

# Statewide E-referral 'go live' information session

15<sup>th</sup> November 2023

## 1. **Welcome and acknowledgement – Andrew Edgar, Council to Homelessness Persons**

Andrew thanked everyone for attending. The level of attendance shows a real interest in this function in SHIP.

This function was turned on in SHIP some years ago but wasn't fully utilised in the Sector because Salvation Army services did not have the same functionality in SAMIS. The purpose of this information session is to re-launch use of e-referral across the homelessness sector.

## 2. **What is e-referral?**

**E-referral is a function in SHIP that enables homelessness services to send consumer information, with consent, to other homelessness services. Acceptance of an e-referral will create a client file in SHIP, with much information auto populated from the referral.**

**E-referral enables homelessness services to forward consumer information electronically. It enables entry points to forward consumer information to receiving support services, but also enables support services to 'e-refer' updated consumer information back to the entry points.**

## 3. **Why e-referral? – Sarah Langmore, Western Homelessness Networker**

Sarah identified why some Networks have been advocating for use of e-referral.

The Homelessness Sector was reformed 12 years ago, largely in response to consumer feedback that the sector was complex and difficult to negotiate. Consumers had to 'tell their story' multiple times across services, until they found a service that could assist them.

The Northern and Western Homelessness Networks identified that only consumers can tell us if the reforms have been successful in achieving their aims. The Networks survey consumers to find out if the changes made in response to that consumer feedback have been successful. Every few years we ask consumers if they are still required 'tell their story' too often. Sadly, they report that they do. We hear comments like "Why can't homelessness workers talk to each other".

The homelessness system is required to function as a coordinated system, with consumers at the centre. So, we advocated for e-referral so that, with consumer consent, workers can pass assessments, notes and documents easily across services. Each contact with a consumer can then build on previous conversations – rather than starting from the beginning each time.

It was wonderful that the Department funded the e-referral upgrade in 2018. Full use of e-referral didn't take off because, at that time, SAMIS had not been upgraded to enable Salvation Army services to send and receive e-referrals. SAMIS has now been upgraded to enable Salvation Army services to send e-referrals, enabling this re-launch.

#### **4. Position from the Department – Bryony Edwards**

Bryony reported that the Department supports use of e-referral. It is efficient, secure, it reduces the need for clients to tell their story.

Achieving full Sector use of e-referral has been complex because homelessness agencies use a range of portals. Homes Victoria is working with those agencies that have moved away from SHIP to upgrade to e-referral capacities.

There are a range of levers that the Department could use to ensure use of e-referral, such as use of the updated Homelessness Guidelines. We are trying this last 'push' first.

Salvation Army, Melbourne City Mission and Haven Home Safe still do not have e-referral capacity. There is likely to be only one agency in each region that does not have capacity to receive e-referral, so this should not hold back use of e-referral.

#### **5. How useful is e-referral in an agency? – Jessica Bardic, Beyond Housing**

Beyond Housing is the homelessness entry point for Goulburn Ovens Murray. Jess identified that the service has been using e-referrals for some years and that it has streamlined their operations. The function has not only reduced consumers re-telling their story, but has also saved time for workers.

One of the key benefits is that an e-referral gives you the ability to upload any information that you have in a client file in SHIP (case notes, documents, contact details) into a referral.

The organisation you refer to can add notes into the referral. This means the entry point can see what the outcome of a referral has been. Entry point works can then track the process of a referral and can assist if the client is not engaging with the support agency.

In e-referral, the receiving agency can accept, decline or acknowledge a referral. This function helps the entry point track the client's journey without having to ring the support agency.

In regional Victoria there are a high volume of clients awaiting support from other agencies. At times the entry point is actively holding hundreds of clients, many of whom are awaiting finalisation of referrals. The e-referral system provides a database that the service can use to monitor the status of referrals.

There is a manual referral function that can be used for services without e-referral. It provides all the functions of an e-referral, such as attaching documents, but is then sent by an email. Workers then manually record the outcomes of the referrals.

If a worker is not in the office, anyone in the team can access information about the progress of a referral.

Jessica recommends use of e-referral as it saves time for workers, reduces the need for clients to re-tell their story, enables services to track the progress of clients' journeys through the service system and assists the services to track trends.

## 6. 'E-referral' how to – Amodha Ratnayeke, Infoxchange

Amodha is very encouraged to see the level of attendance at this session. More recently Safe Steps has started using e-referral and has found it to be very effective. Amodya can be contacted at: amodha@infxchange.org

### Functions – Receiving/Accepting a referral

E-referral is found on the 'Referrals' tab.

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 <span>New</span>	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 on the left hand side, you can open the client file, which provides:

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

States: Waiting

Restriction:  Workgroup  Limited  Cluster

From: FSV - Safe Steps

To: ACME Homeless Services

Service: ACME Homeless Services

Organisation: ACME Inc

Email: gerard@infxchange.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.

**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

Clicking on that client file will open a pdf outlining everything that the referring service has sent. For instance, the service has attached a MARAM assessment:

Family Name	Briggs	Age	43 yrs
Indigenous Status	Neither Aboriginal or Torres Strait Islander	Country of Birth	Australia
Australian South Sea Islander	No	Main Language at Home	English
Other Language at Home	None	Proficiency in spoken English	N/A

**Current Relationships**

Person	Relationship	Date of Birth	Sex	Comments
Peter Briggs	Son	20/09/2020	male	

**Address Details**

Street	Suburb	State	Type	Safety Concerns	Comments
* 11 Tree Grove	caulfield 3162	VIC	Home		

**Contact Details**

Contact	Type	Safety Concerns	Comments
0421273126	Phone (Wk)	Yes	Only call Jenny at work, never at home.

**Key Workers**

Key Worker	Role	Workgroup / Organisation	Comments
Amodha Ratnayake	Case worker	FSV - Safe Steps	

**MARAM Adult Risk Assessment (MARAM Tool)**

End Date  Lock Date 22/11/2023

**Status**

Assessment date	15/11/2023										
Status	In Progress										
MARAM Tool *	Screening tool										
Description	Screening - Jenny Briggs [PUV: J Briggs]										
Victim / Survivor	<table border="1"> <thead> <tr> <th>Client</th> <th>Role</th> <th>Start Date</th> <th>End Date</th> <th>Status (Comments)</th> </tr> </thead> <tbody> <tr> <td>Jenny Briggs</td> <td>Adult victim/survivor</td> <td>15/11/2023</td> <td></td> <td></td> </tr> </tbody> </table>	Client	Role	Start Date	End Date	Status (Comments)	Jenny Briggs	Adult victim/survivor	15/11/2023		
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#### MARAM Adult Risk Assessment (MARAM Tool)

End Date  Lock Date

#### Status

Assessment date	<input type="text" value="15/11/2023"/>
Status	<input type="text" value="In Progress"/>
MARAM Tool *	<input type="text" value="Screening tool"/>
Description	<input type="text" value="Screening - Jenny Briggs [PUV: J Briggs]"/>

Victim / Survivor	Client	Role	Start Date	End Date	Status (Comments)
	Jenny Briggs	Adult victim/survivor	15/11/2023		

Community-wide event

#### The Client

Given names *	<input type="text" value="Jenny"/>
Last name *	<input type="text" value="Briggs"/>

Do you have any immediate concerns about the safety of your children or someone else in your family?	<input type="text" value="Yes"/>
Do you feel safe when you leave here today?	<input type="text" value="Yes"/>
Would you engage with police if you felt unsafe?	<input type="text" value="Yes"/>
Safety plan has been completed?	<input type="text" value="No"/>

#### Additional Considerations

#### Needs Assessment

Needs Assessment	
Last updated by	<input type="text" value="Amodha Ratnayake, FSV - Safe Steps"/>
Last updated on	<input type="text" value="15/11/2023 08:46:53 AEDT"/>

#### Support Period

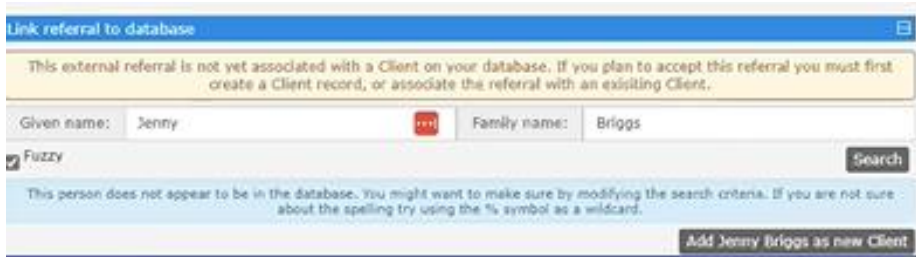
##### ADMIN

Consent Obtained	<input type="text" value="Yes"/>
Date Assistance Requested	<input type="text" value="21/10/2021"/>
Date Support Period Commenced	<input type="text" value="21/10/2021"/>
New Client	<input type="text" value="Yes"/>
Referral Source	<input type="text" value="Mental health service"/>
Referral Details	<input type="text" value="Requires support"/>

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:

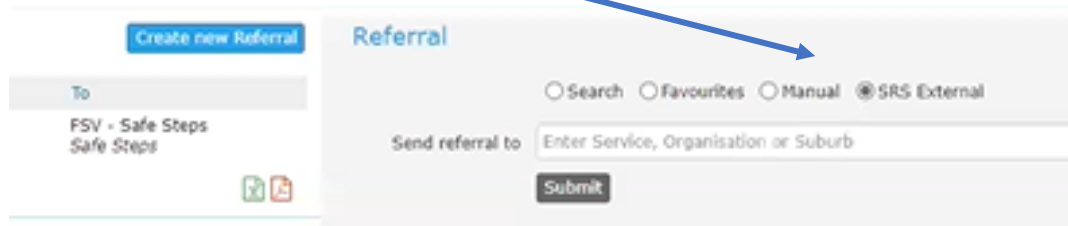
Referrals						
Received   Accepted   Declined   Sent   Draft						
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1 to 3 of 3 results						

## Functions – Sending a referral

Click on the client file, then click on the 'Referrals' tab and then click on 'create a new referral'.



You can then search for the agency you would like to refer the consumer to. If you know the name of the service, you can start typing it in the search field. If you input 'shift + ?', which will show a list of all agencies that you could refer to.



A referral will be created, showing all the information that is auto populated into the referral. The sender can then type in the primary reason (from a drop down), presenting issues and additional information into the referral.

The screenshot shows the 'Referral' form with the following details:

- Family name: Raffe
- Date of birth: 05/06/2001 (Age: 22)
- Sex: male
- 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: 42 Aurum Crescent

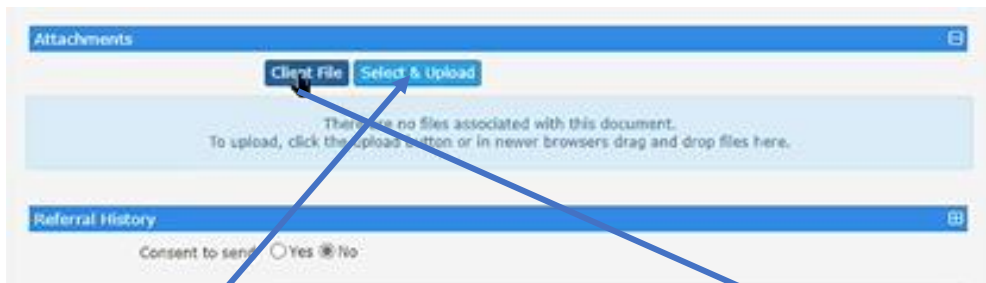
The 'Details' section is expanded, showing:

- Primary reason referred: [Dropdown menu]
- Presenting issues: [Text area]
- Additional Information: [Text area]

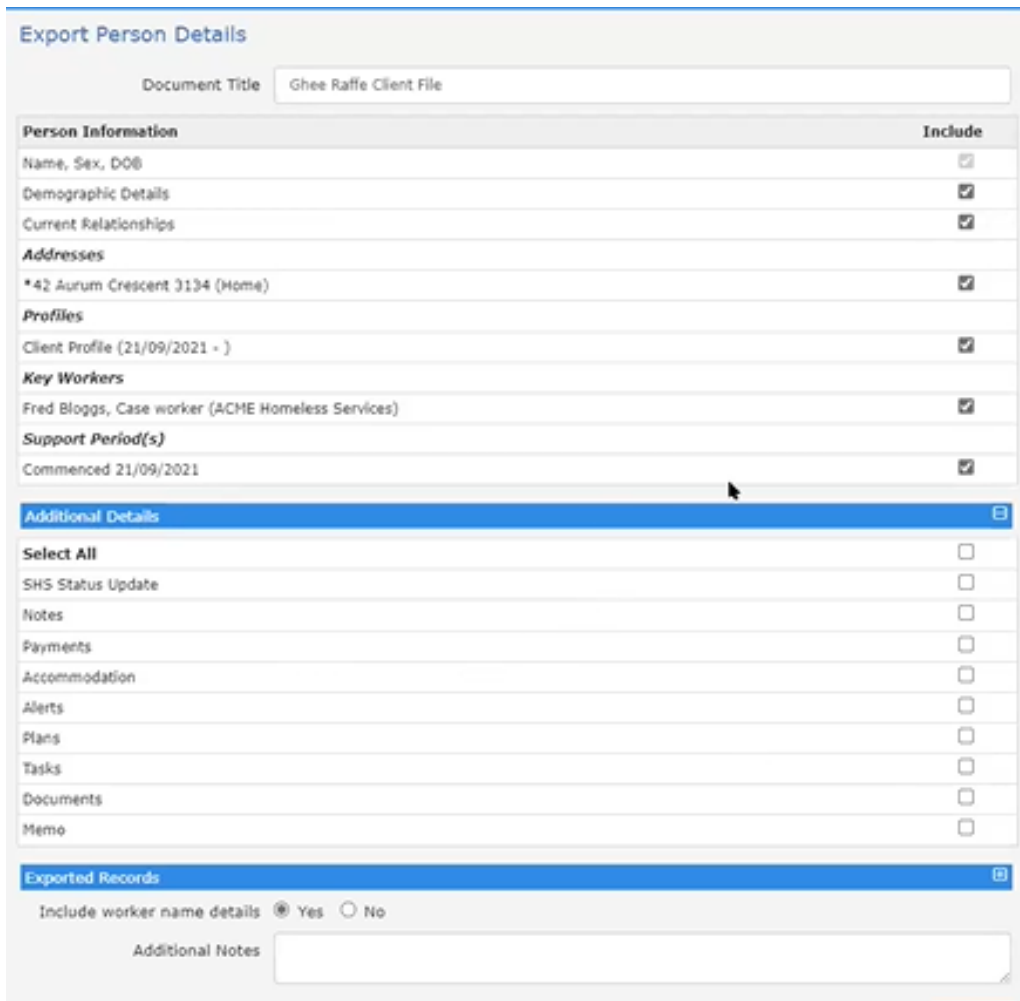
The 'Attachments' section shows a message: "Referral should be saved as draft before attaching any document."

The 'Referral History' section shows a radio button for 'Consent to send' with 'No' selected.

You then need to save the referral as a draft, then you can attach other sections of the consumer's file into the e-referral.



You can 'select and upload' to attach files from your hard drive. If you click on 'Client file', you can then click on any of the elements below for inclusion in the referral:



You can then select 'send'. The referral will be recorded in the 'sent' tab under 'referrals'.

### Sending an e-referral to a service that cannot receive e-referrals

Create the referral in exactly the same way. Save it as a draft, then print or download the draft referral to attach to an email.

The referral will be recorded. You can add comments to the referral yourself and can 'accept' the referral once you hear that the referral has been accepted.

If you are sending a referral to an agency not in the Infoxchange directory, you can create the referral by clicking 'manual'.

Infoxchange is working on e-referral functionality, such as the capacity to e-refer to services that are not in the Infoxchange directory. Infoxchange is also working with **The Orange Doors, to enable them to send and receive e-referrals through SHIP.**



**Salvation Army** – can now send e-referrals but not receive them.

## Questions

**Q:** Does the receiving agency receive a notification when a referral is sent to the agency? **Y:** If services aren't receiving notifications, it means that Infoxchange does not have a notifications email address. Services can send an email to Infoxchange support, providing an email address for notifications to be sent to.

**Q:** Can you use e-referral to transfer to transfer between different workgroups in the same team.

**A:** Yes definitely.

**Q:** Don't we need to get client consent before opening a new support period. **A:** Consent is sought at the access/entry points to transfer of information between services. If consumers given consent to this, the consent lasts six months. The consumer can identify any services that they would not like their information to be sent to.

**Q:** How long does the referral history last? **A:** Forever. The communication in the referral can continue for as long as the two agencies would like.

**Q:** Do we have the option to turn on internal e-referrals only or to receive referrals from only particular workgroups.

**A:** There is an additional tab in the Referral area, one for internal referrals and one for external services. If sending referrals to an internal workgroup, do that through the 'internal' referrals tab. Services can nominate if they would like the e-referral function to be turned off. This can be done by sending an email to Infoxchange support.

**Q:** Does the sender receive a notification when there are updates recorded in the referral. **A:** Yes, the sending service will receive an email notification each time there is an update to the referral.

**Q:** Can we attach referrals from external agencies when the referral is being forwarded on? **A:** This would need to be attached as a document to a referral.

**Q:** It would be great for access/entry points to get updates as agencies are enabled to use e-referral.

**A:** All agencies have this capacity enabled (except MCM, Haven Home Safe and Salvation Army). LASNs can monitor that agencies are actively using e-referral from here.

**Q:** Homelessness support agencies are generally required to receive referrals from one particular access/entry point. Is there any capacity for services to limit the services that can refer to them?

**A:** At this point no. The agency would need to reject the referrals.

**Q:** Services often make 'warm' referrals to each other. Where does e-referral fit in? **A:** A warm referral could be followed up with an e-referral so that services can easily transfer information and referral outcomes to each other.

**Q:** Can you get reports from the Referral tab? **A:** Yes, you can download word or excel reports from the Referral tab.

**Reminder:** If agencies are not receiving notifications of referrals, they should contact Infoxchange support to provide an email address that is a common mailbox that all team members can see.

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](mailto:homelessness@aihw.gov.au)

