

Contents

Overview	1
Creating a Referral	1
Opening a Referral	
Editing a Referral Status	3
Viewing Urgency History	3
Transferring a Referral	4
Discharging a Referral	4
Viewing Referrals	5
Reversing a Referral	5

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





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

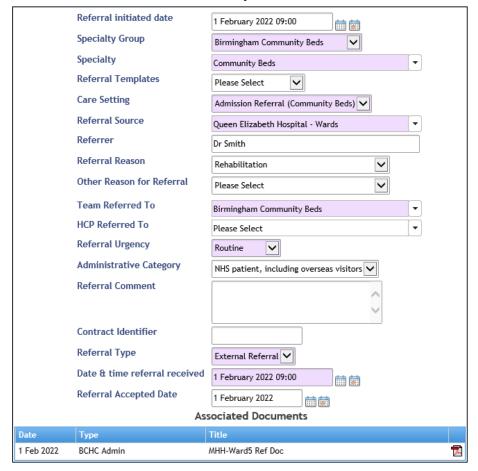
referral.

Administrative Category: NHS

Patient.

Referral Type: always External

Referral for all referrals.



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 List (bottom)

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.



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 <u>Transfer</u> 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



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

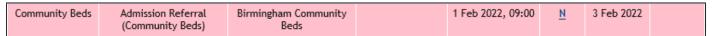
Click the green button in the To Discharge column

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







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



- 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.

