Previewing.
- 7) Click on **Proceed**.

Date: 05/24/2011

Time: 14:36:19

Version:	8.7.532
Version Date:	05/18/2011

AIRS Test System

Page: 1

AIRS - AIDS Institute Reporting System

CLIENT / AGENCY REFERRAL REPORT

Selection Criteria: Program - **BCBS MSA HIV/Junk (4Planning)**

Date Range: **05/01/2011** To **05/31/2011**

REFERRED TO AGENCY	CLIENT REFERRED	DATE OF REFERRAL	DATE VERIFIED/ APPOINT. DATE	REFERRING WORKER	REFERRAL CATEGORY	STATUS
Best Health Agency	MOUSE, MICKEY	05/04/2011	// //	DEVIL, TASMANIAN	STI Screening/Testing & Treatment	
St. Ambrose Hospital	MOUSE, MICKEY	05/01/2011	05/19/2011 //	LIBRE, NACHO	STI Screening/Testing & Treatment	Client Received Service
Community Wellness Center	MOUSE, MICKEY	05/01/2011	05/17/2011 //	LIBRE, NACHO	STI Screening/Testing & Treatment	Client Refused Service

Total Client Referrals for this report: 3