



# Resource – Access and View Referrals Job Aid



## User

- Resource Workers.
- Public Child Placement Agency Workers can view the list of Referrals in the **Referrals** section but will not be able to view the Parties Involved in the Referral, access the Narrative or Closure Summary, or open the Referral Details record.

## Process

This Job Aid table describes the actions needed to access and view the Referrals for a selected Provider.

Refer to the *TM Resource – Access and View Provider Details* job aid for instructions on how to navigate to the desired Provider Details page.

## Introduction

- All Referrals associated with the selected Provider for institutional abuse or neglect will be displayed.
- The Referrals list includes Household Member(s) where clients were involved in the Referral.
- Default sort is by Referral Date with the most recent on top.
- The total number of existing Referrals is indicated in the badge count.
- Columns in the table can be sorted or filtered using the icons to the right of each column heading.

## Table of Contents

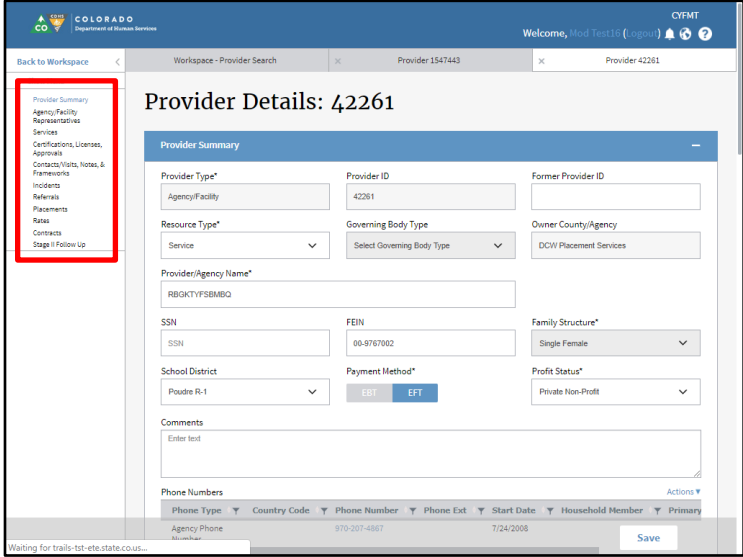
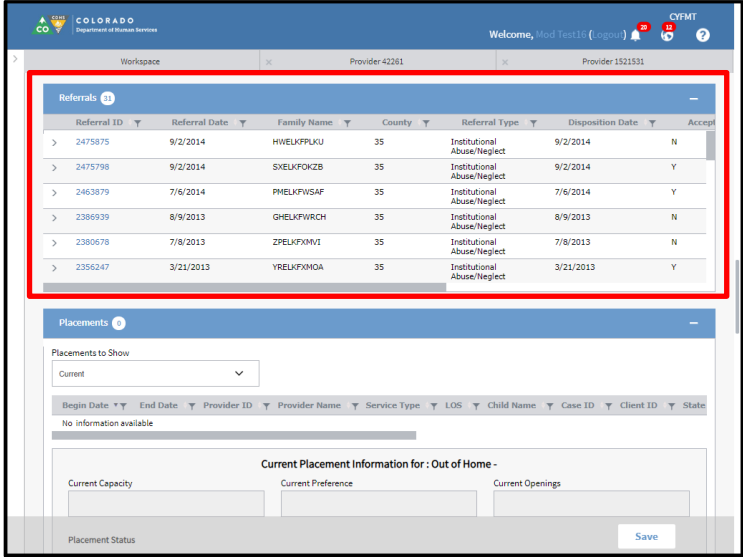
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## Access and View Referrals

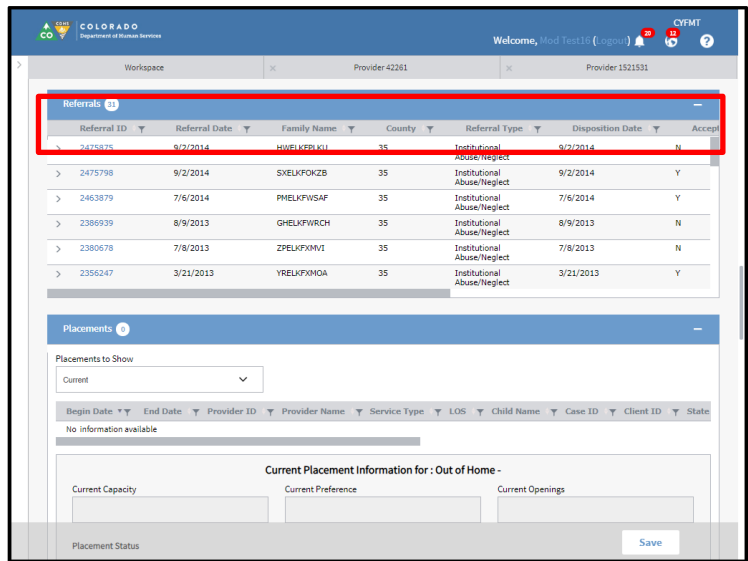
Steps/Output	Screenshot																																																	
<p>Refer to the <i>TM Resource – Access and View Provider Details Job Aid</i> for details on locating the desired Provider.</p> <p>Navigate to the <i>Referrals</i> section by clicking the link in the left navigation panel or using the scroll bar at the right of the page.</p>																																																		
<p>All Referrals associated with the selected Provider for institutional abuse or neglect will be displayed.</p>	 <table border="1" data-bbox="711 1171 1404 1360"> <thead> <tr> <th>Referral ID</th> <th>Referral Date</th> <th>Family Name</th> <th>County</th> <th>Referral Type</th> <th>Disposition Date</th> <th>Accept</th> </tr> </thead> <tbody> <tr> <td>&gt; 2475875</td> <td>9/2/2014</td> <td>HWELKFKLU</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>9/2/2014</td> <td>N</td> </tr> <tr> <td>&gt; 2475798</td> <td>9/2/2014</td> <td>SVELKFOKZB</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>9/2/2014</td> <td>Y</td> </tr> <tr> <td>&gt; 2463879</td> <td>7/6/2014</td> <td>PHELKFWISAF</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>7/6/2014</td> <td>Y</td> </tr> <tr> <td>&gt; 2386939</td> <td>8/9/2013</td> <td>GHELKFWRCH</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>8/9/2013</td> <td>N</td> </tr> <tr> <td>&gt; 2380678</td> <td>7/8/2013</td> <td>ZPELKFWRV1</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>7/8/2013</td> <td>N</td> </tr> <tr> <td>&gt; 2356247</td> <td>3/21/2013</td> <td>YRELKFXMOA</td> <td>35</td> <td>Institutional Abuse/Neglect</td> <td>3/21/2013</td> <td>Y</td> </tr> </tbody> </table>	Referral ID	Referral Date	Family Name	County	Referral Type	Disposition Date	Accept	> 2475875	9/2/2014	HWELKFKLU	35	Institutional Abuse/Neglect	9/2/2014	N	> 2475798	9/2/2014	SVELKFOKZB	35	Institutional Abuse/Neglect	9/2/2014	Y	> 2463879	7/6/2014	PHELKFWISAF	35	Institutional Abuse/Neglect	7/6/2014	Y	> 2386939	8/9/2013	GHELKFWRCH	35	Institutional Abuse/Neglect	8/9/2013	N	> 2380678	7/8/2013	ZPELKFWRV1	35	Institutional Abuse/Neglect	7/8/2013	N	> 2356247	3/21/2013	YRELKFXMOA	35	Institutional Abuse/Neglect	3/21/2013	Y
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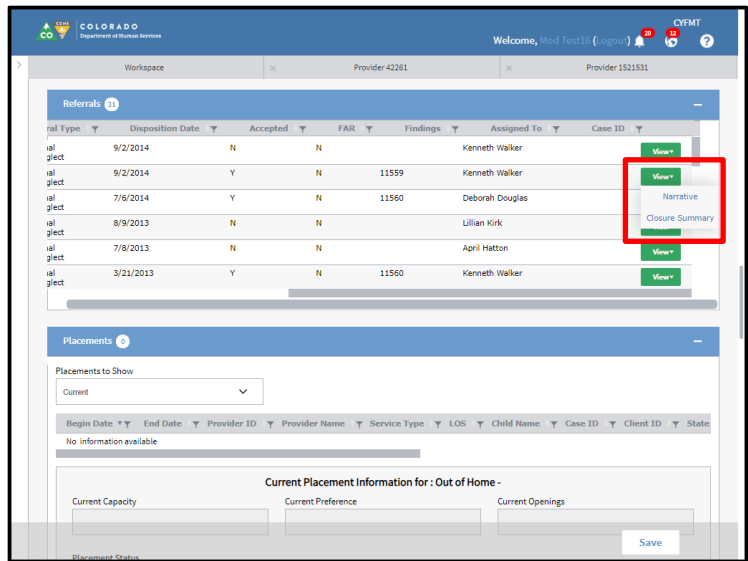
Columns in the table can be sorted or filtered using the icons to the right of each column heading.



The **View** button at the far right of each Referral ID row provides access to the *Narrative* and *Closure Summary* for the selected Referral.

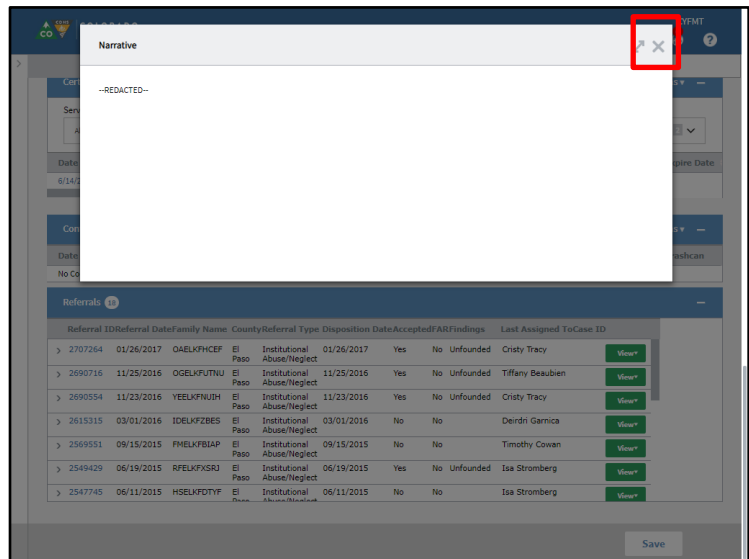
(Optional) To view the *Narrative* or *Closure Summary*:

1. Click **View**.
2. Select **Narrative** or **Closure Summary**.

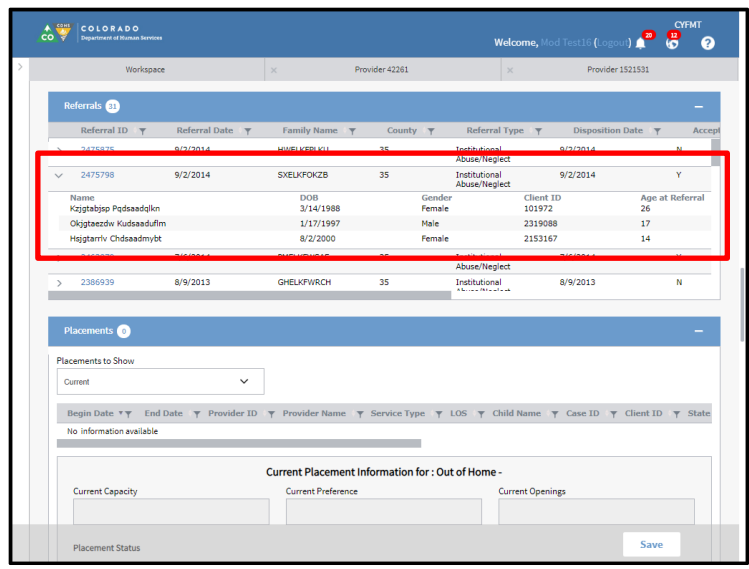


The selected information is displayed in a pop-up window.

- Use the “X” in the top right corner to close the pop-up window.



- Click the expand ( > ) icon at the left of the desired Referral ID to view the parties involved in the Referral.
- Click the icon again to close the list.





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- Click the ID link of the referral in the **Referral ID** column to open the *Referral Details* page in a new application tab.

Referral ID	Referral Date	Family Name	County	Referral Type	Disposition Date	Accept
2475875	9/2/2014	HWELKFKLU	35	Institutional Abuse/Neglect	9/2/2014	N
2475798	9/2/2014	SVELKFOKZB	35	Institutional Abuse/Neglect	9/2/2014	Y
2463879	7/6/2014	PHELKFWAF	35	Institutional Abuse/Neglect	7/6/2014	Y
2386939	8/9/2013	GHELKFWRCH	35	Institutional Abuse/Neglect	8/9/2013	N
2380678	7/8/2013	ZPELKFVWV1	35	Institutional Abuse/Neglect	7/8/2013	N
2356247	3/21/2013	YRELKXMOA	35	Institutional Abuse/Neglect	3/21/2013	Y

Refer to the *Referral Details* Job Aids to view actions for the Referral Details page.

- Click the **Back to Provider Details** link to return to the Provider Details page.

**Referral Details:**  
2569551

Family Name\*:  Primary Caregiver Unknown:  Yes  No

Household Address:  County:

Household Phone Numbers:    Primary

Referral Date:  Referral Time:

Call Taker County:  Responsible County:  Assigned To:

Referral Type\*:  Referral Reasons\*:

Secondary Workers: 

Name	Secondary Role	Start Date	End Date	Comments
No information available				