PPS Referral Management Module (MDS 3.0 Section Q Referrals)
Quick Reference Guide for Local Contact Agency Users

1. An email will be generated for each nursing home referral that gets submitted. Click the link in the email to access the Inbox. *Note*: You can access the Inbox at any time by logging into the system directly at https://pps.wisconsin.gov/ and click on PPS Production.

2. Login – Enter your WAMS ID and Password. You will be taken to the "PPS Home Page"

3. In the "Navigation Menu" on the left side of the page, click on "Inbox" - You will be taken to the "Referral Inbox" page.

4. Fields marked with a red asterisk (*) are required and need to be filled out.

5. **Referral Search Criteria**: Agency and Item Type default based upon the person logged in. You do not need to change any of the default settings if you're interested in seeing all New Referrals.
   a. Not Processed is the default for the **Status** field. Not Processed will display all of the new referrals.
   b. You can enter a received date and a to date. Leaving the date range blank (along with the Status field set to Not Processed) will display all of the New Referrals regardless of date. Then click GO.

6. Click the radio button next to the resident whose referral you wish to process and click the "Next" button. This step will update the status of the referral from **New Referral** to **Processing**.

7. If the **resident is already in PPS** you will be asked to match their referral with an existing record. You can select the match or have the system create a new record. If the resident is not in PPS, the system will create a record for them behind the scenes and will not prompt you for a selection.

8. **Review Information**: The Referral Information page can be printed as needed to aid in resident assignment for staff. To print, click the icon in the upper right of the screen.

9. **Documenting Outcomes**: Once contact with the resident has been made document the outcome of the discussion.
   a. Click Search from the navigation menu
   b. You must enter *First Name, *Last Name, and *Birth Date to search for a record.
   c. Update the **Referral Status and Outcome** section of the form.

10. **Transfers to Other LCAs**: If the resident is interested in returning to a different county you can document the transfer using PPS.
   a. Use the search function to find the resident you wish to transfer to another LCA.
   b. In the **Referral Status and Outcome** section of the Referral Information page, select the appropriate LCA from the drop down list.
   c. Click **Return**
   d. The system will warn you that the referral will be transferred, click **Return** again.
   e. Doing so will send an email to the appropriate LCA, with a link to the referral, and the name of the sending LCA.

11. **Other Transfers**: When referrals are transferred to Family Care, IRIS, Partnership or PACE, the referral is to be faxed.
   a. Document **Other** for the Outcome.
   b. In the Other Text field, document where the referral was transferred to.