

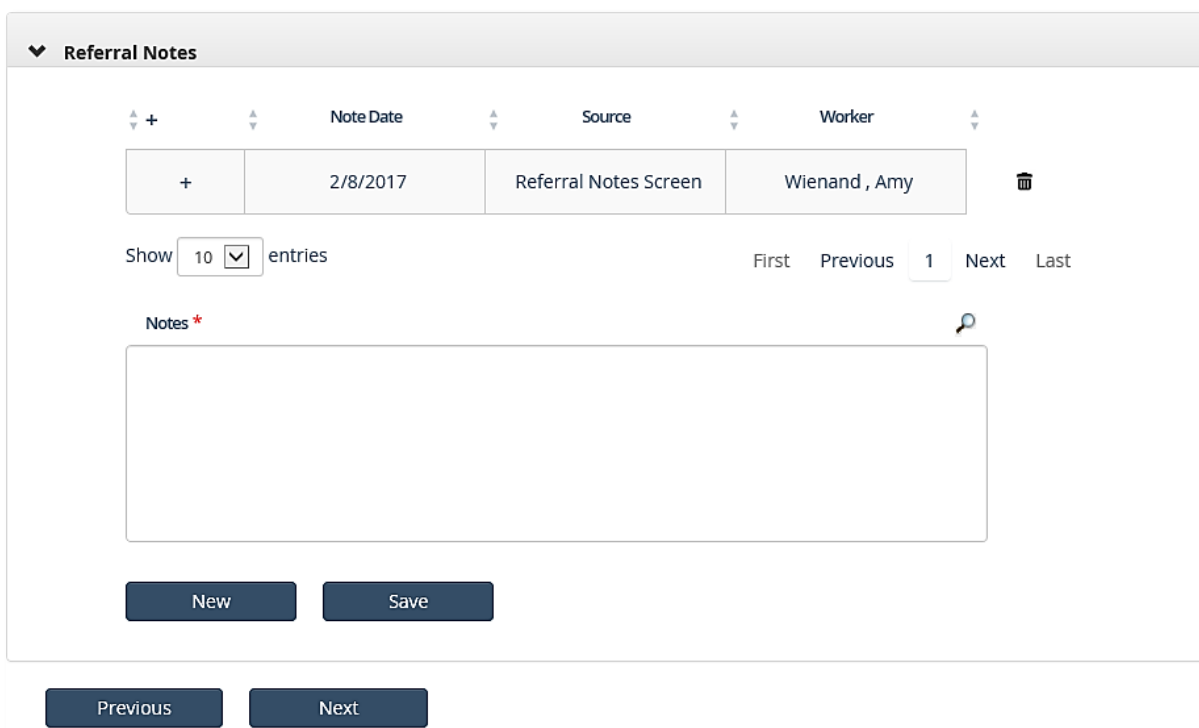


## Referral – Referral Notes

### MH Residential Job Aid

The *Referral Notes* screen allows the user to document notes and contacts regarding the Consumer and the Referral. Notes documented by the worker in Referral will carry over to the **Case Notes** screen.

#### Referral Notes

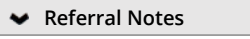


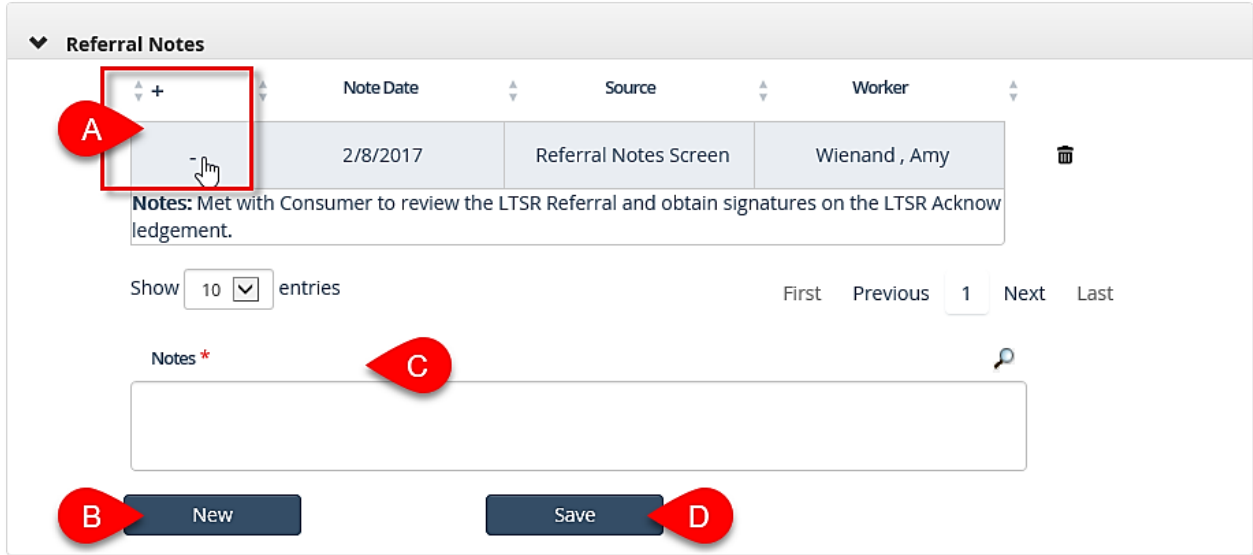
The screenshot shows the 'Referral Notes' interface. At the top, there's a header 'Referral Notes' with a dropdown arrow. Below it is a table with columns: '+', 'Note Date', 'Source', 'Worker', and a trash icon. The table contains one row with values: '+', '2/8/2017', 'Referral Notes Screen', and 'Wienand, Amy'. Below the table, there's a 'Show' dropdown set to '10' and 'entries'. To the right are navigation links: 'First', 'Previous', '1' (selected), 'Next', and 'Last'. Below this is a 'Notes' section with a red asterisk and a magnifying glass icon. It contains a large text area for notes. At the bottom of the notes section are 'New' and 'Save' buttons. At the very bottom of the screen are 'Previous' and 'Next' buttons.

#### Navigation






- From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
  - Click on the **Referral Notes** tile.
- The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.
  - CAUTION:** The **Back** button at the top of the screen will navigate the user back to the Dashboard and any unsaved information will be lost.

## Referral Notes

1.  pane:



The screenshot shows the 'Referral Notes' pane. At the top is a table with columns: Note Date, Source, Worker, and a delete icon. The first row shows '2/8/2017', 'Referral Notes Screen', and 'Wienand, Amy'. Below the table is a text box labeled 'Notes' with a red 'C' callout. At the bottom are 'New' (red 'B') and 'Save' (red 'D') buttons. A red 'A' callout points to a '+' icon in the top left of the table, and a red '-' icon is shown below it.

- To view the *Notes* from the grid without opening the Note, click on the [ + ] to the left of the Note in the grid. To close the *Notes* view, click on the [ - ] that now appears to the left of that Note in the grid.
    - To view the *Notes* for all of the Notes in the current page of the grid, click on the [ + ] above the grid. To collapse all of the *Notes*, click on the [ - ] that now appears above the grid.
  - Click  to start documenting a new Note.
  - Notes*: Enter your notes in the Notes narrative text box.
  - Click  to add the note to the grid.
2. To delete a Note, click the Delete Icon [  ] to the right of the Note in the *Referral Notes* grid.
- A *Confirm Delete* pop-up will appear: Clicking  will delete the Note. Clicking  will cancel the action and the Note will not be deleted.

## For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto: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> or <http://dhsassist.dhs.allegheny.local> for internal users.