

# Directions for Responding to a Referral Sent from WE-TRAC to PPS to the Birth to 3 Program 8/31/09

- Regularly check your county generic email address to review email alerts about incoming referrals.

## Process of a Referral being made to Birth to 3 through PPS:

What the audiologist using WE-TRAC does:

In the WE-TRAC data system, an audiologist will complete a child's chart with basic information such as child's name, gender, date of birth, parent contact information, race, ethnicity, and diagnosis of hearing loss. (screenshot sample below)

The screenshot displays the WE-TRAC Case Management interface. On the left, a table lists 24 cases with columns for NICU status, Child's Name, DOB, Sex, Days on List, Last Procedure, Recommended Next Procedure, and Manage Cases. The 'Child's Chart' window is open for the child SCHULTZ, LUCY, born 08/17/2009. The form includes sections for Child Information (Last Name: SCHULTZ, First: LUCY, Gender: Female, DOB: 08/17/2009, Birth Weight: 3997 g, Birth Hospital: WE-TRAC Birthing Unit, WE-TRAC ID: 679855, Blood Card #: Q015740) and Parent Information (Mother's Last: SCHULTZ, First: SALLY, Father's Last: [blank], First: [blank]). It also features dropdown menus for Race and Ethnicity, checkboxes for Adopted and Foster Care, and a Blood Card History section.

NICU	Child's Name	DOB	Sex	Days on List	Last Procedure	Recommended Next Procedure	Manage Cases
<input type="checkbox"/>	GRANT, JILL	08/02/09	Female	1	Inpatient Screen	Outpatient Screen by: 09/01/2009	[Dropdown]
<input type="checkbox"/>	JORDAN, JUNE						[Dropdown]
<input type="checkbox"/>	PREFECT, FORD						[Dropdown]
<input type="checkbox"/>	GALE, OSBORNE						[Dropdown]
<input type="checkbox"/>	DOBSON, LAURA						[Dropdown]
<input type="checkbox"/>	DOYLE, KOLIN						[Dropdown]
<input type="checkbox"/>	SAVIER, SAVANNAH						[Dropdown]
<input type="checkbox"/>	BADGER, BUCKY						[Dropdown]
<input type="checkbox"/>	SMITH, JOE						[Dropdown]
<input type="checkbox"/>	EURANK, MICHAEL						[Dropdown]
<input type="checkbox"/>	NELSON, ELIZABETH						[Dropdown]
<input type="checkbox"/>	SAWYER, ELIZABETH						[Dropdown]
<input type="checkbox"/>	LITTLE, SAMANTHA						[Dropdown]
<input type="checkbox"/>	GROBE, TAMAR						[Dropdown]
<input type="checkbox"/>	SHIRLEY, ANNE						[Dropdown]
<input type="checkbox"/>	SCHULTZ, LUCY						[Dropdown]
<input type="checkbox"/>	NICU THOMPSON, ERZIN						[Dropdown]
<input type="checkbox"/>	NICU CONWAY, BETH						[Dropdown]
<input type="checkbox"/>	NICU LOVE, GENEVA						[Dropdown]
<input type="checkbox"/>	NICU CORBIN, BENJAMIN	08/21/09	Male	1	Not Screened: NICU	Outpatient Screen by: 11/19/2009	[Dropdown]
<input type="checkbox"/>	CORWAY, BETH	08/26/09	Female	1	Inpatient Screen	Outpatient Screen by: 09/25/2009	[Dropdown]
<input type="checkbox"/>	DEARBORN, VANESSA	08/27/09	Female	1	Not Screened: Not Found	Outpatient Screen by: 09/26/2009	[Dropdown]
<input type="checkbox"/>	HARLOW, JACOB	08/28/09	Male	1	Not Screened: Patient's record not found	Outpatient Screen by: 09/27/2009	[Dropdown]
<input type="checkbox"/>	MOUSE, MICHAEL	08/29/09	Male	1	Inpatient Screen	Outpatient Screen by: 09/28/2009	[Dropdown]

Once a permanent hearing loss has been diagnosed, the audiologist will go into WE-TRAC and choose to Refer to Early Intervention, indicating the county the family lives in and click a button to process the B-3 referral. (two screenshots below)

The screenshot shows the WE-TRAC Case Management interface. The browser window title is "WE-TRAC - Case Management - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The address bar shows the URL: [https://wetractest.han.wisc.edu:7441/mod\\_case/case\\_list.jsp?orgid=1442](https://wetractest.han.wisc.edu:7441/mod_case/case_list.jsp?orgid=1442). The page header includes the WE-TRAC logo and the text "Wisconsin EHDI - Tracking Referral and Coordination". The main content area is titled "Case Management" and "Children's Hospital of Wisconsin - Audiology - Open Cases". It displays a table with one case entry for "SCHULTZ, LUCY" with a "Refer to Early Intervention" dropdown menu open, showing options like "Enter Referral to Org", "View CHL Report", and "Administrative Transfer".

NICU	Child's Name	DOB Sex	Days on List	Last Procedure	Recommended Next Procedure	Manage Cases
<input type="checkbox"/>	SCHULTZ, LUCY	08/17/09 Female	1	CHL Report	Early Intervention by: 01/14/2010	<ul style="list-style-type: none"> <li>Refer to Early Intervention</li> <li>Enter Referral to Org</li> <li>Enter Referral to Ind</li> <li>View CHL Report</li> <li>View/Modify Chart</li> <li>Enter Refusal</li> <li>Administrative Transfer</li> <li>Administrative Close</li> </ul>

and then...

WE-TRAC - Referral - Add - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

File Edit View Favorites Tools Help

https://wetractest.han.wisc.edu:7441/mod\_case/case\_ei\_referral.jsp?mbid=679855&orgid=1442

WE-TRAC - Referral - Add

**Acceptance WE-TRAC**  
Wisconsin EHDH - Tracking Referral and Coordination

You are on the Wisconsin Public Health Information Network

You have 8 Administrative Tasks

Home Cases Administration WE-TRAC Administration Resources Search Reports Feedback Log Out

Case Management > Referral - Add

### Referral - Add

The Code of Federal Regulations (CFR) 34 Part 303 requires healthcare providers to refer all children who may be eligible for Birth to 3 Program services. In Wisconsin, this includes any child with any degree or configuration of hearing loss.

Providers are encouraged to explain the need for the Birth to 3 Program referral to the child's parent/guardian; however, consent for referral is not required.

Parental consent is required for voluntary programs, such as Guide By Your Side.

Today's Date:	09/14/2009
Child's Name:	LUCY SCHULTZ
Procedure:	Referral to Early Intervention
Birth To 3 Referral:	<input type="radio"/> Wisconsin County Birth to 3 Program --Select--
-or-	<input type="radio"/> Out-of-State Early Intervention Program Organization Name <input type="text"/> City <input type="text"/> State --Select--
Guide By Your Side Program Referral:	<input type="radio"/> Yes <input type="radio"/> No <input type="button" value="Reset"/> <input type="button" value="Submit"/>

Done

start

Inbox - Microsoft Out... WETRAC - Microsof I... WE-TRAC - Referral - ... WETRAC 2.bmp - Paint

Trusted sites 100% 2:45 PM

What the WE-TRAC and PPS systems do with the referral information:

Once a day the referrals are sent from the WE-TRAC database to the PPS database and are processed.

For each referral received from WE-TRAC, PPS will generate, based upon the generic email address associated with that particular county, an email alert and will send the email alert to the appropriate generic email. One email alert per child referred. So, one county may receive more than one email alert per day.

**SAMPLE Email Alert**

To: <agency primary email address>  
From: DHSDLTCBto3group@wisconsin.gov

**\*\*This e-mail is automatically generated. Please do not reply to this e-mail.\*\***

This email is to notify you that a child from the Wisconsin Sound Beginnings program has been referred to your Birth to 3 program for potential services.

Please access the child's referral information in the Program Participation System (PPS) by clicking on the link below (you will be required to log-in to PPS to view information).

[https://pps.wisconsin.gov/pps/PPSsearchDisplay?REPORT=REF\\_IBX](https://pps.wisconsin.gov/pps/PPSsearchDisplay?REPORT=REF_IBX)

The referring organization and provider is below:

Clinic Name: Berlin Memorial – Audiology Clinic  
Provider Name: Sarah Kreckman  
Provider Contact Number: 6081231234

If you have technical difficulties with this link, please contact  
DHSSOSHELP@wisconsin.gov.

If this is your first referral, please refer to the training materials on the B-3 TA website at:  
<http://dhs.wisconsin.gov/bdds/birthto3/ta/index.htm>

**Please note:** If the generic email address is designed to receive email alerts for multiple counties (e.g. Forest/Oneida/Vilas), the email alerts you receive will NOT indicate which of the counties the referral is for. Thus, the person processing the referrals through PPS will need to check the Referral Inbox (per directions below) for each county.

A county Birth to 3 program's generic email address may receive zero to several email alerts a day, dependent solely on the audiologist completing the WE-TRAC information and processing a B-3 referral.

Two sets of directions follow: 1. Child not currently in PPS and 2. Child already in your B-3 program

**1. Child not currently in PPS--What Birth to 3 Programs do to process a NEW referral from WE-TRAC:**

Birth to 3 Program staff check the generic email address for email alerts on a daily basis, as receipt of an email alert begins the 45 day timeline for an initial IFSP to be in place.

**\*\* The following process can occur whether or not an email alert is received from the WE-TRAC system into the generic email box. \*\***

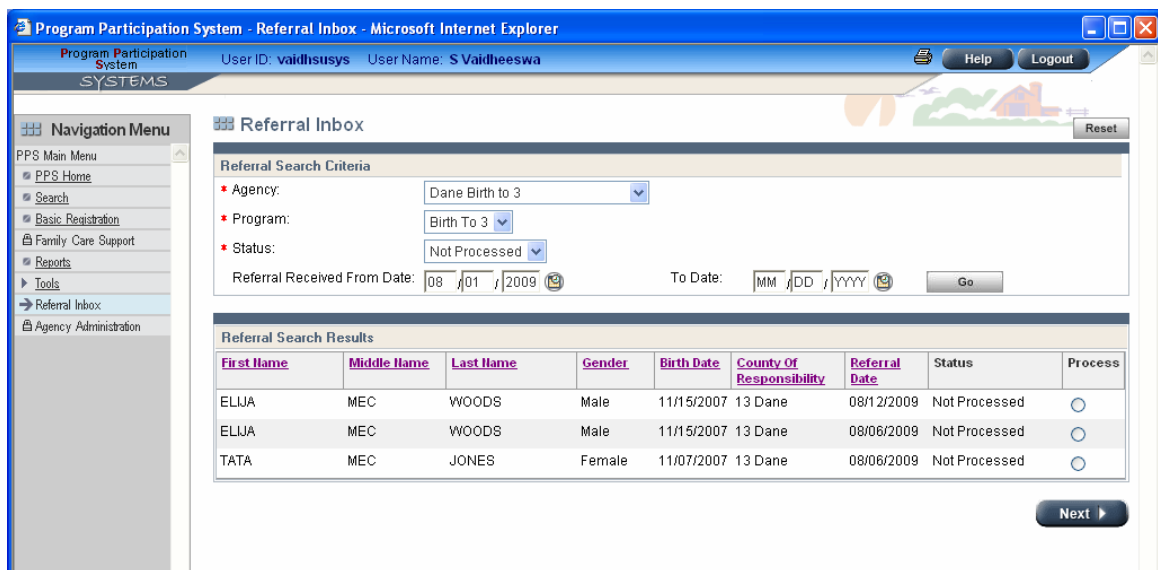
**Step One: Access PPS**

Birth to 3 Program staff access PPS Production (using WAMS ID and password).

**Step Two: Find Referrals from WE-TRAC**

On the Navigation Menu on the left side, click on 'Referral Inbox' (highlighted in blue in screenshot below)

A screen titled, 'Referral Inbox' will appear: Referral Search Criteria (top half of screenshot below)



B-3 enters the criteria of the search including agency ('county name' Birthto3 OR for Dane/Milwaukee counties: "agency name" Birthto3), program (Birth to 3) and status (Not processed)

\* Please do not complete the "Referral Received From Date/To Date" fields to process a new referral from WE-TRAC. (See FAQ for more information on the use of these fields.)

Click GO button

A list of referrals from WE-TRAC will appear in the ‘Referral Search Results’ section (bottom half of the screenshot below)

Program Participation System - Referral Inbox - Microsoft Internet Explorer

Program Participation System User ID: vaidhsusys User Name: S Vaidheeswa Help Logout

Navigation Menu

- PPS Main Menu
- PPS Home
- Search
- Basic Registration
- Family Care Support
- Reports
- Tools
- Referral Inbox
- Agency Administration

Referral Search Criteria

\* Agency: Dane Birth to 3

\* Program: Birth To 3

\* Status: Not Processed

Referral Received From Date: 08 / 01 / 2009 To Date: MM / DD / YYYY Go

Referral Search Results

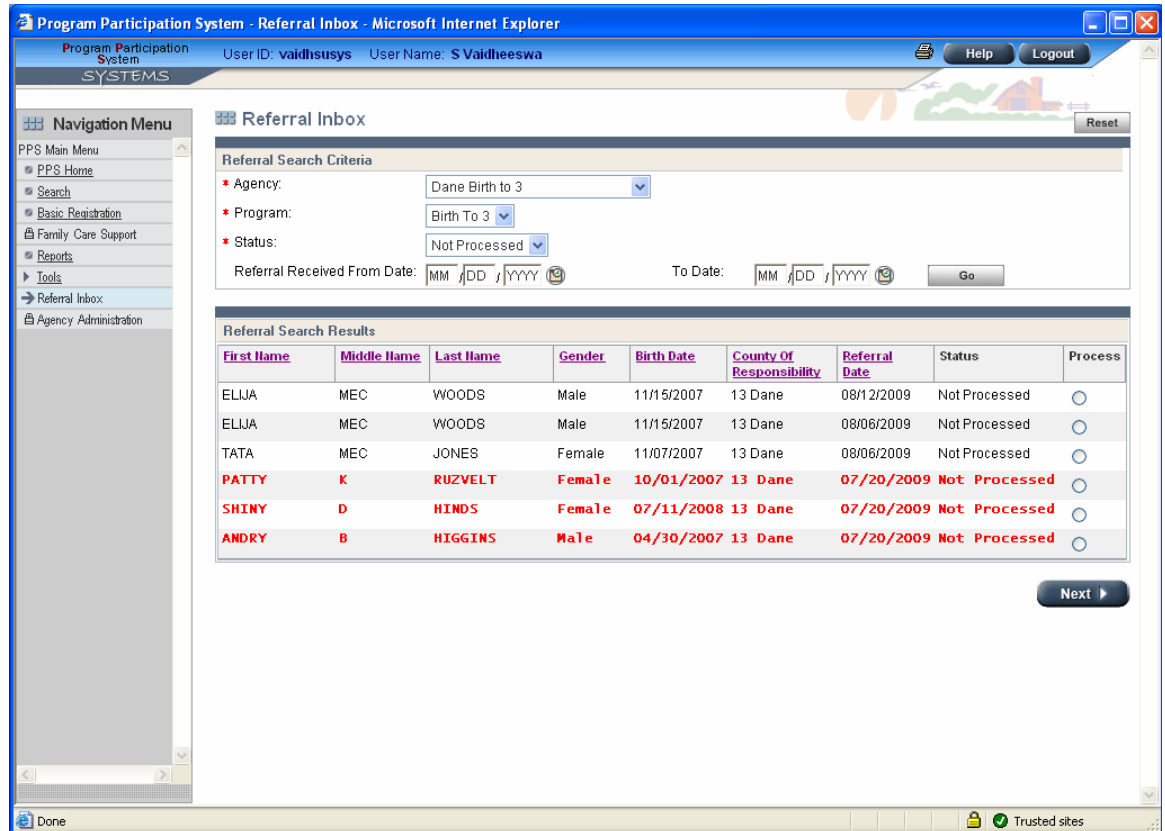
First Name	Middle Name	Last Name	Gender	Birth Date	County Of Responsibility	Referral Date	Status	Process
ELIJA	MEC	WOODS	Male	11/15/2007	13 Dane	08/12/2009	Not Processed	<input type="radio"/>
ELIJA	MEC	WOODS	Male	11/15/2007	13 Dane	08/06/2009	Not Processed	<input type="radio"/>
TATA	MEC	JONES	Female	11/07/2007	13 Dane	08/06/2009	Not Processed	<input type="radio"/>

Next

### Step Three: Process Referrals from WE-TRAC

- \* You can only process one child at a time.
- \* If more than one referral is listed, after you complete the processing of the first referral, click RETURN button. Click the ‘Referral Inbox’ on Navigation Menu on the left and repeat Step Two above and choose the next child to process, continue the steps for this child. (The first child you already processed should no longer be listed here.)
- \* If a child’s name is in red, the referral has been in the ‘Referral Inbox’ for over 14 days past the initial contact date. This will obviously affect a program’s ability to complete the IFSP process in 45 days from the initial contact date. (screenshot below)

Since a child with a permanent diagnosed hearing loss is eligible for the Birth to 3 program under “diagnosed condition,” **a referral from WE-TRAC is considered a referral for an evaluation and begins the timeline to complete the initial IFSP within 45 days.** The 45 day timeline starts from the date the email alert is sent/received (same day).



To process a child's referral, click on the radio button in the 'Process' column and click NEXT button

PPS will then compare the referral information on the child against other information in MCI and PPS—primarily searching for matches by full name (not initials)

The following screen will appear: 'Child and Referral to Birth to 3 Information' (screenshot below)

--means the child information from WE-TRAC was compared to information already in PPS and no matches were found

\* You have created a file for this child

**Navigation Menu**

- PPS Main Menu
- PPS Home
- Search
- Basic Registration
- Family Care Support
- Reports
- Tools
- Referral Inbox
- Agency Administration

**Child and Referral to Birth to 3 Information** Cancel Reset

**Child Information**

**Child's Caregivers**

<b>Primary Caregiver</b>		<b>Other Caregiver</b>	
Relationship:	Parent	Relationship:	
Title:		Title:	
First Name:	STEVE	First Name:	
Middle Name:	M	Middle Name:	
Last Name:	JONES	Last Name:	
Suffix:		Suffix:	
Language Preference:		Language Preference:	
Interpreter Needed:	<input type="checkbox"/>	Interpreter Needed:	<input type="checkbox"/>
Phone:	608 283 3030 x 7854	Phone:	

**Residential Address (Physical Location of Child)**

<b>Child &amp; Primary Caregiver</b>		<b>Other Caregiver</b>	
<input type="checkbox"/> Residential address is different than primary caregiver's residential address		<input type="checkbox"/> Residential address is different than primary caregiver's residential address	
*Address:	433 W WASHINGTON AVE	Address:	
	WEST TOWN		
*City:	MADISON	City:	
*State:	WI	State:	
*Zip:	53703 -	Zip:	

**Mailing Address**

<b>Child &amp; Primary Caregiver</b>		<b>Other Caregiver</b>	
<input type="checkbox"/> Mailing address is different than residential address		<input type="checkbox"/> Mailing address is different than residential address	
Address:		Address:	
City:		City:	
State:		State:	
Zip:		Zip:	

**Child's Race**

*American Indian / Alaskan Native:	No	*Asian:	No
*Hawaiian / Other Pacific Islander:	Yes	*White:	No
*Black / African American:	Yes		

Populate unknown responses as No

**Child's Ethnicity**

\*Hispanic: Yes

**Referral Information**

**Referral Source**

\*Initial Contact Date: 07 / 01 / 2009

\*Source Type: Audiologist

Organization and/or Person: MERITAR WEST MADISON, DIANA JAMES

Contact Number: 608 337 4812 x

**Referral Method: WE-TRAC**

**Responsibilities**

\*County Of Responsibility: 13 Dane

\*Service Provider: Dane Birth to 3

Return

## Information transferred into PPS from WE-TRAC

Please see FAQ about the exact information pre-filled from the WE-TRAC referral information if child is not in PPS; if child is already in B-3, etc.

--Here is a list of the types of information transferred from the WE-TRAC referral into PPS on the 'Child and Referral to Birth to 3 Information' page:

- \* parent contact information (relationship, name, address, phone number)
- \* child's race and ethnicity
- \* referral source type
- \* referral source organization and/or person (name of agency and person who made the referral, same as in email alert)
- \* referral source contact number (same as in email alert)
- \* county of responsibility

(see previous screenshot)

--Here is what type of information is transferred from the WE-TRAC referral into PPS on the 'Screening/Evaluation' page:

Please see FAQ about when the client characteristic of Deaf/Hard of Hearing is pre-filled from the WE-TRAC referral information.

- Client characteristics -- Deaf/hard of hearing is added (screenshot below)

Program Participation System - Screening / Evaluation - Microsoft Internet Explorer

Program Participation System User ID: vaidhsusys User Name: S Vaidheeswa  
SYSTEMS Client: Ruzvelt Patty K 1F

Navigation Menu  
PPS Main Menu  
PPS Home  
Search  
Basic Registration  
Family Care Support  
Reports  
Tools  
Referral Inbox  
Agency Administration

Screening / Evaluation

Cancel Reset

Screenings

Expected Screening Date: MM/DD/YYYY Actual Screening Date: MM/DD/YYYY  
Recommend Evaluation? Rescreen?  
Delete:

Reset Add

Expected Screening Date	Actual Screening Date	Recommend Evaluation?	Rescreen?	Deleted

Evaluations

Initial Contact Date or Screening Date: MM/DD/YYYY Actual Evaluation Date: MM/DD/YYYY  
Initial IFSP Due Date: MM/DD/YYYY Type:   
Eligible for Birth to 3:   
Delete:

Reset Add

Initial Contact Date or Screening Date	Initial IFSP Due Date	Actual Evaluation Date	Type	Eligible for Birth to 3	Deleted

Client Characteristics

Characteristic 1: Deaf/Hard of Hearing Characteristic 2: Characteristic 3:

Return

Done Trusted sites

If necessary, the Birth to 3 Program can change any of the information pre-filled into the fields.

Since a child with a permanent diagnosed hearing loss is eligible for the Birth to 3 program under “diagnosed condition,” **a referral from WE-TRAC is considered a referral for an evaluation and begins the timeline to complete the initial IFSP within 45 days.** The 45 day timeline starts from the date the email alert is sent/received (same day).

Currently, Wisconsin Sound Beginnings sends the B-3 program a fax letting them know about the referral and the B-3 program is to complete the initial IFSP date and return the fax. B-3 Programs will still fax back the form to Sound Beginnings with the date of the initial IFSP completed.

**2. Child already in your B-3 Program--What Birth to 3 Programs do to process a referral from WE-TRAC:**

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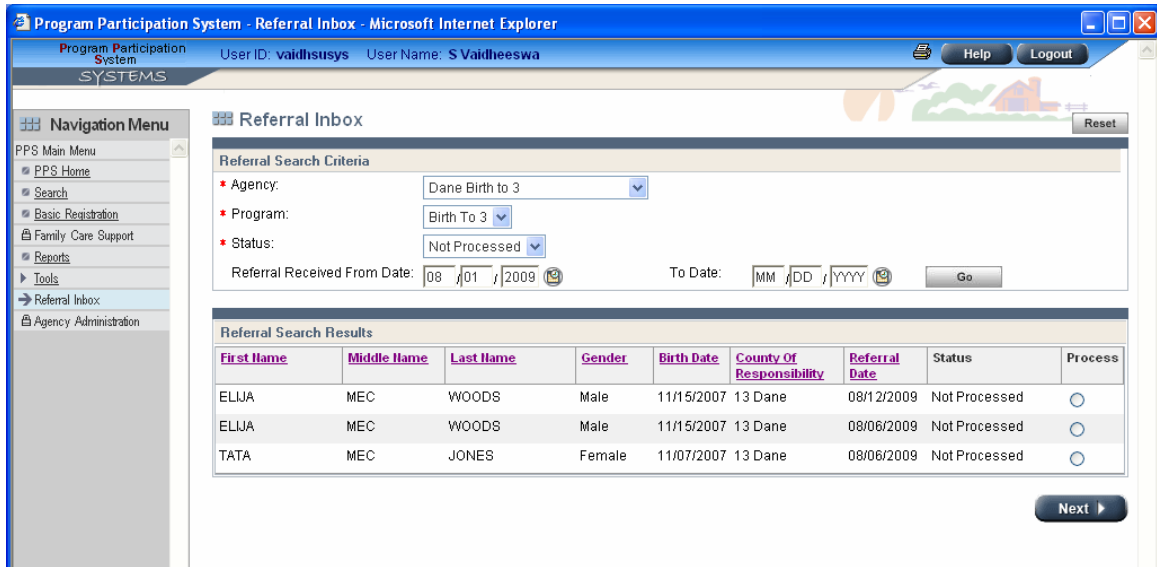
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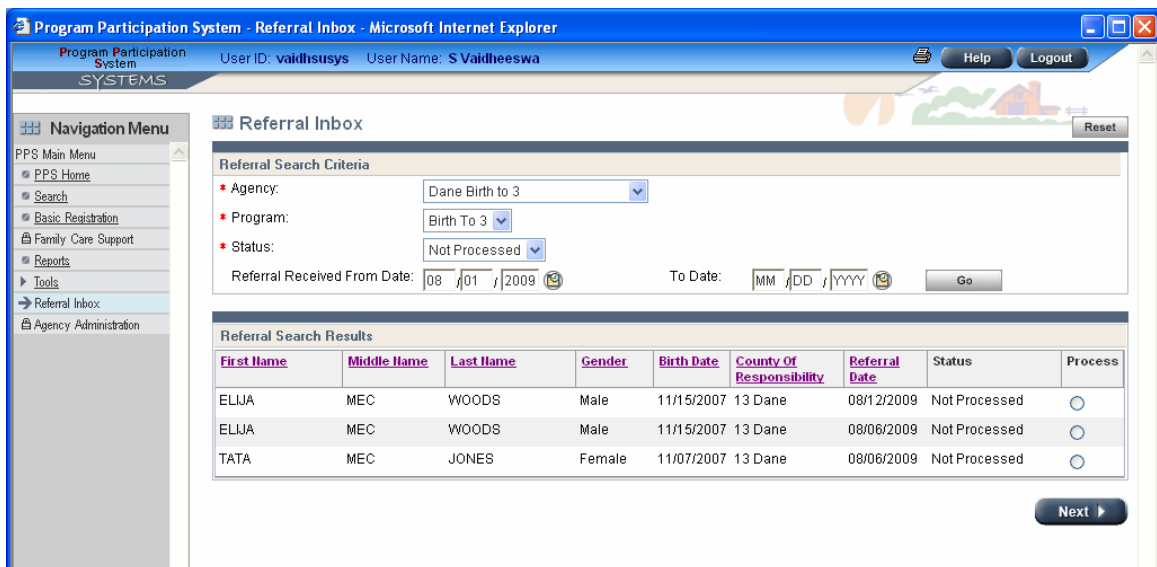


B-3 enters the criteria of the search including agency ('county name' Birthto3 OR for Dane/Milwaukee counties: "agency name" Birthto3), program (Birth to 3) and status (Not processed).

\* Please do not complete the "Referral Received From Date/To Date" fields to process a new referral from WE-TRAC. (See FAQ for more information on the use of these fields.)

Click GO button

A list of referrals from WE-TRAC will appear in the 'Referral Search Results' section (bottom half of the screenshot below)



Screenshot # 2

### Step Three: Process Referrals from WE-TRAC

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- \* If a child's name is in red, the referral has been in the 'Referral Inbox' for over 14 days past the initial contact date. This will obviously affect a program's ability to complete the IFSP process in 45 days from the initial contact date. (see screenshot below)

Program Participation System - Referral Inbox - Microsoft Internet Explorer

User ID: vaidhsusys User Name: S Vaidheeswa

Navigation Menu: PPS Main Menu, PPS Home, Search, Basic Registration, Family Care Support, Reports, Tools, Referral Inbox, Agency Administration

Referral Search Criteria

- \* Agency: Dane Birth to 3
- \* Program: Birth To 3
- \* Status: Not Processed
- Referral Received From Date: MM/DD/YYYY To Date: MM/DD/YYYY

Referral Search Results

First Name	Middle Name	Last Name	Gender	Birth Date	County Of Responsibility	Referral Date	Status	Process
ELIJA	MEC	WOODS	Male	11/15/2007	13 Dane	08/12/2009	Not Processed	<input type="radio"/>
ELIJA	MEC	WOODS	Male	11/15/2007	13 Dane	08/06/2009	Not Processed	<input type="radio"/>
TATA	MEC	JONES	Female	11/07/2007	13 Dane	08/06/2009	Not Processed	<input type="radio"/>
PATTY	K	RUZVELT	Female	10/01/2007	13 Dane	07/20/2009	Not Processed	<input type="radio"/>
SHINY	D	HINDS	Female	07/11/2008	13 Dane	07/20/2009	Not Processed	<input type="radio"/>
ANDRY	B	HIGGINS	Male	04/30/2007	13 Dane	07/20/2009	Not Processed	<input type="radio"/>

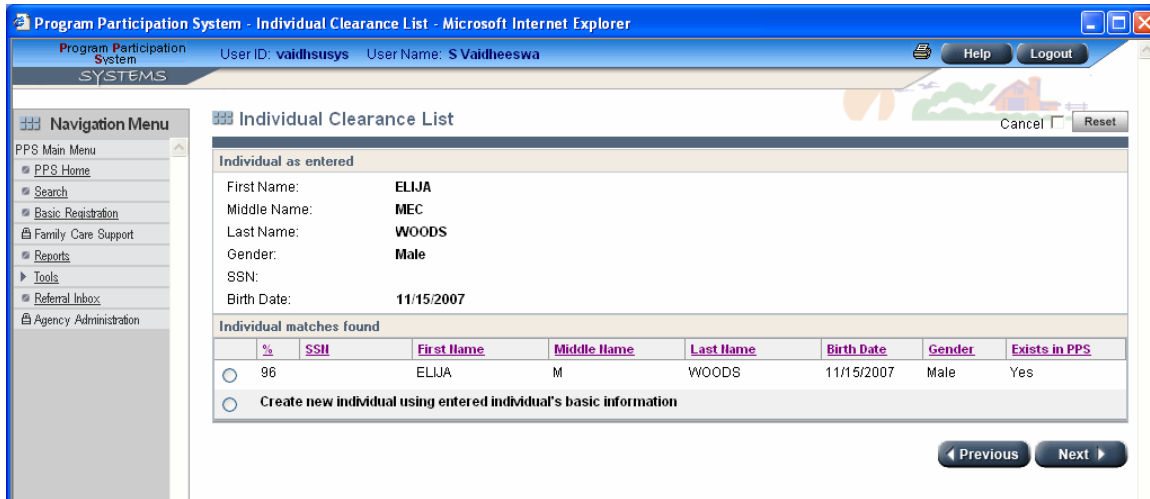
Next

To process a child's referral, click on the radio button in the 'Process' column and click NEXT button

PPS will then compare the referral information on the child against other information in MCI and PPS—primarily searching for matches by full name (not initials)

The following screen will appear:

a screen titled, 'Individual Clearance List' (screenshot below)



- a. displaying the results associated with the search criteria (i.e. full name in referral)
  - b. B-3 chooses the match that most corresponds with the child by clicking the radio button on the far left of the name
    - Please compare the data from WE-TRAC on the top of the page with the match information
    - the higher the % of match, the more likely the file you want to choose;
    - if over 95% choose that file  
click NEXT button
- OR If no matches correspond to the child, click the radio button to the left of “create new individual using entered individual’s basic information” and click NEXT button

Once you have clicked NEXT button, you will see the ‘Child and Referral to Birth to 3 Information’ page of PPS. (screenshot below)



### **Information transferred into PPS from WE-TRAC**

Please see FAQ about the exact information pre-filled from the WE-TRAC referral information if child is not in PPS; if child is already in B-3, etc.

The Birth to 3 Program can change any of the information pre-filled into the fields.

Since a child with a permanent diagnosed hearing loss is eligible for the Birth to 3 program under “diagnosed condition,” **a referral from WE-TRAC is considered a referral for an evaluation and begins the timeline to complete the initial IFSP within 45 days.** The 45 day timeline starts from the date the email alert is sent/received (same day).

Currently, Wisconsin Sound Beginnings sends the B-3 program a fax letting them know about the referral and the B-3 program is to complete the initial IFSP date and return the fax. B-3 Programs will still fax back the form to Sound Beginnings with the date of the initial IFSP completed.

#### **Step Four (as necessary):**

Please note: When reviewing the referrals to be processed (Screenshot # 2 on page 11) if you find that you know one of the children (they are already referred and/or participating in the Birth to 3 Program) yet when you click the radio button in the Process column you are taken directly to the screen (Screenshot # 5 on page 14) —you need to do the following:

1. click RETURN button on the bottom of the ‘Child and Referral to Birth to 3 Information’ page
2. Go to SEARCH in the Navigation Menu on the left side
3. enter the child’s initials for their first and last name and their date of birth ONLY
4. Determine if there are now two entries for this child (a duplicate)
5. If there are two entries for this child, contact your State Lead, giving them the child’s name and date of birth

Thank you for learning about how to process a referral received in PPS from the WE-TRAC system. We hope the materials are helpful.

If you experience roadblocks while processing a referral from WE-TRAC, please contact your State lead in the DHS Birth to 3 Program.

Dana Romary 608-266-5442 [dana.romary@wisconsin.gov](mailto:dana.romary@wisconsin.gov)

Lori Wittemann 608-267-5150 [lori.wittemann@wisconsin.gov](mailto:lori.wittemann@wisconsin.gov)

Darsell Johns 608-267-7844 [darsell.johns@wisconsin.gov](mailto:darsell.johns@wisconsin.gov)