ORE VALLEY HOUSING ASSOCIATION

Fife Rights Forum - Procedure and User Guide

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ORE VALLEY HOUSING ASSOCIATION

FIFE RIGHTS FORUM PROCEDURE

Purpose

The purpose of this Procedure is to outline Ore Valley Housing Association's involvement in The Fife Rights Forum, the Forum's purpose, office procedures and system procedures.

Fife Rights Forum

Fife Rights Forum is the umbrella body for Fife's advice and rights agencies. The remit of Fife Rights Forum includes helping to improve the quality of advice services, promoting co-operation between agencies and increasing community involvement across the sector. The Forum has a co-ordinator. The Forum meets every quarter for networking and information sharing and elects an executive, which guides the development of the forum.

The Fife Rights Forum Referral and Signposting Partnership is a system designed to improve the procedures for the signposting and referral of clients between services.
A protocol has been signed between Ore Valley Housing Association and Fife Rights Forum. This, along with the receipt books, cards and other necessary information is in File - **16.22**

Procedures
Within the office there are two types of users. There are Points of Contact and Referrers. At time of writing the office details are as follows:

Points of Contact
Kerry McLeod, Corporate Support Manager
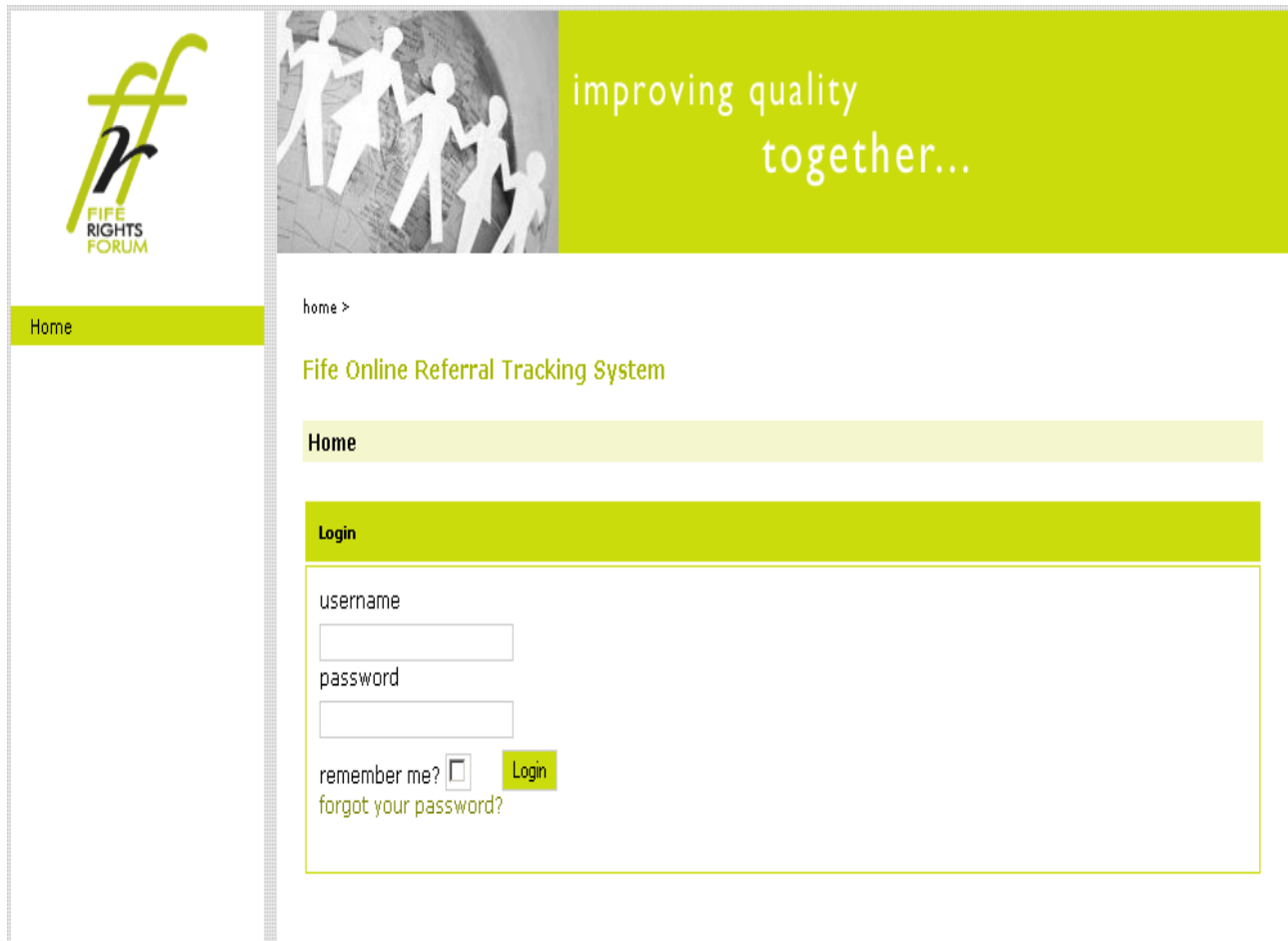Colin McInnes, Housing Management Team Leader

Referrers
Kerry McLeod, Corporate Support Manager
Colin McInnes, Housing Management Team Leader
Karen Burt, Housing Officer
Vicky Murdoch, Community Development Officer

Each member of staff has been provided with a password to access the system. Instructions of negotiating through the system follow this procedure note in the User Guide.

Attention must be given to ensure that the client receives a receipt from the Consent Form, if they are passed through the Fife Rights Forum system. Or if the service provider cannot receive on line referrals, a card will be given to the client with all the contact details of the service provider for the client to contact on their own.

Both Housing Management Team Leader and Officer have their own receipt books and there is one in the file for the office.

USER GUIDE

Instruction manual V 1 - Fife Online Referral Tracking System

Live referral site   http://referrals.fiferightsforum.org
Training referral site   http://training.fiferightsforum.org
Who Can I refer to   http://www.fiferightsforum.org/datasharing

Contents:

1. Introduction

1.   Introduction

The Fife Online Referral Tracking System (FORT herein) provides an online interface for the creation and tracking of referrals between organisations on the system. This manual begins by explaining the common features available to all users of FORT and goes on to detail the abilities of different user types in subsequent chapters.

2.   General

This section provides information for and describes facilities available for all users with the ability to use FORT.

2.1   Logging In

To start using FORT, you must first log in with the username and password assigned to you by an administrator (or in the case of Handlers and Referrers, your Point of Contact).   Selecting 'remember me' will store your login details in your browser so that the next time you visit FORT your login details will be pre-entered. Once the details have been entered click 'Login'.

Login

username

password

remember me? ☐   Login
forgot your password?

If you have forgotten your password, select the 'forgot your password' link. You will be asked for your registered email address, to which your login details will be sent.

home >

Fife Online Referral Tracking System - Training Server

Home
Referrers

logout

Home

Logout	**Search Referrals**
logout	Unique Reference
	Client First Name
	Client Middle Name
	Client Second Name
	Client Postcode
	Search

Once you have clicked 'Login' the main home page will appear. From this screen you have the option to either search existing referrals (see Section 2.3) or to click on your relevant user role (Referrer, Point of Contact, Handler) from the menu on the left to be taken to the user control panel.

A log out option is displayed on both the home page and in the menu. It is recommended you do this when you are finished using the system.

2.2   Interface Overview

Upon opening the user control panel each user will be greeted with a series of options.   These options will vary depending on user type (Referrer, Point of Contact, Handler).

Points of Contact

Fife Council LSO Referral Network (edit details)
Generic Network (edit me)

Messages

Messages	[0]
Send Message	

Users

Referrers	[33]	view
Handlers	[0]	
Create Handler / Create Referrer		

Incoming Referrals

Incoming Referrals Awaiting Acceptance	[0]
Incoming Referrals Awaiting Routing	[0]
Incoming Referrals ReRoute Requested	[0]
Current Incoming Referrals	[0]

Common to all user types is the 'edit me' option which will allow you to change your details (see Section 2.4), the messaging system (see Section 2.5) and the different referral viewing options (explained in overview later in this section, and then in detail in the relevant user type chapter).

Each option for viewing referrals takes the user to a similar list view, the contents of which are dependant on the type of referral selected and the abilities of the presently logged in user.

Unique Reference v	Referral Date	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode	Handler	Referrer	Handler Close Request	Referrer Close Request
+ FRF050914-9188EE	14/09/2005	Test Organiastion 2	Fife Council LSO Referral Network	Money Advice	Joe	Macintyre	ky1 1ky	tricia cockburn	Alison Sword (Fife Council LSO Referral Network)	No	No
+ FRF050914-7012RR	14/09/2005	Test Organiastion 2	Fife Council LSO Referral Network	Money Advice	George	bush	ky1 1ky	tricia cockburn	Martha Shields (Fife Council LSO Referral Network)	Yes	No
+ FRF050824-8652JM	24/08/2005		Fife Council LSO Referral Network	health advice	IAN	FENTON	KY85JJ		Lynda Robertson (Fife Council LSO Referral Network)	No	No
+ FRF050824-7146AN	24/08/2005		Fife Council LSO Referral Network	health advice	IAN	FENTON	KY85JJ		Lynda Robertson (Fife Council LSO Referral Network)	No	No
+ FRF050824-7038ZK	24/08/2005		Fife Council LSO Referral Network	health advice	IAN	FENTON	KY85JJ		Lynda Robertson (Fife Council LSO Referral Network)	No	No

A subsection of details relevant to the type of referral being viewed is presented horizontally, with the column titles at the top of the screen. Column titles in green may be ordered on, those in black may not be ordered on. Clicking on a column title will order entries in the table by that column. Clicking the title again will order the entries in the opposite direction (direction is signified by the '^' and 'v' next to the title).

Example: Referrals ordered chronologically--Earliest dates first

Points of Contact

Active Referrals

Unique Reference	Referral Date ^	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode
+ FRF050914-9188EE	14/09/2005	Test Organisation 2	Fife Council LSO Referral Network	Money Advice	Joe	Macintyre	ky1 1ky
+ FRF050914-7012RR	14/09/2005	Test Organisation 2	Fife Council LSO Referral Network	Money Advice	George	bush	ky1 1ky
+ FRF051006-8600MR	06/10/2005	Test Organisation 2	Yellow Test Organisation	Money Advice	joe	bloggs	
+ FRF051006-3105CV	06/10/2005	Test Organisation	Turquoise Test	health advice	Rose	Brunton	k987uk

Example: Referrals ordered chronologically--Most recent dates first

Active Referrals

	Unique Reference	Referral Date ∨	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode
+	FRF060222-5428NK	22/02/2006	Test Organisation 2	Test Organisation1	Money Advice	Pat	Sproul	vfadgfa3
+	FRF051214-6463ZR	14/12/2005	Test Organisation 2	cornerstone leven	Money Advice	rod	stewart	lv
+	FRF051207-7228WY	07/12/2005	Test Organisation 2	Test Organisation1	Money Advice	David	CAMERON	KY1 1ky
+	FRF051201-1653PS	01/12/2005	Test Organisation	Fife Council LSO Referral	Money Advice	Joe	MacIntyre	ky6 3da

Beside each entry is a '+'. By clicking on this, the entry will open to display the full details (again contents are dependant on referral type and the abilities of the logged in user).

-	FRF050914-9188EE	14/09/2005	Test Organiastion 2	Fife Council LSO Referral Network	Money Advice	Joe	Macintyre	ky1 1ky		tricia cockburn	Alison Sword (Fife Council LSO Referral Network)	No	No

Unique Reference	FRF050914-9188EE
Referral Date	14/09/2005
Referral Category	Money Advice
Client First Name	Joe
Client Middle Name	
Client Second Name	Macintyre
Client Address 1	fife HOuse
Client Address 2	
Client Postcode	ky1 1ky
Client Telephone Number	05165156
Client Mobile Number	
Clients Email	
Associated Notes	Client needs money advice ------------------ Added 14.09.05 @ 14:42 Your referral request to Test Organiastion 2 was accepted. Add Note:
Clients Preferred Method of Contact	Landline
Date of First Contact	--
Status	
Handler	tricia cockburn
Referrer	Alison Sword
Handler Close Request	No
Referrer Close Request	No
	edit

8

Once opened the '+' will change to a '-'. Clicking on the '-' will allow you to close the entry. While the entry is open you will be able to update the details associated with it by clicking the 'edit' button at the bottom.

To return to the main control panel you can either click on your relevant role (Referrer, Point of Contact, Handler) from the menu on the left or click on your browser's back button.

2.3 Searching Referrals

Once logged in you will be presented with the Search Interface. Depending on your user type this will allow you to either search outgoing or incoming referrals associated with your organisation. Referrers will be able to search outgoing referrals while Points of Contact and Handlers will be able to search incoming referrals.

Search Referrals

Unique Reference	
Client First Name	
Client Middle Name	
Client Second Name	
Client Postcode	

Search

Referrals may be searched by the clients' details, or by the unique reference given when a new referral is created. The search supports partial entry (e.g. searching for "Jo" will bring up results for "John", "Joe" and "Jonathan").

Search Results

37 Referrals Found.

	Unique Reference	Client	Client Postcode	Referring Organisation	Assigned Organisation	Assigned Category	Date Created
View	FRF050720-1255LY	ü¾ lily flower		Methil local Office	Test Organiastion 2	None.	20.07.2005
View	FRF050720-9699GL	pat post man	ky1 2an	Methil local Office	Test Organiastion 2	None.	20.07.2005
View	FRF050720-6868SK	thomas ireland	ky8 1hy	Methil local Office	Buckhaven Local Office	Default	20.07.2005
View	FRF050720-5942DT	Mick Jagger	KY11111	Buckhaven Local Office	Buckhaven Local Office	Default	20.07.2005
View	FRF050803-9608ZT	Martin Sheen		Buckhaven Local Office	Methil local Office	Default	03.08.2005
View	FRF050803-7273MK	Barry White		Buckhaven Local Office	Methil local Office	Default	03.08.2005
View	FRF050808-9484QF	Ethel Jones	5555555	Buckhaven Local Office	Buckhaven Local Office	Default	08.08.2005
View	FRF050816-6808CD	Alexander Aitken 22 Aitken Street	555555	Buckhaven Local Office	Buckhaven Local Office	Default	16.08.2005

Brief details of matching referrals are displayed. Selecting the view option provides extra detail regarding the referral.

Selected Referral

Unique Reference	FRF050803-9608ZT
Referral Date	03/08/2005
Referral Category	Default
Client First Name	Martin
Client Middle Name	
Client Second Name	Sheen
Client Address 1	22 The Big Houses
Client Address 2	East Wemyss
Client Postcode	
Client Telephone Number	1111111
Client Mobile Number	
Clients Email	
Associated Notes	Wants housed in Methil area – large selection of his fan club stay there ----------------- Added 04.08.05 @ 09:24 Your referral request to Methil local Office was accepted.
Add Note:	
Clients Preferred Method of Contact	Landline
Date of First Contact	--
Status	
Referrer	Linda Beckwith (Fife Council LSO Referral Network)
	edit

From the detailed view you may add new notes. These will then be presented to the Handler and Referrer associated with the referral when they next view the referral.

2.4   Editing Personal Details

On your control panel, beside your name is a link entitled 'Edit Me'. Selecting this will provide an interface to edit your personal details, and allow you to change the username and password used to log into FORT.

Edit Me

First Name	Henry
Second Name	Black
Username	rhenry
Password	rblack
Email Address	henryblack@sadd.co.uk
Contact Number	01592 123321
	edit

10

Pressing the edit button will update your details. Username and password changes are effective from the next time you log on.

2.5   Messaging System

FORT allows messages to be sent between users regarding any of the referrals associated with them (or in the case of a Point of Contact, their organisation).

The control panel lists the number of incoming messages along with the option to send a new message.

Messages

Messages		[1]	view
Send Message			

Selecting view will present a list of the current messages in your inbox.

Referral	From	To	Date Posted	Delete?
+ FRF050719-9891VK	Sinead Odonnell (Test Organisation1)	Sinead Odonnell (Test Organisation1)	--	>>

Again the '+' will open a message to be viewed and messages may be ordered in the same manner described previously. There is also a delete open which will remove the message from the system altogether.

Messages

Referral	From	To	Date Posted	Delete?
- FRF050719-9891VK	Sinead Odonnell (Test Organisation1)	Sinead Odonnell (Test Organisation1)	--	>>

Referral FRF050719-9891VK

Message

    test

From Sinead Odonnell (Test Organisation1)

To Sinead Odonnell (Test Organisation1)

Message Type

In the same manner as before, selecting the '-' on an open message will close it.

From the control panel the facility to create a new message is available. Messages must be associated with a referral normally accessible to you. Messages can be sent to the referral's Handler, Referrer, or Point of Contact. The options will change depending on the type of user you have logged in as.

Create Message

* Referral   FRF050719-9891VK ▼

Target ◯ My Point of Contact
    ◯ Handlers Point of Contact
    ◉ Handler

* Message

send

Once the text of the message has been entered press the 'send' button to send the message to the target user. Notification of correspondence is emailed to the target user.

3.   Points of Contact

3.1   Editing Your Organisation

As a Point of Contact you have the ability to edit the details of the organisation that you administer. Selecting 'edit details' beside your organisation's name in the control panel will display a form pre-filled with the details of your organisation.

Organisation Name   Fife Council LSO Referral Network

Terms of Service   None listed.

edit

Once you have edited these select the 'edit' button to make the changes.

3.2   Creating Referrers and Handlers

As Point of Contact you are responsible for creating Referrers and Handlers for your organisation. These users create referrals and handle incoming referrals. To create a Referrer or Handler, select the appropriate option from your control panel. You will be presented with a form that will collect the details of the type of user you wish to create.

Create Handler

* First Name	
* Second Name	
* Email Address	
* Username	
* Password	

add

Each user must be given a unique username and a password. These must only contain alphabetic or numeric characters.

3.3   Accepting and Rejecting Referrals

As Point of Contact you are also responsible for accepting and rejecting referrals assigned to your organisation. Referrals awaiting your input must be accepted or rejected to move on to the next step in the referrals process. Referrals awaiting input are listed in the control panel.

Incoming Referrals		
Incoming Referrals Awaiting Acceptance	[5]	view
Incoming Referrals Awaiting Routing	[1]	view
Incoming Referrals ReRoute Requested	[0]	
Current Incoming Referrals	[0]	

Selecting 'view' will display the list of referrals in the standard list view. Opening up the referral will display the basic details of the referral.

Unique Reference	Referral Date	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode	Handler	Referrer	Handler Close Request	Referrer Close Request
- FRF050726-3849AV	26/07/2005	Test Organisation1	Test Organisation1	health advice	Clark	Kent	SM12 9TR		Sinead Odonnell (Test Organisation1)	No	No

Unique Reference FRF050726-3849AV
Referral Date 26/07/2005
Accepted [No ▾]
Referral Category health advice
Client First Name Clark
Client Middle Name
Client Second Name Kent
Client Address 1 Kent Farm
Client Address 2 Smallville
Client Postcode SM12 9TR
Client Telephone Number 50932041
Client Mobile Number
Clients Email
Associated Notes
```
------------------
Added 13.09.05 @ 12:53
test
```
Clients Preferred Method of Contact Email
Referrer Sinead Odonnell (Test Organisation1)
[update]

Under the Unique Reference and the date of the referral is a selection box with the title 'Accepted'. By selecting 'Yes' you are accepting the referral and are agreeing to investigate the client's problem. If, for any reason, you decide to reject the referral you should select 'No'. A box will then appear and you will be asked to enter your reasons for not accepting the referral. Once you click the 'reject' button an email containing your reasons for rejecting the referral will be sent to the Referrer.

Please enter your reasons for rejecting this referral.
```
Not interested.
```
[reject]

3.4   Routing Referrals

Once a referral has been accepted it will move into the list of 'Incoming Referrals Awaiting Routing'.

Incoming Referrals

Incoming Referrals Awaiting Acceptance	[1]	view
Incoming Referrals Awaiting Routing	[1]	view

14

The next action is then to route it to one of the referral Handlers within your organisation.   As in previous views these details are presented as a list, which when opened using the '+' button displays full details of the referral.

Unique Reference	FRF050726-3849AV
Referral Date	26/07/2005
Referral Category	health advice
Client First Name	Clark
Client Middle Name	
Client Second Name	Kent
Client Address 1	Kent Farm
Client Address 2	Smallville
Client Postcode	SM12 9TR
Client Telephone Number	50932041
Client Mobile Number	
Clients Email	
Associated Notes	----------------- Added 13.09.05 @ 12:53 test -----------------
Clients Preferred Method of Contact	Email
Handler	No Selection
Referrer	Sinead Odonnell (Test Organisation1)
	update

In this instance a drop down select box is made available which will list all handlers associated with the organisation. Selecting a Handler and clicking the 'Update' button will route the referral to that Handler. The Handler will then receive email notification of your selection.

3.5   Rerouting Referrals

In some circumstance a Handler may decide that they are unable to handle a referral assigned to them. In this instance they may request that a referral be rerouted to another Handler.

When this happens you will be notified and the referral will be listed under 'Incoming Referrals Reroute Requested'. Selecting "view" will display all the referrals in the list.

Points of Contact

Referral Rerouting Requested

	Unique Reference	Referral Date	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode	Handler
+	FRF050914-7012RR	14/09/2005	Test Organisation 2	Fife Council LSO Referral Network	Money Advice	George	bush	ky1 1ky	tricia cockburn (Test Organisation 2) 📞
+	FRF051006-4584IV	06/10/2005	Test Organisation 2	Blue Test Organisation		wilma	rubble	bed1	tricia cockburn (Test Organisation 2) 📞

Again the '+' will open the full referral details. You will then be able to either select another Handler, or route the referral back to the same Handler.

Client Mobile Number	123456
Clients Email	
Associated Notes	heath & money ------------------ Added 16.02.06 @ 10:08 Your referral request to Test Organisation 2 was accepted.
Clients Preferred Method of Contact	Mobile
Over 65?	No
Handler	tricia cockburn ▾
Referrer	Barbara Moonlight (Blue Test Organisation)
Reroute Requested?	Yes

update

3.6   Viewing Active Referrals

All referrals being handled by your organisation are available for viewing through the 'Current Incoming Referrals' option.

Incoming Referrals

Incoming Referrals Awaiting Acceptance	[1]	view
Incoming Referrals Awaiting Routing	[0]	
Incoming Referrals ReRoute Requested	[2]	view
Current Incoming Referrals	[16]	view

16

Further to this all outgoing referrals made by Referrers from your organisation can be viewed by selecting 'Outgoing Referrals'.

Outgoing Referrals	
Outgoing Referrals	[0]

3.7   Viewing Logs

All actions by Referrers, Points of Contact and Handlers for your organisation are logged by the system. It is possible to view these logs by selecting the 'View Logs'. This will display details of the latest log entries.

Total Records 173

Log Type	Log Action	User	IP Address	Log Data	
logon		Joe MacIntyre (pointofcontact)	81.139.45.16	user_role	pointofcontact
				datetime	03.10.2005 @ 12:59
				user_fullname	Joe MacIntyre
				user_organisation	Test Organisation1
				userid	157
logon		Lex Luther (handler)	81.139.45.16	user_role	handler
				datetime	03.10.2005 @ 12:27
				user_fullname	Lex Luther
				user_organisation	Test Organisation1
				userid	235
referral	assigned	Joe MacIntyre (pointofcontact)	81.139.45.16	poc_organisation	Test Organisation1
				handlerid	235
				datetime	03.10.2005 @ 12:26
				handler_fullname	Lex Luther
				unique_ref	FRF050928-9006IX
				poc_fullname	Joe MacIntyre
				pocid	157

A set of filters are provided to allow you to narrow down log entries to only show the desired log type. Logs may be filtered by date range, action, and even down to the individual fields of the log entry (dependant on the action).

Log Viewer

Log Type

referral ∨	accepted ∨

Date Range

From [   ] (dd/mm/yyyy)

To [   ] (dd/mm/yyyy)

Filter Records

poc_organisation [   ]

handlerid [   ]

handler_fullname [   ]

unique_ref [   ]

poc_fullname [   ]

pocid [   ]

Submit Query

Logs are filtered by pressing the 'Submit Query' button.

4.   Referrers

The first stage of the FORT process is the creation of a referral. This is done by a Referrer.

4.1   Creating a Referral

On the main control panel for a Referrer you will find an option to "Create Referral".

Referrals		
Referrals Awaiting Acceptance	[3]	view
Declined Referrals	[1]	view
Active Referrals	[13]	view
Create Referral		

Selecting this will present you with a form requesting the full details of the referral.

Create Referral

* Client First Name	
Client Middle Name	
* Client Second Name	
* Client Address 1	
Client Address 2	
* Client Postcode	
Client Telephone Number	
Client Mobile Number	
Client Email Address	

A series of text boxes request basic details on the person being referred. These details will only be viewable by the Point of Contact at the organisation being referred to, and the associated Handler.

The boxes that are marked with the '*' are required fields. If the client does not have a post code or if the post code is unknown, the 'dummy' post code KY1 1KY may be entered.

Further information is also collected to allow the Handler of the referral to know the best method of contact and when the client should be contacted.

SSA Scheme? ☐

Clients Preferred Method of Contact [Landline ▾]

Client Availability

	AM	PM
Mon	☑	☑
Tue	☑	☑
Wed	☑	☑
Thu	☑	☑
Fri	☑	☑

Dont Know ☐

Sex ◉ Male ○ Female

Under 18? ☐

Notes [   ]

At the foot of the referral form you may select the Organisations to whom the person is going to be referred.

* Assigned Organisation	[Blue Test Organisation ▾]	* Referral Category	[Default ▾]
Assigned Organisation 2	[None. ▾]	Referral Category	[None. ▾]
Assigned Organisation 3	[None. ▾]	Referral Category	[None. ▾]

At least one and a maximum of three, organisations may be referred to. A Category may also be assigned to the referral so that the target Organisation knows what matter the person needs help with.

Once the Referral has been created, you will be given a unique reference number for your referrals (or set of referrals).

Your referral has been created.

Results

Your unique reference for these referrals is **FRF051003-7784ZU**

Please view and print out the terms and conditions for each of the organisations you submitted to.

Blue Test Organisation
Turquoise Test Organisation

Further to this you will be presented with links to the Terms and Conditions of the Organisations you are referring to. These will appear within a Pop-Up browser window. These should be

19

printed off and read or given to the client. Only one unique reference is given for all organisations you refer to.

4.2 Viewing Referrals Awaiting Acceptance

All referrals that are made are listed under 'Referrals Awaiting Acceptance' in the control panel. Details of these referrals can be viewed by selecting the 'view' option. Referrals will remain in this section until the Point of Contact in the target organisation either declines or accepts the Referral.

Referrals Awaiting Acceptance	[6]	view

At this point you may still make minor changes to the Referral (editing personal details etc.) and add notes to be viewed by the target organisation. You will receive an email letting you know if a referral has been accepted or rejected.

4.3 Viewing Rejected Referrals

When a referral is rejected you will receive an email notifying you of the reason the assigned organisation rejected the referral. A list of referrals that have been declined will be available in the control panel under 'Declined Referrals'. Again details of these referrals can be viewed by selecting the 'view' option.

Declined Referrals	[1]	view

Further to this, by selecting 'Declined Referrals' you will be able to update any rejected referrals and reassign them to another organisation who may be better placed to deal with the referral. Alternatively you may delete the referral and it will be removed from the system.

Declined Referrals

Unique Reference	Referral Date	Assigned Organisation	Referring Organisation	Referral Category	Client First Name	Client Second Name	Client Postcode	Handler	Referrer
- FRF060220-2895XW	20/02/2006		Test Organisation1	health advice	Harry	Carry	KY1 1KY		Sinead Odonnell (Test Organisation1)

Unique Reference	FRF060220-2895XW
Referral Date	20/02/2006
Assigned Organisation	No Selection
Client First Name	Harry
Client Middle Name	
Client Second Name	Carry

4.4 Viewing Current Referrals

20

All current referrals are listed under 'Active Referrals'. From here you may monitor any progress made by the Handler or update the referral with any further details.

Active Referrals	[31]	view

4.5 Closing a Referral

Once an active referral has been completed either the Referrer or the Handler may request that it be closed. If the Handler requests that the referral be closed the Referrer will receive notification of this. Similarly, if the Referrer requests the closure notification will be sent to the Handler.

To request a referral be closed select the referral from the 'Active Referrals' list and display the full details by clicking on '+'. Near the bottom of the entry is a field 'Referrer Close Request'. Select 'Yes' from the drop down box and then click 'Update'.

Handler Close Request No

Referrer Close Request No

update

After Referrer and the Handler have **both** agreed to close a referral it is removed from the system.

5. Handlers

5.1 Incoming Referrals

The role of a Handler is to deal with and assess incoming referrals assigned to them by their organisation's Point of Contact. Assigned referrals are listed under 'My Referrals' in the Handlers control panel.

Referrals		
My Referrals	[2]	view

Once selected, a list of currently assigned referrals is displayed. Clicking the '+' will display the full details of the referral. Should you wish to request that the referral is rerouted to another Handler for any reason, selecting 'yes' under the 'Request Re-Route' option and pressing 'Update' will contact the Point of Contact and let them know of your request.

Further to this two fields are displayed that must be filled in to inform the Referrer of the status of the referral. 'Date of First Contact' should reflect the date the client is first contacted by you, the Handler. 'Status' has the option of 'No Selection', 'Client With Us' or 'Client Abandoned'. 'No Selection' is used to indicate that contact with the client has not yet been made. 'Client With Us' indicates that the referral is being processed. 'Client Abandoned' indicates that the referral has been abandoned, in which case it should be closed.

5.2   Updating a Referral

A referral may be updated and new notes added by viewing the full referral details and clicking on the 'Add Note' box.

By clicking 'Update' the new note, along with the date and time that it was entered, will then appear in the 'Associated Notes' box.

22

The update can then be viewed by any user associated with the referral.

5.3   Closing a Referral

Once an active referral has been completed either the Referrer or the Handler may request that it be closed. If the Referrer requests that the referral be closed the Handler will receive notification of this. Similarly, if the Handler requests the closure, notification will be sent to the Referrer.

To request a referral be closed select the referral from 'My Referrals' list and display the referral details by clicking '+'. Select 'Yes' from the drop down box next to 'Handler Close Request' and click 'Update'.

Once the Handler and the Referrer have **both** agreed to close a referral it is removed from the system.