

BTOTS Electronic Child Referrals FAQ

Overview

Electronic child referrals in BTOTS are referrals that come from users of other state agencies' electronic case management systems. Initially, these electronic referrals will be limited to those coming from the Utah Department of Human Services (DHS), in particular, the Division of Child and Family Services (DCFS).

DCFS "Go Live" Timeline

The following timeline will help explain the DCFS electronic referral "Go Live" activities. Each Monday morning, the DCFS system identifies children from the past week should be referred and prepares a letter to be sent to parents regarding the referral to early intervention (EI). The following Monday morning, the children which were sent a letter previously are then referred electronically from DCFS to BTOTS. This delay gives the parent time to receive the mail introducing them to EI and make them aware of the contact. The first DCFS electronic referrals will appear Monday, July 13, 2015. Figure 1 below gives an overview of the timeline.






Figure 1. Timeline of DCFS Electronic Referrals "Go Live" Activities

Action	Sun June	Mon	Tues	Wed July	Thur	Fri	Sat
DCFS Case Closed	28	29	30	1	2	3	4
Mail Sent	5	6	7	8	9	10	11
Electronic Referral	12	13	14	15	16	17	18

Notification of Electronic Child Referrals

Notification of a new electronic child referral will occur in two ways. First, an email will be sent to the individual in each EI program who is identified as the "New Referral Coordinator" to inform him or her that a new referral is available for processing. Second, the new electronic child referral will appear on the dashboard for users who have been given the ability to create new child referrals, as shown in Figure 2.

Figure 2. Dashboard View of Pending Electronic Referrals

Pending Electronic Referrals							
	Child Name	Birth Date	Primary Contact	Phone	Address	Referred	
	Thompson, Fred	2/13/2014	Doe, Jane	801-123-4567	123 Maple St., Salt Lake City, 12345-6789	2/4/2015	Process
	Doe, John	4/20/2013	Doe, Jane	123-456-7890	123 Maple St., Salt Lake City, 12345	3/6/2015	Process
	Fredricson, Jane	5/2/2013	Doe, Jane	123-456-7890	123 Maple St., Salt Lake City, 12345	3/6/2015	Process
3 Pending Electronic Referrals						View All Recent Electronic Child Referrals	

Processing Electronic Child Referrals

After pending electronic child referrals appear on a user's dashboard, the next step is for the user to begin the referral by clicking on the "Process" link on the dashboard, as indicated by the red arrow in Figure 2 above.

A pop-up window will appear with additional information about the referral and give the user the option to enter contact attempt notes, as shown in Figure 3, or continue processing the electronic child referral. The "Finish Later" option will allow users to save any changes to the contact notes and finish processing at a later time.

Figure 3. Contact Attempt Notes and “Finish Later” Option

The details of the Electronic Child Referral are provided below. [Print View](#)

Child Name	Birth Date	Primary Contact Name
Thompson, Fred	02/13/2014	Doe, Jane
Address		Phone
123 Maple St. Salt Lake City, UT 12345-6789		801-123-4567

Contact Attempt Notes

Record any contact attempts below and click "Save and Finish Later".

2/1/2015: Called and left message

Processing Action

Select one of the options below to process this electronic child referral.

☐ New Electronic Child Referral
☐ [Transfer Electronic Child Referral](#)
☐ Deactivate Electronic Child Referral

Completing the Electronic Child Referral Process

The Referral Wizard will be available if the user selects “New Electronic Child Referral” and clicks the “Process” button to complete the process of gathering information about the new electronic child referral. The referral source will automatically be set to “Division of Child and Family Services” for these referrals, as shown in Figure 4.

During the second step of the Referral Wizard, the user will search to see if there is already a child record in BTOTS that matches the new electronic child referral. **Searching for previously referred child records is critical as it will avoid the creation of duplicate child records.**

Figure 4. Referral Source Automatically Set to DCFS

New Electronic Referral

- Enter Initial Child Information
- Check for Existing Child
- Add Child Contact Info
- Enter Referral Information
- Referral Complete

Enter Initial Child Information

This form allows you to add a new child referral in the system. If the child is already found in the system, a re-activation or transfer may occur instead.

Referral Source

☒ Other Referral Source

Other Primary Referral Source *

Public agencies and staff in the child welfare system, including child protective service and foster care

Name or Organization * Phone Number *

Division of Child and Family Services (DCFS) (555) 555-5555

Initial Child Information

The information below helps us determine if the child is already registered in this system.

Legal First Name * Middle Name Legal Last Name *

John Doe

Gender * Birth Date *

Male 01/01/2014

Preferred First Name Preferred Last Name Service Coordinator *

Primary Language Provider Site

Transferring Electronic Child Referrals

If the user discovers that the electronic child referral should have been assigned to a different EI program, the user can select the “Transfer Electronic Child Referral” option, as shown in Figure 5. This option will require the user to specify the EI program to which the child should be assigned and returns the electronic referral to Baby Watch Early Intervention Program (BWEIP) to re-assign.

Figure 5. Transfer Electronic Child Referral

The screenshot shows a web form titled "Electronic Child Referral". At the top, it says "The details of the Electronic Child Referral are provided below." with a "Print View" link. The form contains several input fields for child and contact information. Below these is a "Contact Attempt Notes" section with a text area containing "2/1/2015: Called and left message". The "Processing Action" section has three radio buttons: "New Electronic Child Referral", "Transfer Electronic Child Referral" (which is selected and highlighted with a red box), and "Deactivate Electronic Child Referral". Under the selected option is a dropdown menu labeled "Transfer to Provider*" with "Kids Kare" selected. At the bottom are three buttons: "Cancel", "Finish Later", and "Process" (which is highlighted with a red box and has a red arrow pointing to it).

Child Name	Birth Date	Primary Contact Name
Thompson, Fred	02/13/2014	Doe, Jane

Address	Phone
123 Maple St. Salt Lake City, UT 12345-6789	801-123-4567

Contact Attempt Notes
Record any contact attempts below and click "Save and Finish Later".
2/1/2015: Called and left message

Processing Action
Select one of the options below to process this electronic child referral.

☐ New Electronic Child Referral

☒ Transfer Electronic Child Referral

Transfer to Provider*
Kids Kare

☐ Deactivate Electronic Child Referral

Buttons: Cancel, Finish Later, Process

Simplified Deactivation for Electronic Child Referrals

A simplified deactivation process will be provided for electronic child referrals in the situation where the user is unable to contact the referral or the family is not interested in services. Selecting the “Deactivate Electronic Child Referral” option will require the user to select from a drop-down of relevant deactivation reasons and provide deactivation notes, as shown in Figure 6.

Figure 6. Deactivate Electronic Child Referral

The screenshot shows a web form titled "Electronic Child Referral". It contains fields for Child Name (Ilingall, Kevin), Birth Date (01/03/2014), Primary Contact Name (Ilingall, Jake), Address (786 N. 400 W. Packwauke, UT 62639), and Phone (729-555-9630). There are sections for "Baby Watch Notes", "Contact Attempt Notes" (with a note dated 08/05/2015: "Called the mother"), and "Processing Action". Under "Processing Action", three radio buttons are present: "New Electronic Child Referral", "Transfer Electronic Child Referral", and "Deactivate Electronic Child Referral" (which is selected and highlighted with a red box). Below the selected option are fields for "Deactivation Reason*" (Moved out of state) and "Deactivation Notes" (Moved to Idaho.). At the bottom are buttons for "Cancel", "Finish Later", and "Process" (highlighted with a red arrow).

After the user selects “Process,” he or she will be taken to the Electronic Referral Deactivation Wizard. The “Deactivation Reason” and “Deactivation Notes” will be brought over from the dashboard screen. On step one of the wizard, the “Provider Site” will be required to be entered if the program has multiple sites, as shown in Figure 7.

Figure 7. Deactivate Electronic Child Referral

The screenshot shows a wizard titled "Deactivation Information". On the left is a sidebar with "New Electronic Referral" and a list of steps: 1. Deactivation Information (selected), 2. Check for Existing Child, and 3. Deactivation Complete. Below the steps is a "New Child Summary" box showing "Kevin Ilingall" and "1/3/2014 (1y 7m)". The main area is titled "Deactivation Information" and says "Provide the necessary deactivation information below:". It includes "Initial Child Information" with fields for Legal First Name (Kevin), Middle Name, Legal Last Name (Ilingall), Gender (Female), and Birth Date (01/03/2014). There are also fields for Preferred First Name and Preferred Last Name. Below these are fields for Deactivation Reason (Moved out of state) and Deactivation Notes (Moved to Idaho.). A "Provider Site*" dropdown menu is highlighted with a red box and shows "--". At the bottom are buttons for "Cancel", "Back", and "Next". The footer includes "© 2015 Utah Baby Watch" and "UDOH Use Disclaimer".

On step two of the wizard, the user will check to see if the child being deactivated already exists in BTOTS. If the child does exist, then the user will select the correct child name from the list of possible matching children. If the child does not exist, the user will select the child under “New Child Referral / Non-Matching,” as showing in Figure 8. The user will then select “Next” to continue.

Figure 8. Deactivate Electronic Child Referral

New Electronic Referral

1. Deactivation Information
2. Check for Existing Child
3. Deactivation Complete

New Child Summary

Kevin Ilingall
1/3/2014 (1y 7m)
Electronic Referral
Care Giver: Jake Ilingall

Check for Existing Child

Review the list of possible child matches below. If present, select the matching child from the list. Otherwise, click the "non-matching, new referral" option near the bottom.

Exact Name Matches (0) **MATCH**

Name	Child ID	Birth Date	Current Provider	Status	Actions
No Exact Matches Found					

Additional Same Birthdate / Gender Matches (5)

Name	Child ID	Birth Date	Current Provider	Status	Actions
Stacey Selinar	WM140630	1/3/2014	Weber School District Early Intervention	Under IFSP	Details
Pamela Jessica Dundol (AKA Jessica Pamela Dundol)	CDC143601	1/3/2014	Jordan Child Development Center	Deactivated	Details
Heather Blesk	UP144301	1/3/2014	Up to 3 Early Intervention	Under IFSP	Details
Rachel Mace	CU151709	1/3/2014	Central Utah Health Department Early Intervention	Referred	Details
Adriana Kelli Taragin	CDC144122	1/3/2014	Jordan Child Development Center	Under IFSP	Details

New Child Referral / Non-matching **NON-MATCH**

☐ "Kevin Ilingall" is a new referral and does not match any of the children listed above

Icon Key

Kevin Ilingall will be re-referred to Kids Kare Previous information for "Kevin Ilingall" will be transferred

Cancel Back Next

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Electronic Child Referral Print View

A print view is provided for the electronic child referrals by clicking on the “Print View” link in the pop-up window, as shown in Figure 9.

Figure 9. Print View of Electronic Child Referral

Electronic Child Referral ? X

The details of the Electronic Child Referral are provided below. [Print View](#)

Child Name	Birth Date	Primary Contact Name
Thompson, Fred	02/13/2014	Doe, Jane
Address	Phone	
123 Maple St. Salt Lake City, UT 12345-6789	801-123-4567	