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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.

Navigating to the Referral screen

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

- **Search** for the Client
- When the Clinical Portal – Clients View screen 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



Creating a Referral

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.

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

Referral initiated date: 3 July 2023 09:00

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

Date	Type	Title
-No Documents Associated-		

Save Referral



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.

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** button (bottom)

The **Referral Status** screen will display

- **Change Urgency:** select required urgency
- **Urgency Change Reason:** select required reason
- Click **Save Urgency/Waiting Status** (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 display at the top of this screen once saved.

- 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 urgency changes.

Referrals



Old Urgency	Start Date	New Urgency	Change Date Time	Change Reason	Change By
Routine	28 Apr 2023	Urgent	28 Apr 2023, 10:48	Deserving Case	RAHMAN, Lily










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

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

Change Referral Reason

If the Referral Reason has been recorded incorrectly this can be amended.

- Click on either the **Specialty, Care Setting or Team** to Open the Referral
- Change the **Referral Reason** as instructed by your Service

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

Save Referral

Referral Status

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

- Click **Save Referral**



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
Birmingham Therapists

Team
HCP
Please Select

Transfer Date / Time
8 July 2021 14:50

Comment
Client moved in with family in the south of Birmingham

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.

COMMUNITY MEDICINE	Community and Clinic	Birmingham Therapists (8 Jul 2021)	15 Jul 2013, 00:00	N		Transfer
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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
Date & time referral received
Referral Source
Referral Reason
HCP Referred to
Care Setting
Comments

COMMUNITY MEDICINE
15 Jul 2013, 00:00
Internal
Advice
Community and Clinic
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

COMMUNITY MEDICINE	Community and Clinic	Birmingham Therapists	15 Jul 2013, 00:00	N	8 Jul 2021
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The **discharged** referral will display in **pink** below any active referrals