



Adding a Referral Category to a Contact – HSSC Job Aid

This job aid will walk the user through the user through associating one or more referral categories to a household's contact.

Adding a Referral Category to a Contact

1. Log into HSSC- Synergy and select an active case.
2. Navigate to the Case Summary screen. Under the Next Steps section, select *Add Contact* button.
3. Under the Case Contacts grid, select the *Add Contact* button to add a new contact.
 - a. Enter required information in the Contact Activity section. To save the contact, click the *Save* button at the bottom of the screen.

Contact Activity

Contact Date * 08/12/2020 Contact Status * Completed

Contact Type * Outgoing Phone Contact Location * -Select-

Primary Purpose of contact *
Completion of Assessment
Completion of Specific Action Steps
Consultation with System Partner or Provider
Distribution of Concrete Goods
Engagement Activities

Contact Description *
Contact

Contact Notes *
Contact notes

Clients **
Tammy Test (HOH) (1/1/19)
Tilly Test (1/1/2018)

Supports
Minimally Involved 3rd Par

New Support

Change Log

Referral Information

Referral Information

Referral Category Referred To

Referral Category Referred To

Referral Details

Please click on Save button below to save all information on this screen.

Save Referral Cancel

Mark as Confidential

Submit Save



4. Below the Contact Activity section is the new **Referral Information** grid.
 - a. To add referral information to a contact, select the referral category from the Referral Category dropdown, and enter the required *Referred To* information. Referral Details are optional.
 - b. In order to save the referral information to the grid, you must click the *Save Referral* button.

☐ Referral Information

Referral Information

Referral Category Referred To

Referral Category Referred To *

Childcare Childcare provider

Referral Details

Referral Details regarding childcare provider

Please click on Save button below to save all information on this screen.

Save Referral Cancel

☐ Mark as Confidential

Submit Save

- c. To save each referral category you add to a contact, you must click the *Save* button at the bottom of the screen.



5. Users can add as many referral categories as needed to a contact.
 - a. After clicking the *Save Referral* button to save referral information to the grid, you can select the Referral Category dropdown and Referred To Details to enter any additional referrals, clicking the *Save Referral* button to add each new referral to the contact.
 - b. After entering as many referrals as needed, click the *Save* button at the bottom of the screen to save the contact with all of the referral details.
 - c. Clicking the *Submit* button after the contact and referral information has been entered will submit the contact to your supervisor for approval.

PLEASE NOTE: Users must click the ***Save Referral*** button to add the referral to the grid. Additionally, users must click the ***Save*** button at the bottom of the screen for each referral category they add to ensure it saves to the contact.

6. Users can remove referral information by selecting the row they want to remove and then clicking the trashcan icon.



Referral Information

Referral Information

Referral Category	Referred To
Childcare	Childcare provider
Household Items and Furniture	Test provider

Show 10 entries

First Previous 1 Next Last

Referral Category

-Select-

Referred To

Referral Details

Please click on Save button below to save all information on this screen.

Save Referral

Cancel

☐ Mark as Confidential

Submit

Save

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 I-Service, go to: <https://servicedesk.alleghenycounty.us>

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