Referring Clients between Agencies

Instructions for Referring Agency

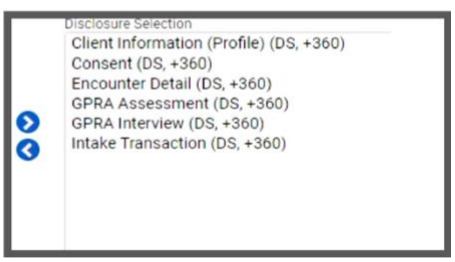
*** The following instructions are provided to assist with referring a client between two KORE-funded program to enable WITS program enrollment and completion of the GPRA by two providers.***

Creating Client Consent Record

Activity List, Consent, Add New Client Consent Record

1. Obtain documentation of signed consent to transmit a client's WITS data to the receiving agency. For more information, see page 3.
2. In WITS, access the client record and click **Add New Client Consent Record.**
3. "Is this related to a waitlist record?" Select **No.**
4. Select **Yes** for System Agency.
5. Select the KORE-funded agency to which the client will be referred. If unsure of the facility, select **All Facilities.**
6. Select **Yes** to indicate that a consent for release of information has been signed (i.e., your agency's release or the WITS template) and enter date of consent.

   ***Note:** Earliest Date of Services: Select the earliest date that the receiving agency can access client data in WITS.*
7. Expiration Type: Select **Discharge** or **Other Event.** For Expiration, **1 year** from the consent date is recommended.
8. Select all six fields to disclose (depicted below) and move them at the same time to the Disclosure Section with the directional button. **All information selected should have an expiration date (365 days).**

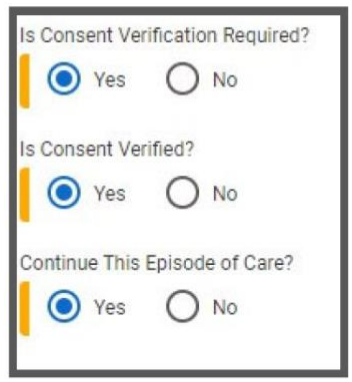


9. Click **Save.**
10. In the upper right corner, click **Generate Report**.
11. Click **Save and Finish.**

Creating Client Referral

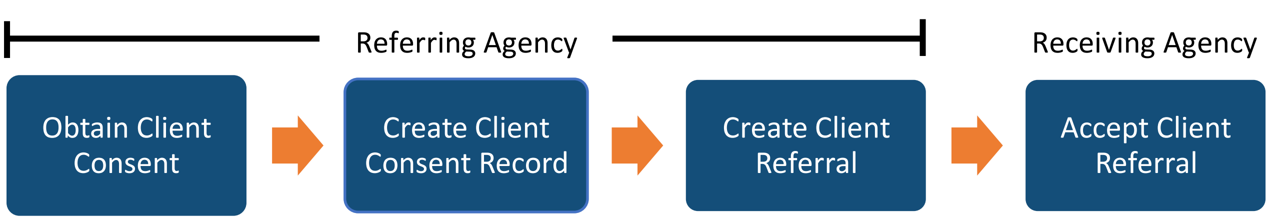
Activity List, Referrals

1. From the Activity List, click **Referral.**
2. Click **Add New Client Referral Record.**
3. "Is Consent Verification Required?" Select **Yes.**
4. "Is Consent Verified?" Select **Yes.**
5. "Continue this Episode of Care?" Select **Yes.**



***Note:** Referral status will default to "Referral Created/Pending." Do not change this when making a referral.*

6. In the Referred To column, select the Agency, Facility, and Program receiving the referral.
7. Click **Save and Finish.**



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Accepting Referred Clients

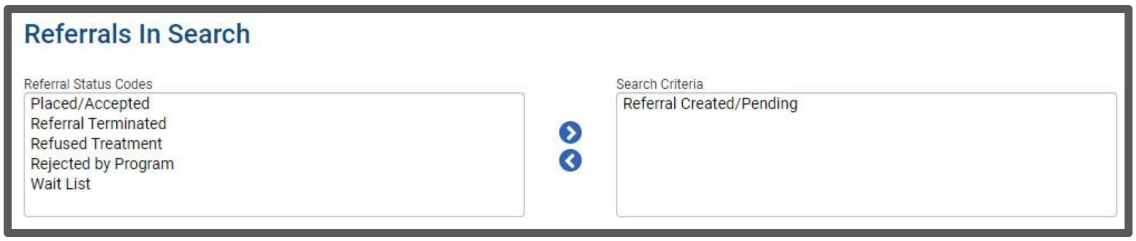
Instructions for Receiving Agency

Accepting Referrals

Agency List, Referrals, Referrals In

Note: *To view Referrals, the WITS user account will require Referrals Access. For user account permissions, contact koreproject@uky.edu*

1. When a client is referred to your agency, a notification will populate on the User Dashboard.
2. Select **Agency, Referrals,** and **Referrals In.**
3. Select **Referral Created/Pending** under Referral Status Codes. Once selected, move this option to the **Search Criteria** box by using the directional button.



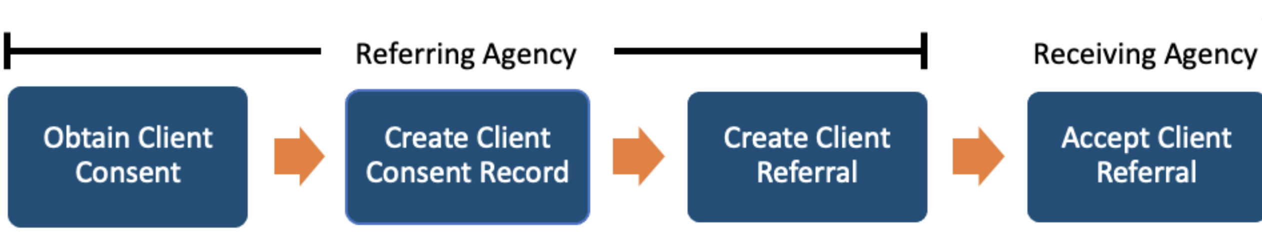
4. Click **Search.** Hover over the ellipsis icon ⋮ to access the client's information.
5. Once a referred client is selected, accept the referral by selecting **Placed/Accepted** on the **Referral Status** box.
6. Click **Save and Finish.**

   Note: *The receiving agency will be responsible for completing the GPRA intake and/or 6-month follow-up if not already completed.*

Reviewing Referred WITS Records

Client List, Linked Consents

1. To see information Clients referred from other agencies, from the **Client List,** click **Linked Consents.**
2. Scroll down to **Clients with Consents from Outside** and click the ellipsis icon ⋮ to review **Consented Information**.



Requesting a WITS Referral

Instructions for Requesting Client Information from another KORE-funded agency

** Occasionally, you might try to enroll a client in WITS and receive the following error message: *"There is a problem creating this client program enrollment record. Please contact your system administrator to resolve this conflict."*

If you receive this error message, it is likely that the client has an open episode of care in WITS with another KORE-funded agency. To reduce the duplication of effort in collecting GPRA and to better understand your client's service history, the following steps are recommended to request a WITS referral and enroll a client in your WITS program. **

1. Ask Client about Previous Providers to Identify the KORE-Funded Agency

- If the client does not recall their previous KORE-funded providers, ask questions such as:
    - "Do you recall receiving treatment or recovery support elsewhere in the past 6 months?"
    - "Do you recall completing a GPRA interview with a previous provider in the past 6 months?"
    - "Has a previous provider contacted you to complete a 6-month follow-up interview?"
- If the client is still unsure about their previous provider, reach out to your implementation specialist or koreproject@uky.edu for further assistance.

2. Obtain Client Consent to Request WITS Record

- Obtain documentation of consent for the release of confidential substance use treatment using an agency-approved release of confidential information form or the WITS template. The following WITS data elements as well as any other client records that will be shared should be specified in the release of information form.
    - Basic Client Information (includes all of the following: name, DOB, race, ethnicity, and collateral contacts)
    - Consent record stored in WITS
    - WITS Encounter Detail
    - GPRA Assessment & GPRA Interview
    - Intake Transaction
- If the client chooses not to provide consent, reach out to your implementation specialist or koreproject@uky.edu for further assistance.

3. Send Signed Consent for Information Release

- Contact the agency using the following KORE Referral Directory and send the client's signed consent using a HIPAA-compliant protocol.
- The referring agency can then initiate a referral in WITS by following the **Referring Clients between Agencies: Instructions for Referring Agencies**

Why Utilize the WITS Referral Process?

- Referring KORE-funded clients between programs decreases the number of GPRA interviews a client might be asked to complete.
- Referring clients helps programs to obtain a richer understanding of the clients history.
- Referring clients enhances linkages between programs and builds a system of care for clients.
- Referring clients increases the likelihood of completing the 6-month GPRA follow-up.
- Referring clients does not mean your services have to end, but enable a client to receive additional services

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