



Referral Information – Dragonfly Job Aid

The *Referral Information* screen contains information on the Consumer's DHS involvement, the referral source's information and the reason for referral.

Referral Information

▼ DHS Involvement

System	Status	Last Updated Date	Referral ID	Worker	Worker Email

▼ Referral Source Information

☐ Self?

Prefix

First Name

Middle Name

Last Name *

Suffix

-Select- ▼

Referral Source

School District

Other District Name

School Building

-Select- ▼

-Select- ▼

Other

Email

Office Phone #

Cell Phone #

▼ Referral Reason

Referral Reason *

Referral Narrative *

Communication with Systems
Link to Services
Other
Placement Change

Navigation

- From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
 - Click on the **Referral Info** tile.
- The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.

DHS Involvement

1. **DHS Involvement**: This pane contains information on the Client's involvement in other Dragonfly referrals or other systems in Synergy.

DHS Involvement						
System	Status	Last Updated Date	Referral ID	Worker	Worker Email	
Dragonfly	Pending	5/31/2017 7:27:19 AM	55921	Samantha Murphy		
Dragonfly	Open	4/27/2017 2:24:30 PM	55720	Brian Mahoney		

Show 10 entries First Previous 1 Next Last

The *DHS Involvement* grid contains basic information on other Referrals that the Client is involved in along with the *Referral ID* and contact information for the assigned worker. Click on the *Referral ID* to navigate to that Referral.

Referral Source Information

1. **Referral Source Information**: If the logged in user is the Referral Source checking the ☒ *Self?* checkbox will automatically add the user's basic contact information. There will still be other fields that will need to be completed.

Referral Source Information

☐ Self?

Prefix

First Name

Middle Name

Last Name *

Suffix

-Select-

Referral Source

School District

Other District Name

School Building

Self

-Select-

Other

Email

Office Phone #

Cell Phone #

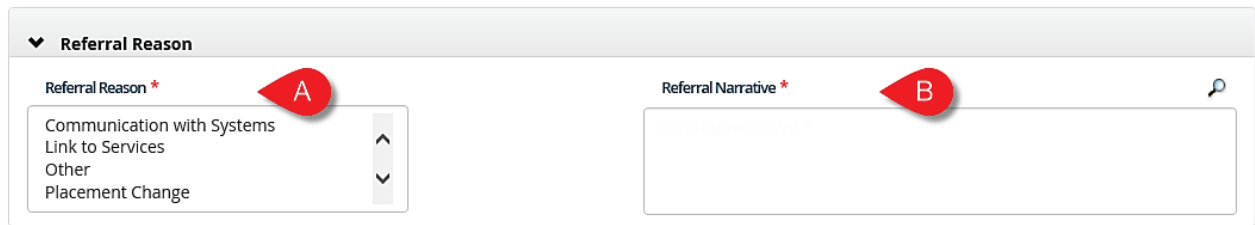
- a. *Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the Referral Source's *First Name* and *Last Name*. If applicable also enter the Referral Source's *Prefix, Middle Name,* and *Suffix*.
- b. *Referral Source*: Select the Referral Source type from the drop-down. If the type is "School" the school information fields will become active.



- c. *School District*: Select the school district from the drop-down. If the school district is not one of the options in the drop-down, select "OTHER" and document the specific school district in *Other School District Name* field.
- d. *School Building*: Select the school building from the drop-down. If the building is not one of the options in the drop-down, select "OTHER(OTHER)" and document the specific school building in the *Other* field.
- e. *Email Address*: Enter the Referral Source's email address.
- f. *Office Phone #* and *Cell Phone #*: Enter the Office and/or Cell Phone number of the Referral Source.

Referral Reason

1.  Referral Reason :



- a. *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.
- b. *Referral Narrative*: Enter any additional information regarding the Referral here.

TIP: The Keyword option in the Search screen can be used to search Referrals by specific words entered in their Referral Narratives.



2. Click **Save** at the bottom of the screen before navigating away from the **Referral Information** screen otherwise any information that has been entered or updated will not be saved. The screen cannot be saved unless all of the mandatory [*] information has been entered.
3. The **Next** button at the bottom of the screen can be used to navigate to the next screen within the Left Navigation tiles.

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>