

Adding a DCA Referral in CSP

1. Begin with the HoH's profile page, click on the "Service Transactions" tab.

Client - (77045) Stewart, Martha

(77045) Stewart, Martha
Release of Information: None

-Switch to Another Household Member- [Submit]

Client Information | **Service Transactions**

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Client Record [Issue ID Card]

Name: Stewart, Martha

2. Once the Service Transaction Dashboard loads, click on the "Add Need" button.

Client - (77045) Stewart, Martha

(77045) Stewart, Martha
Release of Information: None

-Switch to Another Household Member-

Client Information | **Service Transactions**

Service Transaction Dashboard

Add Need | Add Service | Add Multiple Services | Add Referrals

View Shelter Staff | View Entire Service History

3. When the "Add Need" screen loads, use the "Need" drop-down menu to select "Temporary Financial Assistance (NT)".

Client - (77045) Stewart, Martha

(77045) Stewart, Martha
Release of Information: None

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Client Information | **Service Transactions**

Add Need

Household Members

Need Information

Provider * TSA - FHC (61)

Need * Temporary Financial Assistance (NT) [Look Up]

Date of Need * 07 / 17 / 2013 [1] : 29 : 53 PM

Amount if Financial

Notes

- Then enter the “Date of Need” (this is the date the client presented with the need), the “Amount if Financial” (this is the amount that is being requested), and under “Notes” describe what the money is being requested for, i.e. ‘Security Deposit’. Then click “Save and Continue”.

Need Information

Provider*	TSA - FHC (61)
Need*	Temporary Financial Assistance (NT) Look Up
Date of Need*	07 / 17 / 2013 11 : 46 PM
Amount if Financial	500.00
Notes	Security Deposit
Status of Need*	Identified
Outcome of Need	-Select-
If Need is Not Met, Reason	-Select-

Save and Continue Save & Exit Cancel

- A small pop-up window will appear, click the “Add Referrals” button.

Need Information

Service Transaction

Need Successfully Saved. What would you like to do

Add Service **Add Referrals** Exit to Previous Needs

Need Status* Identified

- Once the “Needs Assignment” screen loads, first, in the “Service Code Quicklist” select “Temporary Financial Assistance” and click “Add Terms”.

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Housing Search and Information (BH-3900)
- Material Goods (BM)
- Outreach Programs (TJ-6500.6300)
- Personal Enrichment (PH-6200)
- Substance Abuse Services (RX)
- Temporary Financial Assistance (NT)**
- Transportation (BT)

Add Terms Service Code Look-Up Add Terms & Go To Search Results

Referral Provider Quicklist

- Under "Referral Provider Quicklist", select the appropriate DCA program to which the referral is being made and click "Add Provider".

Referral Provider Quicklist

Provider: CSB Transition Program (115) **Add Provider**

Selected Providers

Provider	Type	Phone	Location
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- The DCA provider you selected will now show up under "Selected Providers". Under "Refer to Providers", set the "Needs Referral Date" (this is the date the referral is being sent to CSB).

Selected Providers

Provider	Type
CSB Transition Program	Level 3

Refer to Providers

Referral Data

Needs Referral Date: 07 / 17 / 2013

- Lastly, scroll down to the bottom of the page and click "Save ALL".

500.00

Identified

-Select-

-Select-

Save Needs ONLY **Save ALL** **Clear ALL** **Cancel**

- Once completed, go to the "entire Service History" tab. The record should have two rows, the first row's "Transaction Type" should be "Need" and the second row's "Transaction Type" should be "Referral". See below.

Service Transactions

Needs Services Referrals Shelter Stays **entire Service History**

All Service Transactions

Select Dates	Start Date	End Date	Transaction Type	Date	Provider	Type	Need Status / Outcome	Need
			Need	07/17/2013	TSA - FHC	Temporary Financial Assistance	Identified	
			Referral	07/17/2013	CSB Transition Program	Temporary Financial Assistance		
			Need	11/22/2010	CSB	Case/Care Management	Closed / Fully Met	
			Service	11/22/2010	CSB	Basic Needs		
			Need	08/27/2010	CSB	Case/Care Management	Closed / Fully Met	