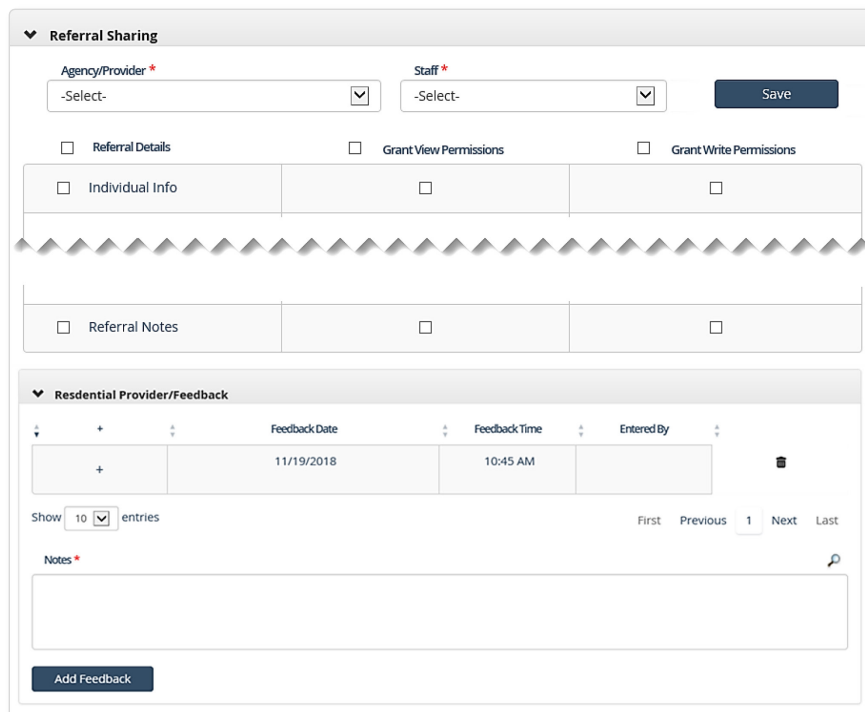




Referral: Referral Share and Residential Provider Feedback – MH Residential Job Aid

The *Referral Share* screen allows the users to share view and/or edit access to all or part of a Referral with another MH Residential user. This screen also contains the Residential Provider Feedback area where DHS and Providers can correspond about a prospective Referral.

Referral Share and Residential Provider Feedback



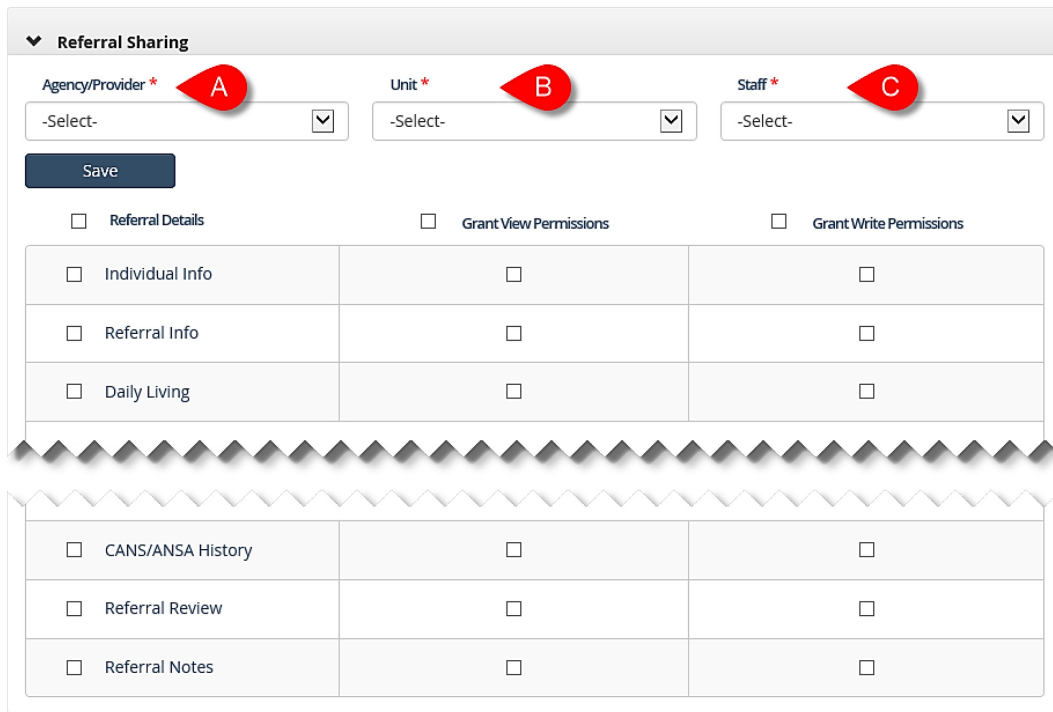
The screenshot shows a web interface with two main sections. The top section, titled 'Referral Sharing', contains two dropdown menus for 'Agency/Provider' and 'Staff', both with '-Select-' as the current selection. To the right of these is a 'Save' button. Below the dropdowns are three checkboxes: 'Referral Details', 'Grant View Permissions', and 'Grant Write Permissions'. Underneath these is a table with three columns and one row, each containing a checkbox. The bottom section, titled 'Residential Provider/Feedback', features a table with columns for 'Feedback Date', 'Feedback Time', and 'Entered By'. The first row shows '11/19/2018', '10:45 AM', and an empty field. Below the table is a 'Show 10 entries' dropdown, navigation links 'First', 'Previous', '1', 'Next', and 'Last', and a 'Notes' text area with an 'Add Feedback' button at the bottom.

Navigation

1. Referral Sharing: Locate the desired Referral on the **Dashboard** and click on the *Referral ID* to bring the Referral into focus. Then click the **Referral Share** tile.
(See [Page 2](#) of this Job Aid for detailed instructions on how to share a Referral)
2. Residential Provider Feedback: Locate the desired Referral on the **Dashboard** inside the **Referrals Shared for Residential Provider Feedback** pane and click on the *Referral ID* to bring the Referral into focus. The Referral will open directly to the **Referral Share** screen.
(See [Page 4](#) of this Job Aid for detailed instructions on how to review and enter Feedback)
3. The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.

Referral Sharing

1. **Referral Sharing** pane: Use this pane to give another user full or partial access to the Referral in focus. Viewing access (*View Permissions*) and/or Editing access (*Write Permissions*) can be given on a per screen basis.



Referral Sharing

Agency/Provider * **A** ☐

Unit * **B** ☐

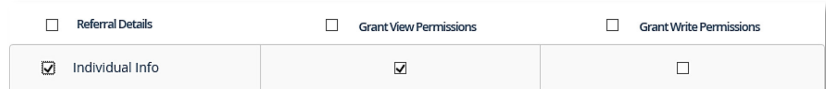
Staff * **C** ☐

Save

☐ Referral Details	☐ Grant View Permissions	☐ Grant Write Permissions
☐ Individual Info	☐	☐
☐ Referral Info	☐	☐
☐ Daily Living	☐	☐
☐ CANS/ANSA History	☐	☐
☐ Referral Review	☐	☐
☐ Referral Notes	☐	☐

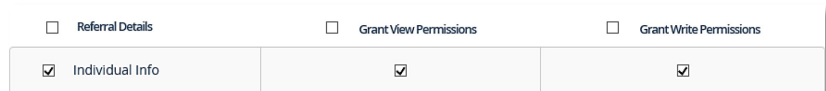
- a. *Agency/Provider*: Select the Agency/Provider of the user with whom the Referral is being shared from the drop-down.
- b. *Unit*: Select the Unit of the user that the Referral is to be shared with from the drop-down.
- c. *Staff*: Select the user with whom the Referral is being shared from the drop-down. This drop-down will update based on the *Agency/Provider* selected.
- d. Select the specific screen or screens to share access.

- i. Viewing access (*View Permissions*): Check the desired screen's checkbox under the *Referral Details* column or the *Grant View Permissions* column a specific screen or screens. Example:



☐ Referral Details	☐ Grant View Permissions	☐ Grant Write Permissions
☒ Individual Info	☒	☐

- ii. Editing access (*Write Permissions*): Click the desired screen's checkbox under the *Grant Write Permissions* column a specific screen or screens. Note that when *Write Permission* is given *View Permission* and *Referral Details* are automatically selected as well. Example:



☐ Referral Details	☐ Grant View Permissions	☐ Grant Write Permissions
☒ Individual Info	☒	☒



2. Granting View Permissions to all of the Referral screens: Check either the *Referral Details* checkbox above the grid or the *Grant View Permissions* checkbox above the grid. This will automatically check all of the *Referral Details* and *Grant View Permissions* checkboxes:

Example:

☐ Referral Details	☐ Grant View Permissions	☐ Grant Write Permissions
☒ Individual Info	☒	☐
☒ Referral Info	☒	☐
☒ Daily Living	☒	☐

3. Granting Write Permissions to all of the Referral screens: Check the *Grant Write Permissions* checkbox above the grid. This will automatically check all of the *Referral Details*, *Grant View Permissions*, and *Grant Write Permissions* checkboxes.

Example:

☐ Referral Details	☐ Grant View Permissions	☒ Grant Write Permissions
☒ Individual Info	☒	☒
☒ Referral Info	☒	☒
☒ Daily Living	☒	☒

Tip: View Access to the Individual Info screen will automatically be given when any other screen is selected. This is because the Individual Info screen is the first screen that appears when a user navigates to a Referral.

4. Click **Save** above the grid to save the Permissions. Once the Permissions are saved the user's name will have [Shared] next to it in the *Staff* drop-down:

▼ Referral Sharing

Agency/Provider *	Unit *	Staff *	Save
Acme Co. ▼	Inpatient ▼	[Shared] Smith, Jane ▼	

5. Permissions can be revoked or added at any time by selecting the user's name from the *Staff* drop-down, updating their Permissions, and clicking **Save**.

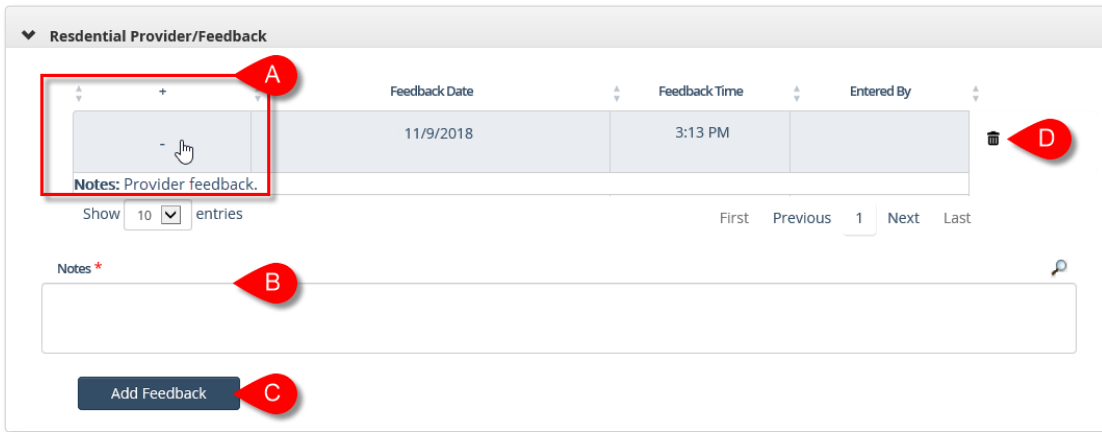
Tip: Supervisors and Managers can also use the Share Referral screen to update shared permissions on Referrals assigned to their Unit or Program.

6. Shared Referrals will appear in their own pane on the dashboard of the user with whom the Referral has been shared.

Residential Provider Feedback

DHS can send a request for feedback on a Referral to multiple Residential Providers using the **Residential Provider Feedback** pane. Residential Providers will be able to see DHS' feedback, their own feedback, and feedback from other Residential Providers. When a Residential Provider receives a feedback request that Provider is also given read-only access to the Referral. This allows the Provider to review all of the Referral information before sending feedback to DHS.

1. **Residential Provider Feedback** :



- a. To view the *Notes* from the grid without opening that specific Feedback note, click on the [+] to the left of the Feedback in the grid. To close the *Notes* view, click on the [-] that now appears to the left of that Feedback in the grid.
 - i. To view the *Notes* for all of the Feedback 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.
- b. *Notes*: Enter your Feedback in the *Notes* narrative text-box.
- c. Click **Add Feedback** to add the Feedback to the grid. **Tip:** If the *Notes* text-box already has text entered, click the **Add Feedback** button first to start a new Feedback note.
- d. Deleting Feedback (Users will only be able to delete their own Feedback): Click the Delete Icon [] to the right of the Feedback in the grid. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Feedback. Clicking **No** will cancel the action and the Feedback will not be deleted.

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> or <https://alleghenycounty.sharepoint.com/sites/dhsassist> for internal users.