Managing Child Referrals

Roles that Have Access: Agency Admin, Home Visit Admin, Home Visit Manager, Home Visit Supervisor, & Home Visitor

You can create child referrals in Hubbe. This instruction sheet will walk through how to set up custom referral entities, how to create child referrals, and how to view/export all referrals.
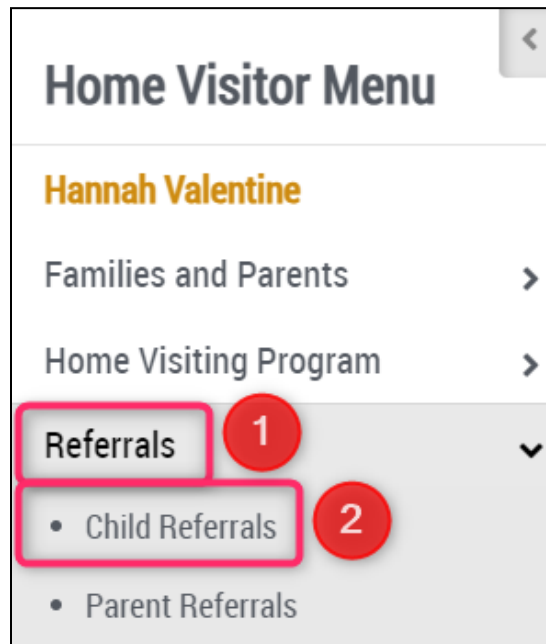
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Prior to creating any referrals, it is recommended that you customize some of the fields that will appear on the referral record itself. This will ensure that the **Child Referral** record is tailored to the needs of your individual organization.

1 From the **Home Visitor Menu**, click on the "Referrals" menu item and then "Child Referrals."

2 You will land on the **Child Referrals** record. From here, you can view all child referrals in your agency.

I   In order to create a child referral, navigate to a **Child** record.

From here, scroll down to the tabs at the bottom of the record, and click on the "Referrals" tab.

2   From here, scroll down to the tabs at the bottom of the record, and click on the "Referrals" tab.
This will show you a table of all the referrals that have been made for this child. By default, there will be none to start. To create a new referral for this child, click on the blue "Create Referral" button.

3 This will open up the "Create Child Referral" modal.

The first field, "Referral ID," is the system-generated unique ID for this referral. This field can be customized, but we recommend you leave it as is.

Next are the "Date Referral Made" and "Date Referral Closed" fields. At the time of creation, you will only know the Date the Referral was made, so leaving the "Date Referral Closed" field can be left blank until the child is no longer receiving service.

In the following field, you will select "Yes" or "No" in response to: "Child Receiving Referral to Services for the First Time due to a Developmental Screening?"

Child Receiving Referral to Services for the First Time due to a Developmental Screening?

🔘 Yes ⚪ No

You will then have to enter the HVP 19 Referral Service Category. This data field is critical for the HVP 19 report. If you are **not** a CalWORKS funded program and **do not** submit a monthly HVP 19 report, you can ignore this field.

HVP 19 Referral Service Category

h. Infant and toddler health care

Next, add the status of the referral. You will most likely tag it as "Referral Made", but there are other status options that may be relevant as well.

Referral Status

Referral Made

Then fill in the "Referral Made Due to One or More of the Following Reasons" and any "Developmental Areas of Concern (when applicable)" fields:

Referral Made Due to One or More of the Following Reasons

Agency Concern, Parent/Family Assessment Results Related

Developmental Areas of Concern (when applicable)

Speech/Communication

In the following "Did This Referral Result in Services Offer to the Parent/Caregiver or Their Child?" field, select either "Yes" or "No."

Did This Referral Result in Services Offer to the Parent/Caregiver or Their Child?

🔘 Yes ⚪ No

In the final field you can enter the "Date Services Began," if the parent declined services, and/or the description of the service (if relevant):

4   Note that all the fields outlined above are **not** mandatory to create a referral, but we recommend filling out as many of them as possible to improve data quality. When you are happy with your referral, you can finalize creation by clicking on the blue "Save" button at the bottom of the modal:
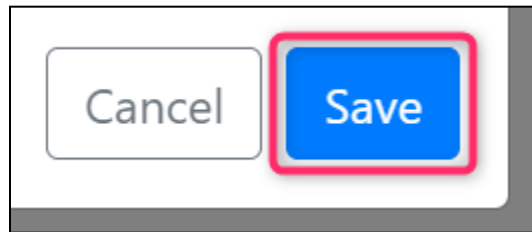
5   The referral will now appear in the table on the **Child** record.

	Referral ID	Status	First Referral?	Date Made	Date Closed	Areas of Concern	Referral Sources	HVP19 Referral Service	Created By	Updated By	Actions
☐	CR10376478	Referral Made	No	4/15/2023		Speech/Communication	Agency Concern, Parent/Family Assessment Results Related , Parent Concern	h. Infant and toddler health care	Created by Admin on 5/9/2023	Updated by Admin on 5/9/2023	✏️ 🗨️(0) 🗑️ ✉️

6   There are additional actions you can make on a referral record. Under the "Actions" column, there are several icons that represent actions.

Actions
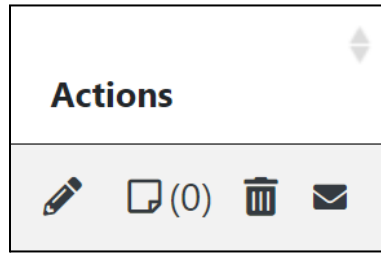
Clicking the pencil icon enables you to edit the referral, selecting the notepad icon gives you the ability to add notes or attachments to the referral, clicking the trashcan icon allows you to delete the referral, and selecting the envelope icon enables you to email the referral.

7   Repeat Steps 1-6 as many times as needed until all of the referrals for the child have been created.

The Child Referrals Grid Features

As you have more referrals, the **Child Referrals** grid will become more overwhelming. There are certain features that can help you narrow down the grid results.

1   If the grid is too overwhelming, you can narrow down the number of entries by selecting the grey "Filters" button.
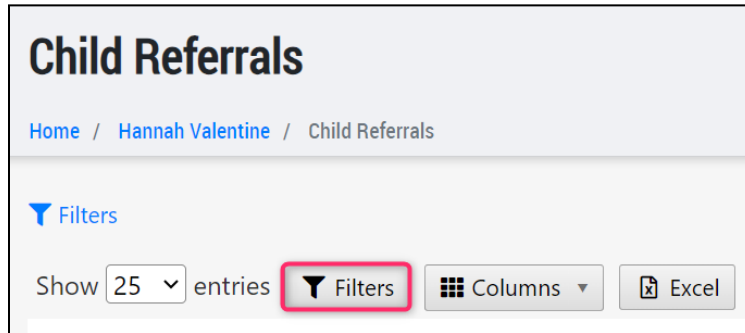
You can then enter any values into the respective filters and click on the blue "Apply Filters" button to refine the dataset.
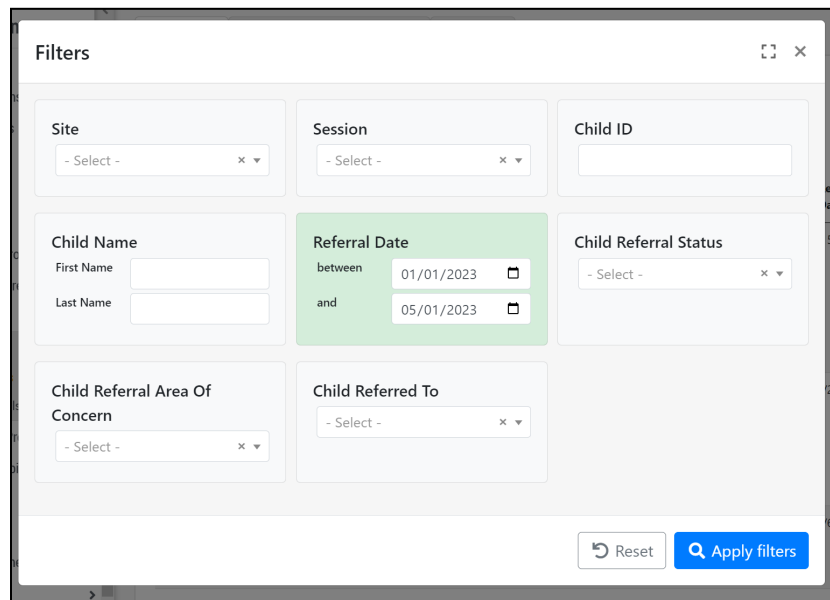
2   Click the grey "Columns" button to narrow down the columns shown in the grid.

Check or uncheck these fields to show or hide them in the grid. For a clean start, click "Unselect All" to uncheck all columns. You can also easily re-select all columns by clicking "Select All."

3   You can also export this page into Excel by clicking on the "Excel" button. It will export the table as shown into an Excel file.

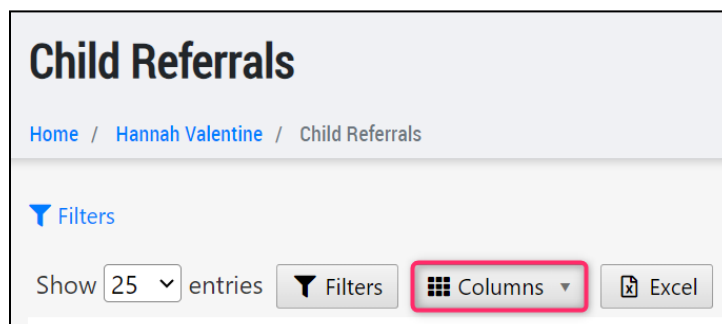|	A	B	C	D	E	F	G	H	I	J
	Referral ID	Family ID	Family Name	Child ID	Child Name	Parent ID	Parent Name	Referral Status	Referral Date	First Referral?
	CR10376478	HH10056913	Aceves Family	ST15064342	Arman Aceves	Julia Aceves	Julia Aceves	Referral Made	4/15/2023	FALSE
	CR17368751	HH14566421	Rohan Family	ST14574266	Aiden Rohan	Ashkon Rohan	Ashkon Rohan	Referral Made	10/25/2022	TRUE
	CR7563592	HH14283919	Hernandez Family	ST14285511	Lilly Mary Hernandez	Amanda Hernandez	Amanda Hernandez	Referral Made	12/6/2022	TRUE
	CR16243816	HH14474069	Bowdry Family	ST14483664	Bryan Ray Bowdry	Kayla Bowdry	Kayla Bowdry	Draft	12/6/2022	TRUE
	CR16397715	HH14517401	Lowel Family	ST14534809	Kenny Lowel	Michael Lowel	Michael Lowel	Referral Made	12/7/2022	TRUE
	CR16404410	HH14517401	Lowel Family	ST14538101	Jenny Lowel	Michael Lowel	Michael Lowel	Draft	12/7/2022	TRUE
	CR17045177	HH15029310	Garcia Family	ST15036110	Opal Garcia	Michelle Garcia	Michelle Garcia	Referral Made	12/10/2022	FALSE
	CR16514615	HH15029310	Garcia Family	ST15036110	Opal Garcia	Michelle Garcia	Michelle Garcia	Draft	12/7/2022	TRUE
	CR16388936	HH10056913	Aceves Family	ST15064342	Arman Aceves	Julia Aceves	Julia Aceves	Referral Made	12/7/2022	TRUE