



Restrict Access to a Referral Step Action Table



User

Primary Referral worker, or Supervisor.

Process

This step action table describes the actions needed to restrict a Referral.

Introduction

- The County/Agency filters default to the primary county or agency associated with the worker who opens the page. The picklists contain all of the counties and/or agencies associated to the worker
- Columns in the table can be sorted or filtered using the icons to the left of each column heading.
- Once an item is restricted, only the primary worker and their supervisor (along with secondary workers and their supervisors) will be able to view and edit details of the restricted item(s). A Trails user with a specific profile that allows Restrict/Unrestrict authority will also be able to view/edit restricted item(s).

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Restrict a Referral

Restrict a Referral	
Step	Action
1	In the <i>Left Navigation</i> panel. <ul style="list-style-type: none">• Click Queues.• Click Pending Referrals.
2	On the <i>Pending Referrals</i> page. <ul style="list-style-type: none">• If required, click the County drop-down arrow.• Select the appropriate County option.• Use the Search, sort or filter functions to locate the required Referral ID.
3	In the filtered list in the <i>Records</i> table. <ul style="list-style-type: none">• Click the number link under Referral ID to open the desired Referral Details page.
4	On the <i>Referral Details</i> page. <ul style="list-style-type: none">• Click the Restrict Referral button in the top right corner of the page.
5	In the Restrict Referral pop-up window. <ul style="list-style-type: none">• Click the Reason for Restrict* drop-down arrow.• Select the appropriate option from the list.• Click In the Restrict Comments text box. Comments are required.• Enter appropriate comments.• Click Done to save or Cancel to close without saving. <p>Note: The Restrict By and Date Restricted are auto-populated by the system.</p>
6	In the Choose Related Items to Restrict pop-up window. <ul style="list-style-type: none">• Select all items to Restrict.



Restrict Access to a Referral Step Action Table



Unrestrict a Referral

Step	Action
1	In the <i>Left Navigation</i> panel. <ul style="list-style-type: none">• Click Queues.• Click Pending Referrals.
2	On the <i>Pending Referrals</i> page. <ul style="list-style-type: none">• If required, click the County drop-down arrow.• Select the appropriate County option.• Use the Search, sort or filter functions to locate the required Referral ID.
3	In the filtered list in the <i>Records</i> table. <ul style="list-style-type: none">• Click the number link under Referral ID to open the desired Referral Details page.
4	On the <i>Referral Details</i> page. <ul style="list-style-type: none">• Click the Unrestrict Referral button in the top right corner of the page.
5	In the Choose Related Items to Restrict pop-up window. <ul style="list-style-type: none">• Select all items to Restrict.
