USER GUIDE



Referrals

ACDHS Users · Provider Users

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Prepared By:

coresphere

1 Revision History

Version	Prepared By	Date Created	Description
1.0	CoreSphere	January 24, 2022	Initial Version

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3 Referral Process

ACDHS Staff							Provid	er Staff	
Adn	nin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\sim	/	\checkmark	\checkmark	\checkmark		\checkmark	\checkmark	\checkmark	

All ClientPath users (except ACDHS or Provider Read-Only Users) can create a new referral.

3.1 Create a Referral – Launch Information Referral Tool (IRT)

The Information Referral Tool (IRT) is the tool used to create a Referral within ClientPath.

- 1. To start the process of creating a new Referral, click the *IRT* tab. The Information Referral Tool will be displayed.
- Select a *Referral Type* from the drop-down. Based on the Referral Type selection, the appropriate Referral Form will be displayed.

	REFERRAL FORM	SELECT PRIMARY REASON	SELECT CONCERNS	CONFIRMATION
	formation Referral Tool			Back Next
Sele	t Referral Type ect an Option)	
	Individual Individual within a Household			
	Household			

Referral Type	Description
Individual	Captures Referral details for a single Individual.
Individual within a Household	Captures Referral details for a single Individual, including some high-level Household information (# of Household Members, Household Income).
Household	Captures Referral details for more than one individual.

3.1.1 Enter Referral Form Details

The Referral Form consists of 2-3 sections, depending on the Referral Type selected. Referral Details and Referred By sections are available regardless of Referral Type selection, whereas a Household Member Details section is only displayed if Household is selected as the Referral Type. The next three sub-sections of this guide describe Referral Details, Referred By, and Household Member Details sections, respectively.

3.1.1.1 Referral Details

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Regardless of the Referral Type, a Primary Client must be selected. The steps below describe how you first need to search for the Client in ClientPath to see if a record exists for them, otherwise additional steps are provided to create a new Client.

 Within the *Client* search box, type the name of the primary Client (First Name, Last Name, First Name & Last Name, SSN, MCI ID, or Client ID), and click enter on your keyboard. Search results (if any) will be displayed in a pop-up screen.

Information Referral To	lool					Back
Enter Referral Details				Referred By		
Client				Referral Source First Name	Referral Source Last Name	
John			۹			
Q Show All Results for	"John"			Organization		
Jan 23, 2022	i l					
* Reason for Referral.				Referral Source Mobile	Referral Source Email	
			2	Auforent Ausona Automatic		
* Eirst Name	* Chosen Name	* Last Name		None	▼ Self Referral	
-				L		

75
4
Canaal
5

- <u>Recent Clients:</u> Upon clicking into the Client search box, a 'Recent Clients' list will display of Clients you have *recently viewed*. This is not a full list of Clients that exist in ClientPath.
- <u>Partial Search:</u> To conduct a partial search, type an asterisk (*) wildcard at the end of your search term. The search term must be at least 2 characters.
- <u>Sorting:</u> Optionally click any column header to sort results (ascending/descending).
- 2. If the Client exists, click the respective *Client ID* to select that Client. Information from the Client's record will display in select fields within the Referral Form. *Skip to Step 8.*

Otherwise, if the Client does NOT exist, continue to Step 3.

3. If the Client does NOT exist, click into the *search box*, and click + *New Client* from the drop-down. A New Client pop-up displays with all the fields collected for an individual.

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			Client			
Client	Q					^
Q "John" in Clients						- 1
+ New Client						
CLIENT ID	CLIENT NAME	LEGAL SEX	DATE OF BIRTH	APPROXIMATE AGE	MCI ID	
C-0000417	John Rose	Male	11/1/1963	58	179292	11
C-0000275	John Anthony	Male	5/2/1986	35		
C-0000078	James John	Male	5/1/2000	21		
C-0000018	John Watson	Male	5/1/1967	54	1001049275	
C-0000472	John Smith	Male	3/26/1974	47		
C-0000471	John Smith	Male	10/4/2000	21		
C-0000470	John Smith	Male	10/3/2000	21		
C-0000469	John Smith	Male	3/26/1974	47	1001067162	
C-0000465	John Wright	Male	2/1/1970	51		
C-0000416	John Smith	Male	1/15/1975	47		
						Cancel

4. Enter/select information for the new Client. Client information is separated into 3 sections: Individual Info, Additional Demographic Information, and Contact Info.

		Ne	ew Client			
Individual Info						
* First Name			SSN			
* Chosen Name			Date of Birth 🕚		苗	
*Last Name						
*Legal Sex	None	•				
* Pronouns	None	•				
Additional Demogr	aphic Information					
Race			Marital Status	None	-	
Available American India Asian	n or	sen				
Asian (Not Spe	cified)					
Asian Indian						

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- <u>Required Fields:</u> Only the fields marked with a red asterisk (*) are required to Save the Client record.
- <u>Duplicate Check:</u> If the First and Last Names are a fuzzy match to an existing Client record, a
 warning message will display with a list of possible duplicates where you can select an existing
 record or proceed with creating the new Client. If the SSN is an exact match to an existing Client
 record, a message will display with a link to the existing record, and you will not be able to
 proceed with creating the new Client with the same SSN.

5. Click the Save button to save the new Client record.

 <u>MCI Clearance:</u> If the mandatory information to MCI-clear [First Name, Last Name, DOB, Legal Sex and SSN (optional)] has been entered in the Client record, an MCI Client Search pop-out will be displayed with a list of potential matches (with the highest percent match on top, if any). MCI ID is Allegheny County's version of a Social Security Number. It is a citizen's unique identifier to help ACDHS keep track of services and supports an individual receives over their lifetime. *Continue to Step 6.*



- Otherwise, if the mandatory information to MCI-clear is NOT entered, a message will appear stating that MCI clearance cannot be completed until [missing information] is entered, but the Client record will still get created and saved. You will be navigated back to the IRT Referral Form with the Client selected. Information from the Client's record will display in select fields within the Referral Form. *Skip to Step 8.*
- 6. If the proper MCI match exists, click the radio box next to the appropriate Client, and click the Update MCI ID button. The newly created Client record in ClientPath will be updated with the MCI ID, and you will be navigated back to the IRT Referral Form with the Client selected. Information from the Client's record will display in select fields within the Referral Form. Skip to Step 8.

Otherwise, if the proper match does NOT exist, continue to Step 7.

- 7. If the proper MCI match does NOT exist, click the Create New MCI ID button. The newly created Client record in ClientPath will be updated with a newly created MCI ID, and you will be navigated back to the IRT Referral Form with the Client selected. Information from the Client's record will display in select fields within the Referral Form.
- 8. **Optionally, update any field in the Referral Details.** Any field can be updated without overwriting what exists on the Client record. Instead, any updates become referral-specific.
 - <u>Client Record Updates:</u> Updates to a Client record can only be done on the Client record itself, as long as your associated Provider is serving that Client through a related Referral or Assigned Service.

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Commented [LS1]: Can 6 and 7 be moved under 5? It seems out of place here.

- <u>Referral Date</u>: Referral Date defaults to today's date, but it can be changed to any date in the past.
- 9. **Optionally, select the** *Confidential checkbox* **to make the referral confidential.** This will ensure the Referral is NOT viewable by others (except those above you in your Provider hierarchy).
- 10. Ensure the *Reason for Referral* is entered. It is required to describe why the Individual(s) is being referred for services.
- 11. If the Referral Type selected was 'Individual within a Household' or 'Household', ensure the *Number of Household Members* is entered. This field is located at the bottom of the Referral Details section.
- 12. If the Referral Type selected was 'Individual' or 'Individual within a Household', and all required fields are entered (Referred By section is optional, see section 3.1.1.2 below), click the *Next button* to navigate to the next screen (Primary Reason).

Otherwise, if the Referral Type selected was 'Household', continue to section 3.1.1.3 below.

3.1.1.2 Referred By

1. Optionally, within the Referral Form, the *Referred By section of fields* can be used to record who referred the individual(s) for services.

Otherwise, if the individual referred themselves, simply select the *Self-Referral checkbox*, which will disable all of the Referred By fields.

REFERRAL FOR	IM	SELECT PRIMARY REASON		SELECT CONCERNS	CONFIRMATION
Information Referral Too	1				Back Next
Enter Referral Details				Referred By	
Client C-0000420			×	Referral Source First Name	Referral Source Last Name
Referral Date	Confident	al O		Organization	
* Reason for Referral				Referral Source Mobile	Referral Source Email
* First Name	*Chosen Name	* Last Name	le	Referral Source Category None	Solf Referral
Cameron	Cam	Edwards			

3.1.1.3 Household Member Details

If 'Household' was selected as the Referral Type, any existing Clients with a relationship to the selected primary Client will be displayed in a list within a 'Household Member Details' section of the Referral Form (underneath the Referred By section).

The list includes the Client Name, Category, Relationship, Gender, and an indicator if it is a direct relationship. A direct relationship means the Clients are associated to the same primary Household.

Commented [LS2]: Just making a note to myself that we need to update the Gender column to Legal Sex in the Household Member Details section.

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Enter Referral Detail					Referred By
Client					Referral Source First Name Referral Source Last Name
C-0000420				×	
* Referral Date		Confidential)		Organization
Jan 19, 2022		ii			
* Reason for Referral					Referral Source Mobile Referral Source Email
				11	Referral Source Category
* First Name		* Chosen Name	* Last Name		None 🛛 👽 Self Referral
Cameron		Cam	Edwards		
* Pronouns		Date of Birth	Approximate Age	1	University of Manuface Data line
He, Him, His	*	May 15, 2010	11		Household member betails
* Legal Sex		SSN	MCI ID		Show only direct Add New Member
Male	*		1001049677		relations tractive
Address Type					Name V Category V Relationship V Gender V Direct
None				-	Sullivan Edwards Extended Family Uncle Male 🗸

- 1. Optionally, click the *Show only direct relations toggle* to filter the list to only those Clients with a direct relationship to the primary Client selected.
- If the Household Member(s) is not listed, click the Add New Member button to start the process of adding a new Household Member. A pop-up screen will appear titled Add [Primary Client's Last Name] Household Member. Continue to Step 3.

C-0000420		(Y	
		· · · · · · · · · · · · · · · · · · ·		_
Jan 23, 2022		Add	duranda Ususahald Namhar	
*Reason for Referral		Add E	dwards Household Member	Referral Source Email
help		Member	Member Name	
		Search Clients Q		
		Category	* Relation Primary Household?	Self Referral
Cameron	Cam	-Select-	-Select-	
	Date of Birth		Save	
He, Him, His	✓ May 15, 2010			

Otherwise, if the Household Member(s) are listed, skip to Step 10.

- Within the Member search box, type the name of the Client, and click enter on your keyboard. Search results will be displayed if any Clients exist in ClientPath with a fuzzy match to what was entered in the Search box.
- 4. See section 3.1.1.1 above and follow Steps 2-7, as applicable to *select a member (Client) or create new*. The Member Name will be automatically populated with the selected Client.
- 5. Select a *Category* from the drop-down. This selection is required and will ensure only applicable Relations are available in the Relation drop-down.
- Select a *Relation* from the drop-down. This selection is required. The list displays Relations based on the Category selected, as well as the gender of the Member/Client selected. Gender-specific and genderneutral values are displayed.
- Optionally, select the *Primary Household checkbox* to make the Household in focus the Primary Household of the selected Member/Client. A Client can only be associated to one Primary Household.
- 8. Click the Save button to save the new Household Member. The form will then clear.
- Optionally, repeat steps 3-8 to add additional Members, otherwise click the X at the top right to close the pop-up and return to the Referral Form. The newly created Household Member will appear in the Household Member list.

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Commented [LS3]: Is this a fuzzy match or exact match?

- 10. Select the *checkbox next to each Household Member* (as applicable) to include them on the Referral. Only those selected will be included on the Referral.
- 11. If all required fields are entered, and the Household Member(s) are selected, click the *Next button* to navigate to the next screen (Primary Reason).

3.1.2 Select Primary Reason

The Primary Reason for Referral screen displays a list of any SP Services you have access to (as a Service Contact), and only for those that have the Referral Module enabled. Each SP Service in the list includes the Service Name and the Facility/Provider through which it is associated. If the SP Service is configured as Confidential, the Referral will automatically be marked as confidential.

1. If the individual(s) is being referred for a specific service, click on the Service. The selected Service will be highlighted.

Otherwise, if the individual(s) is being referred and you are not sure of what service would be the best fit, click the *None* option at the bottom of the screen.

2. Click the Next button to proceed to the next screen (Concerns).

REFERRAL FORM	SELECT PRIMARY REASON	SELECT CONCERNS	CONFIRMATION
2 Please Select Primary Reason for Referral			Back Next
Creative Expression Afterschool Program. I	Facility: SOUTH HILLS INTERFAITH MINISTRIES		
Financial Assistance. Provider: SOUTH HILI	LS INTERFAITH MINISTRIES		
None of the Above.			
<u> </u>)

3.1.3 Select Concerns

The Concerns screen displays several common reasons why an individual may be referred for services.

1. If None was selected as a Primary Reason for the Referral, ensure *at least one Concern is selected* that applies at the time of Referral.

Otherwise, if a Primary Reason was selected, you can still optionally *select any Concerns that apply* at the time of Referral *or click None*.

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REFERRAL FORM	SELECT PRIMARY REASON	SELECT CONCERNS	CONFIRMATION
Please Select Concerns for Referral			Back Subm
Access to Community Resources	+ Child Care	+ Child Developm	ent
+ Drug and Alcohol	+ Education	+ Employment an	d Training
+ Financial	+ Food	+ Medical	
+ Housing	+ Legal	+ Mental Health	
+ Parenting	+ Peer Support	+ Transportation	
+ Utilities			

3.1.4 Submit the Referral

1. Within the Concerns screen of the IRT, click the *Submit button* to create and save the Referral. Upon successful submission, a success message is displayed along with a link to the New Referral record.

REFERRAL FORM	SELECT PRIMARY REASON	SELECT CONCERNS	CONFIRMATION
	Referral <u>R-00455</u> Crea	ited Successfully!	

Information from the IRT is copied into the Referral record. Additionally:

- The Owner field will populate with the name of the user who created the Referral
- The Provider field will populate with the Provider the Owner is associated with
- A Referral ID is assigned
- The *Referral Status* defaults to New.
- The Created By and Last Modified By fields are updated with the Name/Date/Time of who/when the
 record was created/updated.

3.2 Access a Referral

		ACDHS Staff		Provider Staff				
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark	\checkmark

All ClientPath users can view Referrals across all Clients, Services, and Providers. Referrals can be found through the Referrals tab, or by navigating to a Client record to view Referrals specific to that Client.

3.2.1 Confidential Referrals

Confidential Referrals are only viewable to the Assigned Worker/Owner, those above them in their Provider hierarchy, Admins and ACDHS Super Users. ACDHS/Provider Read-Only Users do not have access to any Confidential referrals. If you do not have access to a Confidential Referral, you will not see it in any list, report, or search result.

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If the Primary Reason (SP Service) is not configured to be Confidential, but the Referral was marked confidential through the IRT, users with **Full Access** can optionally *de-select the Confidential checkbox* to make the Referral non-confidential. Refer to Section 5 below to see how to edit a Referral.

3.2.2 Access Referrals Via Referrals Tab

- Click the Referrals tab to see a list of Referrals that you have access to. By default, the 'Recently Viewed' list view may be displayed. This list only shows the Referrals you have recently viewed, not all Referrals.
- Optionally, click the drop-down arrow at the top left and select the All list view. You can also select your
 Provider's Waitlist list view to view the Referrals with a Referral Status of Waitlist.

S0+ items	oferrals	D • Filtere	ed by All referrals						Q Search	this list		\$ ×
	View Acc V	+ ~	Created Date \checkmark	First \vee	Last N 🗸	Referral Stat \vee	Provider ~	Primary Reason 🗸	Own ∨	Owne ∨	c ~	
1	Full	-00455	1/23/2022, 3:48 PM	Cameron	Edwards	New	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Courtney	Macurak		•
2	Limited	00452	1/7/2022, 11:37 AM	Elliot	Cats	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Fix-It For Your Neighbor	Samant	Litvak		¥.
з	Umited	00451	12/21/2021, 11:47 AM	Gary	Bear	Accepted	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Senior Companion	Dolores	Douglass		¥.
4	Limited R	00450	12/21/2021, 11:45 AM	Tom	HILL	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Project Prom	Samant	Litvak		Ŧ
5	Full	00449	12/21/2021, 11:42 AM	Patrick	Cummins	New	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Corrie	Yanko		T
6	Limited	-00447	12/21/2021, 11:35 AM	John	Rose	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI		MPER	Batch		T
7	Limited	-00446	12/21/2021, 11:28 AM	Thomas	Two-Tone	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Project Prom	Samant	Litvak		¥.
8	Limited	00445	12/21/2021, 11:20 AM	Thomas	Two-Tone	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Senior Companion	Samant	Litvak		v
0	Limited	-00444	12/21/2021, 11:17 AM	Sheldon	McNamara	Services Assign	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Project Prom	Samant	Litvak		•
10	Full	00441	12/21/2021, 8:58 AM	DEVIN	LEDBETTER	Services Assign	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Corrie	Yanko		¥.

For each Referral in the All list view, a link to the Referral is included, as well as the Created Date, First and Last Name of the primary Client, Referral Status, Provider, Owner First and Last Name. Once you see Referral records listed, you can sort by clicking on the headers or filter the list further by using the search box.

<u>Full Access vs. Limited Access:</u> A green Full View Access or red Limited View Access icon is next to each Referral to help you better understand which Referrals you see all or partial information for. If the Referral is associated to your Provider, you have **Full Access** and can view all tabs within the Referral record. This includes the ability to upload/view documents and record Interactions, External Referrals, and Concrete Goods. If the Referral is NOT associated to your Provider, you have **Limited Access** and can only view the Referral Details tab and related Clients, but do NOT have access to upload/view documents or record Interactions, External Referrals, or Concrete Goods.

- 3. Optionally, click the *pushpin icon* next to the list view you want to make your default.
- 4. Click the *Referral ID* to view a specific Referral record. The Referral record will be displayed.

3.2.3 Access Referrals Via Clients Tab

- 1. Click the Clients tab. A list of all Clients in ClientPath will be displayed.
- Click the Client ID for the Client record you wish to view. The Client record will open with the Details tab displayed.

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- 3. Click the *Referrals tab* within the Client record. A list of all Referrals for that specific Client are displayed, along with the Referral Status, Primary Reason, Referral Date, and Provider.
- 4. Optionally click column headers to sort rows (ascending/descending).
- 5. Click the *Referral ID* to view a specific Referral record. The Referral record will be displayed. See 4.2 above regarding Full Access and Limited Access.

$\underline{x}^{\underline{1}}$	^{Client} Patrick Cummir	ns						Get	MCI ID Selec	t Service	Edit
Date o 6/9/19	f Birth Ap .84 37	sproximate Age	Legal Sex Cl Male C	lient ID 2-0000001							
ETAIL!	REFERRALS	SERVICES CLI	ENT HISTORY				▶ Househ	olds (1)			
	Referrals (10+)	al a lindated a few serv	ada ada		\$* C	New	Household	Client Nar	ne Priz	mary?	
104 108	ins - sorted by Herein	a · opoated a rew seco	nos ago				Cummins Hou	seh Patrick Cu	mmins 🕑		
	Referral 4 V	Referral Status $ \lor $	Primary Reason V	Referral Date V	Provider V	·					View
1	R-00449	Waitlist	Financial Assistance	12/21/2021	SOUTH HILLS INTERFAITH MINISTRI Waitlist	Ŧ					
2	R-00431	Discharged	Financial Assistance	12/20/2021	SOUTH HILLS INTERFAITH MINISTRIES	T	_				
							2 Polation	white (1)			
з	R-00413	Services Assigned	Food for Thought Pantry	12/9/2021	NORTH HILLS COMMUNITY OUTREACH, INC.	•	🗡 Relation	iships (1)			
3	R-00413 R-00410	Services Assigned	Food for Thought Pantry Back to School Store	12/9/2021	NORTH HILLS COMMUNITY OUTREACH, INC.	•	Secondary C	category	Summary	Relations	ip ID
3 4 5	R-00413 R-00410 R-00405	Services Assigned Services Assigned Discharged	Food for Thought Pantry Back to School Store Senior Companion	12/9/2021 12/9/2021 12/9/2021	NORTH HILLS COMMUNITY OUTREACH, INC. NATIONAL COUNCIL OF JEWISH WOMEN ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES	V	Secondary C	Category Family/Biologi	Summary Patrick Cummins is Father of Gary	Relationsl	rip ID

3.3 View a Referral Record

3.3.1 Details Tab

Upon navigating to a Referral record (see 4.2 and/or 4.3 above), the *Details tab* will be displayed. The Details tab consists of:

- Information pertaining to the primary Client including their Name, DOB, etc.
- The primary Client's Contact Information
- Referral Source information (if any)
- Referral Information such as the Referral ID, Referral Date, Primary Reason, Concerns, Referral Type, etc.

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1/101/ Access		
Full		
First Name	Last Name	
Cameron	Edwards	
Chosen Name	Pronouns	
Cam	He, Him, His	
Date of Birth	Approximate Age	
5/15/2010	12	
Number of Household Members	Legal Sex	
2	Male	
Household Income	SSN	
	Owner	
	Courtney Macurak	
	Provider	
	SOOTH HILLS INTERPAITE MINISTRIES	
· Contact Info		
✓ Contact Info address Type	Phone Type Home	
Contact Info ddress Type treet Address 1	Phone Type Home Phone No	,
 Contact Info ddress Type treet Address 1 	Phone Type Home Phone No 703551234	,
Contact Info ddress Type treet Address 1 treet Address 2	Phone Type Home Phone No 703551234 Email	
Contact Info ddress Type treet Address 1 treet Address 2	Phone Type Home Phone No 703551234 Email	
Contact Info ddress Type treet Address 1 treet Address 2 ity	Phone Type Home Phone No 703551234 Email County	,
Contact Info ddress Type treet Address 1 treet Address 2 ity	Phone Type Home Phone No 703551234 Email County Allegheny	
Contact Info ddress Type treet Address 1 treet Address 2 treet tate	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code	,
Contact Info ddress Type treet Address 1 treet Address 2 ity tate ennsylvania	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215	, ,
Contact Info ddress Type treet Address 1 treet Address 2 itry tate tennsylvania Referral Source	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215	,
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name	, ,
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name	,
	Phone Type Horne Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name Referral Source Mobile	
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name Referral Source Mobile	
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name Referral Source Mobile	
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name Referral Source Mobile	
	Phone Type Home Phone No 703551234 Email County Allegheny Zip Code 15215 Referral Source Last Name Referral Source Mobile Referral Source Email	

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✓ Referral Info	
Referral ID R-00455	Referral Status New
Referral Date 1/23/2022	Not Accepted Reason
Primary Reason Financial Assistance	Original Referral
Concerns	Confidential
Referral Type Household	Days in Queue O
✓ Reason	
Reason for Referral help	

3.3.2 Related Tab

- Click the *Related tab* within the Referral record. The Related tab of a Referral record displays data
 related to the Referral, referred to as Related Lists. This includes (1) a list of all Clients included on the
 Referral, (2) any associated duplicate referrals (see Section 8.2 below for more information), (3) any
 associated Assigned Service, as well as any (4) Interactions, (5) External Referrals, and (6) Concrete Goods.
 Each related list includes the number of records in parentheses, otherwise it will display 0. If a plus (+)
 sign is included in the count, that indicates there are more records than visible in the related list.
- 2. Optionally, click column headers to sort data (ascending/descending).
- 3. Optionally, click View All under the respective related list to view all records.
- 4. Optionally, click the record ID (link) for the record you wish to open/view.

Referral R-00456		
DETAILS RELATED HISTORY		
Client (3)	Client Name	
C-0000430	Carol Brady	
C-0000419	Sullivan Edwards	
C-0000420	Cameron Edwards	•
		View All
Duplicate Referrals (0)		

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Assigned Services (1)	3			
Assigned Service ID	SP Service Name Text	Assigned Worker	Provider	
AS-00252	Financial Assistance	Courtney Macurak	SOUTH HILLS INTERFAITH MINISTRIES	•
				View Al
_				
Interactions (0)	4			
Lxternal Referrals (0)	5			
Concrete Goods (0)	6			

3.3.3 History Tab

- 1. Click the *History tab* within the Referral record. The History tab of a Referral record displays a related list of changes to data within the Referral record. This includes the:
 - Date the change was made
 - Field that was changed
 - <u>User</u> who made the change

Original Value that previously existed New Value that was entered

2. Optionally, click *View All* to view all records.

Referral R-00456					
DETAILS RELATED	HISTORY (2)				
Date	Field	User	Original Value	New Value	
1/23/2022, 7:22 PM	Owner	Courtney Macurak	Courtney Macurak	Corrie Yanko	
1/23/2022, 7:07 PM	Created.	Courtney Macurak			•
					View All

3.4 Edit a Referral

		ACDHS Staff		Provider Staff				
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only





If you have **Full Access** to a Referral record and the Referral is Active (New, Waitlisted, Accepted), you can edit the Referral as needed. See steps below. If the Referral has a Status of Not Accepted, Services Assigned, or Discharged, the Referral is locked (all fields become read-only) and cannot be edited. If you have **Limited Access** to the Referral, you do NOT have access to edit the Referral.

3.4.1 Edit from Within Referral Record

1. From within a Referral record, click the *drop-down arrow* at the top right next to the group of buttons and click *Edit*. The Referral will open in a pop-up screen in editable mode.

Referral R-00456		Upload/View Document	s Select Service	Assign Worker
TAILS RELATED HISTORY		Rec	ord Interactio	Edit Delete Record
fiew Access			Start Stop	
irst Name	Last Name	Start Time		
ameron	Edwards	* Date	* Time	
nosen Name	Proposition			O
am	He, Him, His	End Time		
ate of BirthO	Approximate Age	Date	Time	
15/2010	12			U
umber of Household Members	Logal Sex	* Type		
	Mate	None		*
usehold income	SSN	* Outcome		
		- Mana		
	Owner	reone		*

2. Update data as required and click the *Save button* to save your changes. Any changes are captured in the Referral's History Tab.

3.4.2 Edit from List View

 From within the Referrals tab list view, click the *drop-down arrow* at the end of the row for a given Referral record and click *Edit*. The Referral will open in a pop-up screen in editable mode.

	View Acc $$	R 4 ~	Created Date 🗸 🗸 🗸	First \vee	Last N $ \smallsetminus $	Referral Stat \vee	Provider V	Primary Reason V	own ~	Owne V	c ~
1	Full	R-00456	1/23/2022, 7:07 PM	Cameron	Edwards	New	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Corrie	Yanko	o 🔍 🔶
2	Full	R-00455	1/23/2022, 3:48 PM	Cameron	Edwards	Not Accepted	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Courtney	Macurak	Edit
з	Limited	R-00452	1/7/2022, 11:37 AM	Elliot	Cats	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI	Fix-It For Your Neighbor	Samant	Litvak	Change Owner

2. Edit data as required and click the *Save button* to save your changes. Any changes are captured in the Referral's History Tab.

3.5 Assign Worker to a Referral

		ACDHS Staff				Provid	er Staff	
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\checkmark	\checkmark	\checkmark	\checkmark		\checkmark	\checkmark	\checkmark	

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If you have **Full Access** to a Referral record and the Referral is Active (New, Waitlisted, Accepted), you can assign a Worker to the Referral. See steps below. If the Referral has a Status of Not Accepted, Services Assigned, or Discharged, the Referral is locked (all fields become read-only) and a Worker cannot be assigned. If you have **Limited Access** to the Referral, you do NOT have access to assign a Worker.

The default Assigned Worker (Owner) is the user who created the Referral through the IRT. To change the assigned Worker:

1. Within a Referral record, click the Assign Worker button. A search pop-up will be displayed.

Referral R-00372		Upload/View Docu	ments Select Service	Assign Worker
TAILS RELATED HISTORY			Record Interaction	on
View Access			Start	
first Name	Last Name	Start Time	Time	
llexandra	Hart		#	0
hosen Name	Pronouns			Ū
lex	She, Her, Hers	End Time		
ate of Birth	Approximate Age	* Date	* Time	
/14/2008	14		60	0

2. In the search box, type the name of the staff member you want to search for. Only Active Staff members associated to the same Provider (as the Referral) will be displayed.

			Upload/View Documents	Sele	ct Ser	vice
ніст		*Search			^	
	(Rob		Q	ł	tion
		Roberta Jonas				
		Robert Wegner			*	
		Last Name	Start Time			

- 3. Select the staff member you want to assign.
- 4. **Click the** *Save button* **the save the worker assignment.** Upon save, the Owner field is updated with the newly selected staff member's name. Additionally, the History tab of the Referral record captures the change(s) to the Owner field (Assigned Worker).

3.6 Update Referral Status

		ACDHS Staff				Provide	er Staff	
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\checkmark	\checkmark	\checkmark	\checkmark		\checkmark	\checkmark	\checkmark	

If you have **Full Access** to a Referral record, you can update the Referral Status to ensure each Referral reflects the most up-to-date status. If you have **Limited Access** to the Referral, you do NOT have access to update the Referral Status.

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HOLY FAMILY INSTITUTE INC.	Edit	R-00372	K Robert Wegne
Q. Searc	Referral Info		
🛉 IRT Referrals Clie	Referral ID R-00372 Referral Date	• Referral Status	
R-00372	1/30/2021	None	w Documents Select Service Assign Worker 😿
HISTORY	Stop Now and Plan (SNAP) Concerns Available Chosen	Accepted Services Assigned Not Accepted	Record Interaction
View Access	Child Care Access to Comm	Waitlist Discharged	
Alexandra Chosen Name Alex	Drug and Alco		
Date of Birth	Referral Type Individual •	Days in Queue O	*Time
Number of Household Members Household Income	Doscon	Cancel Save & New	**
			New Colorest

Each Referral has a default *Referral Status* = *New*. Refer to Section 5.5 above to see how to edit a Referral record so you can update the Referral Status. The Referral Status is located within the Referral Info section of the Referral.

3.6.1 Accepted

The Referral Status should be manually changed to Accepted if you intend to provide services to the Client(s).

- 1. Click the *Referral Status drop-down* and select *Accepted*. This step is required to assign services, which is covered the ClientPath Services User Guide.
- Click the Save button to save your changes. This change is captured within the History tab of the Referral record.

3.6.2 Not Accepted

The Referral Status should be manually changed to Not Accepted if you do NOT intend to provide services to the Client(s).

- 1. Click the Referral Status drop-down and select Not Accepted.
- 2. Ensure a Not Accepted Reason is selected from the drop-down provided.
- 3. If the Not Accepted Reason was Duplicate Referral, enter the primary Client Name or Referral ID in the Duplicate Referral search box and click *enter* on your keyboard.
- 4. Click the appropriate Referral ID from the search results to select that Referral as the duplicate.
- 5. Click the *Save button* to save your changes. This change is captured within the History tab of the Referral record. The Referral record is locked for editing.

3.6.3 Waitlist

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The Referral Status should be manually changed to Waitlist if you do not have the capacity and wish to add the Referral to the associated Provider's Waitlist.

- 1. Click the Referral Status drop-down and select Waitlist.
- 2. Click the *Save button* to save your changes. This change is captured within the History tab of the Referral record. Additionally, the following occurs:
 - The Owner field is updated to [Provider Name] Waitlist.
 - Optionally, you can access your Provider's Waitlist through a Referrals tab list view.
- To remove the Referral from the Waitlist, click the Assign Worker button and assign a worker (see Section 7 above). The Owner field will change from '[Provider Name] Waitlist' to the assigned Worker, and the Referral Status will revert back to New.

3.6.4 Services Assigned

The Referral Status CANNOT be manually changed to Services Assigned. This status change occurs programmatically during the Service Assignment process. This process is covered in the ClientPath Services User Guide.

3.6.5 Discharged

The Referral Status CANNOT be manually changed to Discharged. This status change occurs programmatically during the Service Assignment process. This process is covered in the ClientPath Services User Guide.

3.7 Upload/View Documents

		ACDHS Staff				Provid	er Staff	
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\checkmark								

If you have **Full Access** to a Referral record, you have access to Upload/View Documents related to the Referral. Read-Only users do NOT have access to upload documents. If you have **Limited Access** to the Referral, you do NOT have access to Upload/View Documents related to the Referral.

3.7.1 Upload Documents

1. Within a Referral record, click the *Upload/View Documents button* toward the top right of the screen. The Document Collection screen will be displayed.

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K-00372				Upload/View Documents	Select Service Assign Worker
DETAILS RELATED HIS	STORY			Desard	Interaction
				Record	Interaction
View Access				atart	scop
Full		Last Name		Start Time	
Alexandra		Hart		Date	Time
Chosen Name		Prenouns			
Alex	/	She, Her, Hers	/	End Time	
Referral	Document Type	Attach to Client	0		
R+00372	Authorization from the client(s) to share in medical provider, other service provider, etc.	v sformation with other entities (school, tc.).			vice Assign Worker 👻
DETAILS RELATED HIS	Authorization from the client(s) to share in medical provider, other service provider, et Notes Input notes here	م formation with other entities (school, te.). uplead D ث التاريخ	ocument pload Files Or drop files		vice Assign Worker tion
DETAILS RELATED HIS	Netease of information Authorization from the client(s) to share is medical provider, other service provider, of Notee Input notes here Link v Dec Type	v demailse with other entities (school, te.). ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	ocument bload Files Or drop files	Created By	vice Assign Worker
View Access Perants Related His View Access First tame Aloxandra	Netward of Information Authorization free the client(s) to share is medical provides; other services provides; of Netward States Input notes here Link v Doc Type	v demation with other entities (school, ts.). Uplead D v v File Name ∨ Notes	ocument Iolad Files Or drop files	Created By	tion
View Access First Name Alexandra Choon Name	Initialia of Information Authorization free the elient(a) to share in medical provides, other survice provide, e Notes Input notes here Link v Dec Type	v demailse with other entities (school, te,). ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	ocument bload Files Or drop files	Created By	etca Assign Worker •
DETAILS RELATED HIS View Actes Partial Related His View Actes Chose Name Alexandre Data of Data Partial Chose State Chose Stat	Instantia of Information Authorization free the elient(a) to share in medical provides; other survice provide; e Mote Input notes here Link v Dec Type	v dermation with other entities (school, te.). upticat D v	ocurrent Or drop files V Uplead date	Created By	ecc Assign Worker

- 2. Select a *Document Type* from the drop-down provided. Upon selection, the Document Type Description will appear for your reference.
- 3. **Optionally, click the** *Attach to Client toggle*. With this toggle enabled, the document will not only get attached to the Referral record, but also attached to all Client records associated with the Referral. If the Referral is marked as Confidential, the Attach to Client toggle will not be available for selection.
- 4. Optionally, enter any *Notes* about the document.
- Click the Upload Files button to search and select a file from your computer. Upon selection, the file will be uploaded.

	Document Collection			
Document Type Release of Information	Attach to Client Inactive	0		×
	Upload Files			
CMIS Sprint 1 Demo Script.docx 21 KB			Ø	
1 of 1 file uploaded			Done	

6. **Click the** *Done button* **once it is available.** A row will be created for the attached file that includes a Link to the file, Doc Type, File Name, Notes (if any), Upload Date, and Created By.

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			4
n ir	Document Collection		
Referral R-00372	Docurrent Type Attach to Client Choose One •		vice Assign Worker 💌
DETAILS RELATED HIST	notes tipled bounert		tion
View Access	Link v Doc Type v File Name v Notes v Uplead date Created By	~	2
Full First Name Alexandra	1 Go to File Release of Information Release of Information - C Jan 23, 2022 Robert Wegner		
Chosen Name Alex			0
Date of Birth 6/14/2008			0
Number of Household Members	LegitSex	_	

3.7.2 View Documents

- 1. Click the Upload/View Documents button to open the Document Collection screen.
- 2. Click the Go to File link next to the document you wish to view. The Preview tab of the File record is displayed.

Rele	ase of Informatio	n - CMIS Sprint 1 Demo Script	+ Follow Download Upload New Version	Edit File Details 👻
ire IKB	File Extension docx	Cuiner Robert Wegner		
REVIEW	DETAILS		Shared with (2)	*
			Robert Wegner Owner	
		test like in terms bank	R-00372 Viewer	
		Learning and the set of second second set multi- Learning second the set of second s		View All
		E Variable for the contraction of the contract	Versions (1)	*
		1 Struct Specific Conception 1 Annual Annual Conception Conception Conception 2 Annual Conception Conception Conception Conception Conception Conception 2 Annual Conception Conception Conception 2 Annual Conception Conception Conception 2 Annual Conception 2 An	Version 1	

- 3. Click the Download button to download the file.
- 4. Optionally, click the *Details tab* to view details of the document.

3.8 Record Interactions

ACDHS Staff					Provid	er Staff		
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
\checkmark	\checkmark	\checkmark	\checkmark		\checkmark	\checkmark	\checkmark	

If you have **Full Access** to a Referral record, you have access to view and record Interactions related to the Referral. If you have **Limited Access** to the Referral, you do NOT have access to view or record Interactions related to the Referral.

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A *Record Interaction* component resides on the right side of each Referral record. Use this component to document any interactions you have with the Client(s) or other supports during the Referral stage. All required fields are indicated with a red asterisk (*).

- 1. Ensure all fields are entered/selected. Optionally click the *Start and Stop buttons* to automatically populate the Start/End Date and Time fields. Otherwise, *manually enter* those details.
- 2. Click the Save button at the bottom of the component to save the interaction or click the Clear button to clear the form and start over. Upon save of an Interaction, an Interaction record is created, and you will be automatically navigated to that record. The duration of the interaction is automatically calculated based on Start Date/Time and End Date/Time. All Interactions associated to a given Referral can be found within the Related tab of the Referral record and within the Interactions related list.

TAILS RELATED HISTORY				ecord Interactio	n
iew Access				Start Stop	
Full	Last Name		Start Time	* Time	
lexandra	/ Hart		/		Q
Chosen Name Llex	Pronouns She, Her, Hers		End Time		
ate of Birth	Approximate Ap	(e	* Date	*Time	0
umber of Household Members	Legal Sex		* Type		
	Female		None		*
ousenoid income	554		* Outcome		
	Owner		None		*
	Roberta Jonas		* Subject		
	Provider				

E-000328				Edit	Add External Referral	Add Concrete Good
✓ Information		Interact	ion History (1)		
Subject	Referral ID	Date	Field	User	Original Value	New Value
The second	https://www.income	1/23/2022,	Created.	Rober	t Wegner	
in Person	E-000328					View
Start Time	Duration					
/23/2022, 9:00 AM	0 Hours 52 Minutes	External Referrate (0)				
End Time 1/23/2022, 9:52 AM	Owner Owner Robert Wegner	 External Referrals (0) 				
Dutcome Completed	-	Concret	te Goods (0)			
 Interaction Notes 						
lotes Notes from first meeting						
 System Information 						

3.8.1 Record Concrete Goods

Within a Referral Interaction record, users with Core Plus profiles can view/record any concrete goods (tangible items) provided to the Client(s) during the Referral stage.

1. Within the Interaction record, click the *Add Concrete Goods button*. A pop-up will be displayed with a list of all Clients associated to the Referral, as well as a list of Concrete Goods provided (if any).

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Information			🛃 Interac	ction History (1)			
bject rst Meeting	Referral R-0037	L ID 72	Date	Field	User	Original Value	New Value	
pe Person	Interact E-0003	tion ID 128	1/23/2022,	Created.	Robert Wegner		View	
art Time 23/2022, 9:00 AM	Duration 0 Hours	n s 52 Minutes						
d Time 23/2022, 9:52 AM	Oviner	abert Wegner	Litern	External Referrals (0)				
ittome impleted	/		Concre	ete Goods (0)				

HOLY FAMILY INSTITUTE INC. Service Provider Portal				clion	tnath				Robert Wegner Supervisor
			Clie	nt List					Logout
	Q, Search	Client Id	V Client Name	DOB	✓ Concrete Goods				
		C-0000419	Sullivan Edwards	7/3/1978	Create			_	_
n IRT Referrals	Client Services	C-0000420	Cameron Edwards	5/14/2010	Create				
E-000329		C-0000430	Carol Brady	5/4/1977	Create		Edit Add Exten	nal Referral	Add Concrete Goods
✓ Information			Concre	ete Goods		n History	(1)		
Subject		ID V	Client Na V Cate	gory V Quar	ntity V Description V	Field	User	Original Value	New Value
Type				Close		Created.	Robert Wegner		V
In Person	1								View All
Start Time 1/23/2022, 10:00 AM	1								
End Time 1/23/2022, 10:45 AM	/					Referrals (
Outcome Completed	1					Goods (0)			
✓ Interaction Notes									
Notes Notes regarding first meeting					1				

- 2. Click the Create button next to the respective Client. A Record Concrete Goods pop-up is displayed.
- 3. Ensure a Concrete Good Category is selected. This information is required to Save.
- 4. Ensure a Description of Item(s) Provided is entered. This information is required to Save.
- 5. Ensure the Number of Item(s) Provided is entered. This information is required to Save.
- 6. Optionally enter an associated Monetary Amount.

HOLY FAMILY INSTITUTE INC. Service Provider Portal		Record Concrete Goods	×			Robert Wegner Supervisor Logout
٩	Search	Client Name: Sullivan Edwards	1			
	Client Services	* Concrete Good Category Clothing	•			
E-000329		*Description of Item(s) Provided		(Edit Add External Referral	Add Concrete Goods
✓ Information Subject		*Number of Item(s) Provided 3 Monetary Amount		in History (1)		
First Meeting		\$30.00		Field	User Original Value	New Value
Type In Person		Save		Created.	Robert Wegner	View All
Start Time 1/23/2022, 10:00 AM						

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7. Click the *Save button* to save the data or click the *Clear button* to clear the form and start over. Upon Save, a Concrete Good record is created, and a row is displayed within the Concrete Goods list.

HOLY FAMILY INSTITUTE INC. Service Provider Portal	Success II Concrete Goods saved for Client Sullivan Edward	ds Robert Wegner Supervisor
	Client List	Lagout
Q, Search	Client Id V Client Name V DOB V	V Concrete Goods
▲ IPT Deferrals Client Caudane	C-0000419 Sullivan Edwards 7/3/1978	Create
T INT REFERENCES	C-0000420 Cameron Edwards 5/14/2010	Create
E-000329	C-0000430 Carol Brady 5/4/1977	Create Edit Add External Referral Add Concrete Goods
✓ Information	Concrete Goods	n History (1)
Subject	ID \checkmark Client Na \checkmark Category \checkmark Quantity	✓ Description ✓
First Meeting	CG-0000084 Sullivan Edw Clothing 3	Winter Jackets Pield User Original Value New Value
Type In Person	Close	View All
Start Time		VIEW PILK
1/23/2022, 10:00 AM		Referrals (0)

8. Click the *Close button* to close the Concrete Goods screen. Any Concrete Goods record created will also appear in the Concrete Goods related list on the right side of the Interaction record.

E-000329			Edit Add External Referral Add Concrete Goods
✓ Information Subject First Meeting	Referral ID R-00457		Interaction History (1) Date Field User Original Value New Value
Type In Person	Interaction ID E-000329		1/23/2022, 1 Created. Robert Wegner 💌 View All
Start Time 1/23/2022, 10:00 AM End Time	Duration 0 Hours 45 Minutes Owner		External Referrals (0)
1/23/2022, 10:45 AM Outcome Completed	B Robert Wegner		Concrete Goods (1)
✓ Interaction Notes			Concrete Goods, Interaction Date Client Name Concrete Good C
Notes Notes regarding first meeting		/	CG-0000084 1/23/2022 Suttiven Edwards Clothing View All
 System Information 			

3.8.2 Record External Referrals

Within a Referral Interaction record, users with Core Plus profiles can view/record any External Referrals provided to the Client(s) during the Referral stage. This functionality can be used if you are referring the Client(s) to a service for another provider.

1. Within the Interaction record, click the *Add External Referral button*. A pop-up will be displayed with a list of all Clients associated to the Referral, as well as a list of External Referrals provided (if any).

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HOLY FAMILY INSTITUTE INC. Service Provider Portal	cliontnath	Robert Wegner Supervisor		
	Client List	Logout		
Q. Search	Client Id \lor Client Name \lor DOB \lor External Referral			
	C-0000419 Sullivan Edwards 7/3/1978 Create			
A IKI Keterrals Client Services	C-0000420 Cameron Edwards 5/14/2010 Create			
E-000329	C-0000430 Carol Brady 5/4/1977 Create	Edit Add External Referral Add Concrete Goods		
w Information	External Referrals	a History (1)		
Subject	ID \checkmark Client Name \checkmark Category \checkmark Referred To \checkmark	(history ()		
First Meeting	Close	Field User Original Value New Value		
Type In Person	union and a second s	View All		

- 2. Click the Create button next to the respective Client. A Record External Referral pop-up is displayed.
- 3. Ensure a Referral Category is selected. This information is required to Save.
- 4. Ensure a Referred To is entered. This information is required to Save.
- 5. Optionally enter any associated Notes.

HOLY FAMILY INSTITUTE INC. Service Provider Portal		Record External Referral	×			Robert Wegner Supervisor Logout
	Q. Search	Clie Client Name: Sullivan Edwards				
🔒 IRT Raf	ferrals Client Services	C+0 * Referral Category Employment and Training	•			
E-000329		Referred To ABC Training		Edit	udd External Referral	Add Concrete Goods
		Notes Sample notes for External Referral				
Subject		ID Save Clear	~	Field User	Original Value	New Value
Type In Parson		Close		Created. Robert V	egner	

6. **Click the** *Save button* to save the data or click the *Clear button* to clear the form and start over. Upon Save, an External Referral record is created, and a row is displayed within the External Referrals list.



7. Click the *Close button* to close the External Referrals screen. Any External Referrals record created will also appear in the External Referrals related list on the right side of the Interaction record.

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E-000329			Edit Add External Referral Add Concrete Goods
✓ Information Subject First Meeting	Referral ID R-00457		Interaction History (1) Date Field User Original Value New Value
Type In Person	Interaction ID E-000329		1/23/2022, 1 Created. Robert Wegner View All
Start Time 1/23/2022, 10:00 AM	Duration 0 Hours 45 Minutes		A External Referrals (1)
End Time 1/23/2022, 10:45 AM	Owner Bobert Wegner	<u>2</u>	External Referr Interaction Date Client Name Referral Category
Completed			ER-000101 1/23/2022 Sullivan Edwards Employment and 💌
✓ Interaction Notes Notes Notes regarding first meeting		/	Concrete Goods (1)
✓ System Information			Concrete Goods Interaction Date Client Name Concrete Good C

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