Manage Developmental Screening Referral Step Action Table

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User

Generalist or Caseworker assigned to the Assessment or Case.
Caseworker Supervisor affiliated to the Assessment or Case County.

Process

This step action table describes the actions needed to view and edit a Developmental Screening referral associated to a Case. The Developmental Screening Referral includes the following sections: General Information, Parent or Guardian, Current Caregiver, and Referral Agency.

Introduction

- The Developmental Screening is a referral supporting children under the age of five (at the time of the referral).
- The *Parent or Guardian*, *Current Caregiver*, and *Referral Agency* panels only display if the response to the *Will a Dev Screening Referral be Submitted?* question is yes in the General Information panel.

Important Note:

The steps demonstrating how to navigate to the *Developmental Screening* referral will be provided in the future as the navigation process is finalized.

This step action plan will provide the steps for completing the *Developmental Screening* referral after it is created or accessed from an Assessment or a Case.

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Developmental Screening – General Information

Step	Action
1	In the *Left Navigation* panel. • Click **General Information.** This will take you to the *General Information* panel of the Developmental Screening Referral.
2	In the *General Information* panel. • The following fields are populated during the addition of a Developmental Screening and are read-only: ○ **Client ID.** ○ **Family Name.** ○ **Date Created.** ○ **Created By.**
3	In the *General Information* panel. • The **County Making Referral** field is a required field. The default value is the Assessment County. If changes are needed. ○ Click the **County Making Referral** drop-down arrow. Counties affiliated with the worker will be listed. ○ Select the appropriate County from the list. • The **Children** text box is a required field (this is a multi-select field, so more than one choice can be made). ○ Click the drop-down arrow in the **Children** text box. The list includes all clients marked as PAC on the assessment. Only children under age 5 at the time of the referral will be listed. ○ Select one or more children for the Developmental Screening. • **Will the allegations of abuse/neglect be founded?** field is a required field (there is no default value for this field). ○ Click the **Yes** or **No** toggle as appropriate to respond to the question. • **Will a Dev Screening Referral be submitted?** field is a required field. (there is no default value for this field). ○ Click the **Yes** or **No** toggle as appropriate to respond to the question. **Note:** Different fields display based on the response to this question.

4	If the *Will a Dev Screening Referral be submitted?* toggle is set to **No,** only the **Reason for No Referral** and Comments fields display. • Click the **Reason for No Referral** drop-down arrow, if needed. • Select the appropriate Reason from the menu list. • Click in the **Comments** text box, if needed. • Enter Comments as appropriate. • Click **Save** to save your changes. **Note**: This will complete the Developmental Screen Referral. The *Parent or Guardian*, *Current Caregiver*, and *Referral Agency* panels only display if the response to the *Will a Dev Screening Referral be Submitted?* question is yes in the General Information panel.
5	If the *Will a Dev Screening Referral be submitted?* toggle is set to **Yes**. The *Primary Spoken Language*, *Is Parent or Guardian aware of Referral?*, *Do any of the following people have developmental concerns about this child?*, *Areas of Concern*, and *Comments* fields display. • Click the **Primary Spoken Language:** drop-down arrow (this is a required field). • Select the appropriate language from the menu list. • Click the **Yes** or **No** toggle for **Is Parent or Guardian aware of Referral?** (this is a required field). • Click the drop-down arrow in the **Do any of the following people have developmental concerns about this child?** text box. (this is a multi-select field, so more than one choice can be made). • Select one or more People, as appropriate. • Click the drop-down arrow in the **Areas of Concern:** text box. (this is a multi-select field, so more than one choice can be made). • Select one or more Concerns, as needed. • Click in the **Comments** text box, if needed. • Enter Comments as appropriate.
6	In the header for the *General Information* panel. • Click the **Actions** menu in the *General Information* panel. • The **Delete** menu item displays. **Note:** This functionality will be enabled in a future release.
7	Changes to the *Developmental Screen Referral* page will need to be saved before navigating away from the page. • Click **Save** at the top of the page or at the bottom of the page to save changes.

8	Use the links in the left navigation panel or the scroll bar to continue to the **Parent or Guardian** section.

Developmental Screening – Parent or Guardian

Step	Action
1	In the *Left Navigation* panel. • Click **Parent or Guardian.** This will take you to the *Parent or Guardian* panel of the Developmental Screening Referral.

2	In the *Parent or Guardian* panel.
	• The **Name** field is a required field.
	  ○ Click the **Name** drop-down arrow. Clients associated with the Assessment will be listed.
	  ○ Select the appropriate Client from the list.
	• The following areas are auto-populated with the current, active information from the Client Record.
	  ○ **Address.**
	  ○ **Phone Number.**
	  ○ **Email Address.**

3	Add or Edit *Phone Number*. • The **Phone Number** auto-populates with current, active phone number from the client record. If changes are needed, • Click the **Edit Phone Number** hyperlink. • The *Edit Phone Number* pop-up window opens. • Click **Add Phone Number**. • The *Add Phone Number* pop-up window opens. • Complete the **Type**, **Phone Number**, **Extension**, **Country**, **Start Date**, and **Comments** fields as needed. • Click **Save**. • The *Edit Phone Number* pop-up window displays. • If there is more than one phone number listed, click the appropriate radio button for the **Primary Phone** to designate the phone number as primary. • Click **Save**. • The *Primary Phone* number displays in the Parent or Guardian panel. • The **Phone Unknown** field is unchecked by default. • If the phone is unknown, click the checkbox for the **Phone Unknown** field. • The phone number fields will be cleared.

4	Add or edit *Address*. • The **Address** auto-populates with current, active address from the client record. If changes are needed, • Click the **Edit Address** hyperlink. • The *Edit Location Address* pop-up window opens. • Click **Add Location Address**. • The *Edit Address* pop-up window opens. • Complete the **Address** fields as needed. • Click **Save**. • The *Edit Location Address* pop-up window displays. • If there is more than one address listed, click the appropriate radio button for the **Last Known Address**. • Click **Save**. • The *Last Known Address* displays in the Parent or Guardian panel. • The **Whereabouts Unknown** field is unchecked by default. • If the address is unknown, click the checkbox for **Whereabouts Unknown**. • The address will be cleared.
5	Add or edit *Email Address*. • The **Email Address** auto-populates with the open, active email address from the client record. If changes are needed, • Click the **Edit Email Address** hyperlink. • The *Edit Email Address* pop-up window opens. • Click **Add Email Address**. • The *Add Email Address* pop-up window opens. • Complete the **Email Address** fields as needed. • Click **Save**. • The *Edit Email Address* pop-up window displays. • If there is more than one email address listed, click the appropriate radio button for the **Primary Email**. • Click **Save**. • The *Primary Email* displays in the Parent or Guardian panel.
6	Changes to the *Developmental Screen Referral* page will need to be saved before navigating away from the page. • Click **Save** at the top of the page or at the bottom of the page to save changes.

7	Use the links in the left navigation panel or the scroll bar to continue to the **Current Caregiver** section.

Developmental Screening – Current Caregiver

Step	Action
1	In the *Left Navigation* panel. • Click **Current Caregiver.** This will take you to the *Current Caregiver* panel of the Developmental Screening Referral.

2	In the *Current Caregiver* panel.
	• If the check box for **Same as Parent or Guardian** is checked, no other fields display in the *Current Caregiver* panel.
	• If the check box for **Same as Parent or Guardian** is not checked, additional fields are provided.
	• The **Type** field is a required field.
	    ○ Click the **Type** drop-down arrow.
	    ○ Select the appropriate Type from the list.
	• The **Name** field is a required field.
	    ○ Click the **Name** drop-down arrow. If the Type is Client, Clients associated with the Assessment will be listed.
	    ○ Select the appropriate Name from the list.
	• The following areas are auto-populated with the current, active information from the Client Record.
	    ○ **Address.**
	    ○ **Phone Number.**
	    ○ **Email Address.**

3	Add or Edit *Phone Number*. • The **Phone Number** auto-populates with current, active phone number from the client record. If changes are needed, • Click the **Edit Phone Number** hyperlink. • The *Edit Phone Number* pop-up window opens. • Click **Add Phone Number**. • The *Add Phone Number* pop-up window opens. • Complete the **Type**, **Phone Number**, **Extension**, **Country**, **Start Date**, and **Comments** fields as needed. • Click **Save**. • The *Edit Phone Number* pop-up window displays. • If there is more than one phone number listed, click the appropriate radio button for the **Primary Phone** to designate the phone number as primary. • Click **Save**. • The *Primary Phone* number displays in the Current Caregiver panel. • The **Phone Unknown** field is unchecked by default. • If the phone is unknown, click the checkbox for the **Phone Unknown** field. • The phone number will be cleared.
4	Add or edit *Address*. • The **Address** auto-populates with current, active address from the client record. If changes are needed, • Click the **Edit Address** hyperlink. • The *Edit Location Address* pop-up window opens. • Click **Add Location Address**. • The *Edit Address* pop-up window opens. • Complete the **Address** fields as needed. • Click **Save**. • The *Edit Location Address* pop-up window displays. • If there is more than one address listed, click the appropriate radio button for the **Last Known Address**. • Click **Save**. • The *Last Known Address* displays in the Current Caregiver panel. • The **Whereabouts Unknown** field is unchecked by default. • If the address is unknown, click the checkbox for **Whereabouts Unknown**. • The address will be cleared.

5	Add or edit *Email Address*. • The **Email Address** auto-populates with the open, active email address from the client record. If changes are needed, • Click the **Edit Email Address** hyperlink. • The *Edit Email Address* pop-up window opens. • Click **Add Email Address**. • The *Add Email Address* pop-up window opens. • Complete the **Email Address** fields as needed. • Click **Save**. • The *Edit Email Address* pop-up window displays. • If there is more than one email address listed, click the appropriate radio button for the **Primary Email**. • Click **Save**. • The *Primary Email* displays in the Current Caregiver panel.
6	Changes to the *Developmental Screen Referral* page will need to be saved before navigating away from the page. • Click **Save** at the top of the page or at the bottom of the page to save changes.
7	Use the links in the left navigation panel or the scroll bar to continue to the **Referral Agency** section.

Developmental Screening – Referral Agency

Step	Action
1	In the *Left Navigation* panel. • Click **Referral Agency.** This will take you to the *Referral Agency* panel of the Developmental Screening Referral.

2	In the *Referral Agency* panel.
	• The **County where child resides** field is a required field.
	    o Click the **County where child resides** drop-down arrow. All Colorado counties will be included in the list.
	    o Select the appropriate County from the menu list.
	• The **Agency Name** field is a required field. If an Agency has been selected, the *Agency Name*, *Contact Person*, *Phone 1*, *Phone 2*, *Fax*, *Email*, and *Address* will be pre-populated.
	    o Click the **Select Agency** hyperlink to add or change the agency.
	The *Select Agency* pop-up window displays.

3	In the *Select Agency* pop-up window. • Click the **Child Age** drop-down arrow. • Select the appropriate Child Age from the list. • Click the **Residence County**. • Select the appropriate Residence County from the list. • Click **Search**. • Search Results display based on the County and Age criteria. • Select the appropriate **Search Results**. • Click **Select**.
4	In the *Referral Agency* panel. • The *Agency Name*, *Contact Person*, *Contact Email Address*, *Phone 1* (and *Phone 2* if present), and the *Location Address* populate in the Referral Agency panel. • Click **Save**. • A message displays identifying the Developmental Screen saved successfully. • Click **Ok**.

5	In the *Referral Agency* header. • Click the **Actions** menu in the *Referral Agency* panel. • Select **Add Agency** to add a new Referral Agency. **Note:** This functionality will be enabled in a future release. • Select **Send Referral** from the menu. The *New Referral* pop-up window displays.

6	In the *New Referral* pop-up window.
	• Click the **Send Method** drop-down arrow.
	• Select the appropriate Method to send the Referral.
	• If *Email* is selected,
	    ○ The **Email Address** is populated with the Agency Email Address.
	    ○ The **Method** is set to Email.
	• If *Print* is selected,
	    ○ The **Address** fields are populated with the Agency Address.
	    ○ A report will open in a new browser to save locally and print.
	• Click **Save**.

7	In the *Referral Agency* panel. • The **Date Sent** defaults to current date. • The **Sent By** field is populated with the Worker name. • The **Sent To** field is populated with the email address if the method is Email, or the concatenated mailing address if the method is Print. • The **Method** field is set to either Email or Print.
8	Changes to the *Developmental Screen Referral* page will need to be saved before navigating away from the page. • Click **Save** at the top of the page or at the bottom of the page to save changes.