

Managing Parent Referrals

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

You can create parent referrals in Hubbe. This instruction sheet will walk through how to set up custom referral entities, how to create parent referrals, and how to view/export all referrals.

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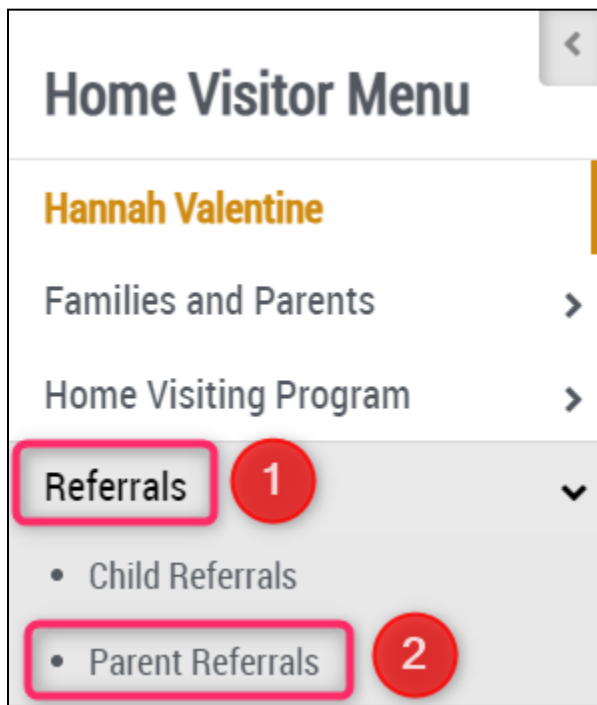
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Customizing the Parent Referral Record

Prior to creating any referrals, we recommend that you customize some of the fields that appear on the referral record itself. This will ensure that the **Parent Referral** record is tailored to the needs of your individual organization.

From the **Home Visitor Menu**, click on the “Referrals” menu item and then “Parent Referrals.”



2 This will take you to the **Agency Parent Referrals** record. From here, you can view all parent referrals in your agency.

Agency Parent Referrals

Home / Hannah Valentine / Parent Referrals

Filters

Show 25 entries Filters Columns Excel Showing 1 to 4 of 4 entries

Referral ID	Family ID	Family Name	Parent ID	Parent Name	First Referral?	Referred Status	HVP19 Referral Service	Referred Date	Referral Source	Area of Concern
PR16585634	HH10056913	Aceves Family	PA15068518	Julia Aceves	Yes	Referral Made	m. Workforce readiness services	4/7/2023	Parent Concern	Parenting/Parent Education
PR16574175	HH14283919	Hernandez Family	PA14288696	Amanda Hernandez	Yes	Referral Made	j. Mental health services	4/7/2023	Parent Concern	Child Care, Housing

Creating a Parent Referral

Once you are satisfied with your parent referral organizations, you are ready to create a referral.

In order to create a parent referral, navigate to a **Parent** record.

The screenshot shows a user interface for a parent record. At the top left is a logo consisting of a green stylized flower or leaf pattern. To its right is a profile picture of a woman with dark hair, identified as Julia Aceves. Below the name is a breadcrumb trail: Home / First 5 Maple / Aceves Family / Julia Aceves. A navigation bar contains three buttons: 'Setup Portal' (blue), 'Delete' (red), and 'Inactivate Parent' (red). On the left is a 'Parent Menu' with a list of options: 'Julia Aceves' (highlighted in orange), 'Surveys', 'Home Visits', 'Parent Photo', 'Education', 'Job Training', and 'Employment'. The main content area is titled 'Parent Information' with an 'Edit' button. It displays several fields in a two-column layout: 'Parent ID' (PA15068518) and 'Courtesy Title' (None); 'Unique Identifier' (Mother) and 'Parent Best Described As' (Mother (biological or adoptive)); 'Head of Household' (Yes, in a green box) and 'Highest Education Level' (Unknown).

From here, scroll down to the group of tabs at the bottom of the record, and click on the one that is labeled “Parent Referrals.”

This screenshot shows a horizontal row of navigation tabs at the bottom of the parent record. The tabs are: 'Children Enrolled', 'Non-Participating Children', 'Resume Builder', 'Parent Case Notes', 'Parent Documents', 'Parent Referrals' (highlighted with a red box), and 'Parent Pregnancies'. Below the tabs is a row of buttons: 'Create Referral' (blue) and 'Download Selected Referrals' (grey).

2

This will show you a table of all the referrals that have been made for this parent. There won't be any referrals initially by default. To create a new referral for this parent, click the blue “Create Referral” button.

This is a close-up screenshot of the navigation tabs and buttons. The 'Parent Referrals' tab is not visible. The visible tabs are 'Children Enrolled', 'Non-Participating Children', and 'Resume Builder'. A red arrow points from the 'Non-Participating Children' tab down to the 'Create Referral' button, which is highlighted with a red box. The 'Download Selected Referrals' button is also visible.

3

This will open the “Create Parent Referral” modal. We will walk through all of the fields within modal.

The screenshot shows a modal window titled "Create Parent Referral" with a close button in the top right corner. The form contains the following fields and options:



- Referral ID:** A text input field containing "CR10497125".
- Date Referral Made:** A date picker showing "07/24/2023".
- Date Referral Closed:** A date picker showing "mm/dd/yyyy".
- Parents/Caretakers Receiving Referral to Services for their child for the First Time due to a Developmental Screening?** Radio buttons for "Yes" and "No".
- Does This Referral Involve One or More Children in the Family** Radio buttons for "Yes" and "No" (selected).
- Does This Referral Involve Another Parent/Caretaker in the Family** Radio buttons for "Yes" and "No" (selected).
- HVP 19 Referral Service Category:** A dropdown menu.
- Referral Status:** A dropdown menu showing "Draft".
- Referral To:** A dropdown menu.
- Referral Made Due to One or More of the Following Reasons:** A dropdown menu.
- Areas of Concern:** A text area.

At the bottom right of the modal are "Cancel" and "Save" buttons.

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

A close-up of the "Referral ID" field, showing a text input box with the value "CR10497125".

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. The “Date Referral Closed” field can be left blank until the referral is closed.

Date Referral Made	Date Referral Closed
05/19/2023 	mm/dd/yyyy 

Then you can select “Yes” or “No” in response to the “Parents/caretakers Receiving Referral to Services for the First Time due to a Developmental Screening?” field.

Parents/Caretakers Receiving Referral to Services for their child for the First Time due to a Developmental Screening?
<input checked="" type="radio"/> Yes <input type="radio"/> 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 complete 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
Parent Concern
Areas of Concern
Parenting/Parent Education

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

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


Yes No

Finally, you can enter the date that the services began **or** if the parent declined services. You can also include a description of the service if relevant.

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

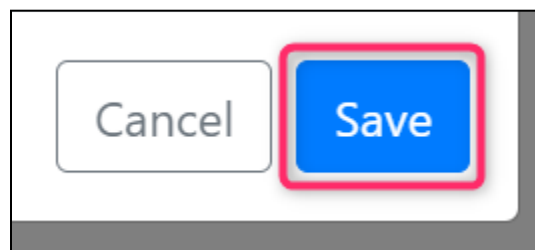
Yes No

Date Services Begin Parent Declined Services





04/25/2023 

Description of New Services Offered

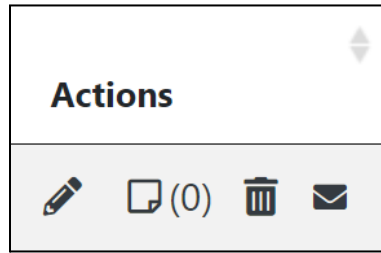
4 Note that the fields outlined above are **not** mandatory to create a referral, but we recommend filling out as many of them as possible to improve data quality. When you are satisfied with your referral, you can finalize it by clicking on the blue “Save” button at the bottom of the modal.



5 We may now observe our referral in the table on the parent record:

<input type="checkbox"/>	Referral ID	Status	Date Made	Date Closed	Areas of Concern	Referral Sources	HVP19 Referral Service	Created By	Updated By	Actions
<input type="checkbox"/>	PR16585634	Referral Made	4/7/2023		Parenting/Parent Education	Parent Concern	m. Workforce readiness services	Created by HannahValentine on 6/7/2022	Updated by AlexCho 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.



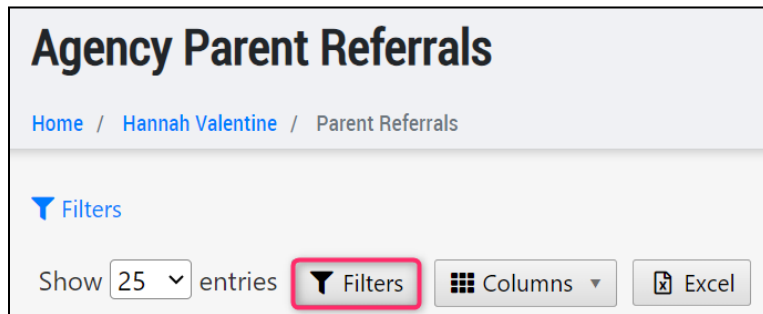
Clicking the pencil icon enables you to edit the referral, selecting the notepad icon gives you the ability to add notes or attachments to the referral, clicking the trashcan icon allows you to delete the referral, and selecting the envelope icon enables you to email the referral.

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

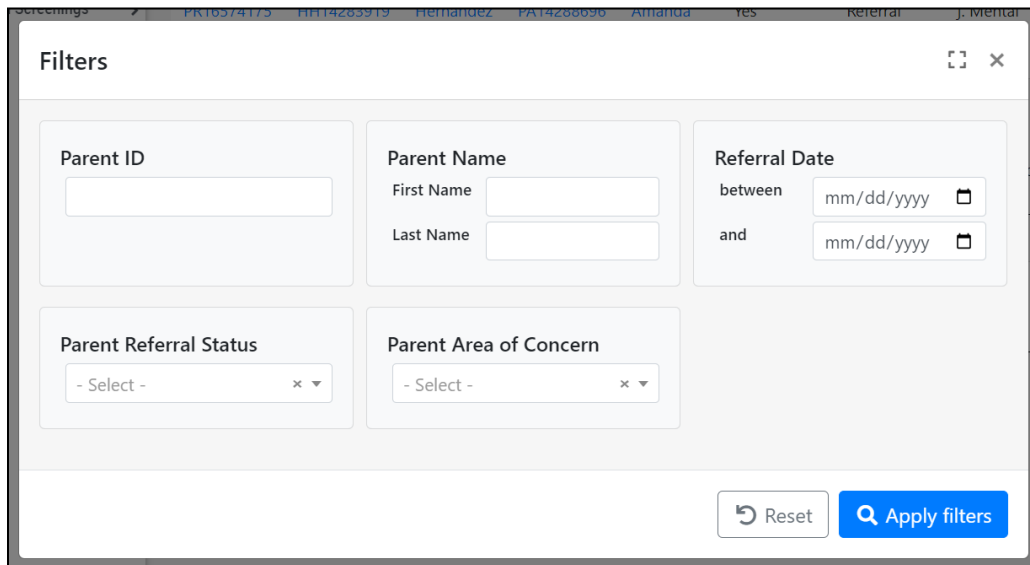
The Agency Parent Referrals Grid Features

As you create more referrals, you will end up with a plethora of referrals for all parents - especially if you are a large organization. The features on the **Agency Parent Referrals** grid allow you to narrow down grid results.

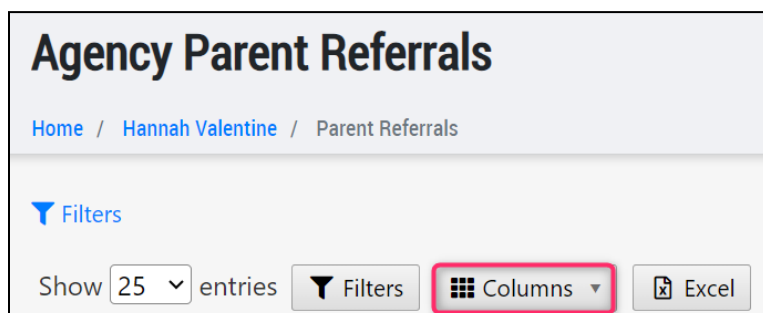
If the grid is too overwhelming, you can narrow down the number of entries by selecting the grey “Filters” button.



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.”

A screenshot of a column selection menu. At the top, there are two options: "Select all" and "Unselect all", both in blue text. Below these are two columns of fields, each with a checked checkbox. The fields are: Referred Status, HVP19 Referral Service, Referred Date, Referral Source, Area of Concern, Created By, Updated By, and Actions. The menu is overlaid on a table with visible text like "PA15049126", "Michelle", "Yes", "Referral", and "C. Fa".

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 screenshot of the "Agency Parent Referrals" page. The title "Agency Parent Referrals" is at the top. Below it is a breadcrumb trail: "Home / Hannah Valentine / Parent Referrals". There is a "Filters" section with a dropdown arrow. Below that, there are controls for "Show 25 entries", "Filters", "Columns", and an "Excel" button with a spreadsheet icon, which is highlighted with a red box. An arrow points downwards from the Excel button.

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