

# DTD Technical Bulletin #3: Updates for 11/18

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This technical bulletin aims to address multiple updates to CoactionNet affecting Care Coordinators and Referral Network Partners as of 11/01/2018.

## Driving the Dream Referral Form (All Network Partners)

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### Copy-Forward Functionality

In this update, the 'Copy Record' button has been added to the DTD Referral Form. In cases where a client needs multiple referrals for services in a single meeting, this functionality may be used to quickly fill in much of a new referrals information. To use, open the most recently created DTD Referral Form and choose 'Copy Record'. The fields that are copied forward include: Referring Organization, What type of services are you providing to this person?, Entire Household Information Section, Care Coordinator Referral and Appointment Section. The other fields still need to be completed manually in order to send the referral.



## Referral Updates

In order to simplify the referral updating process, all referrals will be updated from the Referral Update Web Form, and the status of all referrals will be checked using the home screen bulletins. This ensures consistency in the updating process, and keeps DTD users from needing to check referral status in two different places. To make this transition easier, the referrer may request a copy of the referral e-mail at the point of sending, so that the referrer will have easy access to the Referral Update Web Form. A copy of the referral e-mail can be requested by checking the box for “Check Here If You Want to Receive A Copy of This Referral Email” and choosing yourself from the “Email for Copy of Referral”. NOTE: If you do not choose this option, you will still receive the reminder e-mails containing the link to the Referral Update Web Form. Using this option ensures easy access to the Referral Update Web Form prior to the first reminder.

### Driving the Dream Referral Form

**Client, April J**  
Quick View Information ▶

**Referring Organization ▼**

<b>*Referring Organization</b> Demo Organization ▼	<b>Creation Date</b> --	<b>Created By</b> --
<b>Check Here if You Want to Receive A Copy of This Referral Email</b> <input checked="" type="checkbox"/> Yes	<b>Email for Copy of Referral</b> -- Please Select -- ▼	

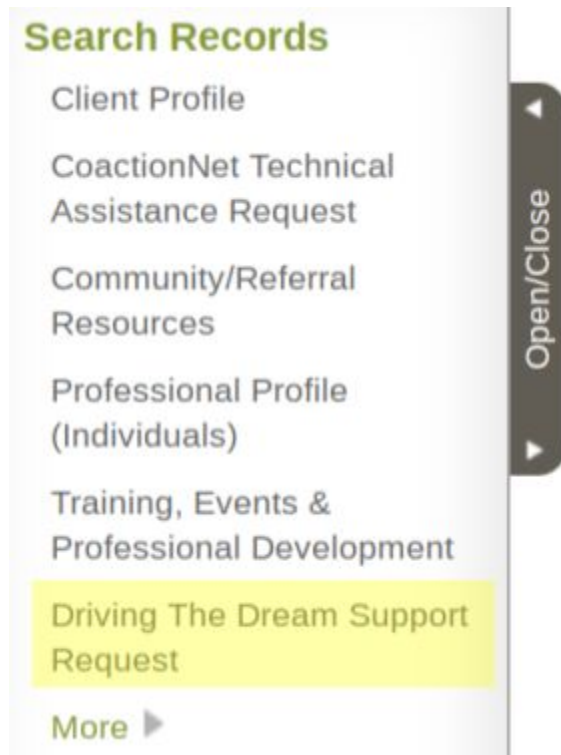
Users may still access the content of the referral e-mail in the System Fields section at the bottom of the referral:

**System Fields ▼**

<b>Record ID</b> 1231558	<b>Modification Date</b> 10/16/2018 2:06 PM CDT	<b>Modified By</b> Eric Burden
<b>PL Email Trigger</b> Not Triggered	<b>CC Email Trigger</b> Not Triggered	<b>Program Referral E-Mail Trigger</b> Email Sent (click to view)

## Support Request Form (All Network Partners)

A new “Driving The Dream Support Request” has been added to CoactionNet to provide simpler tracking and resolution to DTD-related issues and questions as the DTD Network continues to grow. This form is available in the left-hand menu. In order to use this form, simply select it from the left-hand menu, choose an “Issue Type”, type a description, and save the form. Completing this form will trigger an email to a member of the DTD Quality Improvement team for resolution.



### Driving The Dream Support Request

Main ▾

<b>Creation Date</b> --	<b>Created By</b> --
<b>*Issue Type</b> 🔄 Referral ▾	<b>*Issue Description</b> Notes

## Program Enrollment Form (Care Coordinators)

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Care Coordinators can now choose to receive an e-mail when completing a Program Enrollment form. In order to receive the e-mail, the “Care Coordinator Completing This Form” dropdown must be used to select the Care Coordinator’s name. This email will contain reminder information about expected care management activities and timelines.

Program Enrollment

Client, April J  
Quick View Information ▶

Main ▾

<b>*Program</b> Driving the Dream ▾	<b>*Enrollment Date</b> 06/11/2018 📅
<b>Program Site/Funding Source/Region</b> Porter Leath ▾	<b>Discharge Date</b> 📅 06/11/2018 📅
<b>Care Coordinator Completing This Form</b> -- Please Select -- ▾	<b>*What type of services are you providing to this person?</b> <input checked="" type="checkbox"/> 1. Shelter and Housing <input type="checkbox"/> 2. Employment

## Driving the Dream Client Information Form (Care Coordinators)

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The following question was added to the DTD Client Information form, to be completed moving forward. Existing DTD Client Information forms do not need to be updated with this information:

**Did you or someone in your household receive an Earned Income Tax Credit in the most recent filing year?**

- Yes
- No
- Don't Know