



Title: Policy and Procedure

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Section: 5 Care and Record Management

Date: June 1, 2018

Policy: HH5-13A.01 Referral Process

Replaces: December 12, 2017

Referral Process Policy

- The Agency will refer prospects/ clients to other organizations when care/service needs cannot be met.
- A marketing team personnel will refer to the *Referral Source* tab found in ClearCare and identify an organization that best fits the prospect/client's needs.
- If the marketing staff is unable to identify an organization for the prospect/ client, they will contact a member from United Health Care, who will provide us with 10 different organizations in which the prospect will be able to utilize.
- Before deactivation, the marketing team personnel will contact the referral source to notify them that we have evaluated the case and are unable to fulfill services.

Departments Involved in Development: Board of Directors, Compliance Committee, Legal Counsel
Reviewed by Executive Board and approved by the Board 6/1/18
Reviewed by Compliance Officer and approved 6/1/18
All previous versions are obsolete.