UNITED WAY OF THE MID-SOUTH DRIVING THE DREAM COACTIONNET USER GUIDE
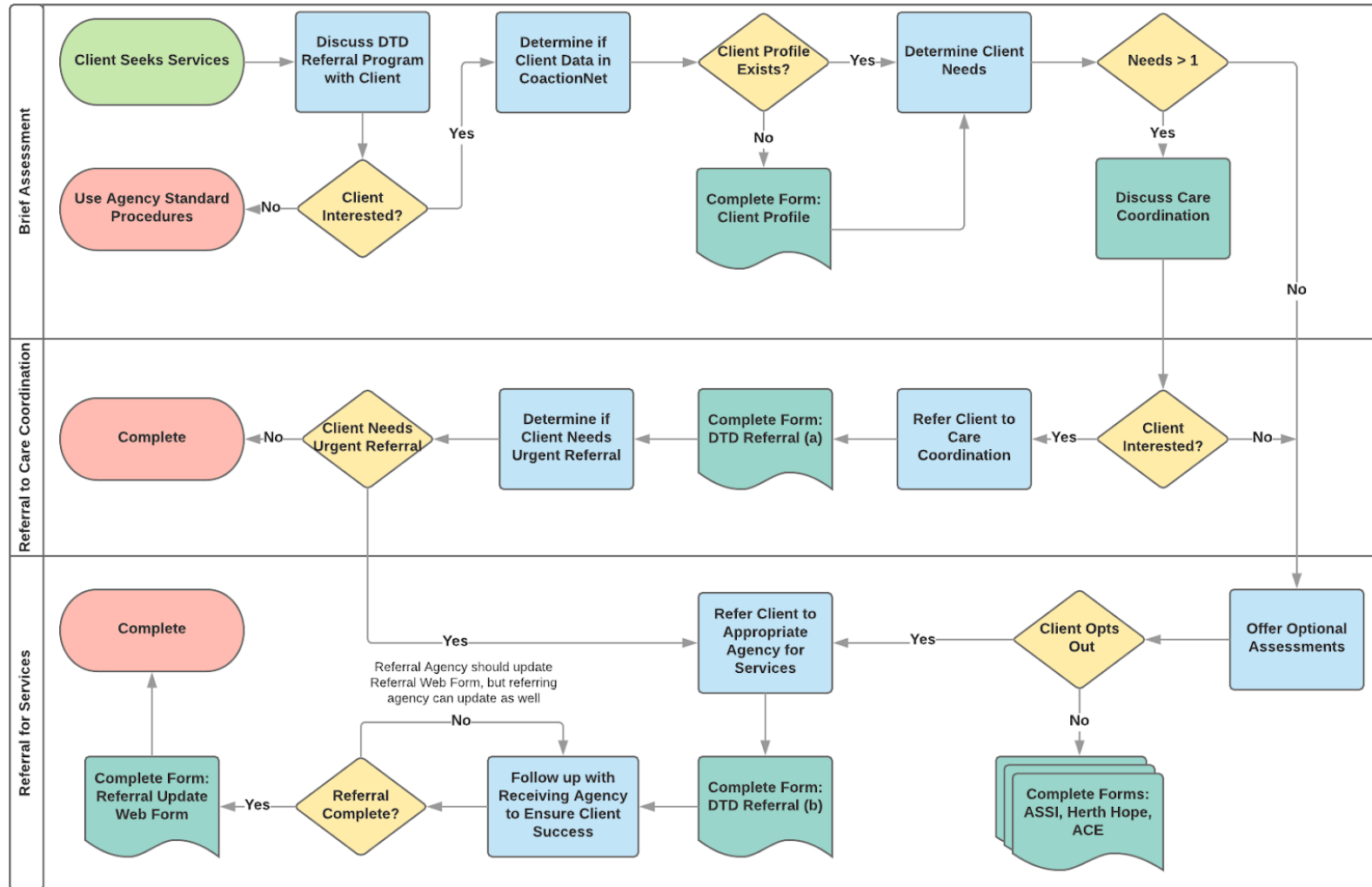

Referral Network Partners

May 2019

Table of Contents

Referral Network Partner Protocol

Brief Assessment

Client Seeks Services → Discuss DTD Referral Program with Client → Client Interested?
- No → Use Agency Standard Procedures
- Yes → Determine if Client Data in CoactionNet → Client Profile Exists?
  - No → Complete Form: Client Profile
  - Yes → Determine Client Needs → Needs > 1
    - Yes → Discuss Care Coordination
    - No → (to Referral for Services)

Referral to Care Coordination

Client Interested?
- Yes → Refer Client to Care Coordination → Complete Form: DTD Referral (a) → Determine if Client Needs Urgent Referral → Client Needs Urgent Referral
  - No → Complete
- No → Offer Optional Assessments

Referral for Services

Offer Optional Assessments → Client Opts Out
- Yes → Refer Client to Appropriate Agency for Services → Complete Form: DTD Referral (b) → Follow up with Receiving Agency to Ensure Client Success → Referral Complete?
  - Yes → Complete Form: Referral Update Web Form → Complete
  - No → (loop back)
- No → Complete Forms: ASSI, Herth Hope, ACE

Referral Agency should update Referral Web Form, but referring agency can update as well
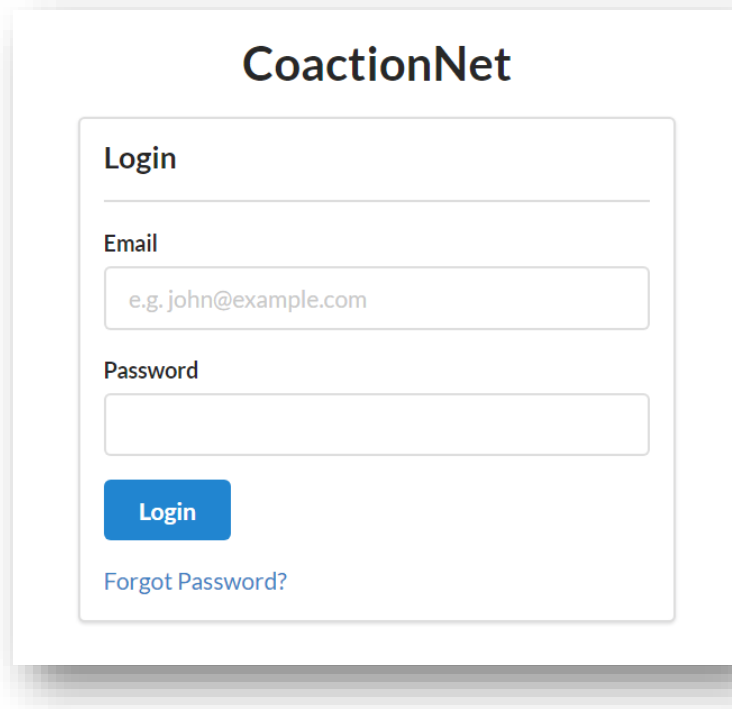
3

Navigating CoactionNet

CoactionNet Login

- Open your web browser (Preferred Browser: Google Chrome, Mozilla Firefox or Safari, CoactionNet is **incompatible** with Internet Explorer).
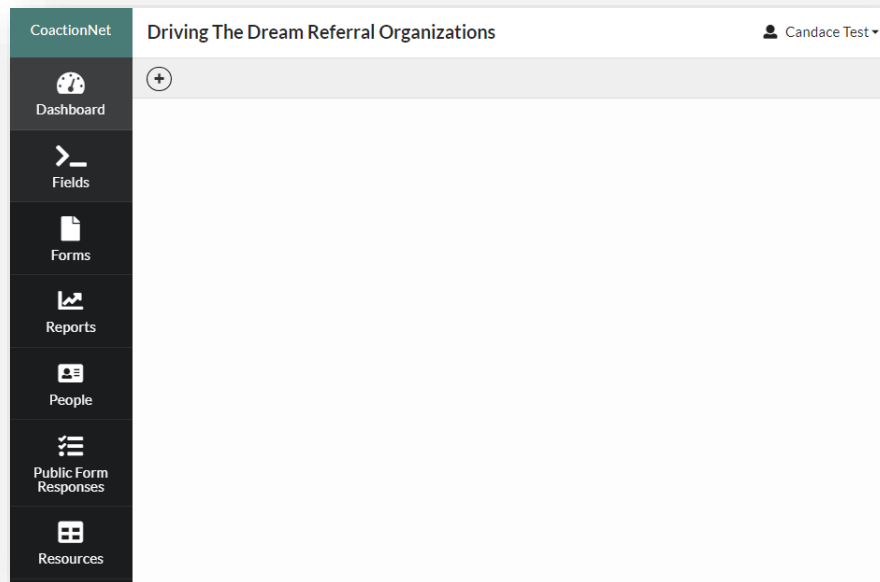
- Type dtdreferral.coactionnet.com in your web browser's address bar.
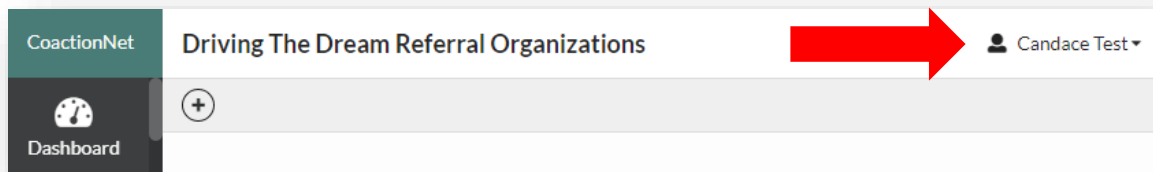

- Enter your email address (firstname.lastname@abcorganization.org) as the username and your personal password. This will be the same e-mail address you submitted when you signed your User Agreement and password you created. Click *Login.*

- If you forget your password, click **"Forgot Password?"** and follow the steps to reset your password.

CoactionNet Interface

- After logging into CoactionNet, you will be taken to a landing page similar to the one above. The buttons on the left allow you to navigate to different pages in CoactionNet. Your name will appear in the upper left hand corner.
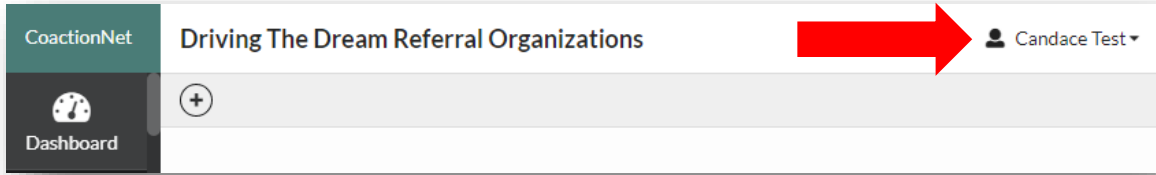
Logging Out

- To logout, click on the button containing your name in the upper left-hand corner of the screen.
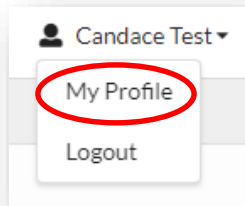

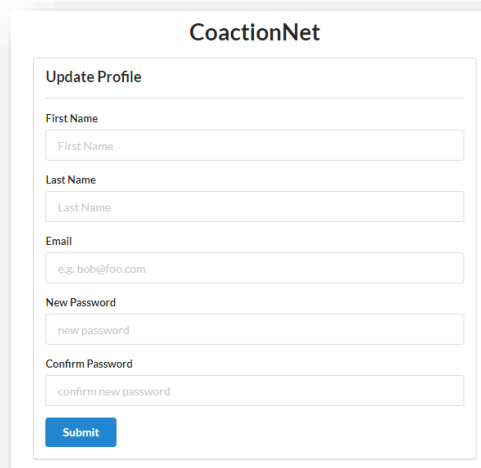- A drop-down menu will appear with the options, "**My Profile**" and "**Logout**". Click *Logout.*

Updating Your User Profile

From your profile, you can update your personal information and password.

- To access your profile information, click on the button containing your name in the upper left-hand corner of the screen.

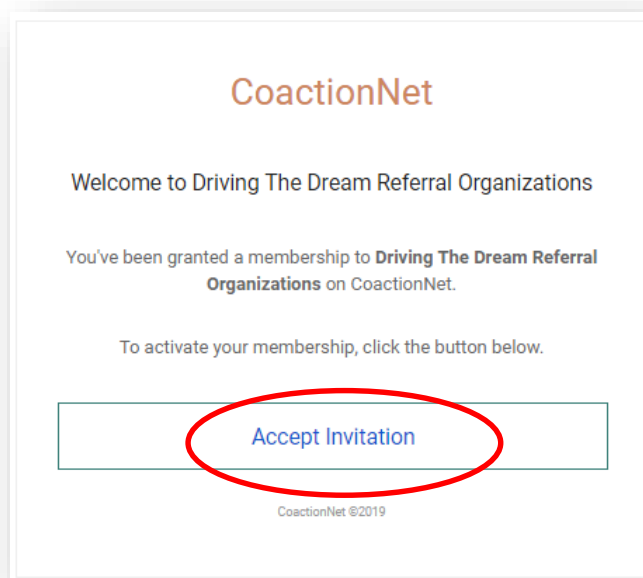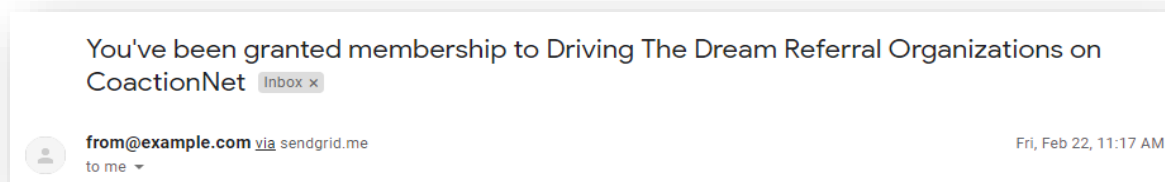- A drop-down menu will appear with the options, "**My Profile**" and "**Logout**". Click *My Profile.*

- From the **Update Profile** Window, make changes to the appropriate personal information or password information boxes. Click *Submit* to confirm changes.

CoactionNet User Profiles

Obtaining a CoactionNet User Profile

- Agency Supervisor or Management staff will inform the United Way DTD team of a new hire or departing staff member.

- United Way of the Mid-South staff will provide training to new hire(s) and collect signed CoactionNet User Agreements.

- DTD Data and Quality Improvement team will create a new user profile for the new hire. CoactionNet auto-generates an email to the new hire from from@example.com with the subject line, "**You've been granted membership to Driving The Dream Referral Organizations on CoactionNet**". See the example below.

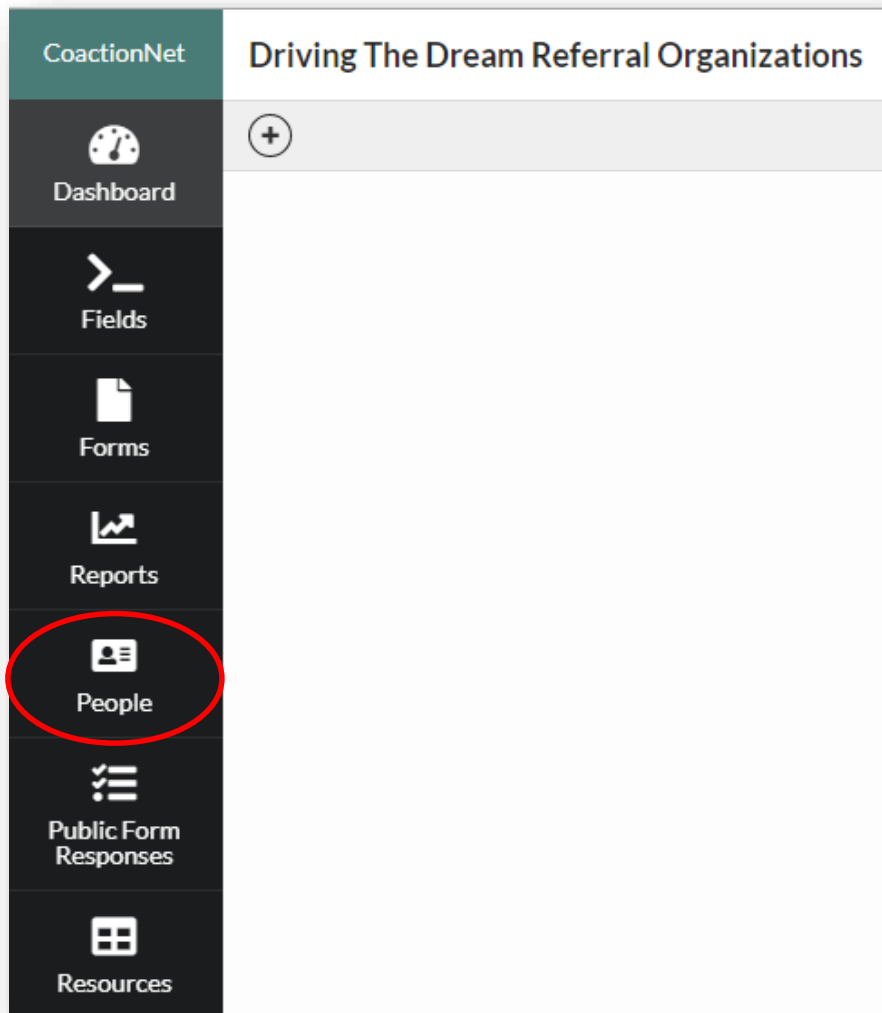- Open the email and click *Accept Invitation.*

- Your email address will already be completed. Enter your First Name and Last Name. Create a password with at least one Upper Case letter, one Lower Case letter, and one number or symbol in the Password box. Retype the password in the Password Confirmation box. Click *Join.*
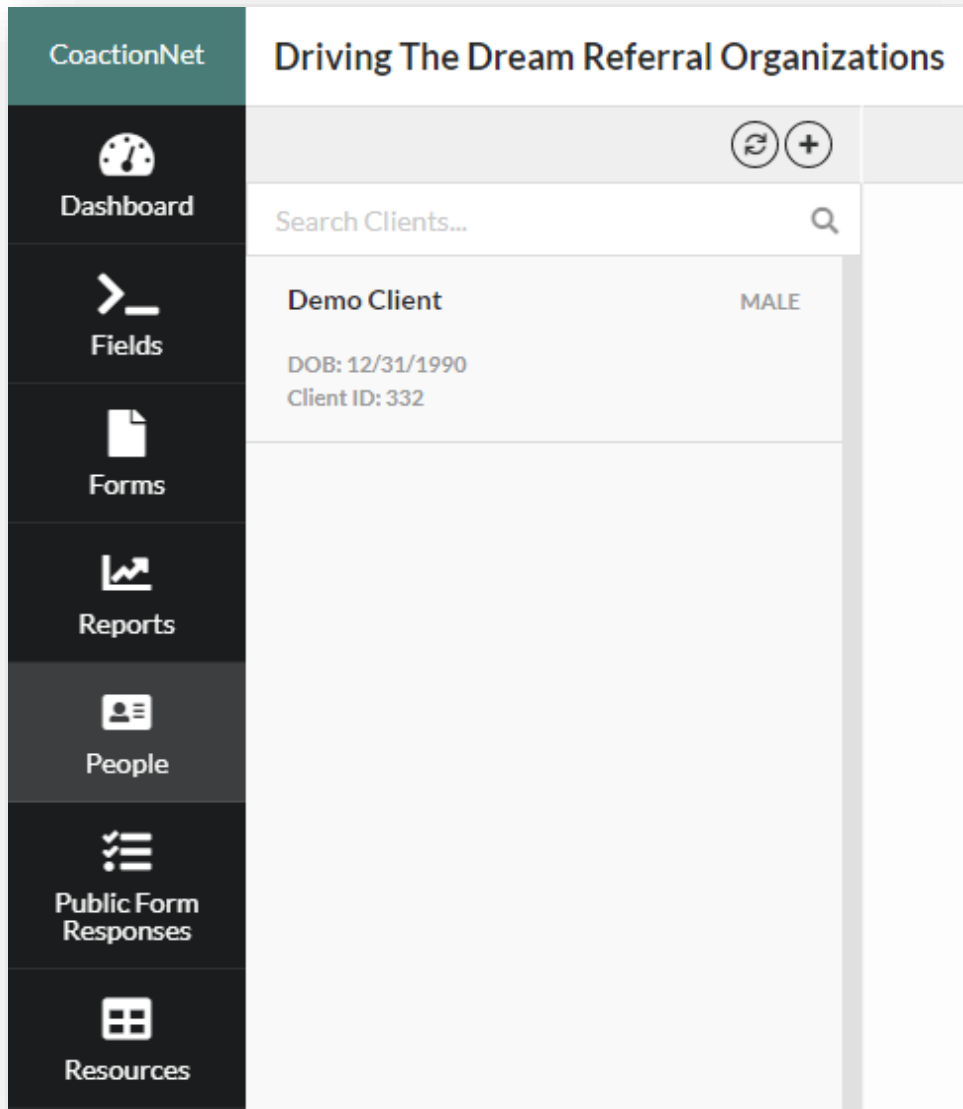

- Once successful, you will be redirected to a login page with 'Invitation Complete!' at the top. Retype your password and click *Login.* (You may be redirected to coactionnet.com, which will display a blank page. In that case, you will need to navigate to dtdreferral.coactionnet.com to access your client records.)

Client Profiles

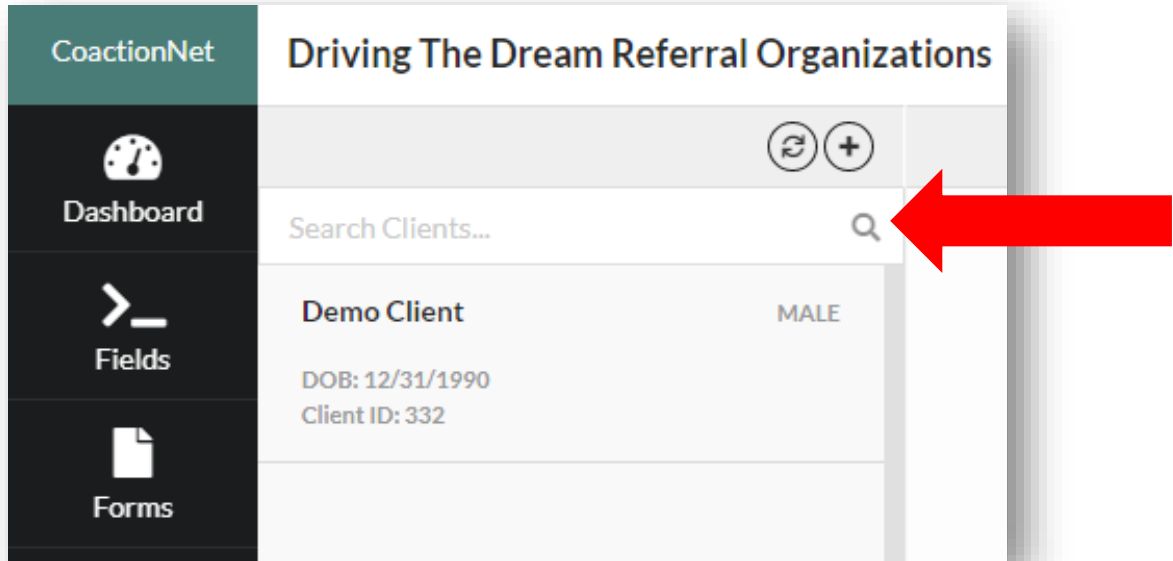## Navigating to a Client Profile

- Once you are logged in to CoactionNet, on the left side of your screen, you will see a list with **People** as one of the options. Click on **People**.
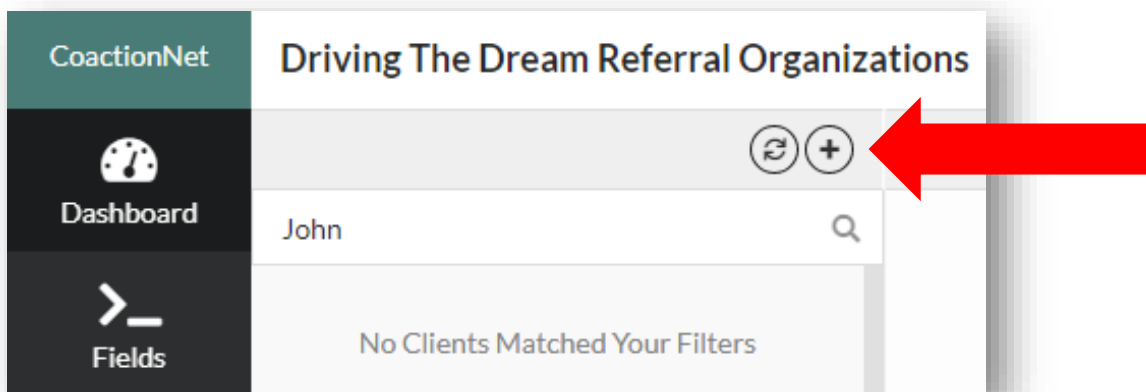
- You will see a screen similar to the one above which includes a list of all clients you have access to as a member of your Agency.

Searching for Clients by Name

- Click "**Search Clients**" above the list of clients, type in the Client's first and/or last name to check for a previously created Client profile.
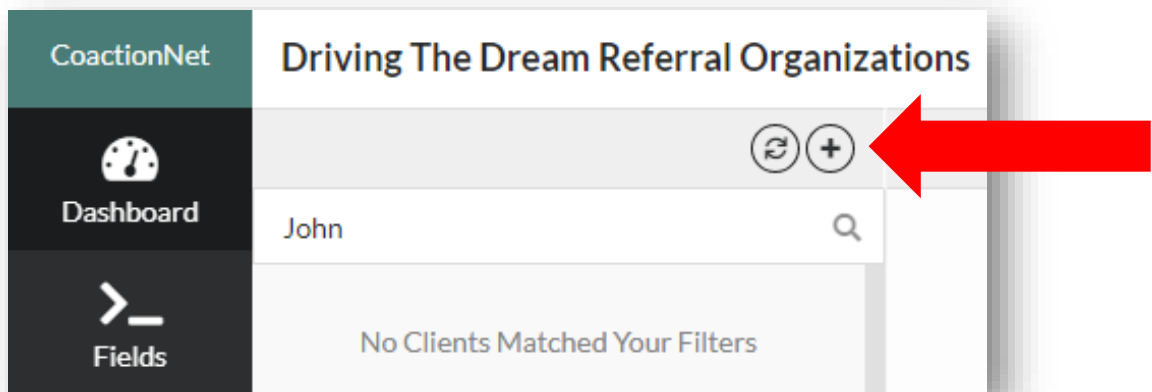

In this example, I am searching for John. No entries for John were returned and I can now create a **New Client Profile**. Click on the plus symbol on the right side of the screen.

Adding a New Client Profile

This section is for the main Client demographics that should stay the same throughout the participant's enrollment.

Required fields are:

- First Name, Last Name

- Date of Birth

- Gender

- Last 4 of SSN (Social Security Number)

  ➢ *If the Client does not have a SSN, create a 4-digit pin that will be used by the Client when interacting with any Driving The Dream Referral Network organizations. This should be a number the client will remember when interacting with subsequent organizations. Try choosing something easy to remember, such as the last four digits of their cell phone number or month/day of birth.*

- After accessing your list of Client from the **People** button, click the plus sign above the search bar to create a **New Client Profile**.

- A form will appear that asks for basic information on the Client. After entering the required information, click **Save.**

- A new Client profile has been created. The Client profile will now appear in your Agency's Client list.

Duplicate Client Profile

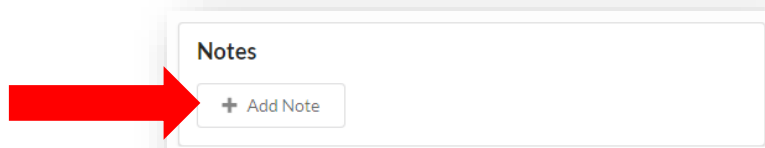- If the client matches a client profile created at another Agency, there will be a message on the Client profile that reads, "**This client appears to have a duplicate record. Would you like to merge these records?".** If you see this message, take the following steps:

  - *DO NOT CLICK* "merge these records".

  - Notify the DTD Data Quality & Improvement team that there is a duplicate record. Contact the Data & Quality Improvement team to request a profile merge.

  - The DTD Data Quality & Improvement team will merge the duplicate profiles ensuring no loss of data. After this is complete, your Agency will have access to all forms that have been created for the Client.
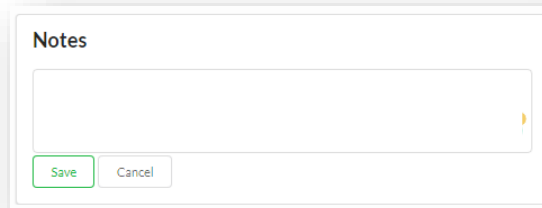
Client Profile Notes

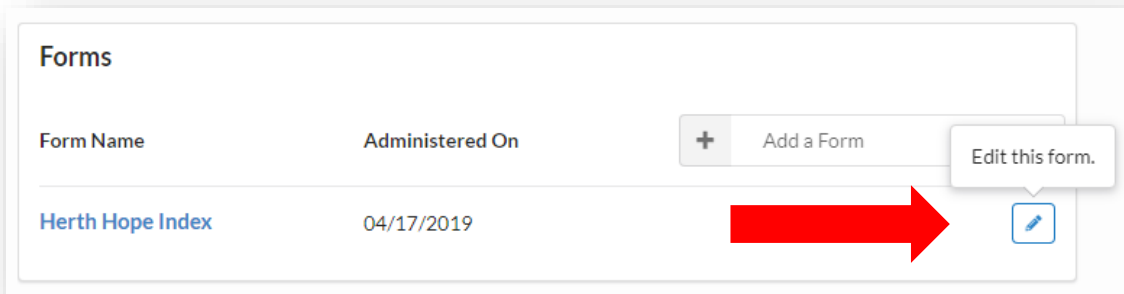- **To add notes** to the Client profile, click anywhere in the box labeled **"Add Note".**

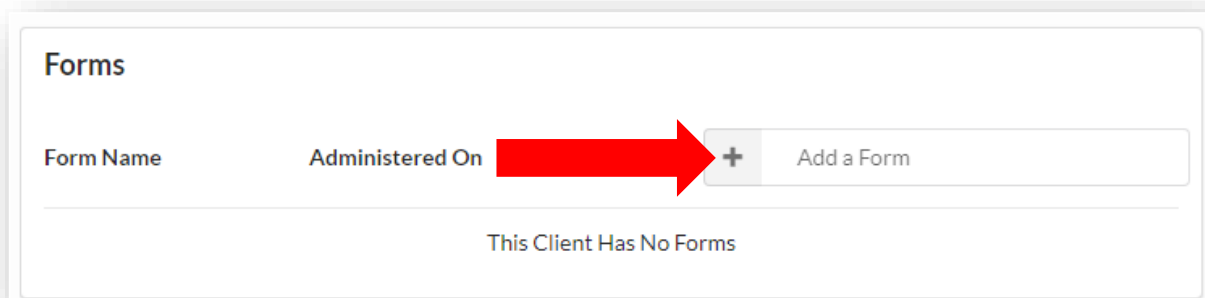- Type any relevant notes and click **Save.**
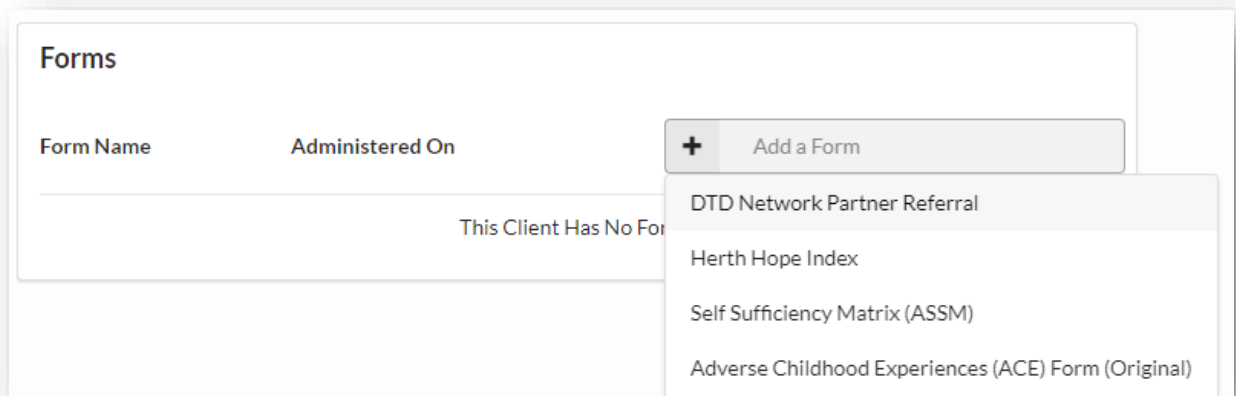
Client Forms

Modify a Form

- **To modify a form** for the Client, click the button with an image of a pencil to the left of the form. A window will pop up when you hover over this button that says, "**Edit this form**."

- Make any modifications desired and click **Save.**

Add a Form

- **To add a form** for the Client, click anywhere in the box labeled "**Add a Form**".

- A drop-down menu will appear with all available forms. Click the relevant form to create a new form for the Client.
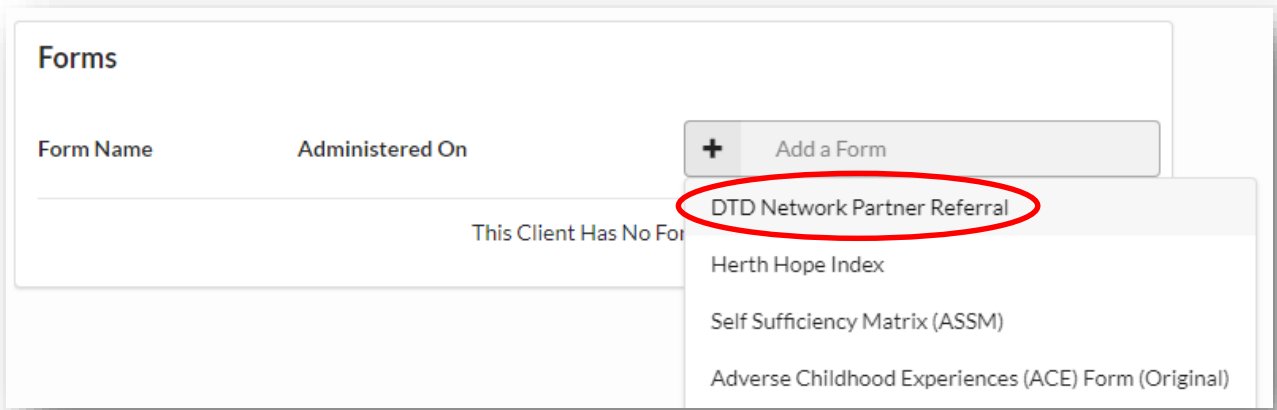
DTD Network Partner Referral Process

Types of Referrals

There are two types of referrals: a Request for Service and Care Coordination. A **Request for Service** is a referral directly to another Agency based on one or more needs within the 20 domains of the ASSM. A **Care Coordination** referral is a referral to a Care Coordinator at one of the Care Coordination Hubs for enrollment in Care Coordination. The Client must opt-in to Care Coordination. In general, Care Coordination is most beneficial to the Client when the Client has several vulnerable or in-crisis needs as determined by the ASSM.

Creating a New DTD Network Partner Referral

Based on assessments and/or conversations with the Client and family, create referrals to appropriate community agencies/organizations.

- Click the "**Add a Form**" box from the Client Profile. A drop-down menu will appear with all available forms. Click *DTD Network Partner Referral* to create a new referral.

- The DTD Network Partner Referral form asks, "Do You Want To Receive A Copy Of This Referral?". Click *Yes! Send Me The Referral.* Type in your email address in the "Email For Referral Copy" box.

- Click on the box underneath the question, "**What Types Of Services Are You Providing For This Person?**". A dropdown menu will appear containing all 20 domains of the ASSM. Select the appropriate domain for your Agency. You may select multiple domains as needed.

- For every referral, the Client must complete a Statement of Consent either verbally or by paper form. If the Client gave consent verbally, click "**Client has agreed to consent of the telephone**". If the client consents by signing a form, click "**Client has signed a consent form**". A field will appear below to attach a digital copy of the completed consent form.

- Complete questions regarding household information with the Client.

- Check each type of Client Contact Information Provided as determined with the Client. As you check each contact method, the related fields will appear below. To remove a contact method, uncheck the box.

- ***You must choose at least one type of contact information***. This will be used by the agency receiving the referral to contact the Client.
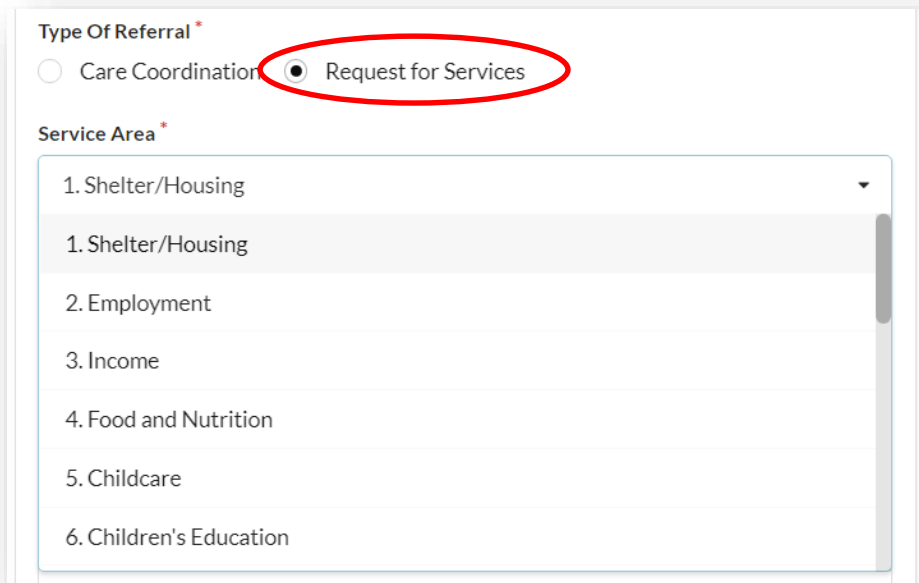

- Include as many contact methods as possible. Complete the related contact information field below. For the primary address, type into the "**Search**" box until the correct address is generated. Click on the address and the address boxes below will automatically fill. Do not fill out the address parts individually.
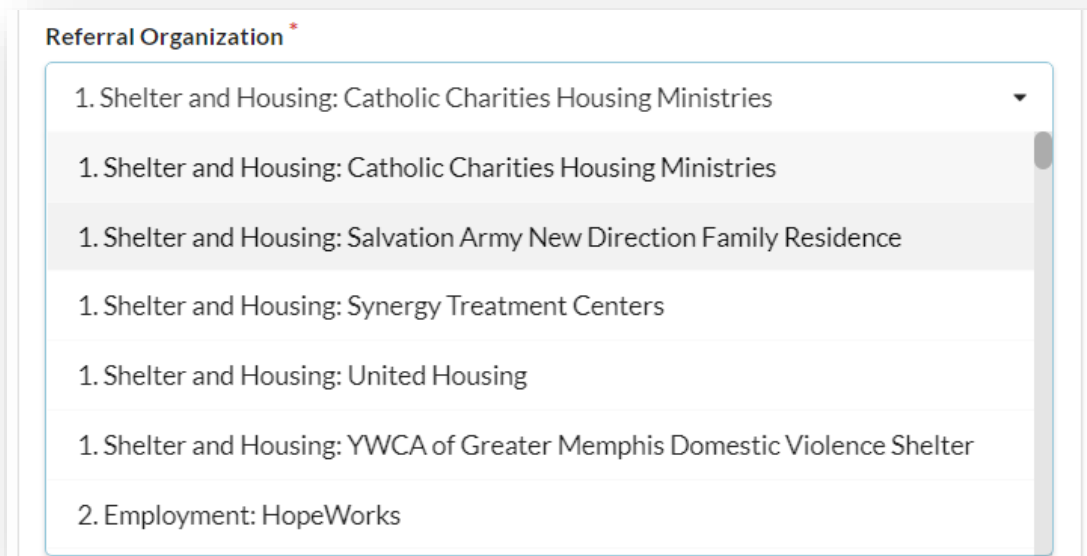
Request for Services

A referral to another Referral Network Partner Agency for an identified service need. One referral is submitted per service need. It is the responsibility of the both the Agency sending the referral to provide a 'Warm Handoff' and communicating with the receiving Agency.

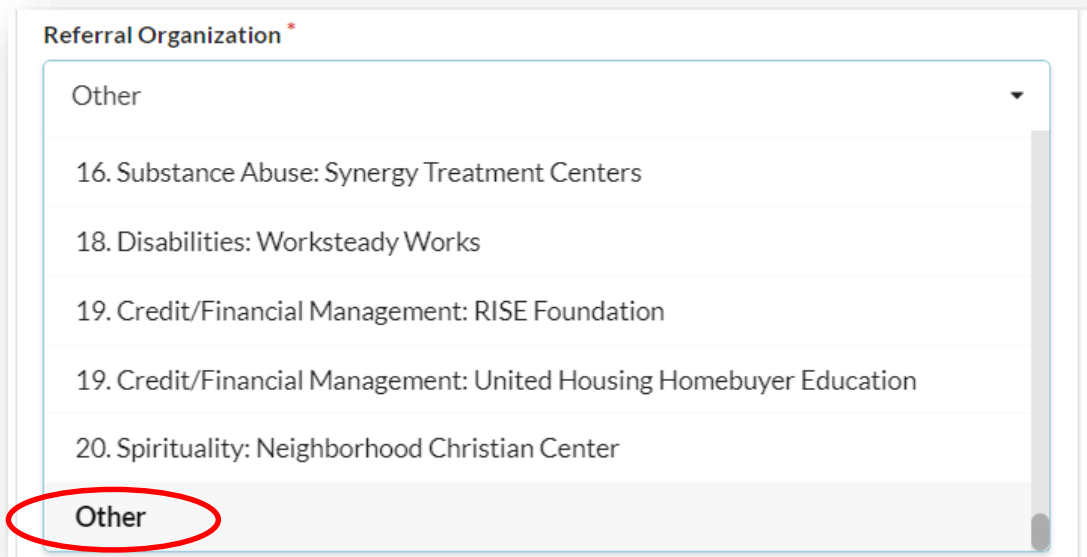- To make a referral to another Agency, click **Request for Services**. Click the box underneath "**Service Area**". A dropdown menu will appear containing all 20 domains of the ASSM. Select the appropriate domain for this referral. List any additional domains as necessary.

- Click on the box underneath "**Referral Organization**". A drop-down menu will appear containing all DTD Network Partner Referral Agencies with the domain number under which they serve. Select the appropriate Agency for this referral.

- For a complete list of DTD Referral Network Agencies and their services, please visit https://www.drivingthedream.org.

- To refer to an Agency outside of the DTD Referral Network Partner Agencies, select "**Other"** from the "**Referral Organization**" drop-down menu.

- Complete the information about the outside Agency, including the Agency Name in the "**Please Specify Other"** field and the "**Referral Organization Contact Email**".

- After selecting an appropriate referral Agency, the contact information for the referral Agency will auto fill. Provide any additional notes about the referral and click *Save.*

Care Coordination

- To make a referral to a Care Coordinator, click *Care Coordination*. Click the box below "**Care Coordinator Organization"** to choose one of the DTD Care Coordination Hubs. Select the appropriate Care Coordination Hub.

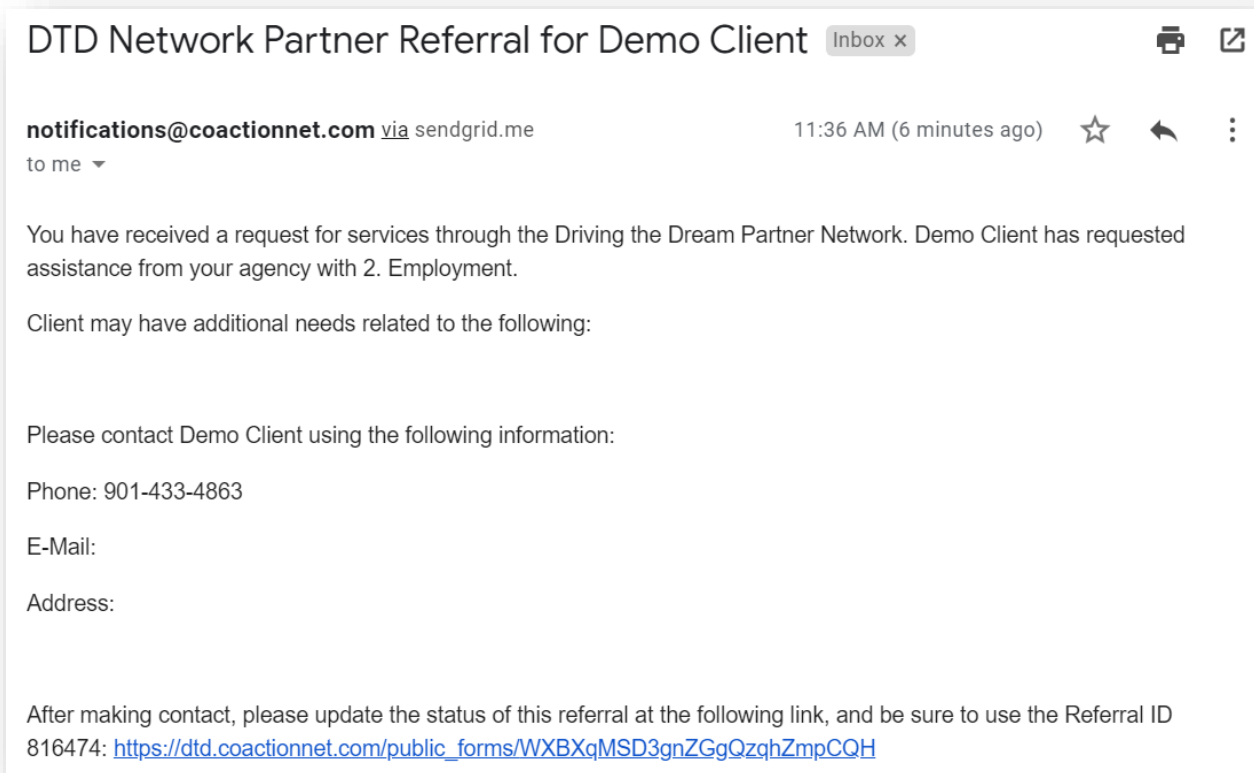- After selecting an appropriate Care Coordination Hub, the contact information for the Care Coordinator will auto fill. Provide any additional notes about the referral and click *Save.*

DTD Referral Update Form

Referrals require updates during each step of the referral process. To complete a Driving The Dream Referral Update, visit:

http://bit.ly/DTD_Referral_Update

- After sending or receiving a referral through CoactionNet, you will receive an email from notifications@coactionnet.com with the subject line, "**DTD Network Partner Referral for ---**" similar to the example above. This email contains several important pieces of information:

    - The domain in which the Client is seeking services
    - The contact information for the Client
    - The **Referral ID** for the referral
    - A link to the DTD Network Partner Referral Update form

- Using the link above or found in the referral reference email, open the Driving the Dream Referral Update Form.

Driving The Dream Referral Update

Referral Id *

Confirm The Referral Id *

Please Check The Referral Id And Ensure That They Match. *

○ Yes, they match!

[Save]

- Complete the "**Referral Id**" and "**Confirm the Referral ID**" with the appropriate referral ID. The referral ID is found in the Network Partner Referral email. After confirming the numbers match, check "**Yes, they match!**".

Please Check The Referral Id And Ensure That They Match. *

⦿ Yes, they match!

Date Of Status Update *

MM/dd/yyyy

Referral Status Update *

Warm Hand-Off ▾

Warm Hand-Off

Received

At Capacity

Pending - In Contact

Pending - Screening for Enrollment

Completed/Enrolled in Program

- Complete the Date of Status Update. Click on the "**Referral Status Update**" box and select the appropriate status update. Add any additional notes and click *Save.*

Below is a summary of referral status':

- **Warm Hand Off:** An introduction from the referring agency to the receiving agency.
- **Received:** Receiving agency updates status to Received upon receipt of referral.
- **At Capacity:** Receiving agency is at full capacity.
- **Pending – In Contact:** Receiving agency is attempting to contact the Client.
- **Pending – Screening for Enrollment:** Receiving agency has made contact.
- **Completed/Enrolled in Program:** Enrollment in receiving agency program(s) are complete.
- **Ineligible:** The Client is ineligible for services.
- **Unable to Contact:** Receiving agency is unable to contact the Client.
- **Contacted but Declined Services:** The Client declined to receive services.

Optional Screenings and Assessment

Arizona Self-Sufficiency Matrix (ASSM)

The head of the household completes the Self-Sufficiency Matrix in order to identify the household's immediate needs. The ASSM form can be completed multiple times as an initial assessment, a follow-up, or a final version.

- Click the "**Add a Form**" box from the Client Profile. A drop-down menu will appear with all available forms. Click *Self Sufficiency Matrix (ASSM)* to create a new ASSM.

Self Sufficiency Matrix (ASSM)

Date Administered *

[MM/dd/yyyy]

This is the date that the assessment is administered to client

Type *

[▾]

Ssm: 1. Shelter/Housing *

○ 0 - Not Applicable   ○ 1 - In Crisis: Homeless or threatened with eviction.

○ 2 - Vulnerable: In transitional, temporary or substandard housing; and/or current rent/mortgage payment is unaffordable (over 30% of income)

○ 3 - Safe: In stable housing that is safe but only marginally adequate.

○ 4 - Building Capacity: Household is in safe, adequate subsidized housing.

○ 5 - Empowered: Household is in safe, adequate and unsubsidized housing.

Ssm: 2. Employment *

○ 0 - Not Applicable   ○ 1 - In Crisis: No job

○ 2 - Vulnerable: Temporary, part-time or seasonal; inadequate pay, no benefits.

○ 3 - Safe: Employed full-time; inadequate pay; few or no benefits.

○ 4 - Building Capacity: Employed full-time with adequate pay and benefits.

○ 5 - Empowered: Maintains permanent employment with adequate income and benefits.

- The agency staff will complete the Self Sufficiency Matrix form with the Client. Include any additional notes or attachments as appropriate. Click **Save**.

Ssm: 19. Financial Management	3 - Safe: Need a Credit Repair Plan
Ssm: 20. Spirituality	3 - Safe
Notes (Long)	
Attachment	
SSM Score	60

- CoactionNet will automatically summarize and score the ASSM. The SSM Score can be found at the bottom of the completed Self Sufficiency Matrix form.

Herth Hope Index

Offer adult family members the Herth Hope Index as an optional assessment.

- A drop-down menu will appear with all available forms. Click *Herth Hope Index* to create a new Herth Hope Index form.

- The Agency staff completes the Herth Hope Index form with the Client. Include any additional notes or attachments as appropriate. Click *Save.*

Hh 11. I Believe That Each Day Has Potential	Agree
Hh 12. I Feel My Life Has Value And Worth	Agree
Attachment	
Herth Hope Index Score	35

- CoactionNet will automatically summarize and score the Herth Hope Index. The Herth Hope Index Score can be found at the bottom of the completed Herth Hope Index form.

Adverse Childhood Experiences (ACE)

Offer adult family members the Adverse Childhood Experience (ACE) screening to identify and more effectively care for individuals who have been exposed to violence.

- A drop-down menu will appear with all available forms. Click *Adverse Childhood Experiences (ACE) Form (Original)* to create a new ACE form.

- If the ACE form was completed outside of CoactionNet, choose "**Score Only**" as the Type of Assessment and provide the Assessment Score. Attach the completed ACE form as appropriate.

- To complete the ACE form within CoactionNet, choose "**Complete Assessment**" as the Type of Assessment and complete the form with the Client. Include any additional notes or attachments as appropriate. Click *Save*.

Assessment Score	
Notes (Long)	
Attachment	
Assessment Score - Calculated	5

- CoactionNet will automatically summarize and score the ACE form. The ACE Score can be found at the bottom of the completed ACE form.