
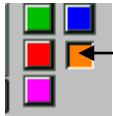



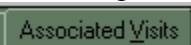
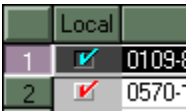


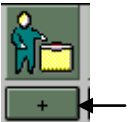

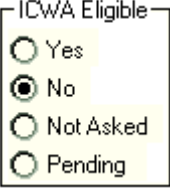
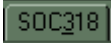
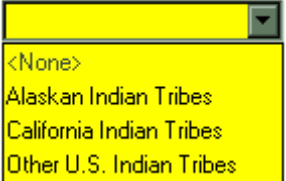


## Referral Management

Open Existing Referral	Record Contacts	Record Services	Record Visits	Client VS Collateral
<p>First open Client Services by clicking on Teddy Bear.</p> 	<p>Go to the Services Management Section.</p> 	<p>If you learn of a service that was provided to a client during a contact, regardless of the purpose of the contact, you can record the service.</p>	<p>If you learn of a visit that was provided to a client during a contact, regardless of the purpose of the contact, you can record the visit.</p>	<p>A collateral is a person that you will have contact with that is not a client. It is often hard to decide if a person is a client or a collateral</p>
<p>Then Open Existing referral by clicking on Referral Folder icon</p> 	<p>Then click on the open New Contact "+" under the rollohex icon</p> 	<p>Click on the Associated Services Page.</p>  <p>Click on the "+" in the left top corner of the services grid box to enter information in the grid. You can change the dates to reflect the date of the service.</p>	<p>Click on the Associated Visits Page</p>  <p>Click on the "+" in the left top corner of the visits grid box to enter information in the grid. You can change the dates to reflect the date of the visit.</p>	<p>One way to decide is to determine if you would ever want to offer services to this person. If not, then you could list them as a collateral.</p>
<p>then select the existing referral that you want to work on.</p> 	<p>Record the required information on first page.</p> <p>Contact Purpose</p>  <p>Be sure to record investigative contacts as such.</p>			
	<p>Record the information that your as the social worker have learned from your contact.</p> <p><i>Note:</i> Some counties want investigigative narratives to go to a document called "Investigative Narrativee" Use narrative box to refer reader to document.</p>			

Recording Education Information	Recording ICWA Information	Recording Family Information	Allegation Conclusions	Client Disposition
<p>If you wish to record school information during a referral or case first go to the client management section</p>  <p>then open an existing client</p> <p>Next search for the education provider by clicing on search and searching by school category, zip code and ownership. Do not search by school name.</p> <p>After search is complete, click on the "+" under "Existing Education"</p>  <p>and select the correct school from the list that is provided. Do not create an "Education Provider". You can record educational information on the notebook pages.</p>	<p>Go to the Client ID page,  then initially record the possible eligibility in the ICWA Eligibility box.</p>  <p>Then go to the SOC 318 page to record the relative information regarding what tribal offices you have requested verification of Indian Status from.  The Soc 318 page allows to to select whcih tribes your have contacted from a list.</p> <p>Tribe Location</p>  <p>Chose which would be the apporpriate choice and complete the page.</p>	<p>Go to the</p>		
	<p>That will enable the worker to create a document requesting verification from each tribe in the client document notebook.</p>			

				
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Other Considerations	Court	Placement	Secondary Assignment	