

Community Area Admin Step by Step for Referrals Received from Central Intake– HPECD Database (June 10th, 2014)

Please see User Manual for details and exceptions

Once you have received Referrals:

- 1) Locate client in HPECD Database using “**Search for a client**”
- 2) Once client has been located, ensure that you have located the correct client by comparing, full name, DOB, PHIN, etc.
- 3) Confirm all Demographic Information previously entered is correct
- 4) Create Labels and place on every page of Client File.
- 5) In some CA’s, assigning cases to the PHN is the responsibility of the Administrative staff, and in others it is the responsibility of a PHN. Whoever has responsibility to assign a PHN to a Referral should complete the “**Date & Time Referred to PHN**” Field in the Referral area. If a Nurse has not already been assigned, assign a Nurse as a Service Provider in “**Service Providers**”
- 6) Enter the **Prenatal** or **Birth Episode** in situations where this applies (e.g., Prenatal Referrals or Postpartum Referrals.)
 - If the Referral is a **Prenatal**, you will need to enter the **Prenatal episode** by choosing **Perinatal Episodes** found below **Demographics and History** in the left hand pane.
 - If the Referral is **Postpartum**, you will need to enter the **Birth Episode** by choosing **Perinatal Episode**” below **Demographics and History** in the left hand pane, then below the Prenatal Episode is the **Birth Episode** field. Click **ADD**. If a Prenatal Episode exists that is relevant to this Birth, select it and add a **Birth Episode**. (Please note, if client received no Prenatal Care, there will not be a Prenatal Episode, so you would then add a blank one by choosing the address in the ‘address’ field and leaving all other fields blank. Click save, which will allow you to then enter a birth episode. Click ‘ADD’ and enter Birth episode using appropriate Information in Postpartum Referral.)

Once you have created the Birth Episode, click **save**. Once you have clicked save, this will allow you to create the **Child Client Record** and link to mom straight from the **Birth Episode** page. Once you have done so, you can ensure all the information was copied correctly to child record by reviewing the Child Client Record.

IMPORTANT: We do NOT link mother and infant if it is an adoption OR apprehended. In this case, you would still create the Birth Episode with biological mother, but you would NOT create an Infant Record. This would be done at Central Intake upon receiving Infant Referral.

- 7) Open the case for Infant.
- 8) Enter the FF Screening number for any brand new Referrals for any child/parent pairing under five years of age. The screening number is only entered on the health record of the child.
- 9) Create & Open Health Records for any significant others indicated on the referral & create relationship between that person, the infant, and the mother.