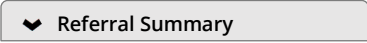# Quick Reference Guide:
Referral/Assignment Closure

In order to close a worker's Assignment to a Referral or the Referral itself, the assigned worker must address unapproved or rejected items. Referrals cannot be closed if there is more than one user assigned to that Referral. All of the items requiring attention will be listed in the *Current Notifications* pop-up.

Quick Overview:

1. Start the closure process by clicking on the Closure Validation Folder Icon **[📬]** above the
   [⌄ Referral Summary] pane.

2. Make note of all items listed in the *Current Notifications* pop-up that must be resolved before Assignment or Referral closure can occur.

3. The following unresolved items may prevent Assignment or Referral closure:
   a. **Concrete Goods Requests** with a status of: *Draft, Awaiting Approval*, or *Rejected*
      [Concrete Goods Job Aid]
   b. **Contacts** with a status of: *Draft, In Progress*, or *Rejected*
      [Contacts Job Aid]
   c. **Meeting Prep** with a status of: *Draft*
      [Meeting Prep Job Aid]
   d. **Transition Plans** with a status of: *Draft*, *In Progress*, or *Rejected*
      [Meetings & Transition Plan Job Aid]
   e. **Transportation Requests** with a status of: *Draft*, *In Progress*, or *Rejected*
      [Transportation Job Aid]
   f. **Youth Summary** with a status of: *Draft*
      [Youth Summary Job Aid]

4. Once all unresolved items have been completed, navigate to the **Referral Assignment** screen to close an Assignment or the whole Referral. [Referral Assignment Job Aid]

NOTE: *If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.*
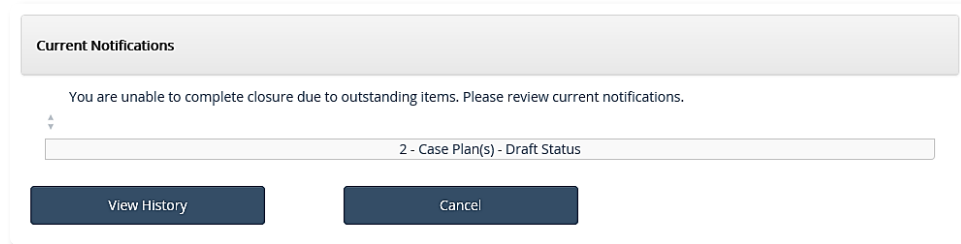*If there is an open IL Stipend, contact JoAnn Hannah for guidance.*

Preparing for Assignment or Referral Closure

1. From the [Dashboard] : Locate the Referral and click on the *Referral ID* to bring the Referral into focus.

2. Start the closure process by clicking on the Closure Validation Folder Icon **[🗁]** above the [❤ Referral Summary] pane.

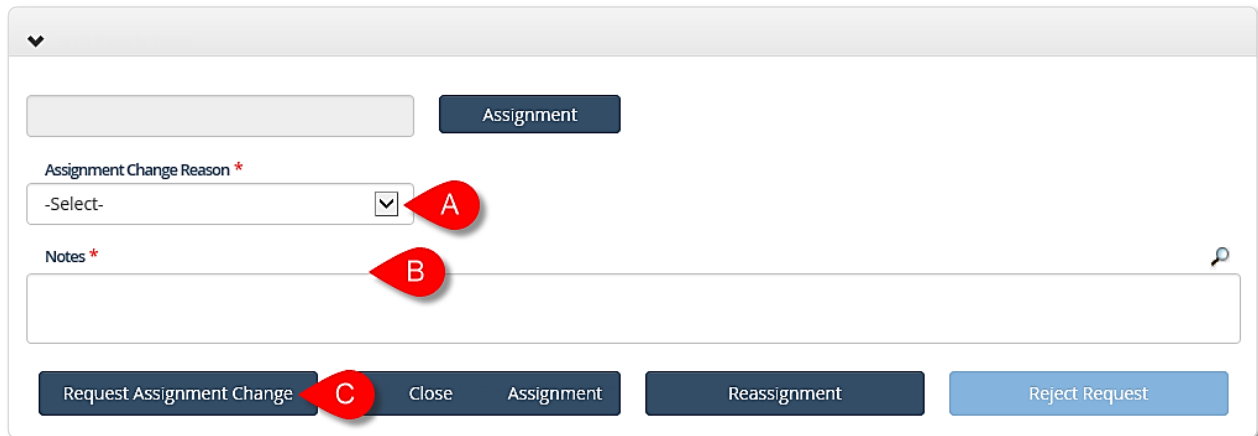3. Make note of all items listed in the *Current Notifications* pop-up that must be resolved before closure can occur.

   Current Notifications

   You are unable to complete closure due to outstanding items. Please review current notifications.

   2 - Case Plan(s) - Draft Status

   [View History]   [Cancel]

   a. Click [Cancel] to close the *Current Notifications* pop-up.
   b. Clicking [View History] will display the *Overrride History* for this Referral.

5. The following unresolved items may prevent Assignment or Referral closure:
   a. **Concrete Goods Requests** with a status of: *Draft* or *Awaiting Approval*
      [Concrete Goods Job Aid]

   b. **Contacts** with a status of: *Draft, In Progress*, or *Rejected*
      [Contacts Job Aid]

   c. **Meeting Prep** with a status of: *Draft*
      [Meeting Prep Job Aid]

   d. **Transition Plans** with a status of: *Draft*, *In Progress*, or *Rejected*
      [Meetings & Transition Plan Job Aid]

   e. **Transportation Requests** with a status of: *Draft*, *In Progress*, or *Rejected*
      [Transportation Job Aid]

   f. **Youth Summary** with a status of: *Draft*
      [Youth Summary Job Aid]

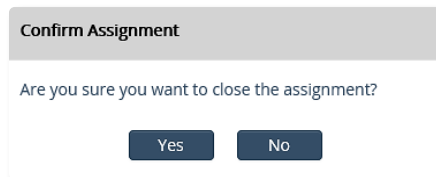## Workers: Closing an Assignment or Referral

1. From the Dashboard : Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.

   a. Click on the Referral Assignment tile.

1. Requesting an assignment closure: Click on the tab that matches the worker's role:

   a. *Assignment Change Reason*: Select the reason that the assignment is being changed from the drop-down.

   b. *Notes*: Enter details of the reason for changing the assignment.

   c. Click Request Assignment Change .

      i. The worker will receive the confirmation pop-up "Are you sure you want to close the assignment?"

      ii. Clicking Yes will send the request for assignment change to the worker's Admin or Supervisor for approval. Clicking No will cancel the request.

      iii. If the worker is the last worker assigned to the Referral the Referral will close when this request is approved.

Admin/Supervisors: Approving or Rejecting a Reassignment Request

1. Reassignment Requests will appear on the Admin/Supervisor's Dashboard: Clicking on the *Role of the Worker* will navigate directly to the Assignment Change Request for that Referral.

2. Assignment Change Request:

a. To close the assignment without reassigning to a new worker, click **Close … Assignment** .
   i. The confirmation pop-up "Are you sure you want to close the assignment?" will appear.

   <p style="text-align:center">OR</p>

   If the worker is the last worker assigned to the Referral, the confirmation pop-up: "Closing this assignment will close the referral. Are you sure?" will appear.
   1. Clicking **Yes** will close the assignment. Clicking **No** will close the pop-up without closing the assignment.

b. To open the *Reassignment* pop-up and reassign the role to another worker, click **Reassignment** and complete the *Reassignment* pop-up.

c. To reject the request for assignment change or assignment closure, complete the *Comments* field and click **Reject Request** .

Admin/Supervisors: Closing the Referral

1. The Referral can be closed by the Admin/Supervisor when the last assigned worker is finished working with the Youth.

   a. Click on the *Referral Closure* tab on the [Referral Assignment] screen.

2. Completing the *Referral Closure* tab:

   a. *Closure Date*: The Closure Date will default to today's date.
   b. *Reason for Closure*: Select the Reason for Closure from the drop-down.
   c. *Notes*: Detail why the Referral is being closed in this field.
   d. Click [Close Referral]. The confirmation pop-up: "Are you sure you want to close the referral?" will appear:

   Clicking [Yes] will close the Referral. Clicking [No] will close the pop-up and the Referral will remain open.

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