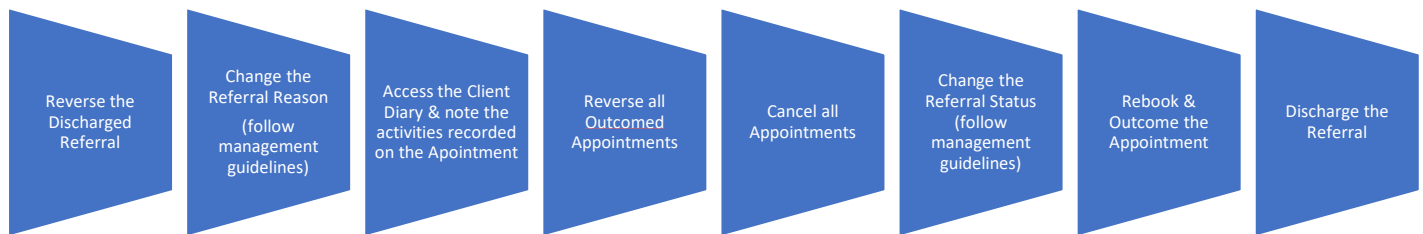
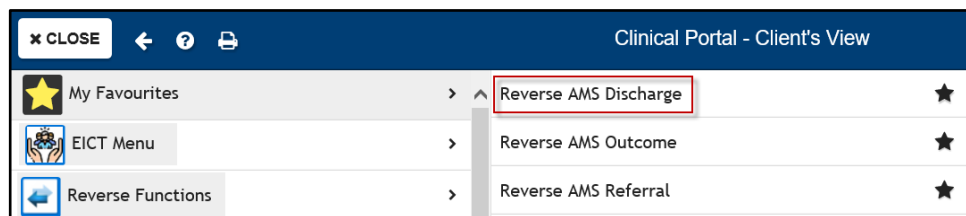




## Process for changing Referral Reason and Referral Status: Bespoke EICT Referrals



### 1 Reverse Discharged Referral



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

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	Date Discharged
Early Intervention Community Team	CAC	Birmingham EICT North		1 Jan 2020, 09:00	Y	4 Feb 2022

- Click **Reverse Discharge**
- Click **Yes**

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 **View Referrals**

# Bespoke EICT: Changing Referral Reason & Referral Status



(Reverse Referrals & Reverse Outcomes)

## 2 Change Referral Reason (follow Management guidelines)

- Click to **Open the Referral**

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	To Discharge	
Early Intervention Community Team	Community and Clinic	Birmingham EICT North		1 Jan 2020, 09:00	Y		<a href="#">Transfer</a>

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

**Referral initiated date**

**Specialty** Early Intervention Community Team

**Referral Source**

**Referring Organisation code**

**Referrer**

**Care Professional Staff Group**

**Referral Reason**

**Other Reason for Referral**

**Care Setting** Community and Clinic

**Team Referred To** Birmingham EICT North

**HCP Referred To**

**Referral Urgency** Urgent

**Administrative Category**

**Referral Comment**

**Contract Identifier**

[Save Referral](#) [Referral Status](#)

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

- Click **Save Referral**

# Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



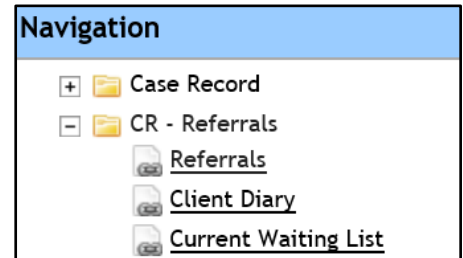
**IMPORTANT NOTE** It is important to make a note of the Outcome details as these need to be used when re-outcoming the Appointment. Access the Client Diary to note the information

## 3 Access the Client Diary

Locate the Patient to Access the **Clinical Portal Client's View**

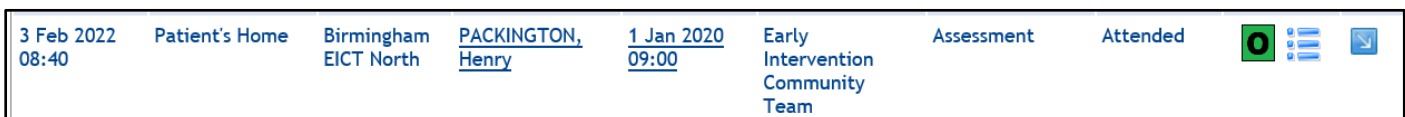
In the Navigation Pane

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

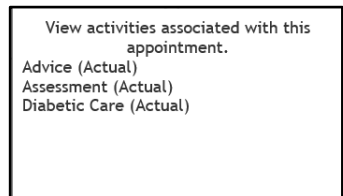


Find the Appointment that needs Reversing

- Click



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

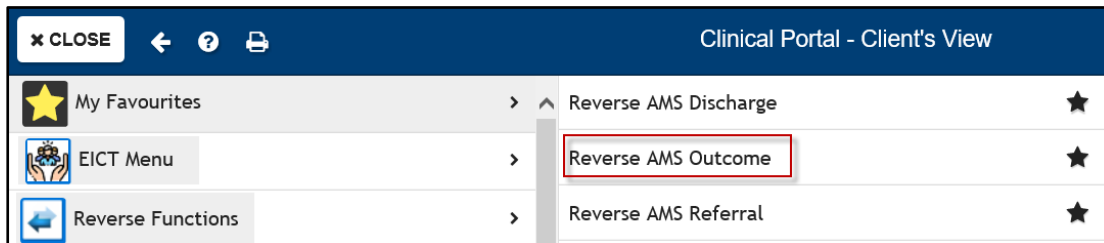




# Bespoke EICT: Changing Referral Reason & Referral Status

(Reverse Referrals & Reverse Outcomes)



## 4 Reverse all Outcomed Appointments:



- Click 
- Search for the Patient
- Enter **Start Date**
- Enter **End Date**
- Click 

The list of Outcomed appointments against this referral will display:

- Click

Client: Mila GRANT

Start Date: 3 February 2022

End Date: 4 February 2022

Go

Clinic	Stream	Date	Time	Duration	Seen Time	Seen Duration	Outcome	<input checked="" type="checkbox"/>
Patient's Home	0	3 Feb 2022	08:30	30	08:40	25	Attended	<input checked="" type="checkbox"/>

Click 



### 5 Cancel Appointment

Access the HCP's Diary

- Click **Appointment Time**

Time	Client Name	Location/Other Activity	Type
06:00			
06:30			
07:00			
07:30			
08:00 - 08:30	GRANT, Mila (Mrs)	Patient's Home	FU-F2F Consultation
08:30			
09:00 - 09:30	SAMRA, Aarav (Mr)	Patient's Home	FU-F2F Consultation
09:30			

- Click **Cancel Appointment**
- Enter **Date & Time**
- Cancellation Reason – **Entered in error**
- Cancellation Comment – **Cancelled to Allow Referral Status to be Changed**
- Click **Cancel Appointment**

Prompt: Are you sure you wish to cancel

- Click **Yes**

Prompt Do you want to book a follow up appointment

- Click **No**

**Cancellation Details**

**Cancellation Date Time** 4 February 2022 11:40

**Cancellation Reason** Entered in error

**Cancellation Comment** Cancelled to Allow Referral Status to be changed

**Cancellation By** PACKINGTON, Henry

The Appointment will disappear from the HCP's Diary



## 6 Change Referral Status:

Access **Clinical Portal Client's View** for Patient

Locate **Navigation>CR Referrals**

- Click **Referrals**
- Click to open **Referral**
- Click **Referral Status**
- **Change Urgency** – Select the information given by your Service
- **Urgency Change Reason** – Select the change to Reason given by your Service

<b>Referrer</b>	
<b>Date &amp; time referral received</b>	2 Dec 2021 13:07
<b>Care Setting</b>	Community and Clinic
<b>Urgency</b>	0 - 2 Days
<b>Waiting Status</b>	
<b>Change Urgency</b>	Please Select
<b>Urgency Change Reason</b>	Please Select
<b>Change Waiting Status</b>	Please Select

- Click **Save Urgency/Waiting Status**

- Click **Urgency History**

Old Urgency	Start Date	New Urgency	Change Date Time	Change Reason	Change By
Routine	1 Jan 2020	Urgent	4 Feb 2022, 09:56	Rapidly Progressive Diagnosis	PACKINGTON, Henry

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**