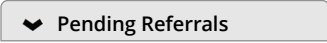
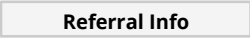




Copy & Send Referral – Dragonfly Job Aid

The *Copy & Send Referral* function allows users to make a copy of a Referral and send it to another Dragonfly user.

Copy & Send Process

1. The *Copy & Send* function can be used to send the Referral to other Dragonfly users.
2. Recipients will receive an email notification for the sent Referral.
3. The sent Referral will appear in the recipient's  dashboard pane.
 - a. The recipient must go into the Referral and change the *Referral Status* to "Open".
4. Information entered in the *Copy & Send* pop-up will appear in the new Referral's  screen. This includes the new *Referral Reason(s)*, *Referral Narrative*, and *Referral Source*. The Referral Source will be the user who completed the *Copy & Send* pop-up.
5. The original Referral will remain open and assigned to its current worker. Closing the original Referral will have no impact on the copied Referral's status.

TIP: Users can view all of the other open Referrals for this client on the **Referral Info** screen under DHS Involvement.

Navigation

1. From the : Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
2. The  button can be found at the bottom of most of the Referral screens.



Copy & Send

1. Navigate to the desired Referral and click **Copy & Send Referral** at the bottom of the screen. The *Copy & Send* pop-up will open.

Copy Current Referral and Reassign to a Group or Another User

Assigned User Group * **A**
-Select- ▼

Assigned User **B**
-Select- ▼

Referral Reason * **C**
Communication with System
Link to Services
Other
Placement Change

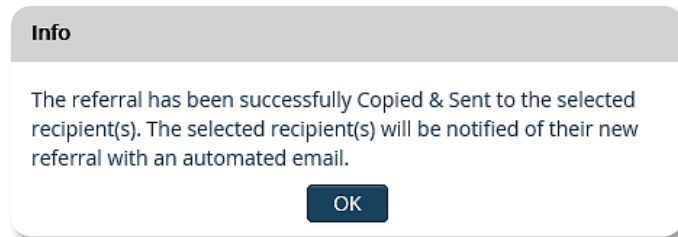
Referral Narrative * **D**
[Text Area]

E Save **F** Cancel

- a. *Assigned User Group*: Select the user group from the drop-down.
- b. *Assigned User*: This drop-down contains a list of users who are part of the selected user group. Select the desired user's name from the drop-down.
- c. *Referral Reason*: Click to select the Referral Reason(s) that apply. To select more than one reason, hold down the **[Ctrl]** key on the keyboard while clicking on each applicable reason. Selected items will be highlighted in blue. To de-select an item hold down the **[Ctrl]** key and click on the item again. The de-selected item will no longer be highlighted.
- d. *Referral Narrative*: Enter additional information regarding the Referral here.
- e. Click **Save** to send the Referral and close the pop-up.
- f. Clicking **Cancel** will close the pop-up without sending the Referral. Any information entered will not be saved.



3. Once the Referral has been successfully sent, an Info pop-up will appear. Click **OK** to close the pop-up.



For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>