Manage Referral Details – Step Action Table

User
Hotline Worker and Hotline Supervisor.

Process
These step action tables describe the actions needed to view or edit the details of a selected Referral. The Referral Details include the following sections: Referral Summary, Hotline Call Details, Provider, Clients, Collaterals, Notes, Prevention/Service Referrals, and Referral Acceptance.

Introduction
- Transfer of the Referral can be initiated from the Referral Details page.
- Secondary Worker can be assigned from the Referral Details page.
- Restrictions on Referrals can be managed from the Referral Details page.
- Columns in the tables can be sorted or filtered using the icons to the left of each column heading.
- The Referral will be editable only if the worker has the appropriate profile and is affiliated to the Responsible County.
- The Referral will be read-only if the worker has the appropriate profile.
- If the worker does not have the appropriate profile to view or edit the Hotline, the Referral Details will not load and the worker will be notified that they do not have the appropriate access.

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View Referral Details:

- The Referral Details page can be accessed anywhere in Trails where the Referral ID is an active link. This step action table will describe the actions for navigation to the Referral Details from the Workload and Queues menus in the left navigation bar on the Workspace landing page.
- The County filter defaults to the primary county associated with the worker who opens the page. The picklist contains all of the counties associated to the worker.

View Referral Details

Step	Action
1	From the *Workload* landing page. • Click on **Workspace** Show Menu.
2	In the *Left Navigation* panel. • Click **Workload.** • Select the appropriate **Assigned To:** worker(s) using the drop-down arrow. • Click the **Trails ID** for the appropriate record with a Record Type of **Referral.** ~ OR ~
3	In the *Left Navigation* panel. • Click **Queues**. • Click **Pending Referrals**. • Select the appropriate **County:** using the drop-down arrow. • Click the **Referral ID** for the appropriate record. ~ OR ~
4	In the *Left Navigation* panel. • Click **Queues**. • Click **Pending Incoming**. • Select the appropriate **Transferred To:** county using the drop-down arrow. • Click the **Trails ID** for the appropriate record with a Record Type of **Referral**. ~ OR ~

5	In the *Left Navigation* panel. • Click **Queues**. • Click **Pending Outgoing**. • Select the appropriate **Transferred From:** county using the drop-down arrow. • Click the **Trails ID** for the appropriate record with a Record Type of **Referral**. ~ OR ~
6	In the *Left Navigation* panel. • Click **Queues**. • Click **Mandatory Reporter**. • Select the appropriate **County:** using the drop-down arrow. • Click the **Referral ID** for the appropriate record.
7	This opens the *Referral Details* page for the selected referral. • Navigate through the Referral *Details* sections using either the options in the **left Navigation** bar or the **scroll bars**.
8	Each section of the *Referral Details* page can be expanded or collapsed. • Click the **Minus (-)** icon on the section header to collapse the section. • Click the **Plus (+)** icon on the section header to expand the section.
9	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
10	Use the links in the left navigation panel or the scroll bar to navigate to the **Referral Summary** section.

Referral Summary:

- The Family Name will auto-populate from the primary associated hotline.
- The Household Address will auto-populate from the primary associated hotline.
- The Referral Date and Referral Time will default to the Report Date and Report Time from the primary associated hotline.
- The Call Taker County will default to the county of the Primary Worker of the primary associated hotline.
- The Responsible County will default to the responsible county from the primary associated hotline.
- There will be a list of the active Secondary Workers assigned to the referral.
- The Assigned To field will default to worker who submitted the primary associated hotline.
- Referral Type and Referral Reasons will auto-populate from the primary associated hotline.
- Referral Narrative will auto-populate from the primary associated hotline. Referral Narrative will be a rich text editor.

Referral Summary

Step	Action
1	In the header for the *Referral Summary* panel. • Click **Actions.** • Select **Print**. This will generate the Referral Information Sheet**.**
2	Update the *Family Name* and *Primary Caregiver Unknown* as needed. • Click in **Family Name** text box and type new name if changes needed. • Click the Yes or No toggle for **Primary Caregiver Unknown**. ○ If Yes is selected and a Primary Caregiver is listed, a warning displays to offer to delete the Client designated as Primary Caregiver. ○ If No is selected and a Primary Caregiver is not listed, a warning states a client must be designated as the Primary Caregiver prior to saving.

3	Add or Edit *Household Address*. • Click the **Edit Address** hyperlink. • The **Edit Address** pop-up window displays. • In the *Edit Address* pop-up window: ○ Enter required fields based on Address Type and Format Type. ○ Click **Save**. **Note:** The County is populated based on the Household Address entered.
4	View *Household Address* on an online map. • Click **Map** icon to the right of the Household Address. • An online map displays in a new browser window. • After reviewing, close the browser window and return to the *Referral Summary*.
5	Add, edit, or delete *Household Phone Number*. • Click the **+Add Another Number**. • This opens a new Household Phone Number Type, Phone Number, and Ext. text boxes. • Click the **Type** drop-down arrow. • Select the appropriate phone type. • Click in the **Phone Number** text box. • Enter the new phone number. • Click in the **Ext**. text box to enter the phone extension, if needed. • Click the **Primary** radio button to designate a phone number as the primary number. • Click the **Trashcan** icon to delete the associated Household Phone Number.
6	Edit *Referral Type* and *Referral Reasons*. • As needed, click the **Referral Type** drop-down arrow. • Select the appropriate option. • As needed, click the **Referral Reasons** drop-down arrow. Referral Reasons is a multi-select field, so more than one choice can be made. • Select the appropriate options.

7	Edit *Referral Narrative*. • As needed, click in the **Referral Narrative** text box. • Enter notes as needed. **Note:** A rich text editor displays with a character count in the lower right hand corner to aid in formatting your comments. The size automatically adjusts depending on the amount of text entered up to 4000 characters. Notes can be copied and pasted into this field.
8	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
9	Use the links in the left navigation panel or the scroll bar to continue to the **Hotline Call Details** section.

Manage Referral Details – Step Action Table

Hotline Call Details:

- For each Hotline associated to the referral, there will be a Hotline Details record.
- The primary associated hotline will appear first and the rest will be sorted in chronological order.
- All fields are read-only.

Hotline Call Details

Step	Action
1	In the header for the *Hotline* record. • Click the **Plus (+)** icon to expand the Hotline record**.** • Click the **Minus (-)** icon to collapse the Hotline record.
2	In the header for the *Hotline* record. • Click the **Open Hotline Record** hyperlink**.** • This opens the associated Hotline record in a new window as read-only.
3	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
4	Use the links in the left navigation panel or the scroll bar to continue to the **Provider** section.

Provider:

- The Provider section will only be displayed if the Call Type of the primary associated hotline is *Institutional Abuse/Neglect*.
- Only one provider will be added to the referral.
- The worker will be able to change the provider by searching again and selecting a new provider
- When a provider found in Trails has been added, an alert will go to all assigned workers (primary and secondary) of all services of the provider.

Provider

Step	Action
1	In the *Provider* section. • Click the **Yes** or **No** toggle for the **Provider found in Trails** field.
2	If the *Provider Found in Trails* is Yes. • Click the **Search** icon to the right of the Provider field to locate an appropriate provider. • In the **Select Provider** pop-up window: ○ Enter Search criteria in the appropriate field(s) to locate the Provider. ○ Click **Search**. ○ The Search Query results display. ○ Click on the appropriate **Provider** record in the table. ○ Click **Select**. • The Provider information populates in the Provider section. **Note:** When searching for a provider, the search will by default only search for Out of Home (OOH) or Child Care (CC) service categories. You will be able to change the service categories.

3	If the *Provider Found in Trails* is No. • The following warning message displays to identify circumstances where a Provider would not be attached to the Referral: *[You have selected 'Institutional Abuse/Neglect' as the Referral Type. When this Referral Type is selected, a Trails provider should be attached to the referral in Trails except in the following circumstances:* • *Unlicensed child care* • *Other Community Agency not in Trails (e.g. Church, Rec Center, etc.)* • *Provider information unknown to Reporting Party* *Do one of the above conditions exist?]* • Click **Yes** to identify one of the conditions exists. o Click in the **Comments** text box. o Enter **Comments**. • Click **No** to identify one of the conditions does not exist. o The Search Provider pop-up window displays as a Provider will need to be selected in Trails.
4	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
5	Use the links in the left navigation panel or the scroll bar to continue to the **Clients** section.

Clients:

- The Client section will list all involved clients and their details. The client's Name, Client ID, and Age will be displayed.
- Each client within the Client section can be collapsed and expanded.
- Currently, you must conduct a search in legacy Trails for all clients to determine if they are a Trails user or Trails Provider. You will be able to Add new Clients in Modernized Trails.
- When the State ID is populated, First Name, Middle Name, Last Name, Suffix, Date of Birth, and Gender Identity will be read-only.
- When the State ID is not populated, First Name, Middle Name, Last Name, and Suffix will be read-only.
- Hispanic Origin and Race will come from the Client record and will be disabled.
- Every referral will be required to have one client with a *Role in Referral* of **Primary Caregiver** unless the *Primary Caregiver Unknown* indicator is selected in the *Referral Summary*.

Clients

Step	Action
1	In the header for the *Clients* panel. • Click **Actions.** • Select **Add Client**.
2	In the *Add Client to Referrals* pop-up window. • Enter at least one of the **Search** criteria in the text boxes. • Click **Search**. • The Search Query Results display. • If Search Results are returned, ○ Select the Client in the Search Query table and click **Select**. ○ The Client is added as a record in the Clients section. ~ OR ~ • Click **Add New**. The *Add Client* pop-up window displays. **Notes:** • Currently, you must conduct a search in legacy Trails for all clients to determine if they are a Trails user or Trails Provider. You will be able to *Add New* Clients in Modernized Trails.

3	In the *Add Client* pop-up window. • Click in the **First Name** text box. • Type the **First Name** in the text box. • Click in the **Last Name** text box. • Type the **Last Name** in the text box. • Click the drop-down arrow for the **Gender Identity**. • Select the appropriate **Gender Identity**. • Enter other known information regarding the client. • Click **Add**. • The Client is added as a record in the Clients section. Note: If a Potential Duplicate exists, either select the Client and Click **Select** (disabled for this release) or Click **Add Anyway**.
4	Navigate within the *Client Record*. • Click the **Plus (+)** icon to expand the Client record**.** • Click the **Minus (-)** icon to collapse the Client record. • Click the **Trashcan** icon to remove the Client record from the Referral.
5	*Change Name* (If the State ID is not populated). • Click the **Change Name** hyperlink. • The *Change Name* pop-up window displays. • Type the name changes in any of the name fields. The First Name is required. • Click **Save**. • The *Add Alias* pop-up window displays. • Click the **Type** drop-down arrow. This is a required field. • Select the appropriate **Type**. • Type any name changes in any of the other fields. • Click **Add**. • The Name will be changed in the Client record and the previous name added as an alias. **Notes:** • When the State ID is not populated, the ability to request to update the Client's name will be enabled. • If the worker changes the Client's First Name, Middle Name, or Last Name, the previous name will be added as an alias. The worker will be required to provide the Alias Type. • There will be an indicator if the client has any aliases associated to them. There will also be a count of the total number of aliases.

6	*View Client Record* • Click the **View Client Record** hyperlink. • The *Client Record* opens in a new browser window.
7	Updates in the *Client* record in the Referral (if needed) • *Role in Referral*. ○ Click the **Role in Referral** drop-down arrow. ○ A multi-select list of Roles displays. ○ Select the check box for all Roles that apply to this client. ○ Click outside the list to close the multi-select list. ○ Click **Save**. Note: Every referral will be required to have one client with a *Role in Referral* of **Primary Caregiver** unless the *Primary Caregiver Unknown* indicator is selected in the *Referral Summary*. • *Participating as a child*. ○ Click the **Yes** or **No** toggle for the **Participating as a child** field to identify a client is participating as a child (Age 21 or under). ○ Click **Save**. • *Is Date of Birth an Estimate?* ○ Click the **Yes** or **No** toggle for the **Is Date of Birth an Estimate?** field to identify a client is participating as a child (Age 21 or under). ○ Click **Save**. • *Active Military*. ○ Click the **Yes** or **No** toggle for the **Active Military** field to identify a client is participating as a child (Age 21 or under). ○ Click **Save**. **Note**: Required fields will be marked with an asterisk (*). If these fields are not pre-populated from an existing Client Record, they will be required prior to submitting the Referral for acceptance.

8	*Relationships* on the Clients Panel. • Click the **Show only participating as children** check box to include only the children's relationships to the Client in the table. *View Relationship History* • Click **View Relationship History** hyperlink. • The *Relationship History* pop-up window displays. • After reviewing, click the **X** to close the browser window. *Add Relationship* • Click the **+Add Relationships** hyperlink. • The *Add Relationship* pop-up window displays. • Click **The following people** drop-down arrow. • Select the appropriate people from the multi-select list. • Click the **are a(n)** drop-down arrow. • Select the appropriate relationship for the Client (in the **To Client** field.) • The **Start Date** defaults to the current date and can be changed as needed. • Click **Add**. • The Relationships table is updated with the new Relationship record. *Edit Relationship* • Click the **Client name** link in the Relationship table. • The *Edit Relationship* pop-up window displays. • Change the relationship information as needed. • Click **Save**. • The Relationships table is updated with the revised Relationship information. *Delete Relationship* • Click the **Client name** link in the Relationship table. • The *Edit Relationship* pop-up window displays. • Click Delete. • A warning message displays asking if the client ever had this relationship. • If **Yes** or **I Don't Know** are selected, ○ A Warning displays stating the Relationship cannot be deleted. Please end date the relationship instead. ○ Click **Okay**. ○ The Edit Relationship pop-up window displays to enter an End Date. • If No is selected, the Relationship record is deleted.

9	*Addresses* on the Client Panel. *View Address History* • Click **View Address History** hyperlink. • The *Address History* pop-up window displays. • After reviewing, click the **X** to close the browser window. *Add Address* • Click the **+Add Address** hyperlink. • The **Add Address** pop-up window displays. • In the *Add Address* pop-up window: ○ Enter required fields based on Address Type and Format Type. ○ The County is populated based on the Address entered. ○ Click **Save**. • An Add Address pop-up window displays asking if you would like to end date the existing location addresses. ○ Enter the end date in the **End Date** text box or use the calendar to enter a date, if needed. ○ Click **Done**. *Edit Address* • Click the **Location** link in the Address table. • The *Edit Address* pop-up window displays. • Change the address information as needed. • Click **Save**. • A message displays identifying that you are editing an existing address and not adding a new address. • Click **Yes** to continue. • The Address table is updated with the revised Address information. *Delete Address* • Click the appropriate **Type** hyperlink in the Address table. • The *Edit Address* pop-up window displays. • Click **Delete**. • A warning message displays asking if the client ever lived at this address. • If **Yes** or **I Don't Know** are selected, a Warning displays stating the address cannot be deleted. Please end date the address instead. ○ Click **Okay**. ○ The Edit Address pop-up window displays to enter an End Date. • If **No** is selected, the Address record is deleted. *Copy from Hotline* • Click the **Copy from Hotline** hyperlink in the Address table. • The *Add Address from Hotline* pop-up window displays. • Click the **Add to Clients** drop-down arrow. • Select one or more Clients from the multi-select list.

	• Enter other fields as needed. • Click **Add**. • The Address is added from the Hotline to all Clients Selected.
10	*Phone Numbers* on Client Panel. *<u>View Phone Number History</u>* • Click **View Phone Number History** hyperlink. • The *Phone Number History* pop-up window displays. • After reviewing, click the **X** to close the browser window. *<u>Add Phone Number</u>* • Click the **+Add New Number** hyperlink. • The **Add Phone Number** pop-up window displays. • In the *Add Phone Number* pop-up window: o Enter required fields based on **Type**. o Click **Save**. *<u>Edit Phone Number</u>* • Click the appropriate **Type** link in the Phone Number table. • The *Edit Phone Number* pop-up window displays. • Change the phone number information as needed. • Click **Save**. • The Phone Numbers table is updated with the revised Phone information. *<u>Delete Phone Number</u>* • Click the appropriate **Type** link in the Phone Number table. • The *Edit Phone Number* pop-up window displays. • Click **Delete**. • A warning message displays asking if the client ever had this phone number. • If **Yes** or **I Don't Know** are selected, a Warning displays stating the phone number cannot be deleted. Please end date the phone number instead. o Click **Okay**. o The Edit Phone Number pop-up window displays to make changes. • If **No** is selected, the Phone Number record is deleted.

11	*Emails* on Client Panel. *<u>View Email History</u>* • Click **View Email History** hyperlink. • The *Email History* pop-up window displays. • After reviewing, click the **X** to close the browser window. *<u>Add Email</u>* • Click the **+Add Email** hyperlink. • The **Add Email** pop-up window displays. • In the *Add Email* pop-up window: ○ Enter email address and Comments, if needed. ○ Click **Save**. *<u>Edit Email</u>* • Click the appropriate **Email** link in the Email table. • The *Edit Email* pop-up window displays. • Change the email information as needed. • Click **Save**. • The Emails table is updated with the revised Email information. *<u>Delete Email</u>* • Click the appropriate **Email** link in the Email table. • The *Edit Email* pop-up window displays. • Click **Delete**. • A warning message displays asking if the client ever had this email address. • If **Yes** or **I Don't Know** are selected, a Warning displays stating the email cannot be deleted. Please end date the email instead. ○ Click **Okay**. ○ The Edit Email pop-up window displays to make changes. • If **No** is selected, the email record is deleted.

12	*Households* on Client Panel. *<u>Add Household</u>* • Click the **+Add Household** hyperlink. • The **Add Household** pop-up window displays. • In the *Add Household* pop-up window: ○ Click the **County** drop-down arrow. ○ Select the appropriate County. This pre-populates the Household Number prefix. ○ Enter the appropriate **Household Number**. Note: Only workers with DCW Business Analyst or CW Household and Sidmod Maintenance profiles will be able to delete a Household Number. ○ Enter the **Start Date** in the MM/DD/YYYY format or use the calendar function. ○ Click **Save**. *<u>Edit Household</u>* • Click the appropriate **Household** link in the Households table. • The *Edit Household* pop-up window displays. • Change the household information as needed. • Click **Save**. • The Households table is updated with the revised Household information. *<u>Delete Household</u>* • Click the appropriate **Household** link in the Email table. • The *Edit Household* pop-up window displays. • Click **Delete**. • A warning message displays confirming deletion of the Household Number. • Click **Yes** to continue.

13	*Client Safety Notices* on Client Panel. *<u>Edit Client Safety Notice</u>* • Click the appropriate **Category** link in the Client Safety Notices table. • The *Critical Info* pop-up window displays. • Change the Critical Information as needed. • Click **Done**. • The Client Safety Notices table is updated with the revised Critical Information. *<u>End Date Client Safety Notice</u>* • Click the appropriate **Category** link in the Client Safety Notices table. • The *Critical Info* pop-up window displays. • Enter the **End Date** in MM/DD/YYYY format or select the date from the calendar. • Click **Done**. • The Client Safety Notices table is updated with the revised Critical Information.
14	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
15	Use the links in the left navigation panel or the scroll bar to continue to the **Collaterals** section.

Collaterals:

- The system will indicate the total number of collaterals associated to the referral.
- There will be a list showing all the collaterals added to the referral. The default sort will be by Name.

Collaterals

Step	Action
1	In the header for the *Collaterals* panel. • Click **Actions.** • Select **Add Relative/Kin Collateral**.
2	In the *Add Relative/Kin Collateral* pop-up window. • Enter **First Name**. • Enter **Last Name**. • The **Role** field defaults to Relative and is disabled. • Click the **Related Clients/Collateral** drop-down arrow. ○ Select one or more of the clients from the multi-select **Related Clients/Collateral** list. • Click the **Relationship to Children/Collaterals** drop-down arrow. ○ Select the appropriate relationship from the **Relationship to Children/Collaterals** list. • Add **Phone** information, if known. ○ Click the **Add Phone** hyperlink to add another phone, if needed. ○ Click the **Primary** radio button to designate the phone as the primary number. • Click the **Add Address** hyperlink to add an address, if known. ○ The Edit Address pop-up window displays. ○ Enter required address information based on **Format Type**. ○ Click **Done**. • The **Start Date** is a required field and defaults to the current date. ○ Click in the **Start Date** field to change the date, if needed. ○ Enter the **Start Date** in MM/DD/YYYY format or select the date from the calendar. • Enter other known information regarding the Collateral. • Click **Save**.

3	In the header for the *Collaterals* panel. • Click **Actions.** • Select **Add Professional / Other Collateral**.
4	In the *Add Relative/Kin Collateral* pop-up window. • Enter **First Name**. • Enter **Last Name**. • Click the **Role** drop-down arrow. ○ Select the appropriate **Role** from the list. • Click the **Associated Clients** drop-down arrow. ○ Select one or more of the clients from the multi-select **Associated Clients** list. • Start typing the name of the agency in the **Agency** text box. ○ Select the appropriate agency from the **Agency** list. • Add **Phone** information, if known. ○ Click the **Add Phone** hyperlink to add another phone, if needed. ○ Click the **Primary** radio button to designate the phone as the primary number. • Click the **Edit Address** hyperlink to add an address, if known. ○ The Edit Address pop-up window displays. ○ Enter required address information based on **Format Type**. ○ Click **Done**. • The **Start Date** is a required field and defaults to the current date. ○ Click in the **Start Date** field to change the date, if needed. ○ Enter the **Start Date** in MM/DD/YYYY format or select the date from the calendar. • Enter other known information regarding the Collateral. • Click **Save**.
5	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
6	Use the links in the left navigation panel or the scroll bar to continue to the **Notes** section.

Notes:

- The system will indicate the total number of notes associated to the referral.
- There will be a list showing all the notes added to the referral. The default sort will be by Date/Time added with the oldest on top.

Notes

Step	Action
1	In the header for the *Notes* panel. • Click **Actions.** • Select **Add Note**. • The *Add Note* pop-up window displays.
2	In the *Add Note* pop-up window. • The **Date and Time Added** field defaults to the current date and time and cannot be changed. • The **Added By** field defaults to the signed-on worker and cannot be changed. • The **Role** field defaults to Relative and is disabled. • Click the **County** drop-down arrow. o Select the appropriate county from the list. • Click the **Type** drop-down arrow. o Select **Note** from the list. • Click in the Comments text box. o A rich text editor displays to aid in entering your notes. o Enter **Comments** as needed. • Click **Add**. • The **Note** displays in the Notes table for the Referral.
3	In the *Notes* Table. • Click on the appropriate **Date** hyperlink. • The Edit Note pop-up window displays. • Change information as needed or add information to the Comments field. • Click **Save**. • The edited **Note** displays in the Notes table for the Referral.

4	In the header for the *Notes* panel. • Click **Actions.** • Select **View Log**. The *Notes Log* pop-up window displays.
5	In the *Notes Log* pop-up window. • Select the appropriate **Type**, **Method**, **Start Date**, and/or End **Date** to filter the Notes. • The Notes display in the table below the search criteria based on the search criteria. • The Notes displayed include: the Date/Time Added, Method, County, Duration, Added By, Type, and Comments. • After reviewing, click the **X** to close the Notes log window.
5	Changes to the *Referral Details* page will need to be saved before navigating away from the page or submitting the Referral for Acceptance. • Click **Save** at the top of the page or at the bottom of the page to save changes.
6	Use the links in the left navigation panel or the scroll bar to continue to the **Prevention/Service Referrals** section.

Prevention/Service Referrals:

- The system will indicate the total number of Prevention and Service Referrals associated to the referral.
- There will be a list showing all the Prevention and Service Referrals added to the referral. The default sort will be by Date Referred with the oldest on top.
- A Prevention or Service Referral can be added to the Referral if at least one client or collateral is added to the Referral.
- Anyone from the responsible county will be able to add service referrals (of all Service Categories) up to 60 days after the referral has been submitted and screened out.
- Each Prevention/Service Referral will be split into sections: Service/Provider Information, Client and Collateral Referred, Contact Information, Reason for Referral, and Delivery Information.
- The worker will be able to add service referrals to the referral prior to or after the referral submission.
- Service Category of Prevention will only available once the referral has been screened out.

Prevention/Service Referrals:

Step	Action
1	In the header for the *Prevention/Service Referrals* panel. • Click **Actions.** • Select **Add Prevention or Service Referral**. • The *New Prevention or Service Referral* pop-up window displays in a new browser window.
2	In the *Left Navigation* panel. • Click **Service Provider Information.** • The Service Provider Information panel displays**.**

3	In the *Service Provider Information* panel. • The **Date Referred** field defaults to the current date and time and cannot be changed. • The **Referred By** field defaults to the Signed-on user and can be changed. • The **County** field defaults to the worker's primary affiliated County and can be changed to another affiliated County. • Click the **Service Category** drop-down arrow. ○ Select the appropriate Service Category. • Click the **Service Type** drop-down arrow. ○ Select the appropriate Service Type. ○ The **Service Type** of *CCR* will not be available when a Call Reason on the primary associated hotline includes any types of sexual abuse. ○ The **Service Type** of *Safecare* will be available when at least one of the client's age is between 0-5. • Click the **Funding Source** drop-down arrow. ○ Select the appropriate Funding Source. ○ When the Service Category is not *Prevention*, then **Funding Source** will be enabled and required. • Click the **Search** icon to add a Provider. ○ The Select Provider pop-up window displays. ○ Enter the appropriate Search criteria. ○ Click **Search**. ○ Select the appropriate provider from the Search Query results. ○ Click **Select**. • The Provider information displays as read-only. • Click the **Map** icon to view directions to the Primary Address.
4	In the *Left Navigation* panel. • Click **Client and Collateral Referred.** • The Client and Collateral Referred panel displays.

5	In the *Client and Collateral Referred* panel. • When the selected provider is for a service referral (Service Category other than Prevention), the worker will be able to select Clients and Collaterals from the selected referral. • When the selected provider is for a prevention referral (Service Category is Prevention), the worker will only be able to select Clients from the selected referral. • Click the **Clients and Collaterals** drop-down arrow. ○ Select one or more clients or collaterals from the multi-select list. ○ Click the appropriate radio button to designate the Primary Contact.
6	In the *Left Navigation* panel. • Click **Contact Information.** • The Contact Information panel displays**.**
7	In the *Contact Information* panel. • The Primary Contacts Name, Phone Number, Email, and Address are displayed. • Click the **Edit** hyperlink for the Phone number to add a new phone number to the referral. • Click the **Edit** hyperlink for the Email to add a new email to the referral. • Click the **Edit Address** hyperlink to add a new address to the referral. • Click the **Primary Language** drop-down arrow. ○ Select the appropriate language from the drop-down list. • Click the **Family Structure** drop-down arrow. ○ Select the appropriate Family Structure from the drop-down list. • Click in the **Number of Adults in Home** text box. ○ Either enter the number of adults or use the up-and-down arrow. • Click in the **Number of Children in Home** text box. ○ Either enter the number of children or use the up-and-down arrow.
8	In the *Left Navigation* panel. • Click **Reason for Referral.** • The Reason for Referral panel displays**.**
9	In the *Reason for Referral* panel. • Click in the Reason for Referral text box. • Enter reasons for selecting the service and/or prevention services.

10	In the *Left Navigation* panel. • Click **Delivery Information.** • The Delivery Information panel displays**.**
11	In the *Delivery Information* panel. • The **Provider Name** field defaults to the Provider selected and cannot be edited. • The **Provider Email** field defaults to the email listed for the Provider and can be changed. • Click the **Yes** or **No** toggle for the **Worker Will Receive Copy** to send a copy to the worker. • Click **Generate** to generate a copy of the prevention/service referral information to the Provider. • Click **Send Email** to send the prevention/service referral information to the Provider. • This completes the New Prevention or Service Referral.
12	At the top of the *New Prevention or Service Referral*. • Click the **< Back to Referral Details** to return to the main referral.
13	Use the links in the left navigation panel or the scroll bar to continue to the **Referral Acceptance** section.

Referral Acceptance:

- The worker will be able to view the Prior History of clients involved in the Referral.
- The worker will be able to view and/or print the Referral Summary.
- Once all the required dispositioning fields are set, the worker will be able to submit the approval request and an alert will be sent to the assigned supervisor.

Referral Acceptance

Step	Action
1	In the header for the *Notes* panel. • Click **Actions.** • Select **Print**. • The *Report Parameters* pop-up window displays.
2	In the *Referral Acceptance* panel. • Click the **View Client History** hyperlink. • The Referral History pop-up window displays. • Click **Run Report**. • The **Report** displays in a new browser window.
3	In the *Referral History* pop-up window. • The Total Records, Screened In records, and Screened out records are tallied in the header. • Click the **>** icon to view the clients associated with a referral. • Click the **View** button to the right of the referral. • Select **Narrative**, **Allegations**, **Closure Summary**, or **Reporter Information** to view additional information about a referral. The information displays in a new pop-up window. • Click the **Referral ID** to open the Referral. • Click the **View Search Options** hyperlink for additional search criteria.

4	In the *Referral Acceptance* panel. • Click in the **Summary of Prior History** text box. ○ Enter Comments. This is a required field. • Click in the **Prior Accepted** field. This is a required field. ○ Enter the number of Prior Accepted referrals. • Click in the **Prior Screen Out** field. This is a required field. ○ Enter the number of Prior Screen Out referrals. • The **Referral Disposition Date** defaults to the current date and can be changed. • Click the drop-down arrow for the **Referral Disposition**. This is a required field. ○ Select either **Accepted for Assessment** or **Not Accepted for Assessment**. ○ Different fields display based on the disposition.
5	If the Referral Disposition is *Not Accepted for Assessment*. • Click the drop-down arrow for **Reason for Screen Out**. ○ Select the appropriate Reason the Referral was screened out. • Click the radio button for **Connect to an Existing Referral/Assessment**, if applicable. ○ Enter the Referral/Assessment ID. • Click the radio button for **Connect to an Existing Case**, if applicable. ○ Enter the Case ID.
6	If the Referral Disposition is *Accepted for Assessment*. • Click the drop-down arrow for **Response Time**. ○ Select the appropriate Response Time for the referral. • Click the **Yes** or **No** toggle for the **Present Danger** field. • Click the **Yes** or **No** toggle for the **Impending Danger** field.

7	In the *Referral Acceptance* panel. • Enter **Comments / Additional Info** as needed. • Click the **Yes** or **No** toggle for the **Was the RED Team held for this Referral?** ○ If No, click the **Why?** drop-down arrow and select a reason from the list. ○ If Yes, the **Why?** Field is removed. • Enter **Comments** as needed. • Click the **Send To** drop-down arrow. ○ Select the appropriate Supervisor to send for approval. • Click **Save Request Approval**. • A message displays identifying the Referral was successfully saved or highlighting the missing areas. • Click **Request Approval.** • A message displays identifying the approval request was successful. • The Supervisor Approval Panel displays for the Hotline Supervisor. Please see the *Manage Referral Supervisor Approval Step Action Table* for further information.