Documenting Referrals in Crossroads

Referrals are a required component of a WIC nutrition care plan. Based on the nutrition assessment, the CPA should refer each participant to appropriate health and social services. This referral should be documented in Crossroads, as well as later follow-up on the referral. Documenting referrals in Crossroads occurs on the Referral Program screen.

**Referral Search Container Default Settings:**

- View only System suggested box is checked
- Program name = All
- Refer Close to = Home
- Search Type = Proximity
- Miles = 5

**Recommended Search Criteria Scenario 1:** To view ALL Referral Programs for the Current County

- UNCHECK the View only System suggested box
- Program name = All
- Refer Close to = Other
- Search Type = County
- County = (user default)

**Recommended Search Criteria Scenario 2:** To view a Specific Program in Another County

- UNCHECK the View only System suggested box
- Program name = (user choice)
- Refer Close to = Other
- Search Type = County
- County = (user choice)
Completing the Referral

1. In the Search Results container, select the green PLUS sign.

The Refer Individual(s) container will pop up.

**NOTE:** Selecting the green PLUS sign does not communicate with the referral agency. A form must be printed and contact made by the participant, as described below.

2. Select the ALL box, or check off the individuals to refer.
3. Select **OK**.

You will be returned to the Referral Search screen.

4. Scroll down to the Referred Individuals Container. The individual(s) you selected will now be in this container.
5. Review the name(s) in the container.
6. Use the red X to delete if needed.
7. Select **Save**.

The individual(s) name(s) will populate in the Referral History container.
Printing a Referral Notification Form

1. Select the Referral Notification Form button in the \textbf{Referral History} container to print a referral form for the participant’s reference and use. The referral form auto-populates:
   - Referral provider name
   - Participant
   - Parent/Guardian
   - Date
   - Birth Date
   - Address

There are spaces/lines to write in (manually, after printing):
   - Organization phone number
   - Reason for referral
   - Measurement Date
   - Height/weight
   - Hgb

\textbf{NOTE:} Selecting the green PLUS sign in the Referral Search container of the Referral Screen does \textbf{not} communicate with the referral agency. This form must be printed and contact made by the participant.
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Following up on Referrals at a Later Visit

Select the pencil in the Referral History container to access the Referral Follow-Up screen.

On the Referral Follow-up screen, the local user can record:

1. The referral result. Results include:
   - Referred (default)
   - Kept
   - Not kept
2. A refused reason, if any. Refused reasons include:
   - Financial barrier
   - Lack of child care
   - Lack of support
   - Not interested
   - Transportation issues
3. Comments.
4. Follow up date.
5. Follow up results.