USER GUIDE

clientpath
Allegheny County Department of Human Services

Referrals

ACDHS Users · Provider Users

Version 1.0
Created January 24, 2022

Prepared By:
coresphere

1 Revision History

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

2 Table of Contents

3 Referral Process

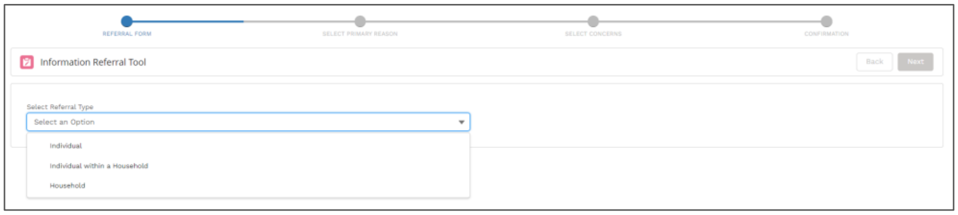
ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

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.
2. **Select a *Referral Type* from the drop-down.** Based on the Referral Type selection, the appropriate Referral Form will be displayed.



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.

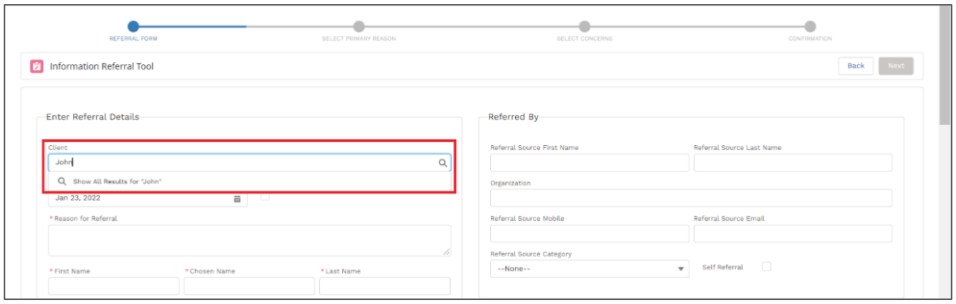
3.1.1 Enter Referral Form Details

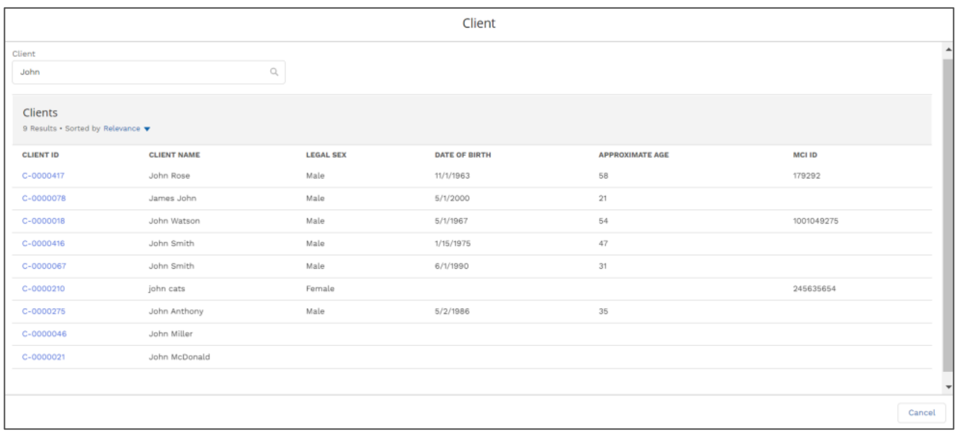
The Referral Form consists of 2-3 sections, depending on the Referral Type selected. Referral Details and Referred By sections are available regardless of Referral Type selection, whereas a Household Member Details section is only displayed if Household is selected as the Referral Type. The next three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

3.1.1.1 Referral Details

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.

1. **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.



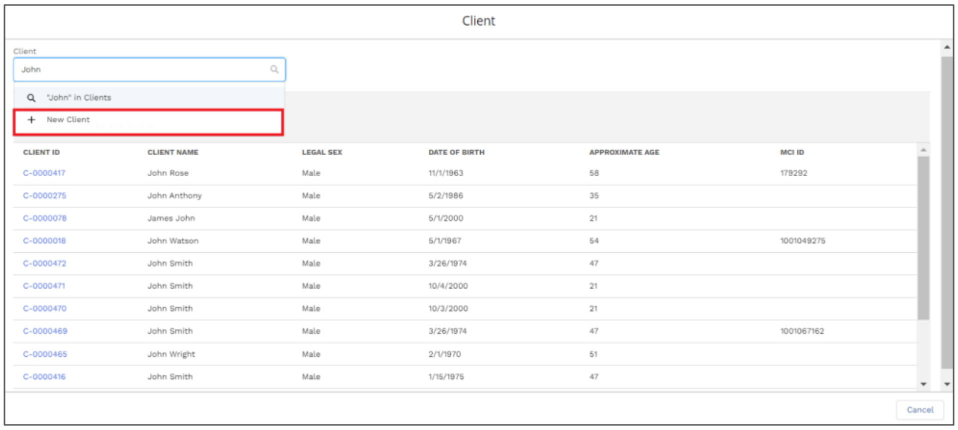


- Recent Clients: Upon clicking into the Client search box, a 'Recent Clients' list will display of Clients you have *recently viewed*. This is not a full list of Clients that exist in ClientPath.
- Partial Search: To conduct a partial search, type an asterisk (*) wildcard at the end of your search term. The search term must be at least 2 characters.
- Sorting: Optionally click any column header to sort results (ascending/descending).

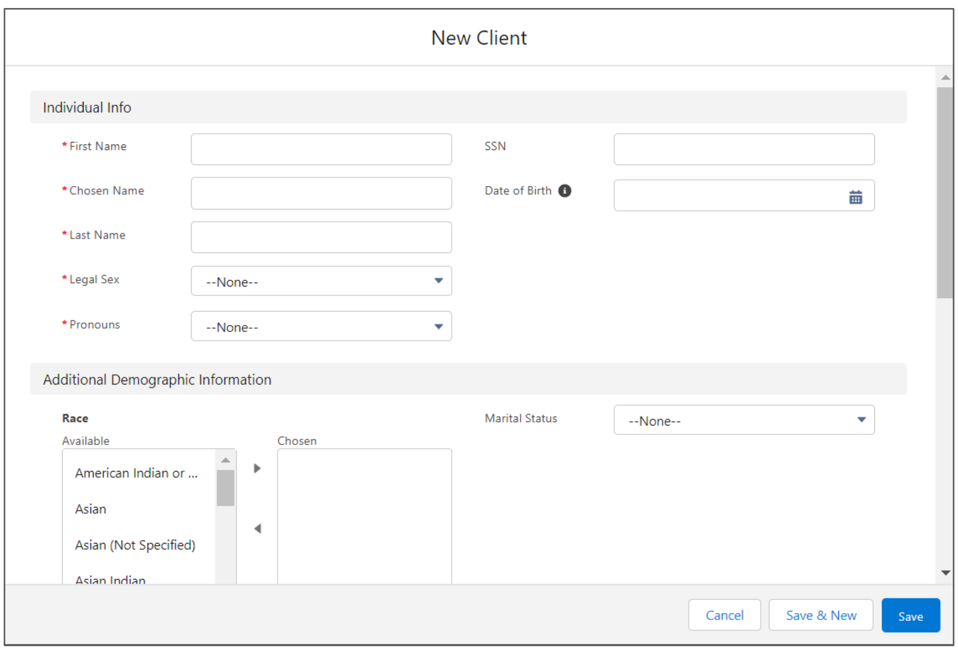
2. **If the Client exists, click the respective *Client ID* to select that Client.** Information from the Client's record will display in select fields within the Referral Form. *Skip to Step 8.*

   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.



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

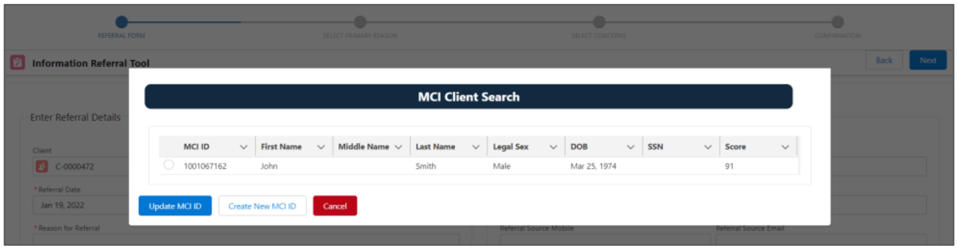


- Required Fields: Only the fields marked with a red asterisk (*) are required to Save the Client record.

- Duplicate Check: 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.**

    - MCI Clearance: 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.*

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

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.

    - Client Record Updates: 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.

- Referral Date: Referral Date defaults to today's date, but it can be changed to any date in the past.

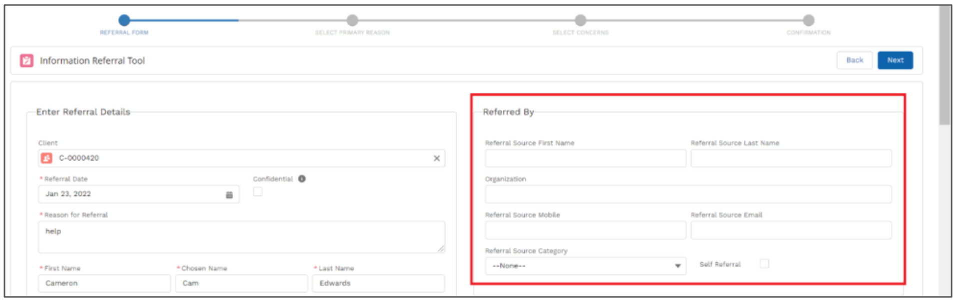
9. **Optionally, select the *Confidential checkbox* to make the referral confidential.** This will ensure the Referral is NOT viewable by others (except those above you in your Provider hierarchy).
10. **Ensure the *Reason for Referral* is entered.** It is required to describe why the Individual(s) is 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.

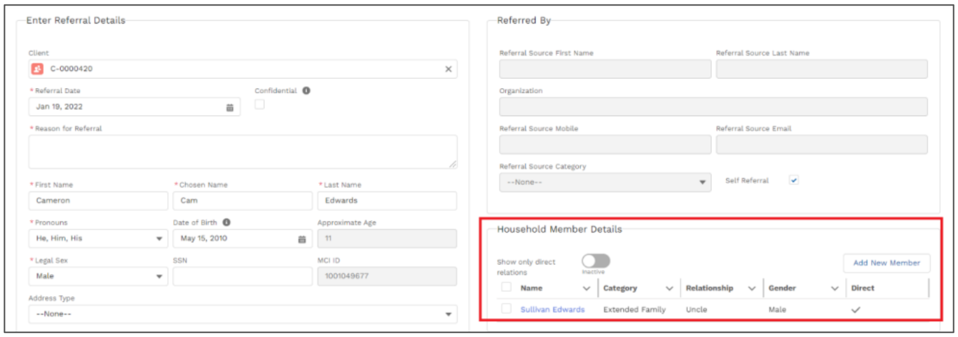


3.1.1.3 Household Member Details

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).

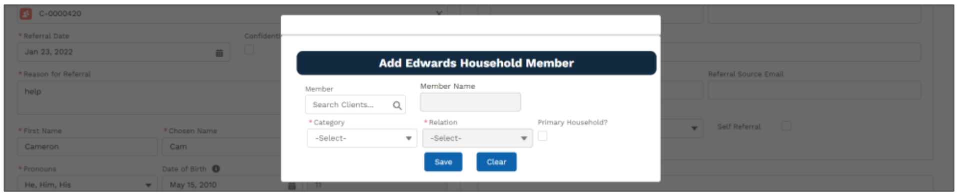
The list includes the Client Name, Category, Relationship, Gender, and an indicator if it is a direct relationship. A direct relationship means the Clients are associated to the same primary Household.

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.



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.**

2. **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.*



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

3. **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.

6. **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 gender-neutral values are displayed.

7. **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.

9. **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.

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).**

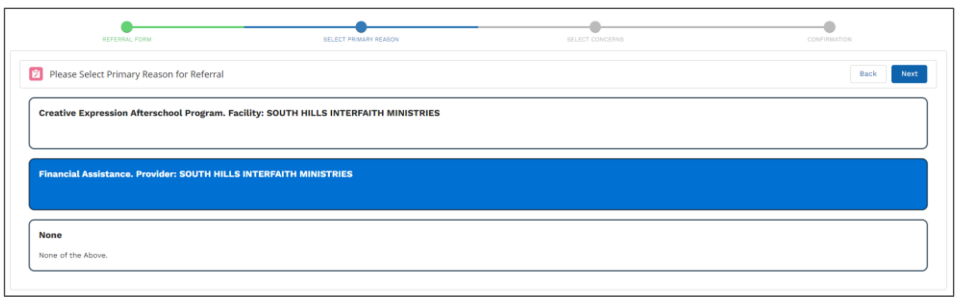
3.1.2 Select Primary Reason

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).**



3.1.3 Select Concerns

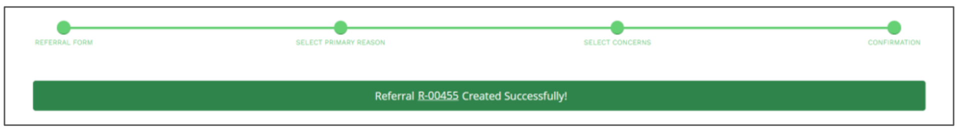
The Concerns screen displays several common reasons why an individual may be referred for services.

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*.

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.



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
✓	✓	✓	✓	✓	✓	✓	✓	✓

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

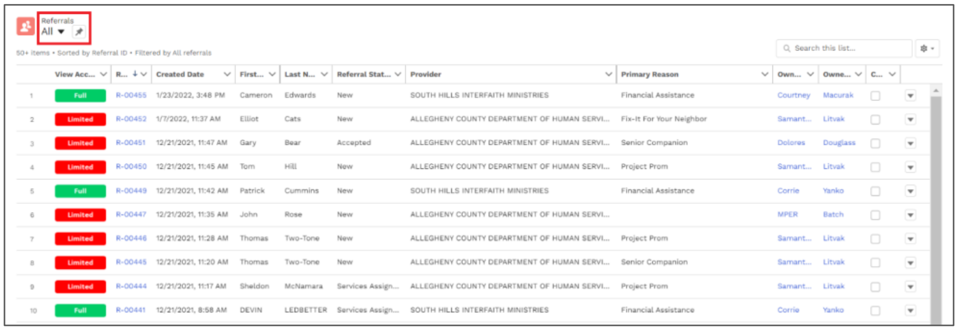
Confidential Referrals are only viewable to the Assigned Worker/Owner, those above them in their Provider hierarchy, Admins and ACDHS Super Users. ACDHS/Provider Read-Only Users do not have access to any Confidential referrals. If you do not have access to a Confidential Referral, you will not see it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

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

1. **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.

2. **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.


Referrals
All
50+ items • Sorted by Referral ID • Filtered by All referrals
Search this list...

	View Acc...	R...	Created Date	First...	Last N...	Referral Stat...	Provider	Primary Reason	Own...	Owne...	C...
1	Full	R-00455	1/23/2022, 3:48 PM	Cameron	Edwards	New	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Courtney	Macurak	
2	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	
3	Limited	R-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	
5	Full	R-00449	12/21/2021, 11:42 AM	Patrick	Cummins	New	SOUTH HILLS INTERFAITH MINISTRIES	Financial Assistance	Corrie	Yanko	
6	Limited	R-00447	12/21/2021, 11:35 AM	John	Rose	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI...		MPER	Batch	
7	Limited	R-00446	12/21/2021, 11:28 AM	Thomas	Two-Tone	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI...	Project Prom	Samant...	Litvak	
8	Limited	R-00445	12/21/2021, 11:20 AM	Thomas	Two-Tone	New	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI...	Senior Companion	Samant...	Litvak	
9	Limited	R-00444	12/21/2021, 11:17 AM	Sheldon	McNamara	Services Assign...	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVI...	Project Prom	Samant...	Litvak	
10	Full	R-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.

Full Access vs. Limited Access: 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.**

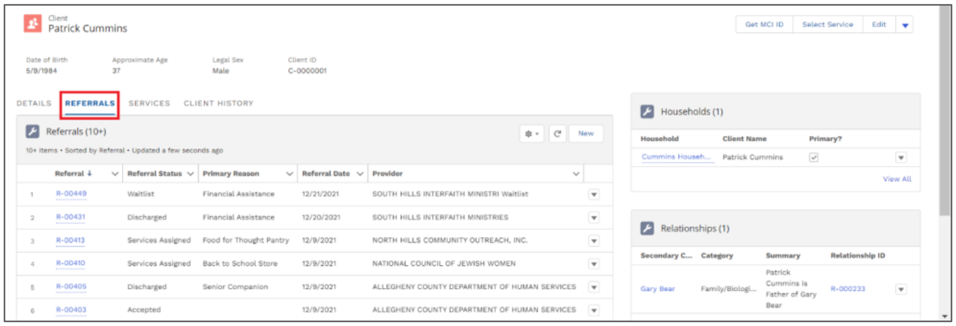
4. **Click the *Referral ID* to view a specific Referral record.** The Referral record will be displayed.

3.2.3 Access Referrals Via Clients Tab

1. **Click the *Clients* tab.** A list of all Clients in ClientPath will be displayed.

2. **Click the *Client ID* for the Client record you wish to view.** The Client record will open with the Details tab displayed.

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.



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.

DETAILS RELATED HISTORY

View Access
Full

First Name
Cameron

Last Name
Edwards

Chosen Name
Cam

Pronouns
He, Him, His

Date of Birth
5/15/2010

Approximate Age
12

Number of Household Members
2

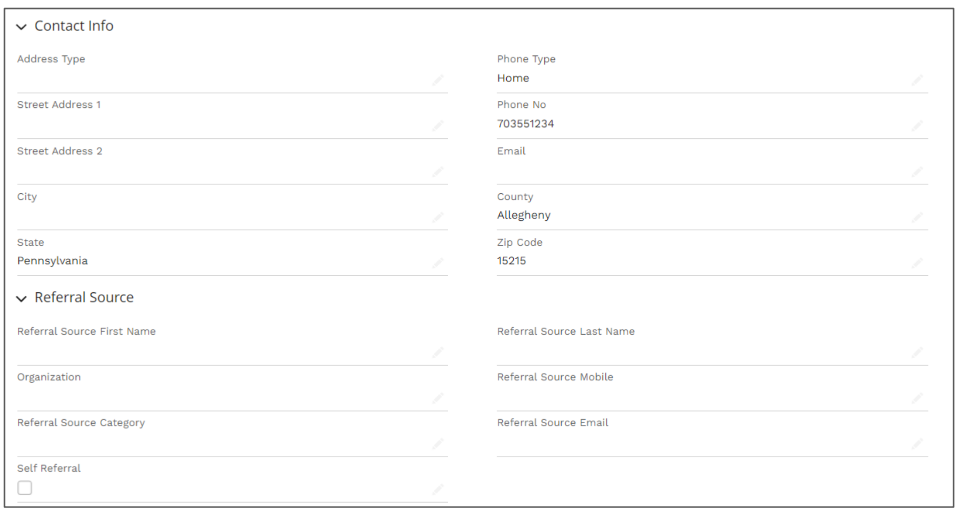
Legal Sex
Male

Household Income

SSN

Owner
Courtney Macurak

Provider
SOUTH HILLS INTERFAITH MINISTRIES



Contact Info

Address Type

Phone Type
Home

Street Address 1

Phone No
703551234

Street Address 2

Email

City

County
Allegheny

State
Pennsylvania

Zip Code
15215

Referral Source

Referral Source First Name

Referral Source Last Name

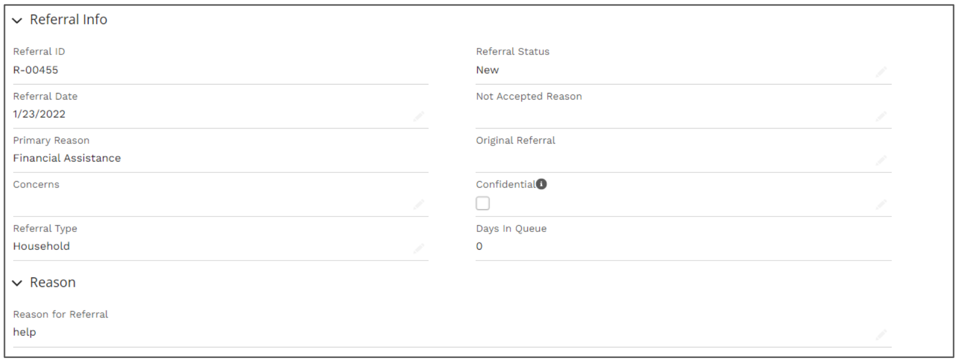
Organization

Referral Source Mobile

Referral Source Category

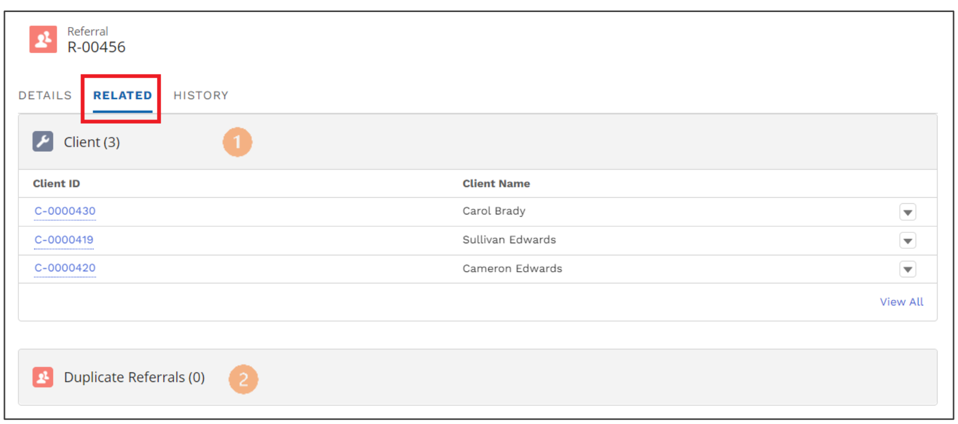
Referral Source Email

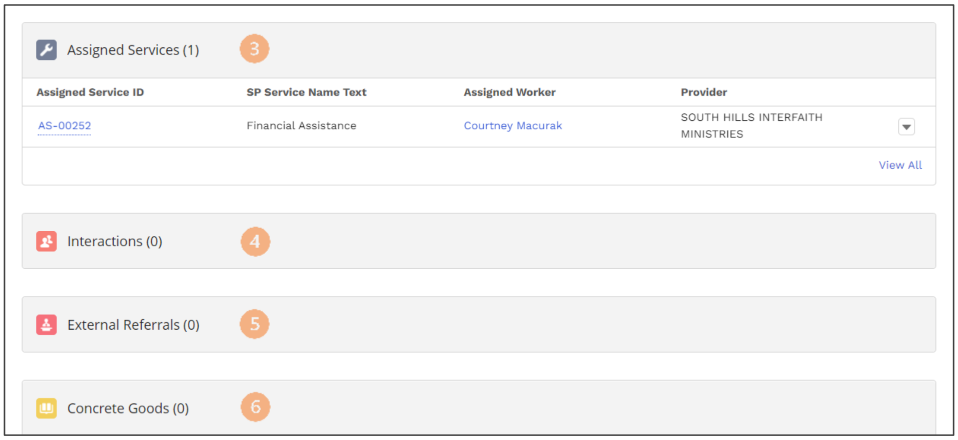
Self Referral



3.3.2 Related Tab

1. **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.**

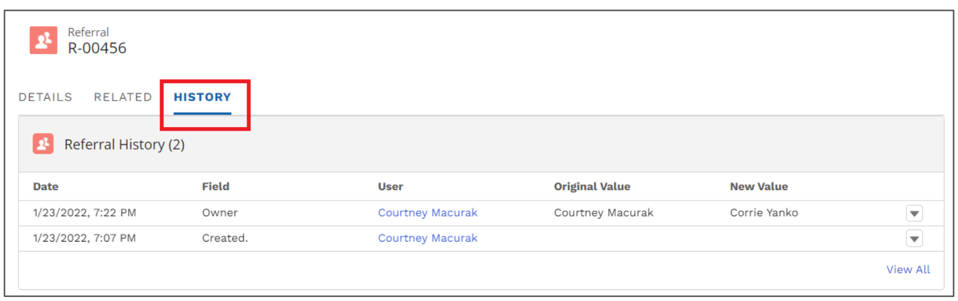




3.3.3 History Tab

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
    - User who made the change

   Original Value that previously existedNew Value that was entered
2. **Optionally, click *View All* to view all records.**



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.

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

1. **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.

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

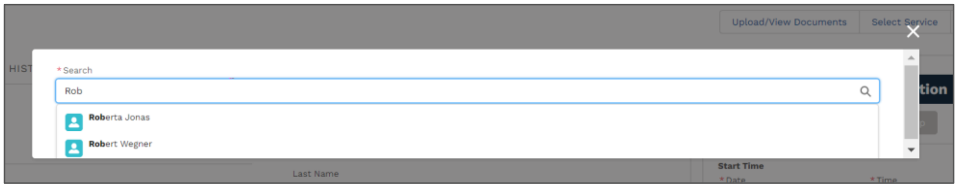
ACDHS Staff					Provider Staff			
Admin	**Super User**	**Supervisor**	**Worker**	**Read-Only**	**Super User**	**Supervisor**	**Worker**	**Read-Only**
✓	✓	✓	✓	--	✓	✓	✓	--

If you have **Full Access** to a Referral record and the Referral is Active (New, Waitlisted, Accepted), you can 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.

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.



3. **Select the *staff member* you want to assign.**

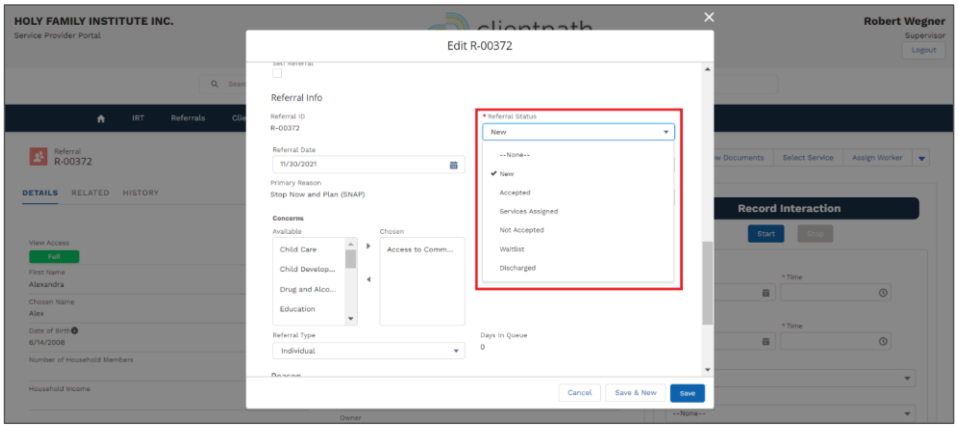
4. **Click the *Save button* the save the worker assignment.** Upon save, the Owner field is updated with the newly selected staff member's name. Additionally, the History tab of the Referral record captures the change(s) to the Owner field (Assigned Worker).

3.6 Update Referral Status

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

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.

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.

2. **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

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.
3. **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.

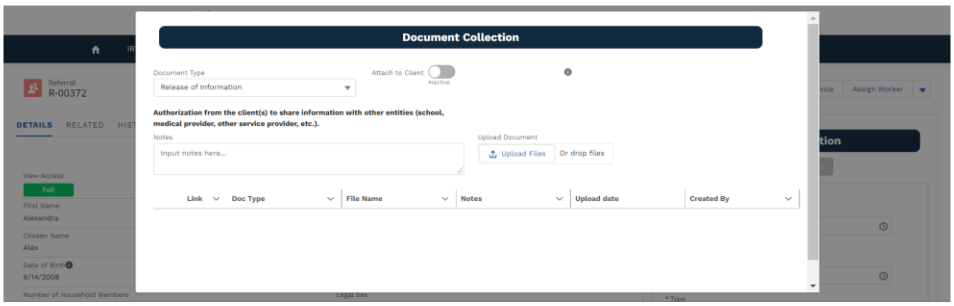
3.7 Upload/View Documents

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

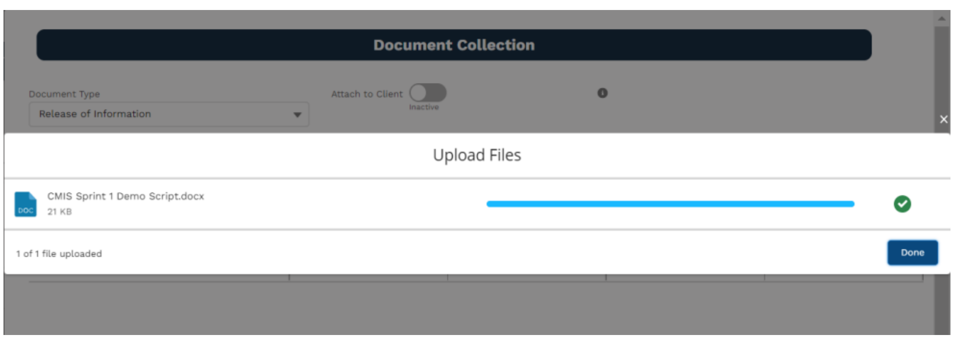
If you have **Full Access** to a Referral record, you have access to Upload/View Documents related to the Referral. Read-Only users do NOT have access to upload documents. If you have **Limited Access** to the Referral, you do NOT have access to Upload/View Documents related to the Referral.

3.7.1 Upload Documents

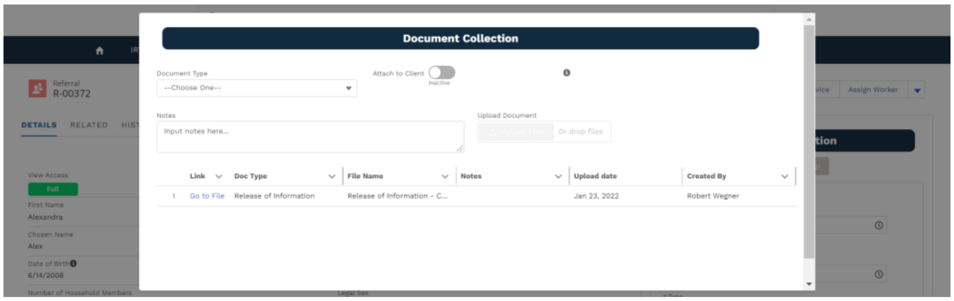
1. **Within a Referral record, click the *Upload/View Documents button* toward the top right of the screen.** The Document Collection screen will be displayed.



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.**
5. **Click the *Upload Files button* to search and *select a file* from your computer.** Upon selection, the file will be uploaded.

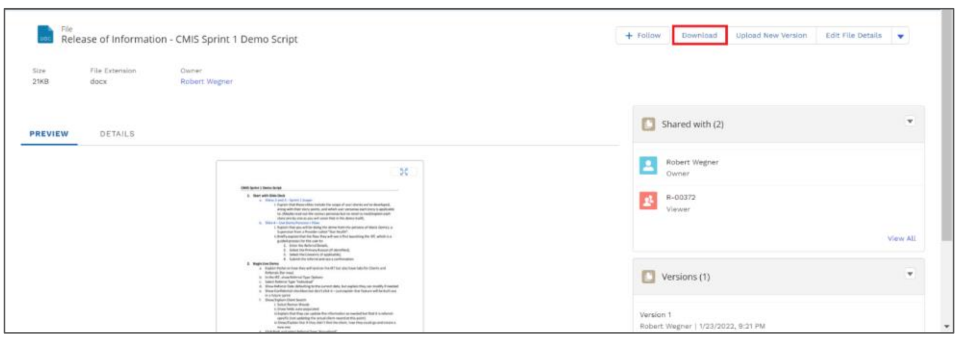


6. **Click the *Done button* once it is available.** A row will be created for the attached file that includes a Link to the file, Doc Type, File Name, Notes (if any), Upload Date, and Created By.



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.



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

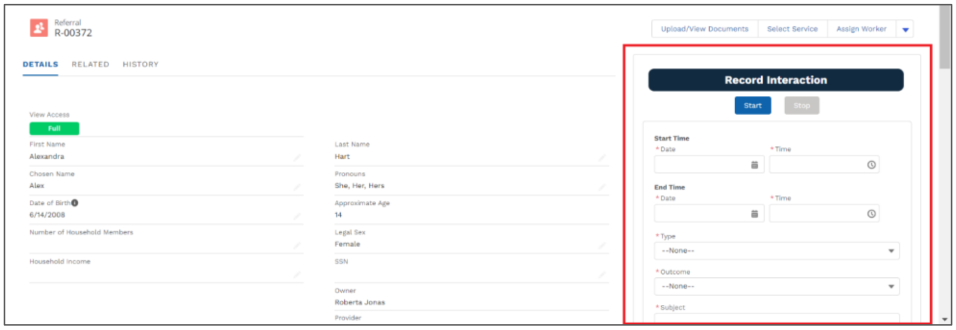
3.8 Record Interactions

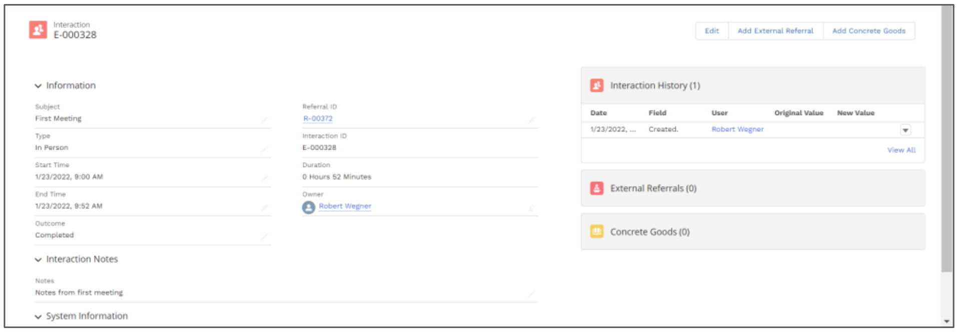
ACDHS Staff					Provider Staff			
Admin	**Super User**	**Supervisor**	**Worker**	**Read-Only**	**Super User**	**Supervisor**	**Worker**	**Read-Only**
✓	✓	✓	✓	--	✓	✓	✓	--

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.

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.

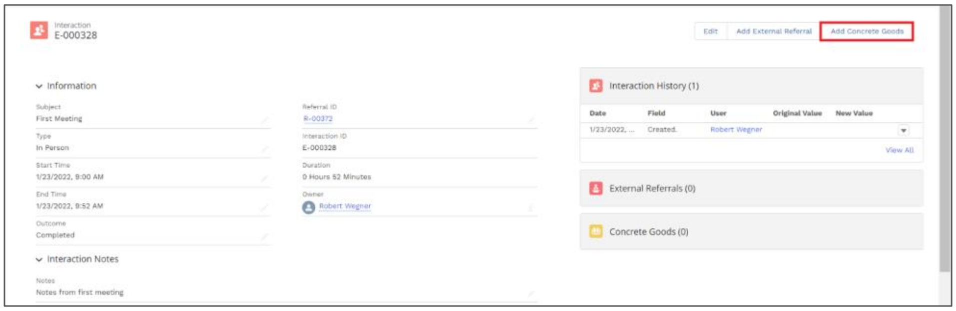


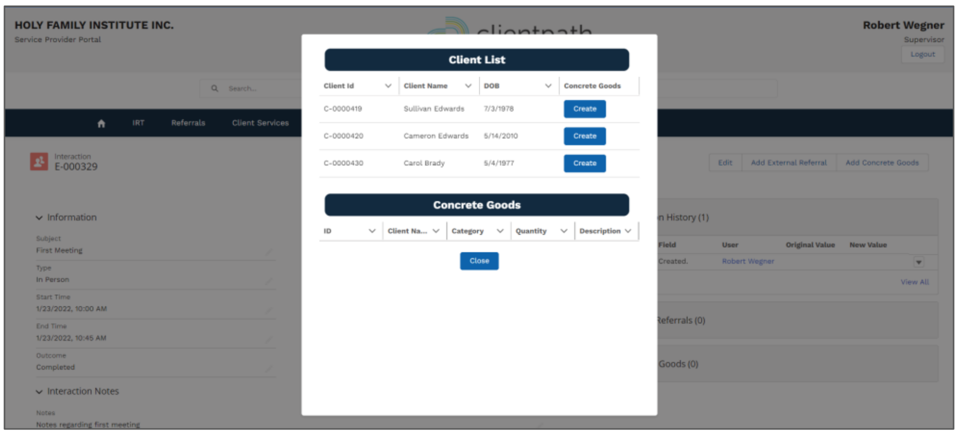


3.8.1 Record Concrete Goods

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).





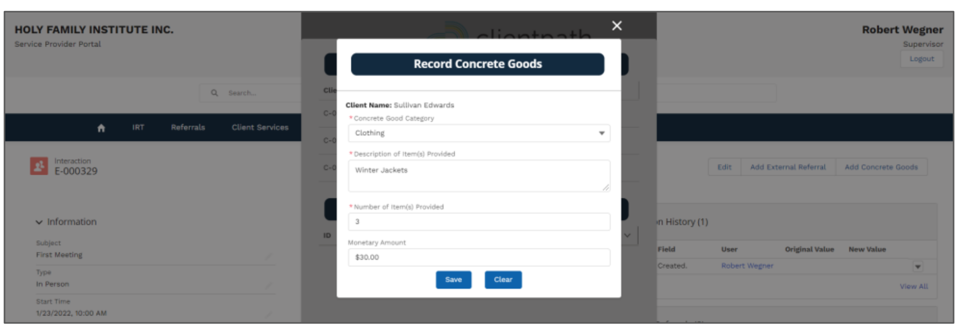
2. **Click the *Create button* next to the respective Client.** A Record Concrete Goods pop-up is displayed.

3. **Ensure a *Concrete Good Category* is selected.** This information is required to Save.

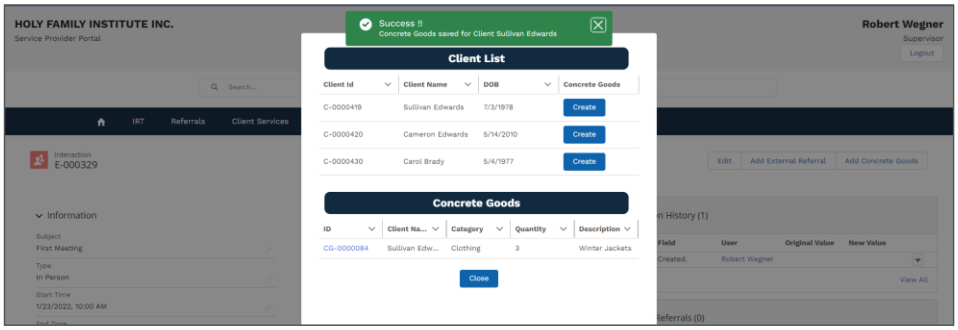
4. **Ensure a *Description of Item(s) Provided* is entered.** This information is required to Save.

5. **Ensure the *Number of Item(s) Provided* is entered.** This information is required to Save.

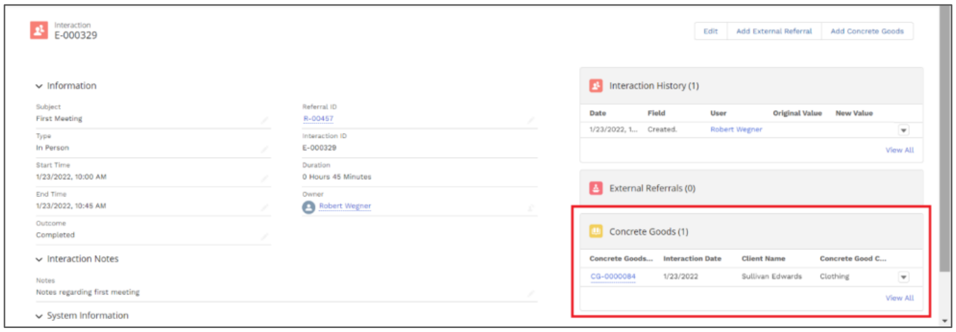
6. **Optionally enter an associated *Monetary Amount*.**



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.



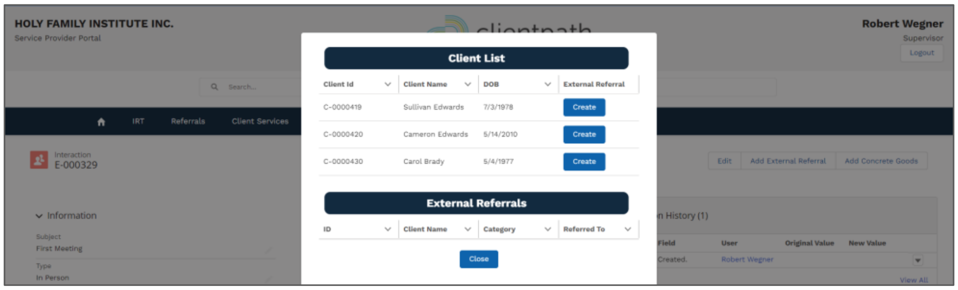
8. **Click the *Close button* to close the Concrete Goods screen.** Any Concrete Goods record created will also appear in the Concrete Goods related list on the right side of the Interaction record.



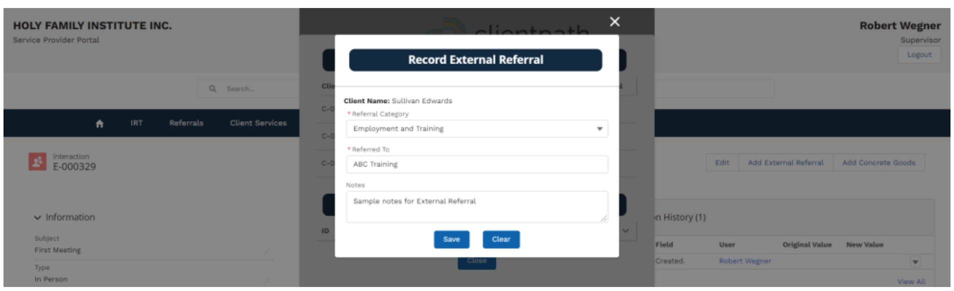
3.8.2 Record External Referrals

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.

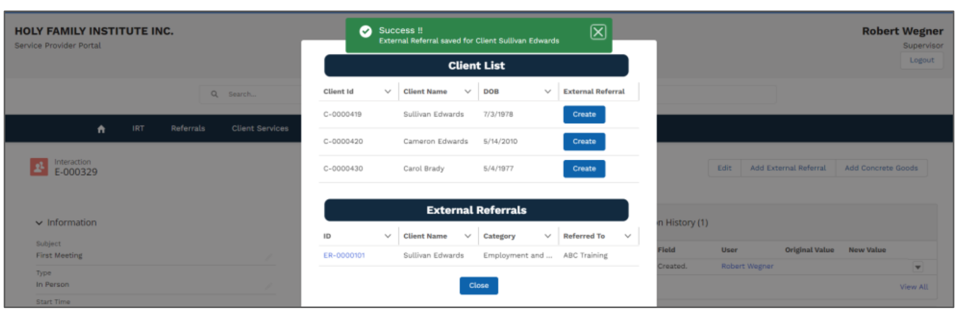
1. **Within the Interaction record, click the *Add External Referral button*.** A pop-up will be displayed with a list of all Clients associated to the Referral, as well as a list of External Referrals provided (if any).



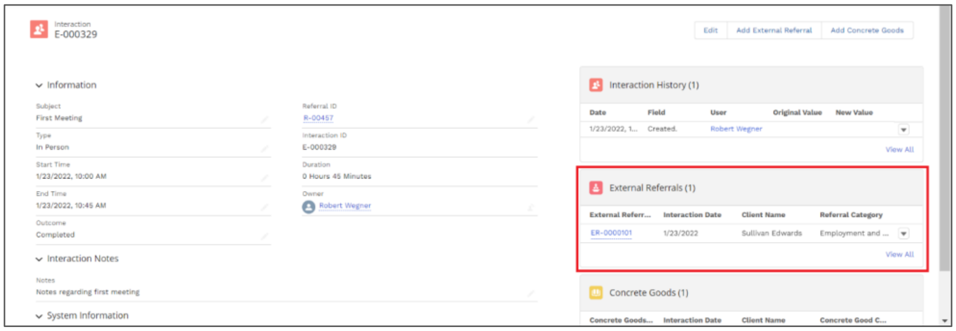
2. **Click the *Create button* next to the respective Client.** A Record External Referral pop-up is displayed.
3. **Ensure a *Referral Category* is selected.** This information is required to Save.
4. **Ensure a *Referred To* is entered.** This information is required to Save.
5. **Optionally enter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



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.


Interaction
E-000329
Edit
Add External Referral
Add Concrete Goods
Information
Subject
First Meeting
Referral ID
R-00457
Type
In Person
Interaction ID
E-000329
Start Time
1/23/2022, 10:00 AM
Duration
0 Hours 45 Minutes
End Time
1/23/2022, 10:45 AM
Owner
Robert Wegner
Outcome
Completed
Interaction Notes
Notes
Notes regarding first meeting
System Information
Interaction History (1)
Date
Field
User
Original Value
New Value
1/23/2022, 1...
Created.
Robert Wegner
View All
External Referrals (1)
External Referr...
Interaction Date
Client Name
Referral Category
ER-0000101
1/23/2022
Sullivan Edwards
Employment and ...
View All
Concrete Goods (1)
Concrete Goods...
Interaction Date
Client Name
Concrete Good C...