Up to 3 Retired Referral Process

It is important to ensure that we have documentation of any referral contact attempts. Referrals that are in BTOTS should be documented in BTOTS. Referrals that cannot be entered into BTOTS should have their contact attempts documented in the “Retired Referral” Excel sheet in BTOTS and the physical copy is placed in the retired referral red folder in the rotating cabinet.

Referrals that are in BTOTS:

* Re-Referrals
  + When parents call into refer their child who was previously in our program, their child’s information will still be in BTOTS
  + Referral contact attempts can be documented in the contact log
* DCFS referrals
  + DCFS referrals, once processed, will appear in BTOTS
  + The DCFS contact attempts (in the notes section of the initial referral) will appear in referral notes instead of the contact log
  + Any further contact attempts can be documented in contact log
  + Print off child’s chart in BTOTS showing deactivated status is placed in the red retired referral folder in the rotating cabinet
* Hospital Referrals
  + Medical record referrals from hospital referrals can be entered into BTOTS
  + Contact attempts should be entered into the contact log
  + Medical records are placed in a perm file that are created for these referrals

The general rule is that any referral where we have sufficient information to enter into BTOTS (regardless of whether they are interested, or we are able to contact) should be entered into BTOTS and the contact attempts documented there.

Any other referrals whose contact attempts cannot be documented into BTOTS should be documented in the “Retired Referral” Excel sheet located in the “Retired Referral” Box folder. This includes referrals who are within 45 days of turning three, who are three and above, or who do not live in the Up to 3 boundaries (Cache, Box Elder, and Rich Counties). Preferably the contact’s name, phone number, and contact attempt notes should be entered into the Excel sheet. Additionally, the physical copy of the referral (i.e. phone note, fax etc.) should be placed in the red retired referral folder in the rotating cabinet.

This Excel sheet will provide documentation in case we need access to past contact information if they call back in the future.