Inpatient Referrals

Contents

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 admissions or interventions with a Clinician from a BCHC service can be recorded in Rio.

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**

Inpatient 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: Admission Referral.

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/Ward.

Referral Urgency: how urgent is the referral.

Administrative Category: NHS Patient.

Referral Type: always External Referral for all referrals.

Referral initiated date	1 February 2022 09:00
Specialty Group	Birmingham Community Beds
Specialty	Community Beds
Referral Templates	Please Select
Care Setting	Admission Referral (Community Beds)
Referral Source	Queen Elizabeth Hospital - Wards
Referrer	Dr Smith
Referral Reason	Rehabilitation
Other Reason for Referral	Please Select
Team Referred To	Birmingham Community Beds
HCP Referred To	Please Select
Referral Urgency	Routine
Administrative Category	NHS patient, including overseas visitors
Referral Comment	
Contract Identifier	
Referral Type	External Referral
Date & time referral received	1 February 2022 09:00
Referral Accepted Date	1 February 2022

Associated Documents

Date	Type	Title	
1 Feb 2022	BCHC Admin	MHH-Ward5 Ref Doc	

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

Community Beds	Admission Referral (Community Beds)	Birmingham Community Beds		1 Feb 2022, 09:00	N	⏵	Transfer	

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	15 May 2023	Urgent	22 May 2023, 13:56	Further Info Received From Referrer	WARD, Rachell

- 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 Beds
Date & time referral received	1 Feb 2022, 09:00
Referral Source	Queen Elizabeth Hospital - Wards
Referral Reason	Rehabilitation
HCP Referred to	
Care Setting	Admission Referral (Community Beds)
Comments	Client re-admitted to QE
Discharge Date / Time	3 February 2022 14:23
Discharge HCP	ASTON, Deidre
Discharge Reason	Readmission to Acute Bed

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

Community Beds	Admission Referral (Community Beds)	Birmingham Community Beds		1 Feb 2022, 09:00	N	3 Feb 2022	

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 admissions booked against a referral you will not be able to reverse it. Admissions and discharges can only be reversed by the Service Support team.

- 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 **reversed**

The referral details display on the screen

Date & time referral received	15 May 2023 09:00
Referral Source	GP Written
Referring GP	Not Known GP
Referral Reason	Assessment
Specialty	DIGITAL SKILLS TRAINING
Care Setting	Admission Referral (Community Beds)
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.