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	A	ction		
1. Search for the desired agency record	 (if not at the My Tools screen) Click My Tools. Click Edit Agency (Including Chapter) in the Resource Management section. 			
Agency Name: Agency ID Number: Keywords: Aliases: Location: Languages Spoken: Status: Start Display Date: End Display Date: Data Provided By:	from mm/dd/yyyy through r	mm/dd/yyyy mm/dd/yyyy		
1. Search for the desired agency record (cont.)	 Enter part of the agency's field. Select the agency's Loca Click Show Profiles. 		e Agency Na	ame
	Select Agency Record to Edit			
	There is 1 matching record.			
AGENCY NAME	AGENCY DESCRIPTION	LOCATION	STATUS	ID
Los Angeles Homeless Services Authority (LAHSA)		California	Active	436920
	SEARCH AGAIN ADD AN AGENCY			

2. Edit the Agency Record 3. (Optional) Indicate updated values to cascade down to selected program and service records.	 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. 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:

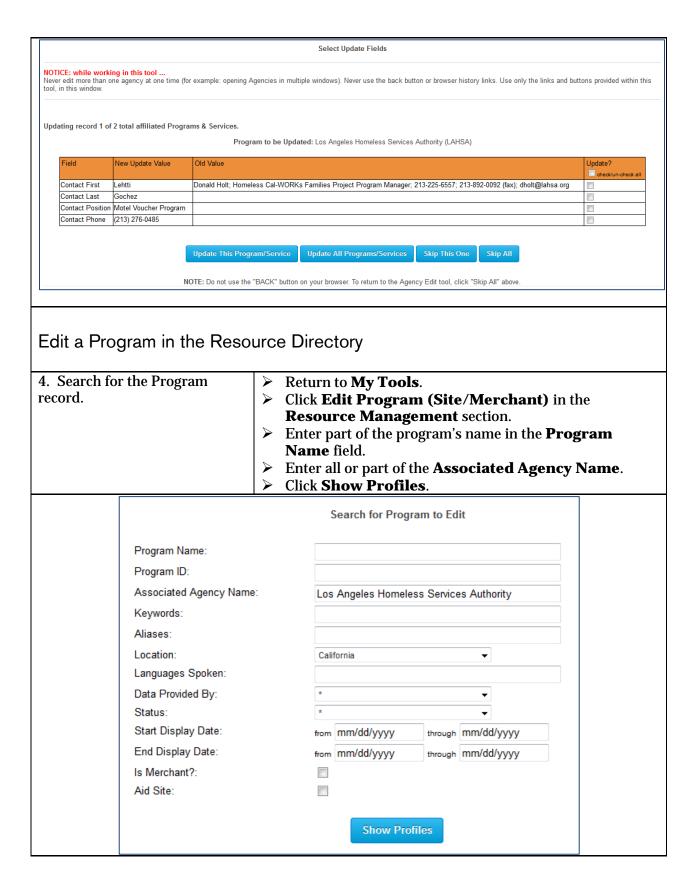
- Contact First
- Contact Last
- Contact Position
- Contact Phone

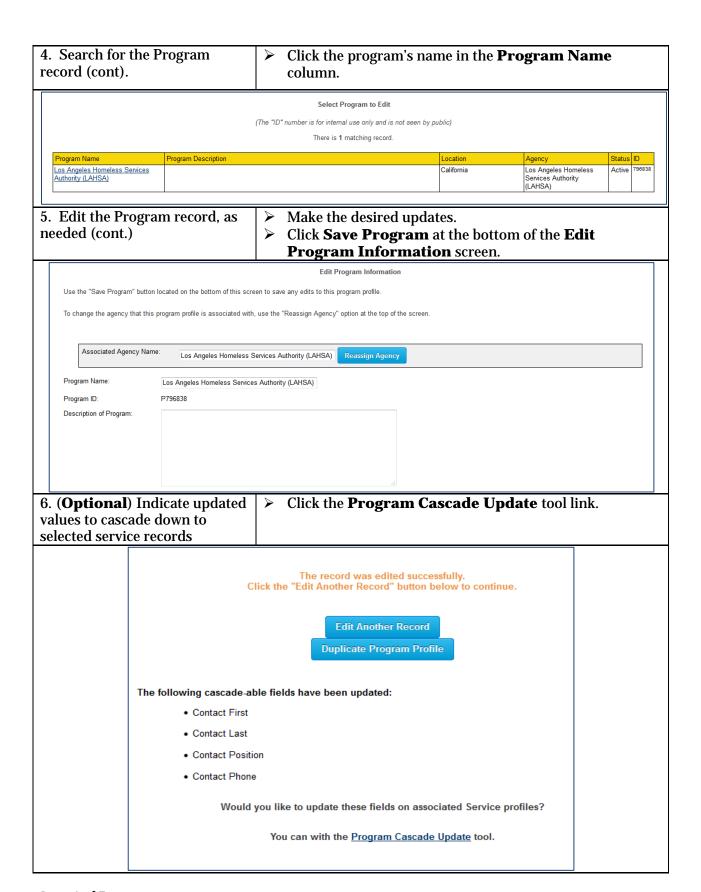
Would you like to update these fields on associated Program or Service profiles?

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.
 - button allows you to simultaneously update the selected values at all of the associated programs and services.





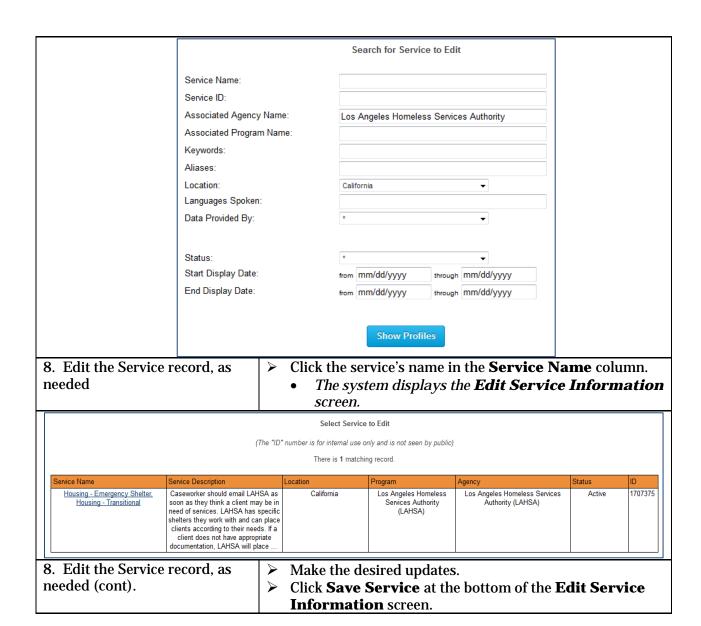
6. (**Optional**) Indicate updated values to cascade down to selected service records (cont.)

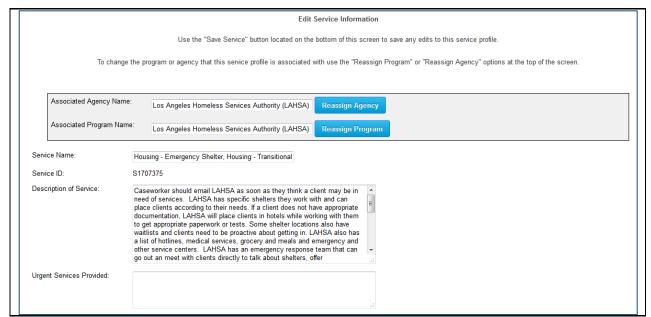
- Check the **Update?** box for each value you would like to cascade down to the current **Service to be Updated**.
 - If you don't want to update any of the values at the current **Service to be Updated**, click **Skip This One** to move to the next service.
 - If you want to exit the **Program Cascade Update** tool without making further updates, click **Skip All** (updates you already performed apply even if you click **Skip All** after performing them).
- > Click **Update This Service**.
 - The system displays the next Service to be Updated with the same values selected as for the previous service.
 - 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.



Edit a Service in the Resource Directory

7. Search for the Service record	
	Click Edit Service in the Resource Management
	section.
	➤ Enter part of the service's name in the Service Name
	field.
	Enter all or part of the Associated Agency Name.
	Click Show Profiles.





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