

Adding to the CAS 2.0 Resource Directory

Steps for New Resources

If an agency has agreed to be a partner, be sure to call the agency to confirm the accuracy of the information you enter.

Gather and check the following information:

- Location
- Main Telephone number
- Intake requirements and hours
- Point of Contact (POC)
- Hours of operation
- Type of services provided

How Do I Add a Referral Record to the Resource Directory?

Once new information has been collected, follow the steps below to add it as a resource record. Make sure all **agency, program** and **service** records include basic information. The Service record will generally have more information than the Agency and Program records.

Please only create one agency entry for multiple locations, which you will enter as separate Programs under the same agency.

<i>Step</i>	<i>Action</i>
1. Search to ensure that the agency record is not in the Resource Directory	<ul style="list-style-type: none">➤ (if not at the My Tools screen) Click My Tools.➤ Click Edit Agency (Including Chapter) in the Resource Management section.<ul style="list-style-type: none">• <i>The system displays the Search for Agency Record screen.</i>

Search for Agency Record

Agency Name:	<input type="text"/>
Agency ID Number:	<input type="text"/>
Keywords:	<input type="text"/>
Aliases:	<input type="text"/>
Location:	<input type="text" value="*"/>
Languages Spoken:	<input type="text"/>
Status:	<input type="text" value="*"/>
Start Display Date:	from <input type="text" value="mm/dd/yyyy"/> through <input type="text" value="mm/dd/yyyy"/>
End Display Date:	from <input type="text" value="mm/dd/yyyy"/> through <input type="text" value="mm/dd/yyyy"/>
Data Provided By:	<input type="text" value="*"/>

- Enter part of the agency's name in the **Agency Name** field.
- Select the agency's **Location** [state].
 - *Because the Resource Directory features agency records throughout all regions, limiting your search by **Location** helps reduce the number of search results.*
 - *It is important that you always record a **Location** at an agency record, so that you can use this search criterion effectively.*
- Click **Show Profiles**.
 - *If it is listed, do not create an additional agency record for it.*
 - *If no agency records meet your search criteria, the system indicates that it found no matching records and displays links to either **SEARCH AGAIN** or **ADD AN AGENCY**. You can search again, if desired or continue to step two.*


Sorry, no records matching your criteria were found.

There were no results for your search. Click the button below to return to the search form.

SEARCH AGAIN | ADD AN AGENCY

<p>2. Add the agency to the Resource Directory</p>	<ul style="list-style-type: none"> ➤ Click ADD AN AGENCY. <ul style="list-style-type: none"> • The system displays the Enter Agency Information screen. ➤ Enter the Agency Name. ➤ Enter the Description of Agency. <ul style="list-style-type: none"> • The Description of Agency appears in the search results when you execute a search through Edit Agency (Including Chapter).
	<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Enter Agency Information</p> <p>Agency Name: <input type="text" value="Los Angeles Regional Food Bank"/></p> <p>Mission: <input type="text"/></p> <p>Description of Agency: <input type="text" value="Food distributor to 500 local food banks. Willing to give us updated list. This website has MANY up-to-date food distribution sites throughout LA County. Search by zip code, includes distribution times, phone numbers and addresses of each site."/></p> </div>
<p>2. Add the agency to the Resource Directory (cont.)</p>	<ul style="list-style-type: none"> ➤ Select the agency's Location (state). ➤ Enter the agency's Physical Address. ➤ Enter the agency's Web Address. ➤ Enter the agency's Hotline Phone. ➤ Enter the agency's Hours of Operation. <ul style="list-style-type: none"> • If the agency has multiple locations, you do not need to enter Hours of Operation at the agency record, but instead enter them at individual SERVICE records. Hours of Operation that you enter at the agency record cascade down to associated programs and services when you create them. ➤ Enter information for the agency's point of contact. ➤ Enter the agency's Languages Spoken. ➤ Select Active as the agency's Status. ➤ Click Save Agency at the bottom of the Enter Agency Information screen. <ul style="list-style-type: none"> • The system displays a screen indicating that the record was added successfully and prompting you to Add Another Agency, if desired.

This profile can currently be viewed by the public.

Status:  Active
Only "Active" profiles are shown to the public.

Start Display Date: (MM/DD/YYYY)

End Display Date: (MM/DD/YYYY)

Hide Director Information:

Enforce AIRS taxonomy compliance:

[Save Agency](#) [Reset Fields](#)

[Delete Agency](#)

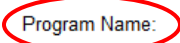
Moving to the second level: Add a Program to the Agency in the Resource Directory

*A Program is for one agency only

3. Add the program to the Resource Directory. First, search to ensure that the program record is not in the resource directory

- (if not at the **My Tools** screen) Click **My Tools**.
- Click **Edit Program (Site/Merchant)** in the **Resource Management** section.
 - The system displays the **Search for Program to Edit** screen.

Search for Program to Edit

Program Name: 

Program ID:

Associated Agency Name:

Keywords:

Aliases:

Location: *

Languages Spoken:

Data Provided By: *


Status: *

Start Display Date: from through

End Display Date: from through

Is Merchant?:

Aid Site:

 [Show Profiles](#)

	<ul style="list-style-type: none"> ➤ Enter all or part of the name of the agency with which you will associate the program in the Associated Agency Name field. ➤ Click Show Profiles. <ul style="list-style-type: none"> • <i>The system displays the programs that meet your search criteria, if any, at the Select Program to Edit screen.</i> • <i>If the program for which you were searching is not listed, continue to step four; if it is listed, do not create an additional record for it.</i>
--	--

<p>4. Add the Program Name and Agency Name</p>	<ul style="list-style-type: none"> ➤ Click My Tools. ➤ Click Add Program (Site/Merchant) in the Resource Management section. <ul style="list-style-type: none"> • <i>The system displays the Enter Program and Agency Name screen.</i> ➤ Enter the Program Name. <ul style="list-style-type: none"> • <i>If you are creating a single program to associate with the agency, the name of the program can match that of the agency.</i> • <i>If you are creating multiple programs for a single agency, give program names that readily distinguish them from one another. Different locations for an agency can be created as programs.</i> ➤ Enter all or part of the name of the agency with which you are associating the program in the Agency Name field. ➤ Click Next Step.
--	---

Enter Program and Agency Name

Entering a program is a three step process. Please follow the steps below:

➡ **Step 1: Enter the program name and associate it with an agency.**

Step 2: Confirm the correct agency.

Step 3: Complete the program information.

Program Name:

Agency Name:

[Next Step](#)

<p>5. Confirm the program's agency</p>	<ul style="list-style-type: none"> ➤ Select the desired agency's radio button. ➤ Click Next Step. <ul style="list-style-type: none"> • <i>The system displays the Enter Program Profile screen; the Associated Agency Name and Program Name fields are auto-populated and read-only based on your data entry at the two prior screens.</i>
--	--

Confirm Agency

Step 1: Enter the program name and associate it with an agency.

➔ **Step 2: Confirm the correct agency.**

Step 3: Complete the program information.

Program Name: Eviction Defense Network- Los Angeles

Select One	Agency Name
<input type="radio"/>	Eviction Defense Network- Los Angeles ⁴⁵⁹⁷²¹

Next Step

- | | |
|-------------------------------------|---|
| 6. Enter the remaining program data | <ul style="list-style-type: none"> ➤ Enter a Description of Program. ➤ (if needed) Update the physical address or other values that cascaded down from the associated agency record. |
|-------------------------------------|---|

Enter Program Profile

Step 1: enter the program name and associate it with an agency.

Step 2: Confirm the correct agency.

➔ **Step 3: Complete the program information.**


The default information below has been taken from the record of the associated agency. You should edit any of the fields which are incorrect and the new information will be saved for this specific program record and will not change the information for the agency.

Associated Agency Name: Eviction Defense Network- Los Angeles

Program Name: Eviction Defense Network- Los Angeles

Description of Program:

- | | |
|---|--|
| 6. Enter the remaining program data (cont.) | <ul style="list-style-type: none"> ➤ Select Active as the program's Status. ➤ Click Save Program at the bottom of the Enter Program Profile screen. <ul style="list-style-type: none"> • <i>The system displays a screen indicating that the record was added successfully and prompting you to:</i> <ul style="list-style-type: none"> • Add Another Record to begin the entry of another program record for the same agency. OR • Duplicate Program Profile if an agency has many programs or locations. Just change what is different at the other program or location. |
|---|--|

<p>Status:  Active <small>Only "Active" profiles are shown to the public.</small></p> <p>Start Display Date: <input type="text"/> (MM/DD/YYYY)</p> <p>End Display Date: <input type="text"/> (MM/DD/YYYY)</p> <p>Aid Site: <input type="checkbox"/></p> <p>Hide Director Information: <input type="checkbox"/></p> <p>Hide Contact Information: <input type="checkbox"/></p> <p>Enforce AIRS taxonomy compliance: <input type="checkbox"/></p> <p><input type="button" value="Save Program"/> <input type="button" value="Reset Fields"/></p>
--

Moving to the Third Level: Add a Service to the Program and Agency in the Resource Directory

<p>7. Add a Service. First, search to ensure that the service record is not in the Resource Directory</p>	<ul style="list-style-type: none"> ➤ (if not at the My Tools screen) Click My Tools. ➤ Click Edit Service in the Resource Management section. <ul style="list-style-type: none"> • <i>The system displays the Search for Service to Edit screen.</i> ➤ Enter all or part of the name of the agency with which you will associate the service in the Associated Agency Name field. ➤ Click Show Profiles. <ul style="list-style-type: none"> • <i>The system displays the services that meet your search criteria, if any, at the Select Service to Edit screen.</i> • <i>If the service for which you were searching is not listed, continue to step eight; if it is listed, do not create an additional record for it.</i>
<p>8. Add the Service Name and Agency Name</p>	<ul style="list-style-type: none"> ➤ Click My Tools. ➤ Click Add Service in the Resource Management section. <ul style="list-style-type: none"> • <i>The system displays the Enter Service Profile screen.</i> ➤ Enter the Service Name. <ul style="list-style-type: none"> • <i>See Appendix C for list of Service Names consistent with existing service records.</i> ➤ Enter all or part of the name of the agency with which you are associating the service in the Agency Name field. ➤ Click Next Step. <ul style="list-style-type: none"> • <i>The system displays a list of agencies that match the name you entered.</i>

Enter Service Profile

Please follow the steps below to enter a service profile.

Step 1: Enter the service name and associate it with an agency

Step 2: Confirm the associated agency and program

Step 3: Complete the service information

Service Name:

Agency Name:

Program Name: *Choose in the next step.*

[Next Step](#)

- 9. Confirm the service's agency**
- Select the desired agency's radio button.
 - Click **Next Step**.
 - *The system displays a list of programs that are associated with the selected agency.*

Enter Service Profile

Please follow the steps below to enter a service profile.

Step 1: Enter the service name and associate it with an agency

➔ Step 2: Confirm the associated agency and program

Step 3: Complete the service information

Service Name: Legal Services

Agency Name: The following agencies match the name you entered. Please select one.

Select	Agency Name
<input checked="" type="radio"/>	Eviction Defense Network- Los Angeles 459721

Program Name: *Choose on the next screen.*

[Next Step](#)

- 10. Select the service's program**
- Select the desired program's radio button.
 - Click **Next Step**.
 - *The system displays the **Enter Service Profile** screen; the **Associated Agency Name**, **Associated Program Name**, and **Service Name** fields are copied and read-only based on the information entered on previous screens.*

Enter Service Profile

Please follow the steps below to enter a service profile.

→	Step 1: Enter the service name and associate it with an agency
→	Step 2: Confirm the associated agency and program
→	Step 3: Complete the service information

Service Name: Legal Services

Agency Name: Eviction Defense Network- Los Angeles

Program Name: The following programs are associated with the confirmed agency. Please select one.

Select	Program Name
<input checked="" type="radio"/>	Eviction Defense Network- Los Angeles 846464

[Next Step](#)

11. Enter core service data

- Enter descriptive information regarding the service for **Description of Service and Urgent Services Provided** (if applicable).
- Enter, confirm or update the **Location** [state] where the service is provided.
- Enter **Intake Procedure and Requirements**.
- Enter **Eligibility** requirements, **Target Population (See Appendix C)**, and **Age Group**.
- Confirm or update **Languages Spoken**.
- Enter, confirm or update agency point of **Contact Information**.
- Enter, confirm or update the **Address** where the service is provided.
- Enter the **Main Phone, Web Address and Hotline Phone** for the service.
- Enter, confirm or update **Hours of Operation**.
Examples include:
 - *M-F 8:00am - 5:00pm; M, W, F 8:30am – 5:30pm, T, Th 1:00pm – 5:30pm.*
- (Optional) Select **Update Cycle**.
 - *This creates a reminder for caseworkers to call agencies and confirm pertinent information, as agencies change their services or are no longer in business.*

Enter Service Profile

Please follow the steps below to enter a service profile.

→	<p>Step 1: Enter the service name and associate it with an agency</p> <p>Step 2: Confirm the associated agency and program</p> <p>Step 3: Complete the service information</p>
---	--

The default information has been taken from the associated agency profile. Edit any fields that contains incorrect information. The new information will be saved for this service profile only and will not change the associated agency's information.

Associated Agency Name:	Eviction Defense Network- Los Angeles
Associated Program Name:	Eviction Defense Network- Los Angeles
Service Name:	Legal Services
Description of Service:	<div style="border: 1px solid gray; height: 80px; width: 100%;"></div>

- **Ensure that the service's Status is Active.**
- **Click Save Service at the bottom of the Enter Service Profile screen.**

Status: → Active Only "Active" profiles are shown to the public.

Start Display Date: (MM/DD/YYYY)

End Display Date: (MM/DD/YYYY)

Hide From Public Search:

Hide From Other Agencies:

Enforce AIRS taxonomy compliance:

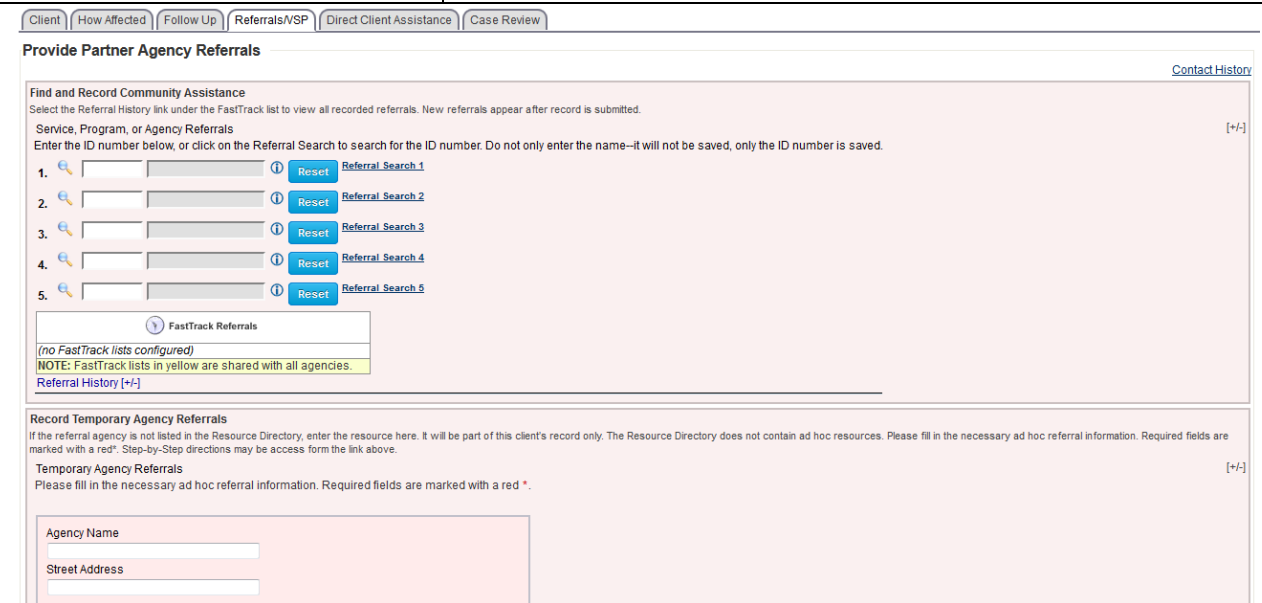
Save Service

Reset Fields

How Do I Add a Referral to a Case?

Referrals should always be documented under the Referrals/VSP tab in the case record if it has been provided to the client. Referrals are part of the qualifications for Supplemental Assistance. Be sure to document the need or reason for the referral in the case narrative prior to issuing the referral in CAS. All referrals should be added separately to the case record either through a referral search or the **Record Temporary Agency Referrals** section.

A general keyword search can be completed to find all saved referrals. If a caseworker has referred a client to a specific program that an agency offers, please select the program when adding a referral to a case. If an agency does not offer a specific program, the program will have the same name as the agency. In that case, the agency should be selected.

Step	Action
1. Access the case	<ul style="list-style-type: none"> ➤ (if not at the My Tools screen) Click My Tools. ➤ Click Case Search. ➤ Click the primary client's Last Name or First Name, or click the Case ID.
2. Access the Referrals tab	<ul style="list-style-type: none"> ➤ Click the Referrals/VSP tab.
	
3. Select the referral	<ul style="list-style-type: none"> ➤ Click Referral Search 1. <ul style="list-style-type: none"> • <i>The system launches a Referral Search window.</i> ➤ Enter desired search criteria; likely minimal search criteria include: <ul style="list-style-type: none"> • Keyword • Location (state) or Sort by Distance From Zip Code <ul style="list-style-type: none"> • <i>Sort by Distance from Zip Code returns services regardless of their physical location but sorts them so that those closest to the entered zip code appear first.</i>

3. Select the referral (cont.)	➤ Click Search at the bottom of the Referral Search window.
4. Issue the referral	<p>➤ Click the Select link at the desired Program or Agency Name listing. Select the Program if a referral has been provided for a specific program otherwise, select the Agency field. Please do not select the Service Name.</p> <ul style="list-style-type: none"> • <i>The item is added to the resource record at the Referrals screen, but the Referral Search window remains open for you to select additional items, if needed. A Back to Search Criteria link and a Search Again link are available to do additional searches. A maximum of 5 entries can be added at once.</i> • <i>To learn more about a service listing before selecting it, click its name link to open a separate window with details from the Resource Directory.</i> <p>➤ (if needed) Select additional items from the Referral Search window.</p> <p>➤ (if needed) Search for additional items by selecting the Search Again link.</p> <p>➤ Close the open Referral Search window by selecting Click here to close this window or clicking the X at the top right of the window.</p>

Client | How Affected | Follow Up | Referrals/VSP | Direct Client Assistance | Case Review

Provide Partner Agency Referrals

Find and Record Community Assistance
Select the Referral History link under the FastTrack list to view all recorded referrals. Service, Program, or Agency Referrals
Enter the ID number below, or click on the Referral Search to search for the

1. Los Angeles Homeless [Referral Search 1](#)
2. [Referral Search 2](#)
3. [Referral Search 3](#)
4. [Referral Search 4](#)
5. [Referral Search 5](#)

(no FastTrack lists configured)
NOTE: FastTrack lists in yellow are shared with all agencies.

Referral Search

Keyword: lahsa
Location: California

Displaying 1 - 3 of 3 results

Click the name to view the profile and click "select" to insert the service ID into your contact history record.

[Map All](#) [Back to Search Criteria](#) [Search Again](#)

Service Name	Rank	Description	Location	Program	Agency	Map
Housing - Emergency Shelter, Housing - Transitional (ID# S1707375) Hotline: 213-225-8651 or 213-883-3333 Contact Phone: (213) 276-0485	★★★★	Caseworker should email LAHSA as soon as they think a client may be in need of services. LAHSA has specific shelters they work with and can place clients according to their needs. If a client does not have appropriate documentation, LAHSA	California	Los Angeles Homeless Services Authority (LAHSA) (ID# P796838)	Los Angeles Homeless Services Authority (LAHSA) (ID# A436920)	
	Referrals: 0 Provided: 0			select	select	

4. Issue the referral (cont.)

- Click **Submit** at the bottom of the **Referrals** screen.
 - *The system validates and processes the referral, and returns you to the **Household** tab.*
- Go back to the **Referrals/VSP** tab and click on **Referral History (+/-)** under the Fast Track Referrals section to view the saved referrals
 - *Once a referral is added, it cannot be modified or deleted.*
 - *Saved referrals will only be visible after selecting the **Referral History (+/-)** link.*

Client | How Affected | Follow Up | Referrals/VSP | Direct Client Assistance | Case Review

Provide Partner Agency Referrals

Find and Record Community Assistance
Select the Referral History link under the FastTrack list to view all recorded referrals. New referrals appear after record is submitted.

Service, Program, or Agency Referrals
Enter the ID number below, or click on the Referral Search to search for the ID number. Do not only enter the name—it will not be saved, only the ID number is saved.

1. [Referral Search 1](#)
2. [Referral Search 2](#)
3. [Referral Search 3](#)
4. [Referral Search 4](#)
5. [Referral Search 5](#)

(no FastTrack lists configured)
NOTE: FastTrack lists in yellow are shared with all agencies.

[Referral History \(+/-\)](#)

Date	Type	ID	Name	Agency Name	Street Address	City	County	State	ZIP	Phone#	Fax#	Email
07/14/2015	Agency	436829	Bet Tzedek Legal Services	Bet Tzedek Legal Services	3250 Wilshire Blvd.	Los Angeles	CA	90010				
07/14/2015	Agency	436907	Inner City Law Center	Inner City Law Center	1309 E 7th St	Los Angeles	CA	90021				
07/14/2015	Agency	436978	Salvation Army	Salvation Army				90025				
07/14/2015	Agency	436884	Goodwill - Los Angeles Region	Goodwill - Los Angeles Region				90025				
07/14/2015	Agency	436815	All Peoples Christian Church	All Peoples Christian Church	822 E. 20th St	Los Angeles	CA	90011				