**FVO Referral Checklist**

(Must be Completed by all ACCs at the Time of Referral)

* Schedule appointment in Scheduling Log
* Write appointment date, time, and Risk Assessor (RA) on top of referral
* Enter referral in system on the same day it is received and write FVO# in the Scheduling Log and on top of the referral
* Enter appointment date in system
* Scan/upload signed referral page (Form 115, page 1) to the ‘Referral Information Page’ and the entire referral packet to ‘Documents’ in the FVO System
* If “legal/alien residency” is on the referral, the referral is forwarded to the FVO liaison

**The following information but be documented in the Service log (this should be the same for all SAI/BHI and FVO referrals):**

* Medicaid status
* TANF. GA, or SSI case status, case type, and last cash
* Total combined WFNJ clock
* Screen print of Medicaid
* Atlantis SAI/BHI case status, including no match on client in Atlantis (do not write this on the referral
* Notes on discussion with caseworker, including GA /TANF/SSI case status/referral comments and if/why client declined a sooner appointment
* Notes that you notified the RA via email of appointment if they need to be made aware of any pertinent information

**Email to RA if they need to be made aware of any pertinent information:**

* Include FVO# in subject line (no identifying information should be given)
* The body of the email should include the assessment date, time and county; any pertinent information the RA needs to know, e.g., translator scheduled, space issues, if referral packet needs client’s signature, etc.
* Copy LACC, FVO Director, and FVO liaison, and anyone needed if office space needed to be secured
* **File the referral in the binder marked “FVO Referrals”**

**Run controls daily-Assessor Schedule (who is the dedicated daily person for these tasks - the LACC or a dedicated ACC? ):**

* Filter Assessor Schedule Reports by county and print daily. Compare printed reports to FVO Scheduling Log. Research any discrepancies and correct immediately
* Make reminder calls for appointments scheduled for next day and service log discussion with client; left voicemail; or no phone, etc.