



Referral to DOH Tobacco Free Florida

AHEC Service Desk Guide

Issuance Date: September 9, 2014

Effective Date: September 9, 2014

1st Revised Date: November 1, 2017

2nd Revised Date: February 13, 2018

3rd Revised Date: February 21, 2018

To: All CareerSource Tampa Bay and CareerSource Pinellas Programs Department Staff

PURPOSE: To provide guidance to staff in the process of referring customers to the Gulfcoast North Area Health Education Center (AHEC) Program and the recording of such information into the State of Florida's MIS system, Employ Florida (EF). All screens referenced in this desk guide are related to the EF system.

BACKGROUND: This is a partnership with Bureau of Tobacco Free Florida, Florida Department of Health that has been in effect since April 2014 and renewed each program year that they offer this to the LWDB's.

POLICY: As staff is meeting with job seekers and program participants they should discuss and promote the benefits of participating in the Tobacco Free Florida initiative. This is another value-added resource that CSTB and CSP provide to the community. If the customer is interested in quitting tobacco products, then you must complete a referral form and enter the information in EF WP. This program initiative can be marketed to job seekers at off-site events as well. Staff conducting outreach for our organization are encouraged to bring a supply of referrals to different community events, job fairs, IHR events etc.

Quarterly Goals: Each PY DOH establishes quarterly goals for the LWDB's. These goals will be shared with management and staff and are closely tracked and monitored throughout the PY. In addition, our CEO has approved a regional TFF incentive plan to recognize individual top performers and our top performing teams.

EF Activity Codes:

Below are the three dedicated EF WP activity codes for this initiative:

| Code | Category | Description | AHEA Referral Form | EFM Case Note |
|-------------|---------------------------------|---|---------------------------|----------------------|
| TNR | Tobacco User - No Referral Made | Use this code if the candidate states they are tobacco user, but does not want a referral to any service. <i>(NOTE: This is for reporting purposes only as this is not counted in referrals.)</i> | N/A | N/A |
| TRQ | Tobacco User | Use this code if the candidate is interested in the Quit Line for a "self-service" approach to quitting. | Yes | Yes |
| TRA | Tobacco User | Use this code if the candidate is interested in participating in the AHEA tobacco cessation program. | Yes | Yes |

EF Data Entry:

- In EF, proceed to the customer's Activities tab.
- Select Activity History/Service Plan
- Select Add Service

- After selecting the Customer Group Wagner-Peyser, select CareerSource Tampa Bay or CareerSource Pinellas for Region and then select your office location.
- Enter the applicable Local Activity from the drop-down menu (local activities and other referral activities are listed below).
- Enter the Actual Date (date the referral was completed), Completion Status- enter Successful Completion, your Position and click Save.
- Proceed to the Case Notes tab to enter any/all required case notes.

| Program | Referral Process | EF Required Entry | Special Instructions |
|-----------------------|---|---|---|
| Tobacco Free Referral | Staff completes the TFF referral form as job seeker is engaged. Staff submits referral form which must be completed fully to appropriate ATLAS queue. | EF TRQ – Staff completes a referral to the Quitline. (Phone or Online Program) EF TRA – Staff completes a referral to AHEC location. (In-Person Class) | NOTE: <i>Only one referral per job seeker supported per 12-month period. A second referral can be completed in a 12-month period for customers if they are switching service methodology.</i> |

Referral Form:

Staff must review the TFF Referral forms to ensure that they are legible and fully complete. The referral form must have a phone number included for the customer especially if the customer is agreeing to telephone contact methodology. There is a manual referral form and a PDF Fillable referral form.

Quit Line Referral Steps (TRQ):

1. Complete the Referral Form (Attachment A) and give a copy to the customer
2. Record a service TRQ in the customer’s EF account under the Activities tab.
 - a. Remember to enter the completion status or the referral will not count.
3. Fax – DO NOT Fax the document. Scan into ATLAS queue and our designated staff (CSP – Stephanie F. and CSTB- Kristin W.) will process to DOH
4. If a TRQ, the EF case note w note must reflect the following:
 - a. **Subject Line:** TRQ Referral
 - b. **Case Note Body:** Customer referred to Quit Line and given the referral form.

AHEC Referral Steps (TRA)

1. Complete the Referral Form (Attachment A) and give a copy to the customer.
2. Record a service TRA in the customer’s EF account under the Activities tab.
 - a. Remember to enter the completion status or the referral will not count.
3. Fax –DO NOT Fax the document. Scan into ATLAS queue and our designated staff (CSP – Stephanie F. and CSTB- Kristin W.) will process to DOH
4. If a TRA, the EF case note must reflect the following:
 - a. **Subject Line:** TRA Referral
 - b. **Case Note Body:** Customer referred to AHEC and given the referral form.

EF E-Referrals

DEO conducted a soft launch of EF e-Referrals earlier in January 2018 which allow job seekers to self-refer to DOH TFF programs. Per DOH as of 1.31.18 they already have received a total of 72 e-Referrals STW. Candidates can complete self-referrals from any location where they are accessing their EF account. The purpose in launching this e-Referral is to enhance the availability and outreach to customers in our community.

Effective 2.1.18 DOH and DEO conducted a conference call with the LWDB to notify us of the full launch Tobacco Free Florida electronic referrals in EF. E-Referrals will count towards our quarterly goals just like the traditional paper referral method.

The DEO training video links provided below will take you to a video demonstration to assist with these features.

1. Job Seeker Self-Referral;
<https://deotraining.deo.myflorida.com/p4g7y1uyhah/>
2. Staff Assisted Job Seeker Referral; and
<https://deotraining.deo.myflorida.com/p725ldcuznc/>

Job Seeker Self-Referral screenshot:

- Individual will log into their EF account
- On their dashboard is the TFF referral link under Surveys
- Here the individual will select their quit preference and provide the requested information
 - See screenshot below

- When they complete the referral form, they click Save and the referral is sent

Staff Assisted Referral screenshot:

- Log into your EF staff account
- Under Services for Workforce staff select Manage Surveys
- Scroll down to the TFF referral form and select “email”
- Be sure to click the create case note to “Yes”
- Select a Region
- Look up customer through search feature
- Select the individual and “continue”
- Select the delivery method and desired select Request Read Receipt
- Select Send

* Select a Program: Wagner-Pryser (WP)

* Select a Region: CareerSource Capital Region

* Recipient(s): [Search]

* Selected Recipient(s): Grape
Flea

Sender Information

* From: Karen Hardy

* Created by: Karen Hardy

Delivery Method

* Select Method:

- Internal Message (Message Center)
- Email (If Available)
- Text Message (If Available)
- Text Message Notification (If Available)
- Use Recipient's Preferred Notification Method

Request Read Receipt: Yes No

You will also receive an email notification if you select Text Message or Text Message Notification

Message

* Subject: Tobacco Free Florida

* Message:

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

Select the delivery method and if desired, select "Request Read Receipt".

- Return to your dashboard and Assist an Individual
- From here you can verify the case note was added and the referral was received

Summary Case Notes Activities Documents (Staff)

[Add New Case Note](#) | [Print Selected Case Notes](#)

[Show Case Note Privileges](#)

[Show Filter Criteria](#)

sort on any column, click a column title

| App ID | Subject | Contact Date | Create Date | Staff User | LWIA | Office | Program | Source / ID | Action | select |
|-------------------------------|---------|--------------|-------------|--------------|------|--------|---------|----------------------|---------------------------|--------------------------|
| Tobacco Free Florida Referral | | 1/18/2018 | 1/18/2018 | Hardy, Karen | 05 | 114 | WP | VOS Message Center-0 | View Only | <input type="checkbox"/> |

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DOH will continue to accept, process and track paper referrals as they have always done.

Marketing Materials:

DOH provides the LWDB's marketing material to promote the program initiative. This information is distributed to all of our One Stop Career Centers for staff usage. This includes posters, brochures, flyers and promotional giveaways. In addition, there is a link on our Resource Room computers to the TFF video which allows job seekers using our Resource Rooms to learn about the initiative.

ATLAS Queue Buttons:

On the staff copiers there is an ATLAS queue or button for this initiative. They are labeled:

- CSP - TFF for Tobacco Free Florida
- CSTB - TC Referral

Staff should select this button when scanning their completed referral forms to the designated LWDB's point of contact. *NOTE: If referrals are entered into EF and not scanned they will not count towards our referral goals.*

LWDB's Point of Contact for Referrals:

- **CSP**- Stephanie Freeman is our central point of contact who QC's referrals and verifies EFM data entry and batch scans to DOH on a weekly basis each Monday morning.
- **CSTB** - Kristin Winn, MIS Tech is our central point of contact who QC's referrals and verifies EFM data entry and batch scans to DOH on a weekly basis each Friday afternoon.

INQUIRIES: Any questions should be directed to Jody Toner, Special Projects Director.