



## Jail Collaborative– Provider Refer a Client for Additional Services

A Jail Collaborative Provider completes the Services screen to create a referral for services that provider is able to deliver to new or existing clients. This screen is also completed to refer an existing client for additional services to be delivered by a different provider.

### Accessing the Services screen

1. Bring the Jail Client into focus.
2. Navigate to the *Services List* screen.
  - a. **Jail Collab. > Services > Services List**

*TIP: This screen lists a history of services the Jail Client has been referred to that are currently open. To view a history of all service episodes, click the radio button next to View All Service Episodes. To view documented Outside Referrals, click the radio button for View All Outside Referrals.*

- b. To view a referral from the Services List, highlight the service episode and click **[Show]**.
  - c. Select **[New]** to refer this client for a new service.
3. The *Select Service Type* screen displays.

### Completing the Select Service Type screen

1. Select the type of referral to document.
  - a. *Request Jail Collaborative Service* allows users to complete a service referral for the Jail Client.
  - b. *Document Outside Referral (Non-Jail Collaborative)* allows the user to document details about services received by the Jail Client outside of the Jail Collaborative initiative.

### Completing the Request Jail Collaborative Service screen

**Services**  
 \* Denotes Required Fields \*\* Denotes Half-Mandatory Fields

**Service Episode**

Original Requestor Kenneth Hirtz-PAD	Provider 	Status 	Referral Date 	Close Date 	Consent to share updated by 
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**Service Information**

Referred By  
Jail

Services \*

**Select**

Status\*  
New Service Request  
☐ Cancel Request

Service Date

Address where services are to be delivered

**New**

Reason for service

☐ Warden Override

Reasons

Type of Referral

**Select**

☐ Consent to share

Close Date

☐ Unable to provide services

Reason

Service Narrative

**Provider**

Provider Type  
☒ Provider ☐ Staff

Name  
 **Find**

Resource ID

Resource Type

Address

Agency/

Home Phone

Work Phone

Extension

**Save** **Approval** **Cancel**

1. *Service Episode* section.
  - a. *Original Requestor* field populates with the name of the user logged in.
  - b. *Referral Date* populates with the date the request is submitted once the screen is saved.
  - c. Provider field populates once the Jail/Re-entry/Courts/Probation user selects a provider for this service.
2. Complete the *Service Information* section.
  - a. *Original Requestor* field populates with the service provider making the request.
  - b. Click **[Select]** under the *Services* box. The *Services* list appears. To select the desired service press the **[+]** sign to expand nodes to view all service options. Once the boxes for all desired services are checked, click **[OK]**. The selected service appears in the field.
3. If *Family Support* or *Education* services is selected, the *Type of Referral* multi-select box becomes enables. Click the **[Select]** button under the *Type of Referral* box. The *Type of Referral* multi-select box appears; highlight any that apply, click **[>>]** and click **[OK]**.
 

*TIP: Select only one service per request. The application searches for providers that provide all the services checked. Since most providers service the Jail Collaborative only offer one service, selecting multiple services will result in no providers being found. If more than one service is needed, submit separate request for each service.*

  - a. *Status* field populates to *New Service Request*.
 

*TIP: The Cancel Request, Service Date, Consent to Share, Close Date, Unable*

to provide services, Reason and Warden Override fields are disabled.

- b. Enter an Address where services are to be delivered.
- c. Enter narrative comments in the Reason for service box.

*TIP: The remaining fields in this section are not available to Providers.*

4. Provider section.

- a. As a provider, you cannot complete this section. Once you send the service request for approval, the Jail/Re-entry/Courts/Probation user responsible for the client has the option to choose the provider for this service.

*TIP: Employment and Training providers have the ability to directly refer a Jail Client to other Employment and Training providers.*

5. Submit for Approval.

- a. Click **[Save]** to save information entered.
- b. Once you have completed all the required fields, click **[Approval]**. An Approval pop-up appears.<sup>10</sup>

Approval

Requesting Worker	Request Date	Approving/Denying Worker	Approve/Deny Date
Requesting Worker: Charles Schramm	Requesting Dates: Wednesday, March 14, 2012	Approving Worker: Hitz-PAD, Kenneth - Jail Unit	Approving Dates:
<input type="checkbox"/> Request <input type="checkbox"/> Deny <input type="checkbox"/> Approve <input type="checkbox"/> Send Back <input type="checkbox"/> Additional Approval			
Reason:			
Comments:			
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

- c. Check the box next to Request and click **[OK]**.

*TIP: This request for service is sent to the Internal user responsible for this client to review.*

*TIP: Status field in the Service Episode section changes to Awaiting Approval once referral is submitted for approval.*

6. If form is completed for the wrong client, or mistakes are noted after it is submitted for approval, open the request from the Services List screen and click the box next to Cancel Request. This voids the request. You can cancel a request until the Jail/Probation/Courts/ Re-entry user has either completed the approval or canceled the request.

## Completing the Provider section

Provider

Provider Type  
☒ Provider ☐ Staff

Name

Address

Resource ID  Resource Type

Agency

Home Phone  Work Phone  Extension

*TIP: This section only applies to Employment and Training providers who are directly referring a Jail Client to other Employment and Training providers.*

1. Complete the *Provider* details.
  - a. Click **[Find]** next to the *Name* field to search for a provider.
  - b. The *Provider Search* screen appears with the *Services* field populated based on prior selections.
    - i. Click **[Find]** to search for the Provider.
    - ii. Highlight the desired provider from the *Search Results* grid and click **[OK]**.  
*TIP: Only providers who provide ALL of the services selected in the Services multi-select above appear. If you prefer different providers for different services, you need to request these services in separate Service Requests.*
  - c. Once a provider is selected, the Provider information populates the rest of the fields in the *Provider* section.

### Completing the Document Outside Referral (Non-Jail Collaborative) screen

The screenshot shows a web form titled "Services". At the top, it says "\* Denotes Required Fields \*\* Denotes Half-Mandatory Fields". The form is divided into two main sections: "Service Episode" and "Service Details".

**Service Episode**

Original Requestor	Provider	Status	Last Updated By	Last Updated Date
Kenneth Hirtz-PAD				

**Service Details**

Service Start Date*	Service End Date	Provider*	Service Type*	Other Specify
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Buttons: Save, Cancel

1. Selecting the *Document Outside Referral (Non-Jail Collaborative)* options directs the user to the appropriate *Services* screen.
2. The *Service Episode* section automatically populates.
3. Complete the *Service Details* section.
  - a. Select a *Service Start Date*.
  - b. Select a *Service End Date*, if applicable.
  - c. Enter the *Provider* name.
  - d. Select a *Service Type*. If *Other* is selected, the *Other Specify* field becomes enabled and required.
  - e. Enter narrative comments in the *Comments* box.
4. Click **[Save]** to save the screen.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [servicedesk@alleghenycounty.us](mailto:servicedesk@alleghenycounty.us) or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>.

This Job Aid and additional user materials are located on the DHS Amazon site at <http://dhswebt.s3.amazonaws.com/KIDSJobAids/index.html>.