Information Sheet:

E-referral in the homelessness system

Benefits of e-referral

The Homelessness Sector was reformed between 2008 and 2011, largely in response to consumer feedback that the Sector was difficult to navigate. One issue that clients identified was that they were 'telling their story' too often.

E-referral has been created as a mechanism to:

- Help homelessness workers create a more seamless service system for clients by enabling sharing of client information, with their consent.

- Save time for homelessness workers – e-referral will create creates and auto populates clients files and enables download of documents.

- Increase security of information for access/entry points sending referrals to homelessness services and for homelessness services to forward updates to access/entry point or to other homelessness services.

E-referral has been operational in SHIP and SRS since 2018. E-referral capacity has now been incorporated into SAMIS so a new 'go live' date has been established to assist the Sector to move to e-referral simultaneously: Wednesday 15th November 2023.

You can access e-referral training videos from the 'go live' information session here:
- Overview session - https://bit.ly/eReferral-Overview
- Demonstration session - https://bit.ly/eReferral-Demonstration

Notes:

- All SHIP, SRS and SAMIS services can now send e-referrals. All SHIP and SRS services can now send and receive e-referrals.

- Access/entry points can send referrals to support agencies through e-referral. SHIP will automatically create a client file, when a referral is accepted.

- Support services can 'e-refer' back to an entry/access point at the end of support period so that the access/entry point has the most up to date information if the consumer re-presents. Support services can also e-refer on to other services supporting a consumer.

- Consumer notes, sections of notes and uploaded documents can be sent with an e-referral.

- Sending client details via e-referral is much more secure than emailed referrals.

- In the future there will be a facility for more of the transferred files (such as MARAM) to be auto-populated into the receiving agency's SHIP .

- Services can create an e-referral and then email it to agencies that do not have e-referral facility.

- **Departmental follow up:** DFFH will incorporate the expectation that homelessness services will referrals and updates via e-referral, rather than emailing referrals into the updated *Homelessness Guidelines and Conditions of Funding*.

Setting up e-referral

- In the 'Services' tab, ensure that 'receive referrals internal', 'receive referrals external', 'send email notifications' and 'receive email notifications' are ticked.

- All SHIP workgroups should identify an email address for receipt of e-referrals. Ideally services will set up a generic email address for the workgroup, rather than providing a specific worker's email address. If you need any help with this, contact In

- Anyone is a workgroup can see that a referral has come in on the 'Referrals', then 'received' tab.

Sending an e- referral:

- With client consent, you can send e-referrals to any homelessness agency. You can also create an e-referral to email to an agency that does not have e-referral facility.

- To send a referral, click on 'Referrals' tab, then 'Create new referral'. Most referrals will be 'external' (to another agency). Inserting **Shift %** in 'send referral to' will provide a list of any external agencies that your organisation can refer to.

- If there are multiple workgroups in your agency, you will have an 'internal' and 'external' button.

- Select the agency to refer to and click 'submit'. Click 'save draft'. This brings up some information that is already in the system and provides some fields for additional information.

SHIP

Home · Persons · Days · Reports · Admin

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

Id	Referral Date ↓	Status	From	To
498	15/01/2021	Accepted	DHS UAT 1 A *DHS UAT 1*	Ricmond Transitional Housing *DHS UAT 1*

1 to 1 of 1 results

Recent List
Amanda Bowen
John Doe

Status New referral

Restriction ● Workgroup ○ Limited ○ Cluster

From *Ricmond Transitional Housing*

To *DHS UAT 2A*

Service DHS UAT 2A

Program / Group [ ]

Organisation DHS UAT 2

For *Amanda Bowen*

Details

Primary reason referred [▼]

Presenting issues [ ]

Additional Information [ ]

Attachments

Referral should be saved as draft before attaching any document.

Referral History

Consent to send ○ Yes ● No

Comment [ ]

amily name search
[ ] GO

Attachments

Client File | Select & Upload

...are no files associated with this document.
To upload ...ick the upl...ad button or in newer browsers drag and drop files here.

Referral His...ry

Consent to send ○ Yes ● No

• 'Select and upload' provides a link to attach external documents. Clicking on 'client file' shows the range of information available about the client. Click on the information that you would like included in the referral. If you select 'case notes', you can choose the date range for case notes.

- You can also print out a pdf version of the referral to send to agencies or attach the pdf to an email.

- The referral tab contains a list of all referrals sent, which is a useful way to track referrals. The referring and receiving agency can communicate with each other through the referral.

- E-referrals can be sent to non homelessness services listed in Infoxchange Service Seeker, but files cannot be added to these referrals.   If you are sending a referral to an agency not in the Infoxchange directory, you can create the referral by clicking 'manual'.

Consent to send a referral:

If the agency has obtained consent from the client to transfer their information through the homelessness service system and this consent is held at the service, then a copy of the consent does not need to be transferred with the referral.

DFFH advised that, according to the privacy framework, consent wording to clients is that you will share their information as needed, to achieve the client's primary goal. If they do not want you to share their information, then they should not provide it to you.

Receiving a referral

- The 'Referrals' tab provides lists of referrals received, accepted, declined sent and in draft.

- Once a new referral is received, the receiving service can accept or decline the referral. If the referral is accepted, then the referring service is notified (comments can be added into the acceptance). The referring and receiving service can continue to communicate about the referral through the comments area.

- If a referral is accepted for a new client, the receiving agency has the option of automatically creating a new client file, with some of the client's details auto populated into SHIP/SRS.

- Documents attached to the e-referral can be manually saved into the client file.

Each worker in a workgroup can see referrals received in a referral tab. This list of referrals identifies the status of each referral, the referring agency and the consumer's name. Unopened referrals are marked 'new'.

Specialist Homelessness Information Platform

My List   Team List   My Actions   Team Actions   Profiles   **Referrals**   Support Periods   Service Directory   Reception

Received ⓘ   Accepted   Declined   Sent   Draft

Referrals

	Id	Send Date ↓	Status	Sent From	Sent By	Client
☑	1699	15/11/2023 **New**	Waiting	FSV - Safe Steps Safe Steps	Amodha Ratnayeke	Jenny Briggs DOB: 30/10/1980 Gender: female
☑	1668	25/10/2023	Waiting	FSV - Safe Steps Safe Steps	Anthony Laurance	Ava Jones DOB: 30/09/2010 Gender: female
☑	452	18/06/2020	Acknowledged	Infoxchange	Athan Dres	Esther Egg DOB: 03/01/1990 Gender: female
☑	120	04/11/2016	Acknowledged	Oceanview Accommodation South Coast Accommodation Inc	Amodha Ratnayeke	Susan Jones DOB: 01/01/1980 Gender: female

1 to 4 of 4 results

If you click on the client file icon on the left hand side, you can open the client file.

Referral

Tracey Donaldson Gi...

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 exisiting Client.

Given name: Jenny   Family name: Briggs

☑ Fuzzy   [Search]
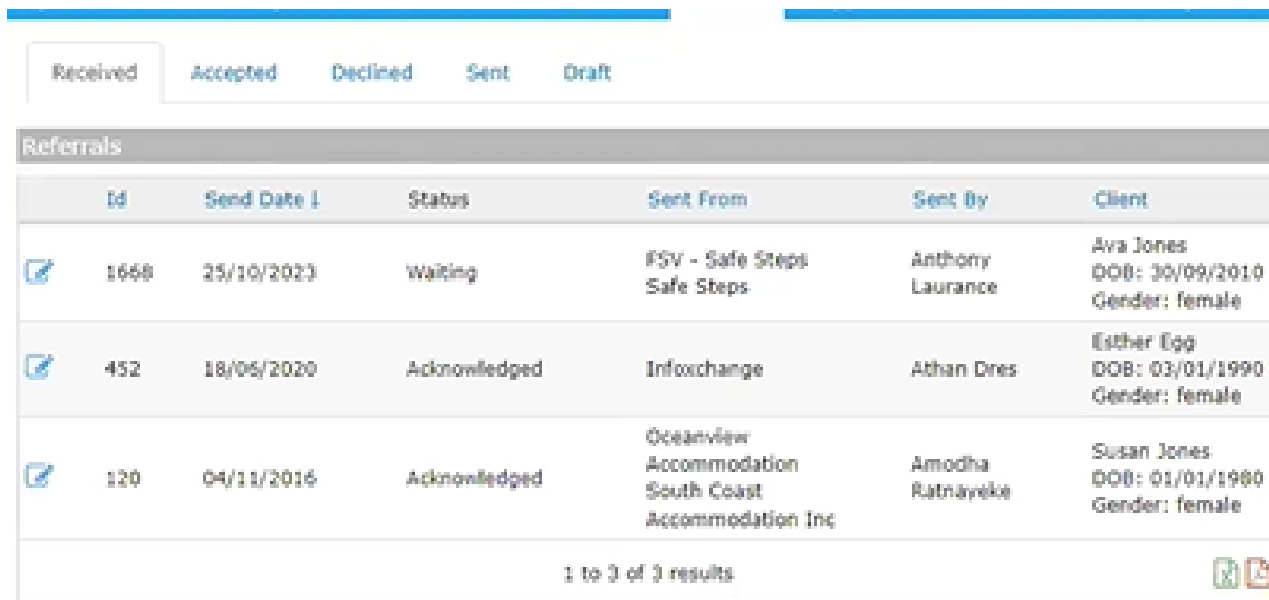
This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.

[Add Jenny Briggs as new Client]

Referral sent   15/11/2023 07:50:55 AEST

Status   Waiting

Restriction   ⦿ Workgroup ○ Limited ○ Cluster

From FSV - Safe Steps

To ACME Homeless Services

Service   ACME Homeless Services

Organisation   ACME Inc

Email   gerard@infoxchange.org

For Jenny Briggs

Associated Persons

Additional associated clients

Details

Primary reason referred   Family/child support

Presenting issues   test

For Jenny Briggs

Given name   Jenny

Family name   Briggs

Date of birth   30/10/1980 (Age: 43)

Sex   female

Language at Home   English

Proficiency in spoken English   N/A

Country of birth   Australia

Indigenous status   Neither Aboriginal or Torres Strait Islander

Culturally and linguistically Diverse   No

Address   11 Tree Grove
caulfield VIC 3162

Phone (Wk)   0421273126
Only call Jenny at work, never at home.

Associated Persons

Additional associated clients

Details

Primary reason referred   Family/child support

Presenting issues   test

Additional Information   test

This referral document includes a client file.   Clicking on that client file will open a pdf outlining everything that the referring service has sent.

Attachments

File Name	Uploaded
client_file_2714.pdf	15/11/2023 07:50:55 AEST

Referral History

Referral sent by Amodha Ratnayeke, FSV - Safe Steps   8:50am AEDT Wed 15/11/23

Consent to send provided for all persons associated with referral   Yes

The receiving agency can acknowledge, accept, or decline the referral and can type in updates, which can be seen by the referring agency. The referring agency can also type in updates:

Once a referral is acknowledged, the receiving agency can search to find out if the consumer is already in their system.

If the consumer is not in the system, click 'add new client' button.   Once the consumer has been added as a new client, information from the referral will be auto populated into the new client file.

Information that has been attached, such as the MARAM and information about the support period is manually selected from the client file and can be saved into the new consumer file.

Once a referral has been accepted, the receiving service can select a 'referral outcome' as a report back to the referring agency.

The Referrals tab includes tabs for referrals received, accepted, declined, sent and in draft:

	Id	Send Date ↓	Status	Sent From	Sent By	Client
✏	1660	25/10/2023	Waiting	FSV – Safe Steps Safe Steps	Anthony Laurance	Ava Jones DOB: 30/09/2010 Gender: female
✏	452	18/05/2020	Acknowledged	Infoxchange	Athan Dres	Esther Egg DOB: 03/01/1990 Gender: female
✏	120	04/11/2016	Acknowledged	Oceanview Accommodation South Coast Accommodation Inc	Amodha Ratnayeke	Susan Jones DOB: 01/01/1980 Gender: female

1 to 3 of 3 results