1) There are two ways to find a referral in the TPCA Application. An Open/Accepted referral can be found on the Employment Specialist’s Dashboard. Or, referrals of all statuses (Pending, Accepted, or Closed) can be found using the Referral Search screen.

   a. To View the details of a referral from the Employment Specialist’s Dashboard, locate the referral, click the button titled “Action” and select “Details” from the dropdown. After selecting “Details”, you will be taken to the Referral Details screen.

   b. To View referrals of all statuses (Pending, Accepted, or Closed), click on the “Referrals” menu item at the top of the screen, and select “Search”. After selecting “Search”, you will be taken to the Referral Search screen.
2) The Referral Search screen provides multiple search options for locating referrals, such as; Student ID, Student Last Name, Student First Name, Employment Specialist, Referral Date, Referral Status, and Referral Type. Enter all of the relevant information in the desired fields and click the “Search” Button. To erase information entered in the search fields, click the “Reset” button.

*Note: Point of Contacts (POC’s) for a School District will have the opportunity to search for all referrals sent to a school district. Employments Specialists (ES’s) will only be able to search for referrals that were assigned to them by a POC.*
3) To View the details of a referral and/or add a Service or CBWE attachment to a referral, after performing a search, click on the “Action” button in the same row of the referral you wish to view, and select “Details” from the dropdown.

4) After you click on the “Details” link, you will be taken to the Referral Details screen. The Referral Details screen provides a summary information section, a list of any attachments VR Staff included with the Referral, a section for Employment Specialists to Add and Update Services for the referral, a section for Employment Specialists to Add and Update CBWE forms for the referral and a section that tracks Activities, such as changes in referral status, documents that have viewed, etc. that occur for the referral.

   a. The Referral Details section provides summary information about the Referral. This information cannot be updated or changed within the TPCA application. It is view only.

   b. The Referral Attachment section provides a list of attachments, or supporting documents, VR staff submitted, along with the referral. To view an attachment, click on the “Action” button and select “View” in the drop down.

   *Note: If you are using Internet Explorer as your web browser, after you click on “View” you will receive a dialog box at the bottom of your screen that looks like the following screenshot. To view the attachment, click the “Open” button.*
c. The Services section provides a list of services that have been entered for the referral. And provides the ability add or update services.

*Note: The Services section only displays the three most recent Services by default. This is save the amount of scrolling needed to view all information on a referral. To view more than the three most recent services, click the blue button titled “Show All Services”. This will expand the Services section to sow all of the services entered on a referral. Also, the “Show All Services” button will only appear if there are more than three total services for a referral.*

i. To Add a new service, click on the green button titled “Add Service”. After clicking the “Add Service” button you will be taken to the TPCA Referral Service Create Screen.

On the TPCA Referral Service Create Screen enter the service date associated with the service and click the button titled “Next”. After clicking the “Next” button you will be able to enter the text of the service. Once all service information has been entered, click the button titled “Create”, to save the service entry.
ii. To Update an existing service, click on the Action button next to the service you would like to update, and select, “Update” from the drop down”. After clicking “Update” button you will be taken to the TPCA Referral Service Update Screen.

On the TPCA Referral Service Update Screen update the service date associated with the service, if desired, and click the button titled “Next”. After clicking the “Next” button you will be able to update the text of the service. Once all service information has been updated, click the button titled “Update”, to update the service entry.
d. The CBWE section provides a list of services that have been entered for the referral. And provides the ability to add CBWE forms.

i. To View an existing CBWE form, locate the CBWE you would like to view, click the Action button, and select “Details” in the drop down. After selecting “Details,” you will be taken to the TPCA Referral CBWE Details screen.

On the TPCA Referral CBWE Details screen, click the Action button for the CBWE Attachment, and select “View” from the drop down.

*Note: If you are using Internet Explorer as your web browser, after you click on “View” you will receive a dialog box at the bottom of your screen that looks like the following screenshot. To view the attachment, click the “Open” button. *

ii. To Add a new CBWE form, click the green button titled “Add CBWE”. After clicking the “Add CBWE” button you will be taken to the TPCA Referral CBWE Create Screen.
On the TPCA Referral CBWE Create Screen, enter the Start Date and End Date for the CBWE, then click on the green button titled “Add Attachment” to upload the CBWE form. After you click the “Add Attachment” button, you will be taken to the Add Attachment screen.

On the Add Attachment screen, enter a description for the attachment, and click the “Browse” button next to the FileName field. After you click the “Browse” button, a Microsoft Windows window will open. Use this window to locate the file you wish upload, and double click the file after locating it. Once you selected the file you wish to upload, click the “Upload File” button on the Add Attachments screen.

After you click the “Upload File” button, you will remain Add Attachments screen. You have the ability to upload more than one attachment if desired. To upload an additional attachment, follow the previous steps. If you are finished uploading attachments, click the “Close” button to return to the TPCA Referral CBWE Create Screen.
Once you return to the TPCA Referral CBWE Create Screen, all attachments will be listed. To complete the creation of the Referral CBWE, click the “Create” button. If you do not click the “Create” button, the attachments will not be saved, and the Referral CBWE will not be created. After clicking the “Create” button you will be taken back to the Referral Details screen.

5) Click the “Cancel” button at the bottom of the Referral Details screen at any time to return to the Employment Specialist Dashboard.