

Referrals Quick Reference Guide

Referrals are used to transfer client files between SHS Providers. The referral includes selected parts of the client file, including initial assessment information, and is transferred in PDF format. The provider accepting a referral will have access to a PDF version of the information sent. This information is accessible for all workgroup referrals on the Referrals tab of the Home page and for individual client referrals on the Referrals tab of the Persons page.

This quick reference guide is for the Referrals function in CIMS and includes:

1. Create a referral form for a client and perform workflow actions - **Save Draft**, **Send**, **Recall** and **Delete**.
2. Manage all referrals to and from the Workgroup
3. Receive a referral and perform workflow actions - **Acknowledge**, **Decline** and **Accept**.
4. View referrals for an individual client

1. Creating a Referral

Richard Burton Male, DOB: 01/01/1900 (Age 115 yrs) Mark Latham (BDCSA - Housing Supp...) My Workgroups | Logout

Search Details Consent Assessments Notes Payments Accommodation Status Alerts Referrals Plans Tasks Documents Memo

Referrals Create new Referral Referral ?

This person has no history of referrals on record

1. Select an SHS Provider

A provider is selected for the client on Referral form which is accessible on the Referrals tab of the Persons page.

- Click **Persons** to access the Persons page.
- After selecting a client click the **Referrals** tab on the Persons page.
- Click the **Create new Referral** button to select options.
- If a referral is being sent from a workgroup within a cluster containing multiple workgroups then
 - Either Click **Internal** tab to send referral to another workgroup in your cluster then select workgroup to receive referral in **Send Referral to**
 - Click **Submit** to display the Referral form.
 - Go to step **2. Complete referral Form**
 - Or Click **External** to send the referral outside the cluster
 - Otherwise in a single workgroup cluster just select **SHS Providers** then continue
- If the referral is being sent from a workgroup providing multiple services one workgroup service must be selected in the **Referral from** field
- Type characters into the **Send Referral to** field, wait and a dropdown list containing all Providers having the search characters in their service outlet name will be displayed.
- From the dropdown list select an SHS provider.
- Click **Submit** to display the Referral form.

Internal External

Send referral to BDCSA - Youth Housing Support Ser

Submit

Ballina District Community Services Assoc Inc
BDCSA - Housing Support Service
BDCSA - Youth Housing Support Service

Internal External

Send referral to Allambi House

Submit

Allambi House
Allambi Youth Services Inc

2. Complete Referral form

Enter information about **Presenting issues** and **Additional Information** into the **Details** section.

- Obtain consent from the client to send the referral. Choose **Consent to send** option **yes** or **no**. A **Comment** field is provided to enter more information relating to the consent.
- Click **Save Draft** to save a draft of the referral.
- Referrals must be saved as draft before attachments can be added.

Referral

Status New referral
Restriction Workgroup Limited Cluster

From Harbour Counselling Services

To Allambi House

Service Allambi House

Program / Group

Organisation Allambi Youth Services Inc
Fax 0249486355
Email bretts@allambi.org

For Arnold Rimmer

Details

Presenting issues

Additional Information

Attachments

Referral should be saved as draft before attaching any document.



Referral History

Consent to send Yes No

Comment

Save Draft Send

3. Add Attachments to a referral.

- Clicking the  icon opens the Attachments section. It is possible to create and attach (1) selected parts of the CIMS client files using the **Client File** button and (2) external document files using the **Select & Upload** button.
- Click **Select & Upload** to attach an external document to the referral.
- To attach a client file that is located within the CIMS, click **Client File** which displays the Export Person Details.
- Select tick box options in the **Person Information** and **Additional Details** sections to specify which information to include in the client file attachment.
- Page Control** and **Order** provide client file format options.
- Export Period** nominates the period of client history to be included in the attachment.
- Additional Notes** allows free text entry of any additional information.
- Click **Attach file** to create and attach a file containing the selected CIMS client file information.
 - Clicking a highlighted File Name will display the file contents in the PDF editor
 - Clicking  allows an attachment to be deleted from a referral.

Attachments		
File Name	Uploaded	
client_file_24.pdf	07/08/2014 13:24:44	
Navigation Guideline (1).pdf	07/08/2014 13:25:27	

Export Person Details

Document Title: John Doe Client File

Person Information	Include
Name, Sex, DOB	<input checked="" type="checkbox"/>
Alias Details	<input type="checkbox"/>
Demographic Details	<input checked="" type="checkbox"/>
Current Relationships	<input checked="" type="checkbox"/>
Prior Relationships	<input type="checkbox"/>

Addresses

*21 Hunter Street NEWCASTLE WEST 2302 (Home)

Contacts

999999999 (Mobile)

Profiles

Client Profile (30/07/2014 -)

Housing Application (30/07/2014 -)

Key Workers

Mark Latham, (Allambi House)

Support Period(s)

Commenced 30/07/2014

Additional Details

Select All

SHS Status Update

Notes

Payments

Accommodation

Alerts

Plans

Tasks

Documents

Memo

Page control: No page break between each record

Order: Most recent at top

Export period: Full History

Additional Notes:

Attach file

4. Send Referrals

- After consent has been obtained and all attachments have been included
- Click **Send** to send referral to the SHS provider
 - Clicking the **PDF** button opens a copy of the referral form for viewing, printing or saving

Referral History

Consent to send: Yes No

Comment:

Save Draft **Send** **Delete** **PDF** **Copy**

5. Delete a Referral

- Use this option if you wish to permanently delete a referral.
- Clicking **Delete** will delete the referral from the system. It is only possible to do this when a referral has a status of *draft* or *recalled*.

6. Recall a Referral

- Use this option if you wish to recall a referral. This action cannot be performed if the referral has been acknowledged by another provider.
- Click **Recall**. This action can only be performed when a sent referral is still *waiting*. The button is not visible if the referral has been *acknowledged* or *accepted*.



Referral History

Consent to send: Yes

Recall **PDF** **Copy**



2. Managing all referrals to and from the Workgroup

Incoming and outgoing referrals for a workgroup are managed on the Referrals tab of the Home page.

- To navigate to the Workgroup referrals page
 - Click the **Home** button
 - Click the **Referrals** tab
- Workgroup referrals can be viewed by selecting one of the following tabs:
 - Received** | **Accepted** | **Declined** | **Sent** | **Draft** to display one of the following lists
 - Incoming Referrals - not yet Accepted or Declined** with status *waiting* or *acknowledged*
 - Incoming Referrals - Accepted** with status *accepted*
 - Incoming Referrals - Declined** with status *declined*
 - Outgoing Referrals - by Status** with status *waiting*, *acknowledged*, *accepted* or *declined*
 - Outgoing Referrals - not yet sent** with status *draft* or *recalled*
- Click the icon:
 -  to open the referral form for further processing. Within a referral form, click **PDF** to print or save a copy of the Referral form.
- Click the icon:
 -  to navigate to a client's details

Received | Accepted | Declined | Sent | Draft

Incoming Referrals - not yet Accepted or Declined

Id	Sent Date	Status	Sent From	Sent To	Sent By	Client
 193	27/02/2015	Waiting	BDCSA - Housing Support Service Ballina District Community Services Assoc Inc	Harbour Housing Harbour Family Support Inc	Mark Latham	Arnold Rimmer DOB: 01/01/1980 Gender: Male
 177	11/02/2015	Waiting	Moree Aboriginal Women's Housing Byamee Proclaimed Place Inc	Harbour Counselling Services Harbour Family Support Inc	Mark Latham	Liz Taylor DOB: 01/01/1990 Gender: Female

1 to 2 of 2

NOTE

When Receiving a Referral into a workgroup containing multiple services. The name of the service the referral was sent to within a workgroup is included in the **Sent To** column.


3. Receiving a Referral

Client Information Management System

My List | Team List | My Actions | Team Actions | Profiles | Referrals | Support Periods | Reception | Vacancies

Received | Accepted | Declined | Sent | Draft


Incoming Referrals - not yet Accepted or Declined

Id	Sent Date	Status	Sent From	Sent By	Client
 186	27/02/2015	Waiting	Harbour Counselling Services Harbour Family Support Inc	Mark Latham	Arnold Rimmer DOB: 01/01/1980 Gender: Male

1 to 1 of 1

Referrals are actioned by selecting a referral from the list

Incoming Referrals - not yet Accepted or Declined

- Click the  icon for the referral you wish to action.

Acknowledge


- Click **Acknowledge** to send an acknowledgement of receipt back to the sender and update the status to *acknowledged*.

View client records

To view the referral client records, click a highlighted File Name within the Attachments section. This will display client records in the PDF editor for viewing, printing or saving to a directory folder.

Accept

Before a referral can be accepted it must be linked to either an existing or new client record. A workgroup is searched for a matching client on entry to the form. The search results display any potential matching clients. The search function can now be used to refine or expand search results.

- Click  to link a referral to an existing workgroup client
- Click **Add Arnold Rimmer as new Client** to create a new client record when no matching client record can be found.

Once a referral is linked to a client, a message is displayed on the form and the Accept button becomes visible.

- Click **Accept** to accept the referral and update the status to *accepted*.

Decline

- Click **Decline** to decline the referral and select the reason from the dropdown box. The referral status is updated to *declined*.

Referral

Link referral to database

This external referral is not yet associated with a Client on your database. If you plan to accept this referral you must first create a Client record, or associate the referral with an existing Client.

First: Arnold Last: Rimmer

Fuzzy

First Name Last Name Gender DOB
Arnold Rimmer male 01/01/1980

Add Arnold Rimmer as new Client

Referral sent 27/02/2015
Status Waiting
Restriction Workgroup Limited Cluster

From Harbour Counselling Services

To Allambi House

Service Allambi House
Organisation Allambi Youth Services Inc
Fax 0249486355
Email bretts@allambi.org

For Arnold Rimmer

Attachments

File Name	Uploaded
client_file_318.pdf	27/02/2015 13:23:53

Referral History

Consent to send Yes

Comment

Acknowledge Decline PDF

4. View referrals for an individual client

John Doe Male, DOB: 14/11/1973 (Age 40 yrs)

Home | Search | Details | Notes | Payments | Accommodation | Status | Alerts | Referrals | Plans | Tasks | Documents | Memo


Persons | Referrals | [Create new Referral](#) | [View Recalled and Declined](#)

No valid referrals

Recalled and Declined

Id	Referral Date	Status	From	To
 50	07/08/2014	Recalled	Allambi House Allambi Youth Services Inc	ACON Housing Project ACON

All referrals related to a client are visible on the Persons page Referrals tab

- Select a client record to view the referral list
- The list will include the full history of the client's referrals and latest status.
- Clicking the  icon, opens the referral
- To view client records, click a highlighted File Name within the Attachments section. This will display client records in the PDF editor for viewing, printing or saving to a directory folder.
- Click [View Recalled and Declined](#) to see a list of *recalled* and *declined* referrals against the client record