FSS - Family Services Staff
DSC - Data Systems Coordinator

Resource/Referral and Follow Up Flow Chart

See To Do List:
Resource/Referral and Family
Goals 25/26 for Follow Up

Identify Request for Additional

Support or Information

on the Family Assessment

See SOP 5.5.4.1

↓

Add Event (DSC) in CP for each Request
for Additional Support or Information

See SOP 8.1.2.6

↓

Add Action (DSC) with a
scheduled date as to when
you will offer
Resource/Referral
See SOP 8.1.2.6

→

Open Action (FSS) and
enter date once the
Resource/Referral
has been offered See
SOP 8.1.2.6

→

Add Action (DSC) with a
scheduled date as to
when you will provide
follow up to the Resource/
Referral offered
See SOP 8.1.2.6

↑

Open Action (FSS) and enter date
once the follow up to the Resource/
Referral is complete

See SOP 8.1.2.6

↑

Open Original Event (FSS) and fill in the
"Date Closed" box with the follow up to
the Resource/Referral date

See SOP 8.1.2.6

This event will drop off your To Do List

Revised 7/9/25