Ereferral instructions (Phase 1)

Specialist Homelessness Information Platform (SHIP)

1. What is Ereferral?

Ereferral is a new function in SHIP (July 2018) that enables SHIP users to send, receive and respond to Ereferrals to and from other Specialist Homelessness Services via SHIP.

2. How do I access Ereferral?

- Ereferral can be found in the 'Home' and 'Persons' tab in SHIP.
- In the Home tab, SHIP users can view all the Ereferrals for their workgroup including referrals received, accepted, declined, sent, and drafted (Fig 1).
- In the 'Person' tab, SHIP users can view Ereferrals for that client (Fig 2).

3. How do I send an Ereferral?

Please note:
- From 1 July 2018 to 1 November 2018 (Phase I), <u>only</u> Initial Assessment and Planning workers will be able to send Ereferrals. This protocol is being implemented as part of a trial process to understand potential issues associated with sending Ereferrals. We encourage all workers to identify any potential issues in the survey that will be provided.
- Relevant state-wide protocols for Ereferrals are provided in the footnotes.

Steps:

i. Go into client profile, and click on Referrals tab.

ii. Select whether the referral is 'Internal/External' (Fig 3). If it's an external referral, a search field will pop up. Search and select the correct service. Once the correct service is identified, click 'Make a referral'[1]. If the agency you are referring to does not use SHIP, you will be notified that the referral will not be sent electronically[2] (Fig 4).

iii. Once you have selected an agency[3], fill out Ereferral free-text fields and attach relevant external documents[4]. It is possible to attach external documents or attach specific data collected via SHIP (Fig 5). Ensure written client consent has been provided[5] and type into 'Additional Information' that is attached. Before submitting referrals, also ensure that you have entered in sufficient information to allow workers receiving referral to make assessment. If you need to add more information, save draft and send referral later. Once referral is complete, click on 'submit'.

iv. Once received, the receiving agency can respond to the referral by either 'acknowledging', 'accepting' or 'denying' and the sending agency will be notified of their response.

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[1] If you are having issues identifying the relevant service in SHIP, please contact the relevant service to confirm their name in this service directory. If there are other issues, please log this as an issue and notify IAP team leader.

[2] In this scenario, please save referral as a PDF and send to agency via fax/email.

[3] It is essential to state in the 'Program/Group' field which program client is being referred to. This is because workgroups are often shared between different programs within one agency, which means Ereferrals can be viewed by workers outside the program being referred to.

[4] When attaching information, ensure that it is clear as to why certain information is being included. This information should be provided in 'Additional Comments' free-text. Also, ensure that client consent is provided for any attachments. SHIP users are discouraged from adding SHIP notes, except in special circumstances (use discretion).

[5] Attach a consent form to every Ereferral and input 'consent form attached' in comments field. Also, ensure that client consent is provided for any attachments are sent.

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v. Once the receiving agency has responded to the Ereferral, the referring agency will be notified of the response in their record of the referral. They will also be notified in their workgroup inbox[6].

4. What do I do when I receive an Ereferral?

Please note: From 1 July to 31 October 2018, every SHIP/SRS user can receive Ereferrals and respond to Ereferrals from Initial Assessment and Planning workers. Please refer to guidelines to assist in identifying appropriate responses to Ereferrals in SHIP. We encourage users to identify any potential issues in the survey provided.

i. Ereferrals can be viewed in the 'Home' tab, under 'Referrals'. A list will come up of referrals to your workgroup and their status[7].

ii. For referrals in your inbox, select the pencil icon for the referral and check the client information included to ensure that that it is sufficient information before responding to the Ereferral. This is important because once an agency acknowledges, accepts or declines an Ereferral[8], it is not possible to make amendments to that referral[9]. If you require more information, please contact the referring agency and request that they 'recall' the Ereferral and make recommended changes (Fig 6).

iii. Once you have identified the appropriate response for the Ereferral as outlined in guidelines, you can select to acknowledge, accept or decline the Ereferral.

Sometimes it gets tricky…

i. <u>A record already exists for the person referred -</u>

If your agency receives an Ereferral for a client that has been previously engaged with your workgroup, it is important NOT to create a new client. Creating a new client will create a duplicate for that client in that workgroup.

<u>Ereferrals for households</u>

A limitation of Ereferral is that you can only send *one referral* for *one client* to *one agency* via SHIP.

This means that if the person is part of a household, you will need to make sure this is clear in their Ereferral. You should do this by stating their household situation in Ereferral free-text fields. It is also possible to attaching their internal files in SHIP if their household information is included in their SHIP file.

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[6] *Referrals should be responded to in 12 hours (business hours). It is recommended to set aside some time once a week to check whether referrals sent by your workgroup have received a response.*

[7] *SHIP workgroups that receive referrals should respond to referrals within 12 hours. Workgroups can nominate a worker/s to receive notifications of Ereferral updates via email as an additional means of tracking referrals.*

[8] *When an agency receive an Ereferral, they have three options on SHIP for how to respond.*

i) Acknowledge – An Ereferral is acknowledged when the information provided is determined as sufficient and the case is being reviewed.

ii) Accepted – When the agency/program accepts to take on client – note that this is can occur before client contact. If the client refuses or disengages with service, a support period should not be created and unassisted record can be created.

iii) Denied – An Ereferral should be denied if the client is not appropriate or the vacancy has been filled.

[9] *DHHS recommends that agencies ensure that prior to responding to Ereferral, they determine whether information provided is sufficient. If more information is required, they can request referring agency to 'recall' referral and make amendments. Ereferral will not allow changes to be made if a referral has been responded to.*

Figure 1: Viewing referrals for *workgroup*

Figure 2: Viewing referrals for a *client*

Figure 3: Creating a new referral for internal/external agencies.

Figure 4: When a referral cannot be sent electronically
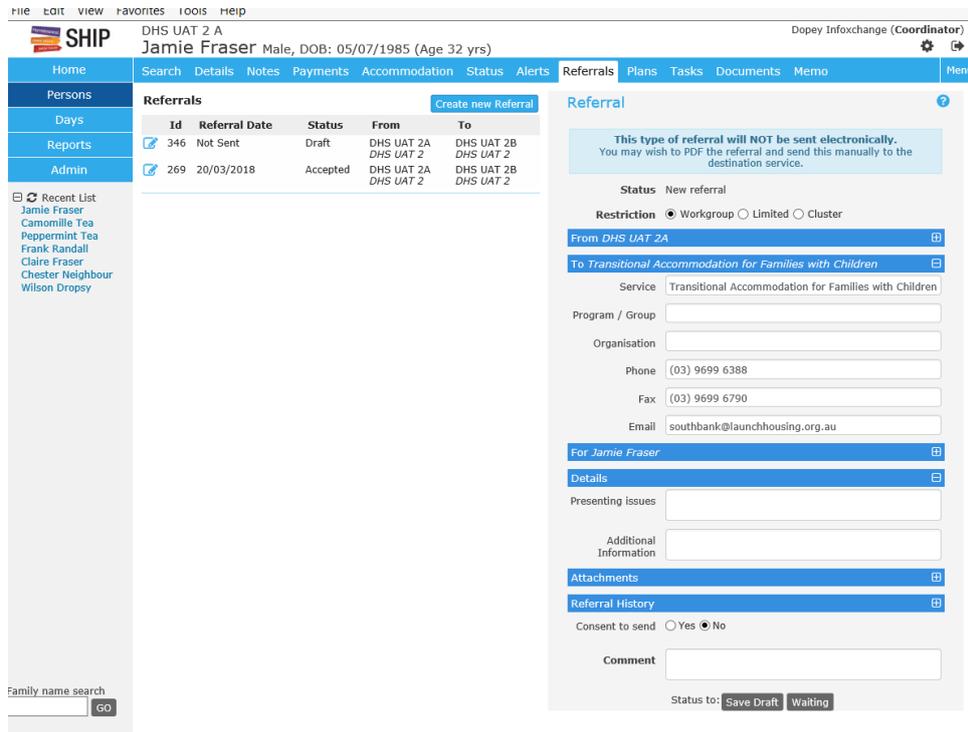
Figure 5: Attaching external documents
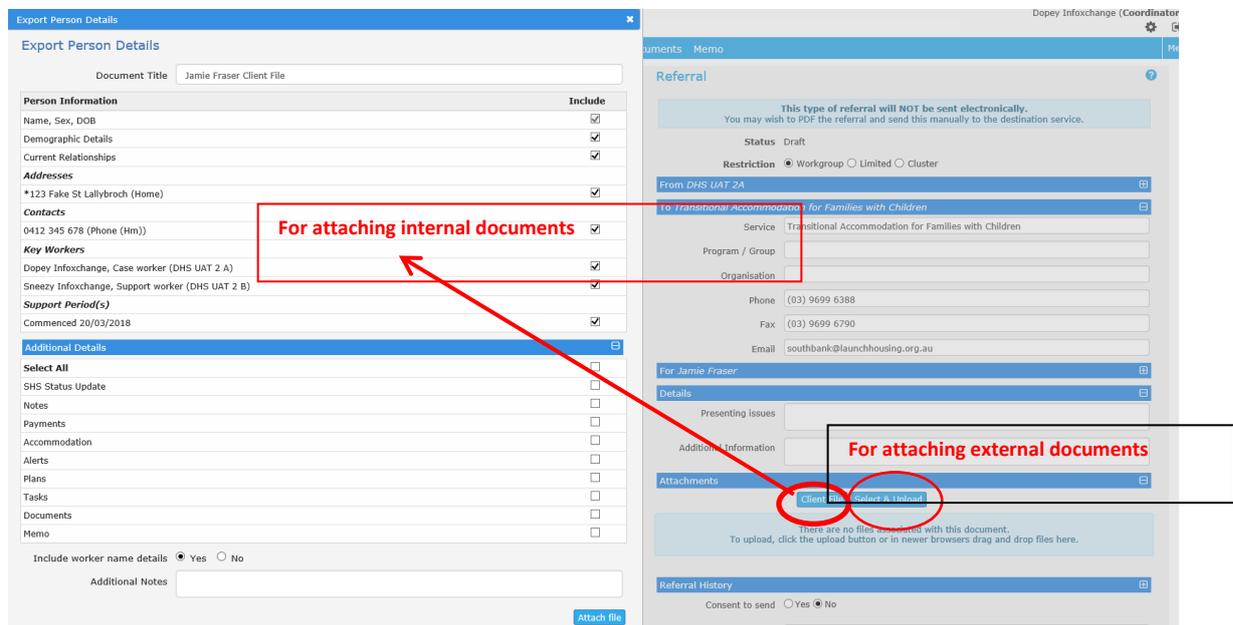
Fig 6 : Recalling referrals (by agencies that sent the referral)

DHS UAT 2 A
Jamie Fraser Male, DOB: 05/07/1985 (Age 32 yrs)

Dopey Infoxchange (**Coordinator**)

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

Referrals

Create new Referral

Id	Referral Date	Status	From	To
347	Not Sent	Draft	DHS UAT 2A DHS UAT 2	Transitional Accommodation for Families with Children
346	25/05/2018	Waiting	DHS UAT 2A DHS UAT 2	DHS UAT 2B DHS UAT 2
269	20/03/2018	Accepted	DHS UAT 2A DHS UAT 2	DHS UAT 2B DHS UAT 2

Referral

Referral sent 25/05/2018 17:38:51 AEST

Status Waiting

Restriction ◉ Workgroup ○ Limited ○ Cluster

From *DHS UAT 2A* ⊞

To *DHS UAT 2B* ⊟

Service DHS UAT 2B

Program / Group Private rental worker

Organisation DHS UAT 2

For *Jamie Fraser* ⊞

Details ⊟

Presenting issues Requires assistance accessing private rental, currently living in rooming house
More information about client in attachments

Additional Information Client consent attached

Attachments ⊟

File Name	Uploaded
canoe3.jpg	25/05/2018 17:30:57 AEST
Client profile, Jamie Fraser.pdf	25/05/2018 17:37:47 AEST

Referral History ⊞

Consent to send Yes

Recall | PDF | Copy