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#### **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
- · Search for your Client

The **Referrals** screen will then display

From the **Referrals** screen

• Click Create New Referral





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

Referral initiated date 3 July 2023 09:00 iii e Specialty Group Adults and Community Specialty DIABETIC MEDICINE Referral Templates Please Select Care Setting Community and Clinic > Referral Source BCHC District Nurse Referrer Referral Reason Clinical Assessment Other Reason for Referral Please Select Team Referred To Community Diabetes **HCP Referred To** Please Select Referral Urgency Routine Administrative Category NHS Patient Referral Comment Contract Identifier Referral Type External Referral 💙 Date & time referral received 3 July 2023 09:00 . Referral Accepted Date 3 July 2023 Associated Documents Title Type -No Documents Associated-Save Referral

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







Referred GP

**Care Setting** 

Waiting Status
Change Urgency

**Urgency Change Reason** 

Urgency



Not Known GP

Routine

Urgent

Deserving Case

Community and Clinic

Date & time referral received 4 Sep 2019 10:43

#### **Opening a Referral**

Click Specialty, Care Setting or Team of required referral

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

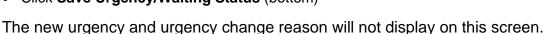
#### **Editing a Referral Status**

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 Status (bottom)

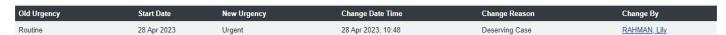


• Click View Client Referrals link to return to the Referrals screen

### **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.



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



If the referral is on a Waiting List, you may see further prompts which need to be responded to accordingly

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.



## 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







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

COMMUNITY MEDICINE	Community and Clinic	Birmingham Therapists	15 Jul 2013, 00:00	<u>N</u>	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 AMS Referral
- Search for Client
- Click Go

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

Click Referral to be Reversed

The referral details display on the screen



- 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
- · Please note: You cannot reverse a referral with appointments etc. associated with it

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