

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 and auto populate 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

The screenshot shows the SHIP admin interface. The 'Services' tab is selected, and the 'Receives external referrals' checkbox is checked. The 'Service Description' field contains the text: 'Connects people with Disabilities with people, services, resources and carers in their community. Contact if a person with a disability is needing support in their area.'

| Home | Password | Preferences | Documents | Finance | Bulk Actions | Users | Merge | Audit | Templates | Reference Data | Services | About |
|---------|----------|----------------------------------|-------------------------------|---------|--------------|-------|-------|-------|-----------|----------------|----------|-------|
| Persons | 94 | External SHS Workgroup 3 | External SHS Organisation 1 | | | | | | | | | |
| Days | 117 | FSV - After Hours service | Organisation X | | | | | | | | | |
| Reports | 173 | FSV - Day service | Organisation X | | | | | | | | | |
| Admin | 118 | FSV - Safe Steps | Safe Steps | | | | | | | | | |
| | 3 | Hobart Central Outreach (HTAS-2) | Hobart Benevolent Association | | | | | | | | | |
| | 76 | IX Test 1 A | IX Test 1 | | | | | | | | | |
| | 77 | IX Test 1 B | IX Test 1 | | | | | | | | | |
| | 82 | IX Test 2 A | IX Test 2 | | | | | | | | | |
| | 83 | IX Test 2 B | IX Test 2 | | | | | | | | | |

Phone 1: (03) 9418 7400
Contact 2:
Phone 2:
Fax:
Email: Test@infochange.org
Web Address: DHSUAT1A.org
Service Description: Connects people with Disabilities with people, services, resources and carers in their community. Contact if a person with a disability is needing support in their area.
Receive Referrals Internal:
Receives external referrals:
Send Email Notification:
Receives Email Notification:
Accommodation Available From:
Support Available From:
Start date:
End date:
Client Group:
Last Updated in ISS:
Last Updated: Anne Scott, 11/12/2020 08:35:15

- 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:

The screenshot shows the SHIP system interface for user Amanda Bowen. The 'Referrals' tab is active, and the 'Create new Referral' button is highlighted. The 'Referral' form is open, showing a dropdown list of agencies. The list includes:

- PJ Test WKGrp UAT 1A
- ACME Homeless Services
ACME Inc
- DHS UAT 2A
DHS UAT 2
- Each/Conekter Referral Test
Org 1 *Richmond*
Each/Conekter Referral Test Org 1
- Each/Conekter Referral Test
Org 2 *Collingwood*
Each/Conekter Referral Test Org 2
- MARAM 1
FSV
- MARAM 2
FSV
- IX Test 1 A *WEST END*
IX Test 1
- IX Test 1 B *SOUTH BRISBANE*
IX Test 1
- IX Test 2 A *BOWN HILLS*

- 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 DHS UAT 1 B Amanda Bowen DOB: 01/02/1977 (Age 44 yrs) Amodha Ratnayake (Coordinator)

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

Persons Days Reports Admin

| Id | Referral Date | Status | From | To |
|-----|---------------|----------|--------------------------|--|
| 498 | 15/01/2021 | Accepted | DHS UAT 1 A DHS UAT 1 | Richmond Transitional Housing DHS UAT 1 |

1 to 1 of 1 results

Recent List
Amanda Bowen
John Doe

family name search GO

Status New referral

Restriction Workgroup Limited Cluster

From Richmond 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

Attachments

[Client File](#) [Select & Upload](#)

There are no files associated with this document.
To upload, click the upload button or in newer browsers drag and drop files here.

Referral History

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.

The screenshot shows the 'Export Person Details' window in the SHIP system. The window title is 'Export Person Details' and the document title is 'Amanda Bowen Client File'. The data is organized into several sections:

- Person Information:** Name, Sex, DOB (checkbox), Demographic Details (checkbox), Current Relationships (checkbox).
- Addresses:** *4 Crabbage Street JACK RIVER 3971 (Home) (checkbox).
- Contacts:** 0416444832 (Mobile) (checkbox).
- Profiles:** View Prior (checkbox).
- Key Workers:** Team Managed, AOF (DHS UAT 1 A) (checkbox).
- Support Period(s):** Commenced 14/05/2012 (checkbox).
- Additional Details:** A list of fields with checkboxes: SHS Status Update, Notes, Payments, Accommodation, Alerts, Plans, Tasks, Documents, Memo.
- Exported Records:** Include worker name details (radio buttons for Yes/No).

A blue arrow points to the 'Additional Details' section. The background shows the main SHIP interface with a search bar and navigation tabs.

- 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 screenshot displays the SHIP Specialist Homelessness Information Platform interface. The top navigation bar includes 'My List', 'Team List', 'My Actions', 'Team Actions', 'Profiles', 'Referrals', 'Support Periods', 'Lists', 'Service Directory', 'Reception', and 'Dashboard'. The 'Referrals' tab is selected, and a blue arrow points to it. Below the navigation bar, there are filter buttons for 'Received', 'Accepted', 'Declined', 'Sent', and 'Draft'. A second blue arrow points to the 'Received' filter. The main content area shows a table of referrals with the following data:

| Id | Send Date | Status | Sent From | Sent By | Client |
|-----|----------------------------------|--------------|--------------------------|------------------|--|
| 642 | 24/03/2021 <small>New</small> | Waiting | DHS UAT 1 A DHS UAT 1 | Amodha Ratnayeke | Amanda Bowen DOB: 01/02/1977 Gender: female |
| 266 | 12/02/2020 | Acknowledged | DHS UAT 1A DHS UAT 1 | Amodha Ratnayeke | Amanda Bowen DOB: 01/02/1977 Gender: female |
| 397 | 12/02/2020 | Waiting | DHS UAT 1A DHS UAT 1 | Gerard Palk | Amanda Jewell DOB: 01/02/1977 Gender: female |

At the bottom of the table, it says '1 to 3 of 3 results'.





- 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 Ratnayake | 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 | Infixchange | Athan Dres | Esther Egg DOB: 03/01/1990 Gender: female | |
|  120 | 04/11/2016 | Acknowledged | Oceanview Accommodation South Coast Accommodation Inc | Amodha Ratnayake | 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 GL...

[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.

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@infoexchange.org

[For Jenny Briggs](#)

[Associated Persons](#)

[Additional associated clients](#)

[Details](#)

Primary reason referred Family/child support

Presenting issues test

Additional Information 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 Ratnayake, 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:

Referral History

| | |
|---|--------------------------|
| Referral sent by Amodha Ratnayake, FDV - Safe Steps | 8:50am AEST Wed 15/11/23 |
| thanks Referral acknowledged by Amodha Ratnayake, ACHE Homeless Services | 9:21am AEST Wed 15/11/23 |

Consent to send provided for all persons associated with referral Yes

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

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.

Given name: Jenny Family name: Briggs

Fuzzy

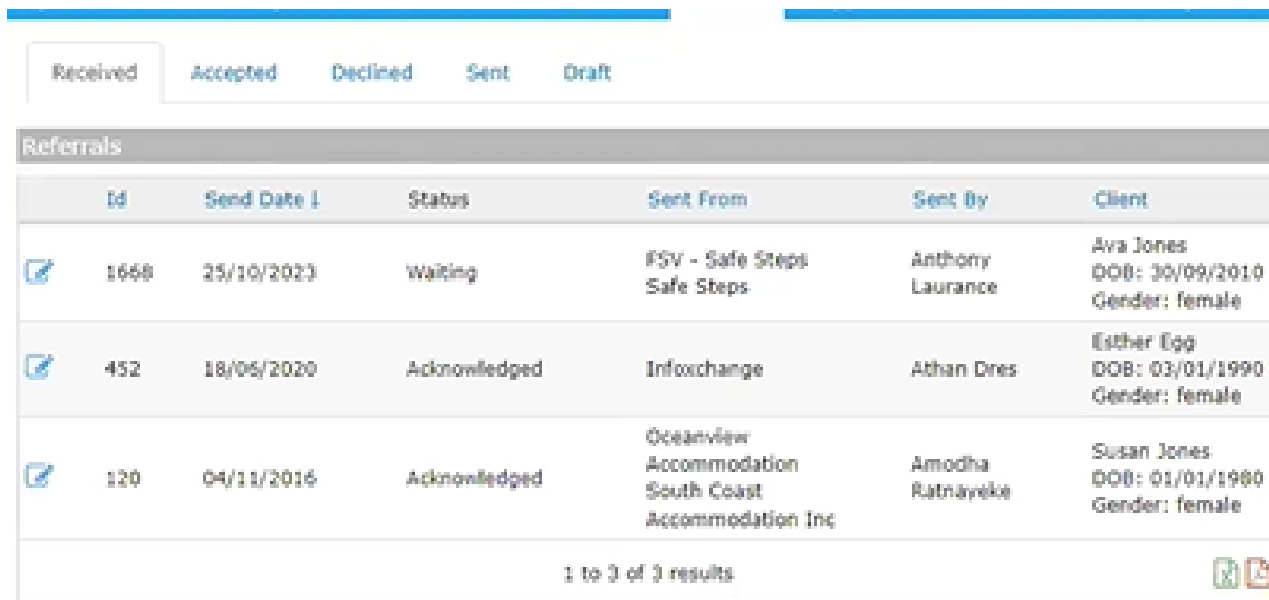
This person does not appear to be in the database. You might want to make sure by modifying the search criteria. If you are not sure about the spelling try using the % symbol as a wildcard.

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:



The screenshot shows a web interface for managing referrals. At the top, there are five tabs: 'Received' (selected), 'Accepted', 'Declined', 'Sent', and 'Draft'. Below the tabs is a table titled 'Referrals' with the following columns: 'Id', 'Send Date ↓', 'Status', 'Sent From', 'Sent By', and 'Client'. The table contains three rows of data. At the bottom of the table, it says '1 to 3 of 3 results' and there are two small icons on the right.

| Id | Send Date ↓ | Status | Sent From | Sent By | Client |
|------|-------------|--------------|--|---------------------|--|
| 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 Ores | Esther Egg DOB: 03/01/1990 Gender: female |
| 120 | 04/11/2016 | Acknowledged | Oceanview Accommodation South Coast Accommodation Inc | Amodha Ratnayake | Susan Jones DOB: 01/01/1980 Gender: female |

If you have any issues with e-referral, Infoxchange support can be contacted on: Phone 1800 627 191

Option 1: SHIP support

Option 2: All other queries including Validata™ support

Email homelessness@aihw.gov.au