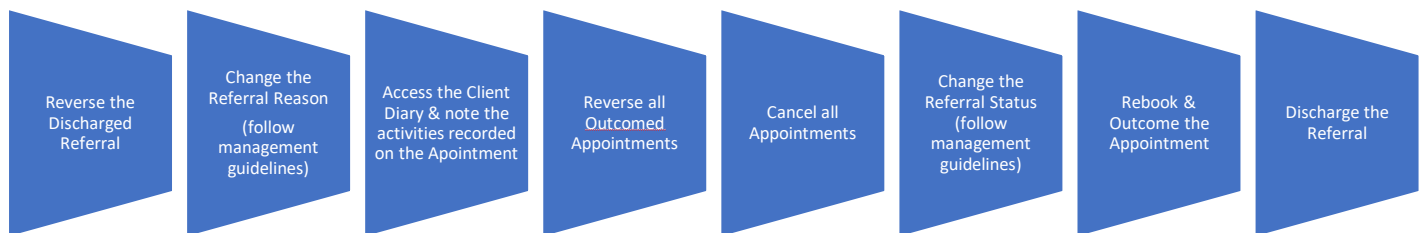


Bespoke EICT: Changing Referral Reason & Referral Status

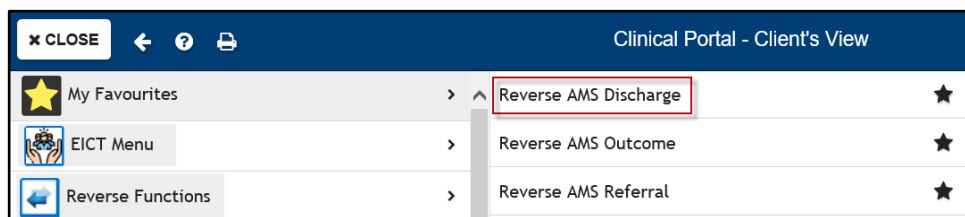
(Reverse Referrals & Reverse Outcomes)



Process for changing Referral Reason and Referral Status: Bespoke EICT Referrals



1 Reverse Discharged Referral



- From **MENU**, select **Reverse AMS Discharge**
- Search for the Client

Note the Discharged Referral has contacts (Outcomed Appointments) against it

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	Date Discharged
DIGITAL SKILLS TRAINING	Community and Clinic	DST Total Mobile Training	WARD, Rachell	1 Apr 2025, 09:00	Y	25 Jun 2025

- Click on the Referral you wish to Reverse the Discharge

The Reverse Referral Discharge screen displays

- Click **Reverse Discharge** (bottom of the screen)
- An Information pop up will display
- Click **Yes**

Information

This will reverse the Discharge of the current referral.
Are you sure you wish to continue?

Yes No

Your screen now displays the following message

The discharge has been successfully reversed.
Any appointments that were cancelled due to discharge will remain cancelled with a cancellation reason of:
Entered in error.

- Click the **View Referrals** link

Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



2 Change Referral Reason (follow Management guidelines)

- Click in either the Specialty, Care Setting or team column on the referral to **display the Referral**

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	To Discharge	RTT	Waiting List(s)
DIGITAL SKILLS TRAINING	Community and Clinic	DST Total Mobile Training	WARD, Rachell	1 Apr 2025, 09:00	Y	Transfer		

information

- Change the **Referral Reason** as instructed by your Service

Referral initiated date	<input type="text" value="1 January 2020 09:00"/>
Specialty	Early Intervention Community Team
Referral Source	<input type="text" value="Hospital Inpatient Service"/>
Referring Organisation code	<input type="text"/>
Referrer	<input type="text" value="Dr Shah"/>
Care Professional Staff Group	<input type="text" value="Please Select"/>
Referral Reason	<input type="text" value="Assessment"/>
Other Reason for Referral	<input type="text" value="Please Select"/>
Care Setting	Community and Clinic
Team Referred To	Birmingham EICT North
HCP Referred To	
Referral Urgency	Urgent
Administrative Category	<input type="text" value="NHS patient, including overseas visitors"/>
Referral Comment	<input type="text"/>
Contract Identifier	<input type="text"/>

[Allocation History](#) [View Referrals](#) [Team Transfer History](#)

- Click **Save Referral**

Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



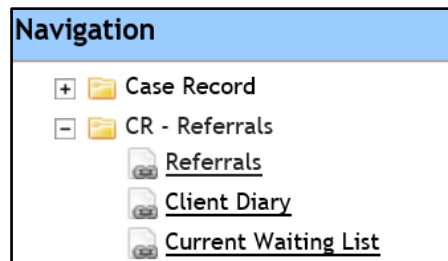
IMPORTANT NOTE make a note of the Outcome details as these need to be used when re-outcoming the Appointment/s. Access the Client Diary to note the information

3 Access the Client Diary

Locate the Client to Access the **Clinical Portal - Client's View** screen

In the Navigation Pane

- Click **CR - Referrals**
- Click **Client Diary**



Find the Appointment that needs Reversing

3 Feb 2022
08:40

Patient's Home

Birmingham
EICT North

PACKINGTON,
Henry

1 Jan 2020
09:00

Early
Intervention
Community
Team

Assessment

Attended

• Click

View activities associated with this appointment.

Advice (Actual)

Assessment (Actual)

Diabetic Care (Actual)

Make a note of the **Date & Time, Location, HCP & Main Activity & Additional Activities** details – you will need these later

Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)

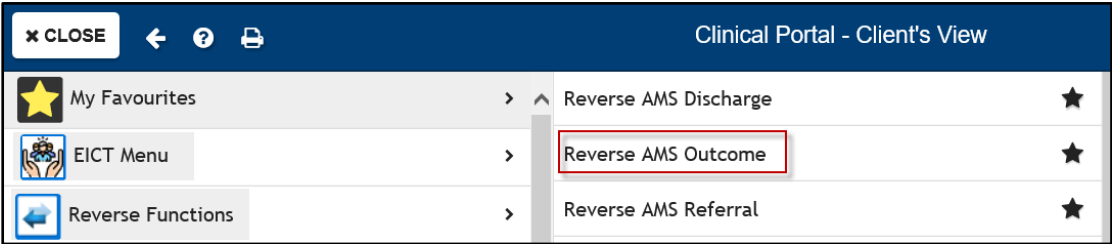




Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



4 Reverse all Outcomed Appointments:



- From **MENU**, Select **Reverse AMS Outcome**
- Click 
- Search for the **Client**
- Enter **Start Date**
- Enter **End Date**
- Click 

The list of Outcomed appointments against this referral will display:

- Click ☒ to select the appointment

Clinic	Stream	Date	Time	Duration	Seen Time	Seen Duration	Outcome	<input checked="" type="checkbox"/>
Patient's Home	0	5 May 2025	14:20	20	11:27	1	Attended	<input checked="" type="checkbox"/>

Click 



5 Cancel Appointment

Access the **HCP's Diary**

- Click the **Appointment Time** (for the appointment/s you have reversed the outcomes for)
- Click **Cancel Appointment** (bottom of the screen)
- Enter **Date & Time**
- Cancellation Reason - **Entered in error**
- Cancellation Comment - **Cancelled to Allow Referral Status to be Changed**
- Click **Cancel Appointment**

Information Prompt: Are you sure you wish to cancel?

- Click **Yes**

Information Prompt: Do you want to book a follow up appointment?

- Click **No**

The Appointment will be removed from the HCP's Diary



6 Change Referral Status:

- Access the Client's **Clinical Portal - Client's View** screen
- Locate **Navigation** pane (right of screen)
- Select the **CR-Referrals** folder
- Select the **Referrals** link
- Click to **open** the **Referral**
- Click **Referral Status** (bottom of the screen)
- **Change Urgency** – Select the information given by your Service
- **Urgency Change Reason** – Select the change to Reason given by your Service

Referrer	
Date & time referral received	2 Dec 2021 13:07
Care Setting	Community and Clinic
Urgency	0 - 2 Days
Waiting Status	
Change Urgency	Please Select ▼
Urgency Change Reason	Please Select ▼
Change Waiting Status	Please Select ▼

- Click **Save Urgency/Waiting Status**
- Click **Urgency History**

The Referral is now in its correct state

- **Re-Book the Appointments**
- **Outcome the Appointment (using the information you noted from the Client Diary earlier)**
- **Discharge the Referral**