



Manage Referral Supervisor Approval Step Action Table



User

Hotline Supervisor.

Process

This step action table describes the actions needed to manage referral requests.

Introduction

- The supervisor will be able to search for and open a referral, access the approval request, and approve the referral record.
- The supervisor will need to indicate that they reviewed each approval checklist item.
- Once all approval checklist items have been selected, the Approved By field will default to the supervisor and current date/time.
- Once the referral acceptance has been approved, the referral is locked down (read-only), except for the sections that were specifically selected to be editable.
- Once the referral is approved, the Primary Worker and all Secondary Worker assignments will be end-dated.
- The supervisor will be able to decline the approval request and will be required to provide comments as to why the request was declined.
- All referral approvals/rejections will be saved to history.
- The supervisor will be able to override the approval of a referral if it is within 60 days of the call date on the primary associated hotline, and will be required to provide a reason for the override.
- Once the override is complete, the approval for the referral will be removed and the supervisor will be set as the assigned primary worker on the referral.

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Approve Referral

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none"> Click Search. Click Hotline Search.
2	<p>On the <i>Hotline Search</i> page.</p> <ul style="list-style-type: none"> Click in the Referral ID text box. Enter Referral ID. Click Search.
3	<p>In the <i>Hotline Search</i> table.</p> <ul style="list-style-type: none"> Click the Referral ID link to open the Referral Details.
4	<p>On the <i>Referral Details</i> page.</p> <ul style="list-style-type: none"> Navigate down to the Supervisor Approval section. Review and select all items in the Approval Checklist. <p>Note: Selecting an item in the Approval Checklist will navigate the user to the corresponding section.</p> <p>Note: The Disposition by field will auto-populate with the hotline supervisor’s name and today’s date, and cannot be edited.</p> <ul style="list-style-type: none"> Select Approve. Add Comments to the Comments field, if required. Click Submit Referral. <p>Note: When the referral is approved, an alert will be sent to the referral’s primary worker (if different from the worker who is approving), and to the primary worker(s) or secondary workers with a role of “Child Primary Worker” of all associated open assessments and cases.</p> <p>Note: When the referral is approved, it will be removed from the pending referrals queue for the county.</p> <p>Note: When the referral is approved the Override Approval button will be enabled in the Supervisor Approval section.</p>
5	<p>On the <i>Referral Details</i> page.</p> <ul style="list-style-type: none"> Navigate down to the Referral Acceptance section. Click View Submission History link above the <i>Requested By</i> field. <p>Note: The history window opens and the user can review the full history of approvals for the referral.</p>



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Decline Referral

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none">• Click Search.• Click Hotline Search.
2	<p>On the <i>Hotline Search</i> page.</p> <ul style="list-style-type: none">• Click in the Referral ID text box.• Enter Referral ID.• Click Search.
3	<p>In the <i>Hotline Search</i> table.</p> <ul style="list-style-type: none">• Click the Referral ID link to open the Hotline Details.
4	<p>On the <i>Referral Details</i> page.</p> <ul style="list-style-type: none">• Navigate down to the Supervisor Approval section.• Select Decline.• Add required Comments in the Comments field. <p>Note: The Disposition by field will auto-populate with the hotline supervisor's name and today's date, and cannot be edited.</p> <ul style="list-style-type: none">• Click Submit Referral. <p>Note: When approval request is declined, an alert will be sent to the referral's primary worker.</p>
5	<p>On the <i>Referral Details</i> page.</p> <ul style="list-style-type: none">• Navigate down to the Referral Acceptance section.• Click View Submission History link above the <i>Requested By</i> field. <p>Note: The history window opens and the user can review the full history of rejections for the referral.</p>



Manage Referral Supervisor Approval Step Action Table



Override Referral Approval

Step	Action
1	In the <i>Left Navigation</i> panel. <ul style="list-style-type: none">• Click Search.• Click Hotline Search.
2	On the <i>Hotline Search</i> page. <ul style="list-style-type: none">• Click in the Referral ID text box.• Enter Referral ID.• Click Search.
3	In the <i>Hotline Search</i> table. <ul style="list-style-type: none">• Click the Referral ID link to open the Hotline Details.
4	On the <i>Referral Details</i> page. <ul style="list-style-type: none">• Navigate down to the Supervisor Approval section.• Select Override Approval.• Add required Comments in the Comments field. <p>Note: The approval for the referral will be removed and the supervisor will be set as the assigned primary worker on the referral.</p>
