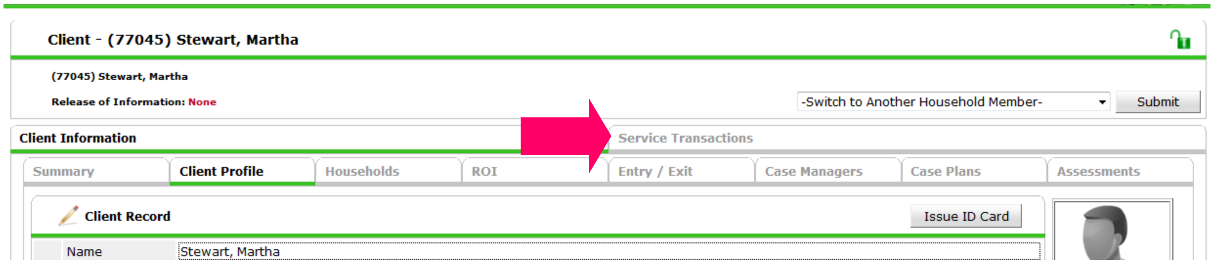
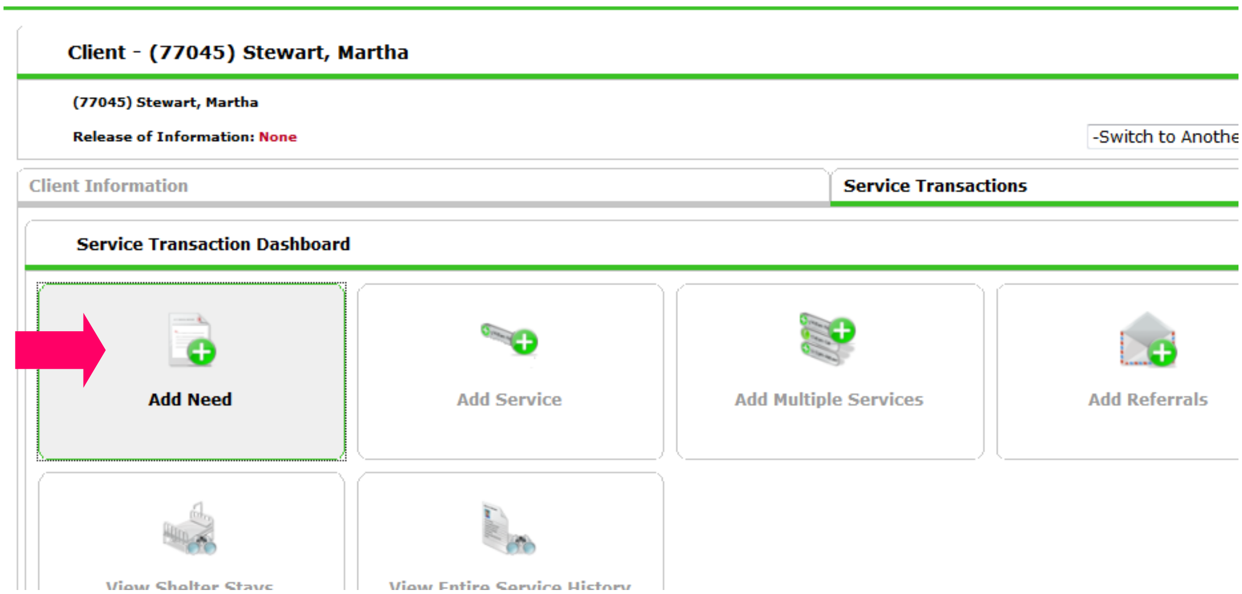
Adding a DCA Referral in CSP

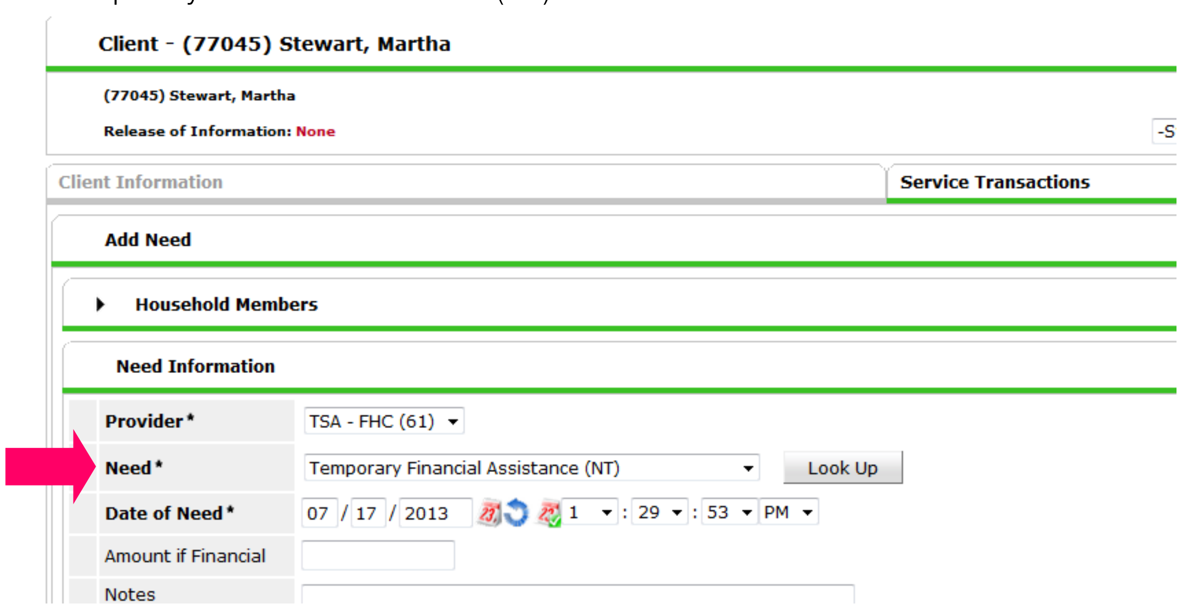
1. Begin with the HoH's profile page, click on the "Service Transactions" tab.



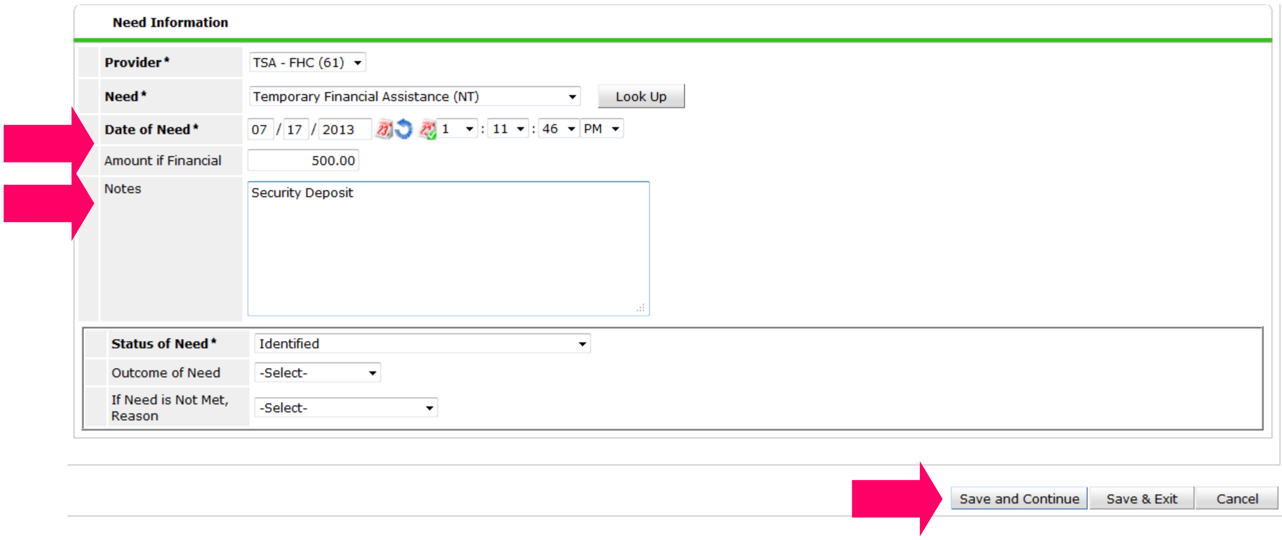
2. Once the Service Transaction Dashboard loads, click on the "Add Need" button.



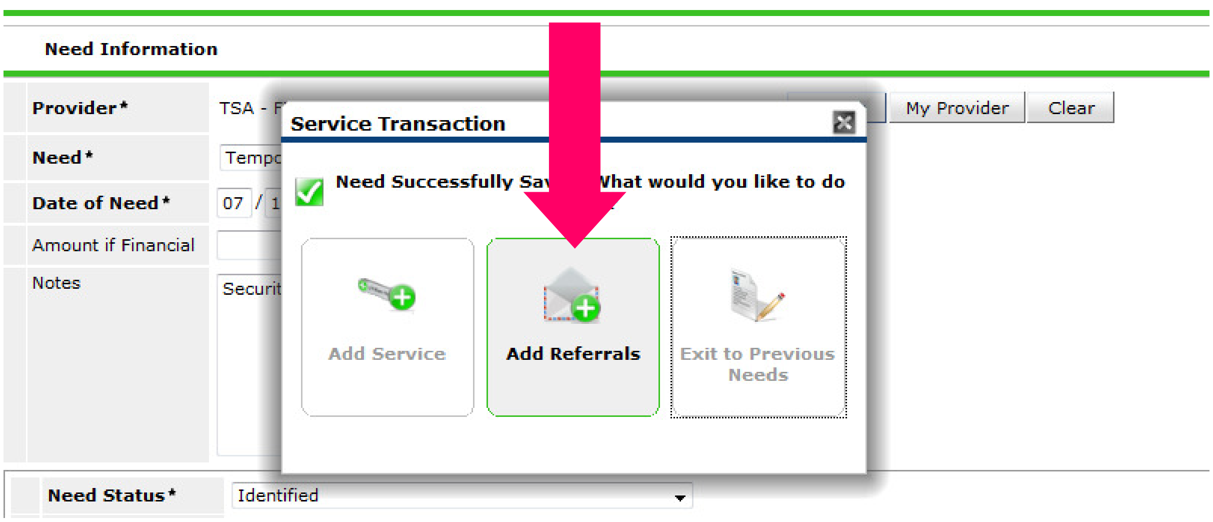
3. When the "Add Need" screen loads, use the "Need" drop-down menu to select "Temporary Financial Assistance (NT)".



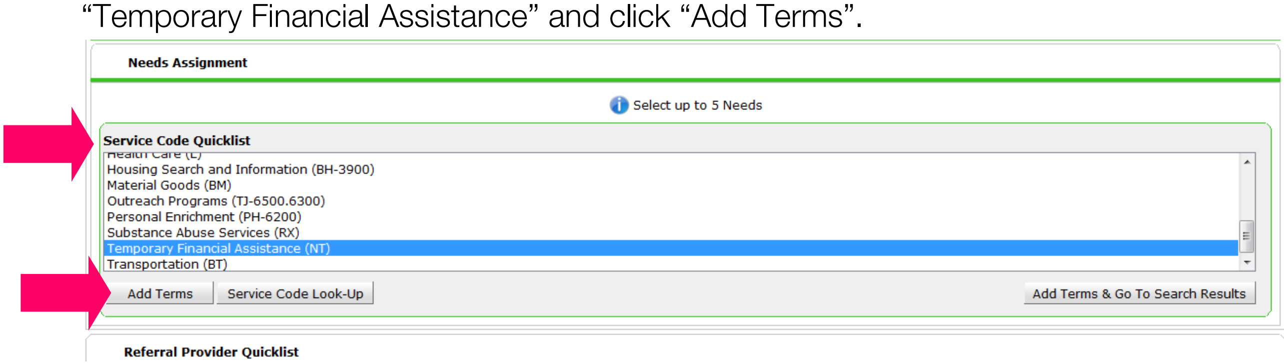
4. Then enter the “Date of Need” (this is the date the client presented with the need), the “Amount if Financial” (this is the amount that is being requested), and under “Notes” describe what the money is being requested for, i.e. ‘Security Deposit’. Then click “Save and Continue”.



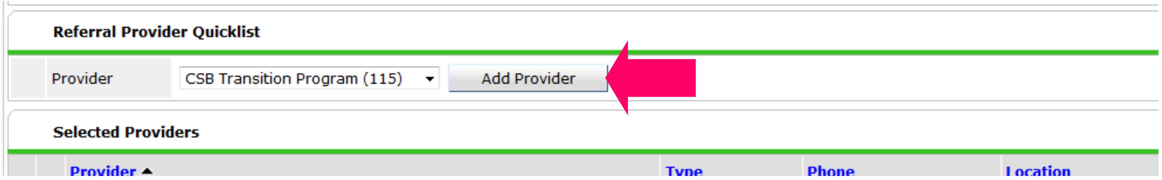
5. A small pop-up window will appear, click the “Add Referrals” button.



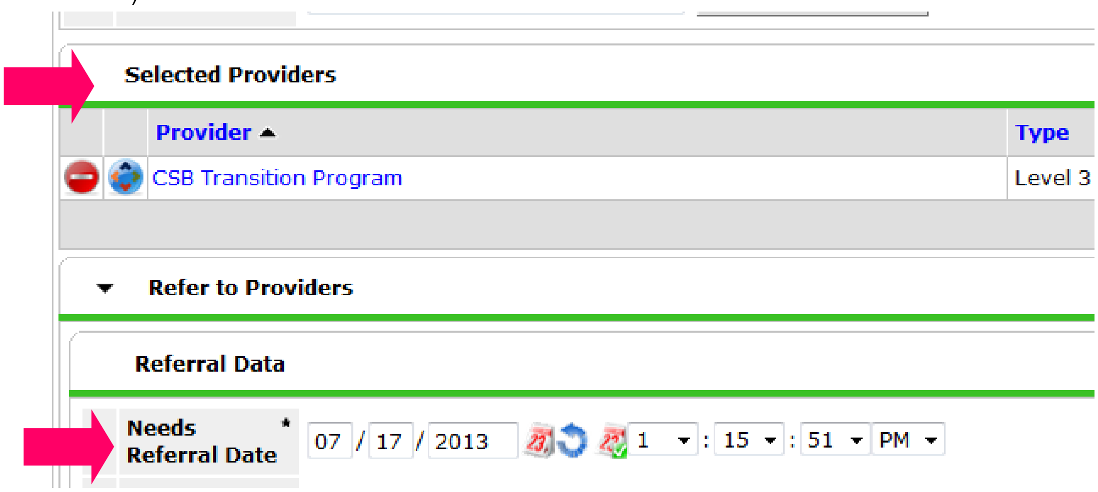
6. Once the “Needs Assignment” screen loads, first, in the “Service Code Quicklist” select “Temporary Financial Assistance” and click “Add Terms”.



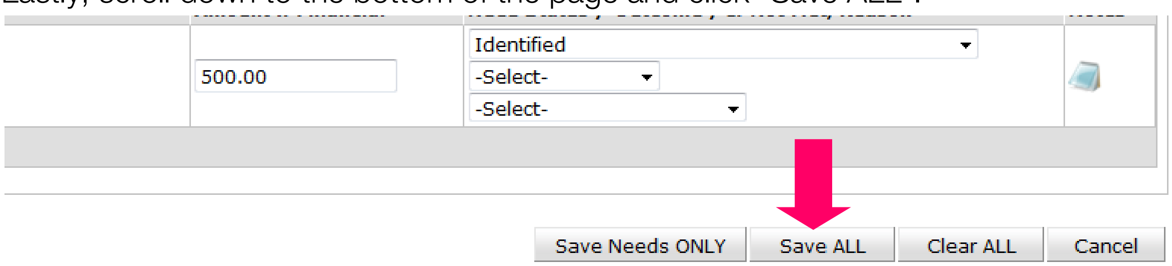
7. Under “Referral Provider Quicklist”, select the appropriate DCA program to which the referral is being made and click “Add Provider”.



8. 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).



9. Lastly, scroll down to the bottom of the page and click “Save ALL”.



10. 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.