



Referrals

This tool lists high level policy requirements for making and documenting referrals and information about how to document in Cascades. Please review [Volume 1, Chapter 12 – Referrals](#) for more information and details.

1. Offer referrals at each certification (Initial, Subsequent, and Complete Assessment for PE participants), Mid-Certification Health Assessment, and when a participant or applicant is ineligible for WIC.
 - Staff are encouraged to make and document referrals at any time during the eligibility period.
2. Assess for the following **mandated referrals** and refer as appropriate.
 - **Help Me Grow WA Network: 1-800-322-2588** – refer all participants to assure they have access to information about important resources for the family.
 - **Medicaid** – refer participants and families who aren’t currently on Medicaid and appear eligible.
 - **Immunizations** – refer infants and children to age 24 months who aren’t up-to-date. Select “**Immunization Status**” on the Health Information screen and enter the infant’s or child’s immunization status as follows.
 - **Unknown:** the caregiver didn’t bring the immunization record or staff can’t determine if the child is up-to-date.
 - **Up-to-date:** the child is up-to-date with immunizations.
 - **Not up-to-date:** the child isn’t up-to-date with immunizations. This includes when the family chooses not to immunize.
 - **Alcohol and drug abuse counseling and treatment** – refer when appropriate.

At a minimum a participant would have a referral to the Help Me Grow WA Network, if no other referrals apply or are needed.

For example, if staff assess for the four mandated referrals and finds the participant is on Medicaid (or wouldn’t be eligible), is current with immunizations (to 24 months of age), and doesn’t need drug/alcohol treatment information, the only referral staff must document is the Help Me Grow WA Network referral line.

3. Make additional referrals as appropriate by sharing a local referral line phone number, provide verbal or written referrals to programs or services, or provide a community resource handout (local referral list).



Staff Tool: Referrals



- 4. Document all participant referrals in Cascades on the **Referral Program** in the **Care Plan** Quick Link.
 - Document [mandated referrals](#) and any additional general (listed below) referrals made.
 - See the following pages for more information about documenting in Cascades.

General referrals available in Cascades	
• Breastfeeding Peer Counselor	• Local referral list
• Dentist	• Medical Provider
• Domestic Violence	• MSS
• FDPIR	• Other*
• Food bank	• SNAP
• Head Start	• TANF
• Homeless shelter	

* Select “Other” when referring to a program or service not entered in Cascades. Staff have the option to edit the referral to document the specific referral made.

- 5. It’s best practice and recommended to follow-up on referrals to assess outcomes and document in Cascades. See [page 4](#) for an example.

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Cascades referrals

- Document all participant referrals on the **Referral Program** screen in the **Care Plan** Quick Link.
 - Cascades has [mandated referrals](#) and general referrals. Referrals are to types of health care providers (medical provider, dentist), programs (Medicaid, MSS, Head Start), and organizations or services (food bank, homeless shelter, etc.).
 - We use a generic address of 100 Main Street for each WIC clinic's ZIP code.
- The **Referral Program** screen is for documenting only. Referrals don't forward electronically to the referral organization.
 - Staff can print the **Referral Notification Form** and add information for the participant to take to the organization if needed.

Steps	Cascades Screen																		
<p>Access all Cascades referrals</p> <ul style="list-style-type: none"> Program Name = All Refer Close to = Clinic Search Type = ZIP Code View only System suggested = Uncheck <p>Use other search criteria as appropriate.</p>																			
<p>Select the referral</p> <ul style="list-style-type: none"> Press the next to the referral 	<table border="1"> <tr><td></td><td>Other</td><td>Help Me Grow WA Network</td></tr> <tr><td></td><td>Homeless</td><td>Homeless shelter</td></tr> <tr><td></td><td>Immunization</td><td>Immunization</td></tr> <tr><td></td><td>Other</td><td>Local referral list</td></tr> <tr><td></td><td>Medicaid</td><td>Medicaid</td></tr> <tr><td></td><td>Doctor (MD)</td><td>Medical Provider</td></tr> </table> <p>Tip! You can click on the column title to list referrals alphabetically or move the columns.</p> <div style="border: 1px solid gray; padding: 5px; width: fit-content; margin: 10px auto;"> Program Name Provider Name </div>		Other	Help Me Grow WA Network		Homeless	Homeless shelter		Immunization	Immunization		Other	Local referral list		Medicaid	Medicaid		Doctor (MD)	Medical Provider
	Other	Help Me Grow WA Network																	
	Homeless	Homeless shelter																	
	Immunization	Immunization																	
	Other	Local referral list																	
	Medicaid	Medicaid																	
	Doctor (MD)	Medical Provider																	
<p>Select family members being referred</p> <ul style="list-style-type: none"> Select All to refer all family members Select Individual(s) when the referral only applies to some family members Press OK 	<div style="display: flex; align-items: center; justify-content: space-around;"> <div style="border: 1px solid gray; padding: 5px;"> <p>Medicaid</p> <p>Refer Individual(s) to Medicaid Program</p> <p>Select Individual(s) <input checked="" type="checkbox"/> All </p> <p><input checked="" type="checkbox"/> ADULT REFERRAL</p> <p><input checked="" type="checkbox"/> INFANT REFERRAL</p> <p><input checked="" type="checkbox"/> CHILD REFERRAL</p> <p>OK Cancel</p> </div> <div style="text-align: center;"> <p>All family members referred to Medicaid</p> <p>Some family members referred to Medical Provider</p> </div> <div style="border: 1px solid gray; padding: 5px;"> <p>Medical Provider</p> <p>Refer Individual(s) to Doctor (MD) Program</p> <p>Select Individual(s) <input type="checkbox"/> All </p> <p><input type="checkbox"/> ADULT REFERRAL</p> <p><input checked="" type="checkbox"/> INFANT REFERRAL</p> <p><input checked="" type="checkbox"/> CHILD REFERRAL</p> <p>OK Cancel</p> </div> </div>																		
<p>Save the referral(s)</p> <ul style="list-style-type: none"> Selected referrals go into the Referred Individual(s) container Press Save 																			

Steps	Cascades Screen
<p>Referral History</p> <ul style="list-style-type: none"> All saved referrals appear in the Referral History container Optional Referral Notification form: Print the form and fill out additional information for the participant to take to the provider or service as needed Edit or delete referrals: <ul style="list-style-type: none"> Use the to delete Use the pencil icon to edit 	
<p>Edit referrals</p> <ul style="list-style-type: none"> Use the icon to edit the referral Optional/Recommended - Edit the referral to document: <ul style="list-style-type: none"> Information about required referrals, for example if the family already has resources or isn't interested. For example: <ul style="list-style-type: none"> Has Resources: Family is eligible for Medicaid but has medical insurance Not Interested: Infant or child not up-to-date on immunizations, but the family doesn't immunize "Other" – list the specific referral Follow-up to referrals at future appointments 	<p style="text-align: center;">Examples of recommended Referral Follow-up</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="802 803 1371 1401"> <p style="text-align: center;">Required Referral – Has resources</p> </div> <div data-bbox="1409 803 1978 1401"> <p style="text-align: center;">General Referral - Follow-up at future appt</p> </div> </div>