# Editing Referrals in the Resource Directory

## How Do I Update a Referral in the Resource Directory?

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.

| Step | Action |
|---|---|
| 1. Search for the desired agency record | ➢ (if not at the **My Tools** screen) Click **My Tools**.<br>➢ Click **Edit Agency (Including Chapter)** in the **Resource Management** section. |
|  | |
| 1. Search for the desired agency record (cont.) | ➢ Enter part of the agency's name in the **Agency Name** field.<br>➢ Select the agency's **Location** [state].<br>➢ Click **Show Profiles**. |
|  | |

| 2. Edit the Agency Record | ➢ Click the agency's name in the **Agency Name** column. |
| | ➢ Make the desired updates. |
| | ➢ Click **Save Agency** at the bottom of the **Edit Agency Record** screen. |
| | • *If you edited fields that are eligible to cascade down to program or service records, the screen will also list those fields and provide a link to the Agency Cascade Update tool.* |
| 3. (Optional) Indicate updated values to cascade down to selected program and service records. | ➢ Click the **Agency Cascade Update** tool link. |
| | • *The system displays the Select Update Fields screen, which lists the values that are eligible to cascade down to program and service records, indicates the number of associated (or affiliated) program and service records, and displays the first of these records as the initial Program to be Updated.* |

The record was edited successfully.
Click the "Edit Another Record" button below to continue.

**Edit Another Record**

The following cascade-able fields have been updated:

- Contact First
- Contact Last
- Contact Position
- Contact Phone

Would you like to update these fields on associated Program or Service profiles?

You can with the Agency Cascade Update tool.

| 3. (Optional) Indicate updated values to cascade down to selected program and service records (cont.) | ➢ Check the **Update?** box for each value you would like to cascade down to the current **Program to be Updated**. |
| | • *If you don't want to update any of the values at the current Program to be Updated, click Skip This One to move to the next program.* |
| | • *If at any time you want to exit the Agency Cascade Update tool without making further updates, click Skip All (updates you already performed apply even if you click Skip All after performing them).* |
| | ➢ Click **Update This Program/Service** or **Update ALL Programs/Services.** |
| | • *Clicking the Update All Programs/Services button allows you to simultaneously update the selected values at all of the associated programs and services.* |

**Select Update Fields**

**NOTICE: while working in this tool ...**
Never edit more than one agency at one time (for example: opening Agencies in multiple windows). Never use the back button or browser history links. Use only the links and buttons provided within this tool, in this window.

Updating record 1 of 2 total affiliated Programs & Services.

Program to be Updated: Los Angeles Homeless Services Authority (LAHSA)

| Field | New Update Value | Old Value | Update? check/un-check all |
|---|---|---|---|
| Contact First | Lehtti | Donald Holt; Homeless Cal-WORKs Families Project Program Manager; 213-225-6557; 213-892-0092 (fax); dholt@lahsa.org | ☐ |
| Contact Last | Gochez | | ☐ |
| Contact Position | Motel Voucher Program | | ☐ |
| Contact Phone | (213) 276-0485 | | ☐ |

**Update This Program/Service**   **Update All Programs/Services**   **Skip This One**   **Skip All**

NOTE: Do not use the "BACK" button on your browser. To return to the Agency Edit tool, click "Skip All" above.

# Edit a Program in the Resource Directory

| 4. Search for the Program record. | ➤ Return to **My Tools**. <br> ➤ Click **Edit Program (Site/Merchant)** in the **Resource Management** section. <br> ➤ Enter part of the program's name in the **Program Name** field. <br> ➤ Enter all or part of the **Associated Agency Name**. <br> ➤ Click **Show Profiles**. |
|---|---|

**Search for Program to Edit**

Program Name: [ ]

Program ID: [ ]

Associated Agency Name: [ Los Angeles Homeless Services Authority ]

Keywords: [ ]

Aliases: [ ]

Location: [ California ▼ ]

Languages Spoken: [ ]

Data Provided By: [ * ▼ ]

Status: [ * ▼ ]

Start Display Date: from [ mm/dd/yyyy ] through [ mm/dd/yyyy ]

End Display Date: from [ mm/dd/yyyy ] through [ mm/dd/yyyy ]

Is Merchant?: ☐

Aid Site: ☐

**Show Profiles**

| 4. Search for the Program record (cont). | ➢ Click the program's name in the **Program Name** column. |
|---|---|

**Select Program to Edit**

*(The "ID" number is for internal use only and is not seen by public)*

There is **1** matching record.

| Program Name | Program Description | Location | Agency | Status | ID |
|---|---|---|---|---|---|
| Los Angeles Homeless Services Authority (LAHSA) | | California | Los Angeles Homeless Services Authority (LAHSA) | Active | 796838 |

| 5. Edit the Program record, as needed (cont.) | ➢ Make the desired updates.<br>➢ Click **Save Program** at the bottom of the **Edit Program Information** screen. |
|---|---|

**Edit Program Information**

Use the "Save Program" button located on the bottom of this screen to save any edits to this program profile.

To change the agency that this program profile is associated with, use the "Reassign Agency" option at the top of the screen.

Associated Agency Name: Los Angeles Homeless Services Authority (LAHSA)  [Reassign Agency]

Program Name: Los Angeles Homeless Services Authority (LAHSA)

Program ID: P796838

Description of Program:

| 6. (**Optional**) Indicate updated values to cascade down to selected service records | ➢ Click the **Program Cascade Update** tool link. |
|---|---|

The record was edited successfully.
Click the "Edit Another Record" button below to continue.

[Edit Another Record]

[Duplicate Program Profile]

The following cascade-able fields have been updated:

- Contact First
- Contact Last
- Contact Position
- Contact Phone

Would you like to update these fields on associated Service profiles?

You can with the **Program Cascade Update** tool.

| 6. (**Optional**) Indicate updated values to cascade down to selected service records (cont.) | ➢ Check the **Update?** box for each value you would like to cascade down to the current **Service to be Updated**. <br> • *If you don't want to update any of the values at the current **Service to be Updated**, click **Skip This One** to move to the next service.* <br> • *If you want to exit the **Program Cascade Update** tool without making further updates, click **Skip All** (updates you already performed apply even if you click **Skip All** after performing them).* <br> ➢ Click **Update This Service**. <br> • *The system displays the next **Service to be Updated** with the same values selected as for the previous service.* <br> • *If multiple services are associated with the program, the system displays an **Update All Services** button that allows you to simultaneously update the selected values at all of the associated services.* |
|---|---|

**Select Update Fields**

**NOTICE: while working in this tool ...**
Never use the back button or browser history links. Use only the links and buttons provided within this tool, in this window.

Updating record 1 of 1 total affiliated Services.

Service to be Updated: Housing - Emergency Shelter, Housing - Transitional

| Field | New Update Value | Old Value | Update? ☑ check/un-check all |
|---|---|---|---|
| Contact First | Lehtti | Donald Holt; Homeless Cal-WORKs Families Project Program Manager; 213-225-6557; 213-892-0092 (fax); dholt@lahsa.org | ☑ |
| Contact Last | Gochez | Letti Gochez; Caseworker, (213) 276-0485 | ☑ |
| Contact Position | Motel Voucher Program Manager | | ☑ |
| Contact Phone | (213) 276-0485 | | ☑ |

[ Update This Service ]  [ Update All Services ]  [ Skip This One ]  [ Skip All ]

NOTE: Do not use the "BACK" button on your browser. To return to the Program Edit tool, click "Skip All" above.

## Edit a Service in the Resource Directory

| 7. Search for the Service record | ➢ Return to **My Tools**. <br> ➢ Click **Edit Service** in the **Resource Management** section. <br> ➢ Enter part of the service's name in the **Service Name** field. <br> ➢ Enter all or part of the **Associated Agency Name**. <br> ➢ Click **Show Profiles**. |
|---|---|

**Search for Service to Edit**

| | |
|---|---|
| Service Name: | |
| Service ID: | |
| Associated Agency Name: | Los Angeles Homeless Services Authority |
| Associated Program Name: | |
| Keywords: | |
| Aliases: | |
| Location: | California |
| Languages Spoken: | |
| Data Provided By: | * |
| Status: | * |
| Start Display Date: | from mm/dd/yyyy through mm/dd/yyyy |
| End Display Date: | from mm/dd/yyyy through mm/dd/yyyy |

**Show Profiles**

| | |
|---|---|
| **8. Edit the Service record, as needed** | ➢ Click the service's name in the **Service Name** column.<br>• *The system displays the **Edit Service Information** screen.* |

**Select Service to Edit**

*(The "ID" number is for internal use only and is not seen by public)*

There is **1** matching record.

| Service Name | Service Description | Location | Program | Agency | Status | ID |
|---|---|---|---|---|---|---|
| Housing - Emergency Shelter, Housing - Transitional | 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 will place ... | California | Los Angeles Homeless Services Authority (LAHSA) | Los Angeles Homeless Services Authority (LAHSA) | Active | 1707375 |

| | |
|---|---|
| **8. Edit the Service record, as needed (cont).** | ➢ Make the desired updates.<br>➢ Click **Save Service** at the bottom of the **Edit Service Information** screen. |

**Edit Service Information**

Use the "Save Service" button located on the bottom of this screen to save any edits to this service profile.

To change the program or agency that this service profile is associated with use the "Reassign Program" or "Reassign Agency" options at the top of the screen.

| Associated Agency Name: | Los Angeles Homeless Services Authority (LAHSA) | Reassign Agency |
| Associated Program Name: | Los Angeles Homeless Services Authority (LAHSA) | Reassign Program |

Service Name: Housing - Emergency Shelter, Housing - Transitional

Service ID: S1707375

Description of Service: 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 will place clients in hotels while working with them to get appropriate paperwork or tests. Some shelter locations also have waitlists and clients need to be proactive about getting in. LAHSA also has a list of hotlines, medical services, grocery and meals and emergency and other service centers. LAHSA has an emergency response team that can go out an meet with clients directly to talk about shelters, offer

Urgent Services Provided:

Note: Select **Inactive** under the **Status** field at the Agency, Program and Service records for each agency no longer included in the Resource Directory.

See the following documents for additional information:
- **Introduction to the CAS 2.0 Resource Directory**
- **Adding a Referral to the Resource Directory**