How do I…Create a Service Referral

How Do I…?	Selections	Tips & Guidelines

Create a Services Referral	▪ From the Desktop, select *Create > Service Referral*. The Intake Inquiry Search page displays
	▪
	▪ Enter Last Name and First Name, and then click the **Search** button.
	▪ If there is a match, Click on *Select* to add the desired Person(s) in the Persons Returned group box. Or click on the *Merge* to add them to the Merge Person page page where comparison and possible merge activity can be completed.
	▪ Once the search and selection process if complete continue with the steps below
	▪ If there *is not* a match, click the **Close** button in the message box. Click **Create**. The Create Person page displays.
	  ▪ Enter Participant, Address, and Phone Information. Click **Continue**. The Address Normalization page displays.
	  ▪ Click the appropriate radio button. Click **Continue**. The Intake Inquiry Search page displays.
	  ▪ In the Participants group box, click **Continue**. The Intake page displays.
	  ▪ Complete required Intake Information. Proceed to next section to Complete Service Referral.
	▪ If there *is* a match, click the Select hyperlink next to the Participant in the Persons Returned group box. Click **Add Participant(s)**.
	  ▪ In the Participants group box, click **Continue**. The Intake page displays.
	  ▪ Complete required Intake Information. Proceed to next section to Complete Service Referral.
		*You **must** perform a Search on each participant. If no match is found, then you should complete the Create Person process for each participant.*
		
		Date/Time Report Received is system generated, but can be modified.
		
		If you have a person with a duplicate SSN then you will have to view every duplicate SSN before you can allow the duplicate SSN. Once viewed the persons record will display the Viewed icon with a check mark. After the duplicate records have been viewed the "Allow Duplicate SSN" button will be enabled.
		The Select Merge hyperlink allows the user to select to three people into the "Merge (#)" bucket. This allows the user to not only initial a request to merge duplicates that present themselves in the search process but also to compare the person data of up to 3 persons to help fine tune their search results
		The person merge process is controlled by security with some users only able to view the candidates for Merge, others able to request the merge and those who can complete the process
		
		When searching for a participant, the system allows a user to search by SSN. When searching for a person using the SSN field then the following guidelines need to be used:
		
		You cannot enter a SSN with the following
		• *The first three digits of 000, 666, 900 series.*
		• *The second two digits of 00 or the last four digits of 0000.*
		• *The sequential numbers, 123-45-6789 will not be allowed, and numbers that are all the same, such as all 1's, 2's, etc.*

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Complete a Services Referral	▪ Select the Participants tab. ▪ Click the <u>Roles</u> hyperlink to select a role for each participant. The Roles page displays. ▪ Select roles, identifying one participant as the Intake Name. ▪ Click **Continue**. ▪ If applicable, click the **Address Copy** button. Click **Yes** in the message box. Select participants for Address Copy. Click **Save**. Click **Close**. Returns to the Participants tab. ▪ Click the **Referral Information** expando and enter applicable information. If Caller ID N/A checkbox is not selected, Reporter Caller Id is a required field. Note: From the Referral Information group box, use right scroll bar to enter Source information field, if applicable. ▪ Select the Relationship tab. ▪ Click **Insert**. ▪ Relationships group box displays row with three dropdown columns: Subject(s), Relationship, and Subject(s). ▪ Select appropriate Subject(s) and Relationship options. ▪ Click **Insert** to enter a new relationship between participants. ▪ Select the Services tab. ▪ Select a *Service Referral* from the Service Type drop down list. ▪ Select a service from the *Specific Services Requested* group box if applicable. ▪ If applicable, enter a Narrative. ▪ Select the Victim/Child Location tab. ▪ If applicable, document directions to home and/or Worker Safety Concerns. ▪ Select the Prior Intakes and Service Records tab to view information. ▪ Select the Decision tab. ▪ Select the appropriate *radio button* in the Decision group box. ▪ Select a *Reason* from the drop down list. ▪ Create/Link to a Case ▪ Select the *Create/Link Case* hyperlink. Click **Yes** in the message box. Click **Yes** in the next message box. ▪ Select the radio button for the case name. ▪ Click **Create**. The Maintain Case page displays.	*Document the Roles for **each** participant.* *No more than five roles may be selected for each participant.* *The same participant can not occupy both subjects.*

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