# Referrals

## Contents

## Referral Overview

A 'Referral' is how a service knows about a Client. Referrals are received from a variety of sources for example Client's GP, Hospital Consultant, Social Services etc.

A Referral must be created on Rio for a Client before any appointments or interventions with a Clinician from a BCHC service can be recorded in Rio. Once a Referral is created the Client automatically displays within the Team Caseload.

## Creating a Referral

The Clients **Referrals** screen can be accessed via the **Clinical Portal**

- **Search** for the Client

- When the Clinical Portal displays, locate the **Navigation** pane (right)

- Open the CR-**Referrals** folder

- Click the **Referrals** link

Or directly via the **Menu**

- Open the Menu

- Click Quick Menu

- Click **Referral**

The **Referrals** screen will then display

From the **Referrals** screen

- Click **Create New Referral**

# Referrals

Each service will have specific instructions for exactly what you need to select from the drop-down lists you will find on this screen. As you start to complete the screen more fields will display, you will need to complete the following fields, the pink fields are mandatory.

**Referral initiated date:** when the referrer decided to refer the Client to your service.

**Specialty Group:** your Division.

**Specialty:** your Service.

**Care Setting:** Community and Clinic for Community Services; Admission Referral for Inpatients.

**Referral Source:** where the referral comes from.

**Referrer:** may be auto entered (e.g., GP) or enter name/reference for referrer.
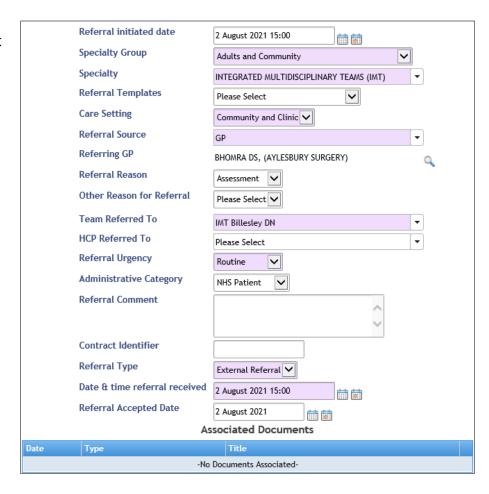
**Referral Reason:** why the Client is being referred.

**Team Referred To:** your Team.

**Referral Urgency:** how urgent is the referral.

**Administrative Category:** NHS Patient.

| | |
|---|---|
| Referral initiated date | 2 August 2021 15:00 |
| Specialty Group | Adults and Community |
| Specialty | INTEGRATED MULTIDISCIPLINARY TEAMS (IMT) |
| Referral Templates | Please Select |
| Care Setting | Community and Clinic |
| Referral Source | GP |
| Referring GP | BHOMRA DS, (AYLESBURY SURGERY) |
| Referral Reason | Assessment |
| Other Reason for Referral | Please Select |
| Team Referred To | IMT Billesley DN |
| HCP Referred To | Please Select |
| Referral Urgency | Routine |
| Administrative Category | NHS Patient |
| Referral Comment | |
| Contract Identifier | |
| Referral Type | External Referral |
| Date & time referral received | 2 August 2021 15:00 |
| Referral Accepted Date | 2 August 2021 |

**Associated Documents**

| Date | Type | Title |
|---|---|---|
| | -No Documents Associated- | |

**Referral Type:** always External Referral for all services unless in ASR or Dental Divisions.

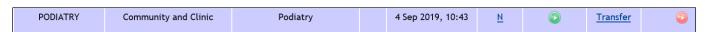**Date & time referral received:** when you received the referral.

**Referral accepted date:** when your service made the decision to accept the referral.

You may also use the green plus to associate referral information received electronically with the referral

- When you have completed all the required fields, click **Save Referral**

The **Referrals** screen will display

The new **Active** referral displays in blue

| PODIATRY | Community and Clinic | Podiatry | 4 Sep 2019, 10:43 | N | | Transfer | |
|---|---|---|---|---|---|---|---|

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## Opening a Referral

- Click **Specialty, Care Setting** or **Team** of required referral

The **Referral Details** screen displays, showing the details of the referral.

## Editing a Referral Status

If the status of the referral changes, it can be updated.

- Ensure the **Referral Details** screen is displaying the detail of the referral

- Click **Referral Status** (bottom)

The **Referral Status** screen will display

- **Change Urgency:** select required urgency

- **Urgency Change Reason:** select required reason

- Click **Save Urgency/Waiting List** (bottom)

| Referred GP | Not Known GP |
|---|---|
| Date & time referral received | 4 Sep 2019 10:43 |
| Care Setting | Community and Clinic |
| Urgency | Routine |
| Waiting Status | |
| **Change Urgency** | Urgent ▼ |
| **Urgency Change Reason** | Deserving Case ▼ |

The new urgency and urgency change reason will not display on this screen.

- Click **View Client Referrals** link to return to the Referrals screen

## Viewing Urgency History

- Ensure the **Referral Status** screen is displaying

- Click **Urgency History** (bottom)

The **Referral History Urgency History** screen will display showing details of any referral urgencies.

| Old Urgency | Start Date | New Urgency | Change Date Time | Change Reason | Change By |
|---|---|---|---|---|---|
| Routine | 4 Sep 2019 | Urgent | 5 Jul 2021, 15:49 | Deserving Case | TRAINER, IT |

- Click the **back arrow** ← to return to the **Referrals** screen

You should now be back on the **Referrals** screen

## Transferring a Referral

You can transfer a referral to another team within the same service.

Locate the referral for your Team

- Click the **Transfer** link on the referral

The **Referral Transfer** screen will display

- Select the team you wish to **transfer to** from the drop-down list

- Click **Go**

- Leave the **HCP field blank**

- Enter the **Transfer Date/Time**

- Enter a **Comment**

- Click **Save**

Referral Specialty: COMMUNITY MEDICINE
Date & time referral received: 15 Jul 2013, 00:00

| | |
|---|---|
| **Team** | Birmingham Therapists |
| **HCP** | Please Select |
| **Transfer Date / Time** | 8 July 2021 14:50 |
| **Comment** | Client moved in with family in the south of Birmingham |

You will see the change has occurred to the referral details, recording the new **team** and **date of transfer** in brackets below the team name**.**

| COMMUNITY MEDICINE | Community and Clinic | Birmingham Therapists (8 Jul 2021) | 15 Jul 2013, 00:00 | N | ● | Transfer |
|---|---|---|---|---|---|---|

## Discharging a Referral

When the Client's treatment is complete the referral should be discharged.
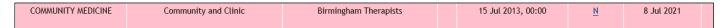
Locate the referral for your Team

- Click the **green button** in the **To Discharge** column

The **Discharge Referral** screen displays

- Enter any **Comments**

- Select the **Discharge Date/Time**

- Select **Discharge HCP**

- Select **RTT Discharge Reason** (only if the service is RTT)

- Select **Discharge Reason**

- Click **Save Discharge Details**

| | |
|---|---|
| **AMS Specialty** | COMMUNITY MEDICINE |
| **Date & time referral received** | 15 Jul 2013, 00:00 |
| **Referral Source** | Internal |
| **Referral Reason** | Advice |
| **HCP Referred to** | |
| **Care Setting** | Community and Clinic |
| **Comments** | Client's episode of care has ended |
| **Discharge Date / Time** | 8 July 2021 16:20 |
| **Discharge HCP** | ANDERSON, James |
| **RTT Discharge Reason** | Treatment Complete |
| **Discharge Reason** | Treatment completed |

The **discharged** referral will display in **pink** below any active referrals

| COMMUNITY MEDICINE | Community and Clinic | Birmingham Therapists | 15 Jul 2013, 00:00 | N | 8 Jul 2021 |
|---|---|---|---|---|---|

## Viewing Referrals

Referrals can be viewed via the Clinical Portal - Client's View

- **Search** for the Client

- When the Clinical Portal displays, locate the **Navigation** pane (right)

- Open the CR-**Referrals** folder

- Click the **Referrals** link

The **Referrals** screen displays showing all active (blue) and discharged referrals (pink) for a Client.

- Click on any **column heading** to sort in **ascending** (A-Z) order.
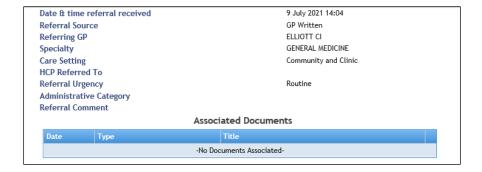
## Reversing a Referral

Once a referral is created, providing you have access to **Reverse** functionality, you may remove it from the Client's record. If there are appointments booked against a referral you will not be able to reverse it.

- Click **Menu**

- Click [Reverse Functions]

- Click **Reverse AMS Referral**

- **Search** for Client

- Click **Go**

The **Reverse Referral** screen will display all referrals for the Client.

- Click **Referral** to be **cancelled**

The referral details display on the screen

| Date & time referral received | 9 July 2021 14:04 |
| --- | --- |
| Referral Source | GP Written |
| Referring GP | ELLIOTT CI |
| Specialty | GENERAL MEDICINE |
| Care Setting | Community and Clinic |
| HCP Referred To | |
| Referral Urgency | Routine |
| Administrative Category | |
| Referral Comment | |

**Associated Documents**

| Date | Type | Title | |
| --- | --- | --- | --- |
| | | -No Documents Associated- | |

- Click **Reverse Referral** (located at the bottom)

- An **Information** prompt will display asking if you are sure you want to reverse the referral, click **Yes**

The referral has been removed and on longer displays on the Reverse Referral screen.