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| SHIP Referrals |  |
| video transcript  |  |
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**SHIP referrals**

[Info graphic of workers at computer desks]

[Narrator speaks]: As a worker in the homelessness and family violence sectors, it’s important that you feel confident when using the electronic ‘Referrals functionality’ within SHIP.

[PowerPoint slide: How do I access electronic referrals in SHIP?]

[Narrator speaks]: There are two areas in SHIP where you can access the electronic referral functionality.

[Shot of SHIP home screen, Referrals tab]

[Narrator speaks]: If you select the ‘referral’ tab from the Homepage you’ll find a repository that shows the Received, Accepted, Declined, Sent and Draft Referrals. We call this the ‘workgroup referral mailbox.’

Here you can see the status of all referrals for the workgroup.

You can also access the referral functionality from within a Person’s record. You can navigate to a person’s record through the Person’s tab,

[Shot highlights ‘Persons tab’ on navigation bar]

[Narrator speaks]: or from the workgroup referral mailbox, simply click the person icon on an existing referral to navigate to the Person’s record

[Shot to Person tab]

[Narrator speaks]: From the Person’s record, go to the Referral’s tab

[Shot highlights and moves to Referral tab]

[Narrator speaks]: Here you can see the status of all referrals for this person. We call this area, the person’s ‘referral repository’.

[Shot of highlights the status of referrals]

[PowerPoint slide: How do I send an electronic referral?]

[Narrator speaks]: From the person’s referral repository, click the ‘Create new referral’ button.

Click ‘SRS external’ and use the search box to find the workgroup you want to send the referral to.

[Shot of FSV-After Hours Service workgroup]

[Narrator speaks]: Then click ‘Submit’ to create a referral form.

[Shot of Referral form]

[Narrator speaks]: The referral form will appear.

[Shot expands worker information]

[Narrator speaks]: This tells you where the referral has come from and is automatically generated using your workgroup credentials

[Shot expands to workgroup information]

[Narrator speaks]: This tells you where the referral is being sent to. There is a Program/Group text box here where you can enter free text relating to a program or group that you wish the Referral to be sent to.

[Shot expands client information ]

[Narrator speaks]: This tells you who the referral is for. This is automatically generated from the Person’s record that you created the Referral from, but always check that the details are correct.

[Shot: Click Save Draft and the Associated Persons will populate with the plus symbol]

[Narrator speaks]: Here you can also add associated persons such as children to the referral.

[Shot: You can delete person attached in error by clicking on the red pen]

[Narrator speaks]: This is an optional section and covers the reasons for the referral.

You can include the primary reason for the referral, and there are two free text fields for presenting issues and additional information.

Finally, select Save Draft.

[Shot highlights Save draft]

[Narrator speaks]: In the attachments section, you can attach documents from the client’s file or you can select and upload from your network drive.

[Shot of screen to attach client file]

[Narrator speaks]: See how files from the Person’s information record are automatically ticked? You can untick these as needed, and tick any relevant information from the ‘additional files’ section.

[Shot ticks additional files]

[Narrator speaks]: complete the other details and include additional notes about any of the files at the bottom of the screen as needed, then click ‘attach file’.

[Shot showing attached files]

[Narrator speaks]: The attached file or files will sit inside the referral. This example shows a consent file from the documents tab and the client file attached separately.

Once you have obtained consent click ‘yes’. Click ‘ok’ when this notice appears.

[Shot of ‘Are you sure you wish to send the referral?’]

[Narrator speaks]: You can also save and leave a draft to send later. It will sit in the draft folder of the workgroup referral mailbox and also the Person’s Referral repository, so you just need to click the pen icon to open and send it.

[Shot highlighting the pen icon]

[Narrator speaks]: Once the referral is sent, it will appear in the Sent folder of the workgroup Referral Mailbox as ‘waiting’ until action is taken by the receiver.

[Shot highlights sent folder]

[Powerpoint slide: How do I accept an electronic referral?]

[Narrator speaks]: Received referrals will sit in the received folder of the workgroup referral mailbox, marked as ‘waiting.’ If email notifications are set up, the workgroup email will also receive an email when new referrals have been received.

[Shot highlights received folder and waiting status]

[Narrator speaks]: Click the pen icon to open the referral and review the documentation to make sure the referral should be accepted. The referral form will appear. You can also choose to press ‘acknowledge’, if you want to acknowledge the Referral, but not action it right now.

[Shot clicks pen and highlights referral and then acknowledge]

[Narrator speaks]: The referral shows if the person is already a client. Here, we can see Molly’s details don’t match to a same client in the workgroup database and as such the referral does not recognize Molly Jones as an existing client.

[Shot: cursor highlight message]

[Narrator speaks]: You can widen your search to find this person in the workgroup database by ticking the ‘fuzzy’ box

[Shot: cursor highlights fuzzy box]

[Narrator speaks]: Or include the wildcard symbol. This search will show everyone with ‘jon’ in their family name. You can link a person that appears in the search to the Referral by clicking the ‘link’ icon

[Shot: demonstrates the wildcard (%) symbol and highlights the link icons]

[Narrator speaks]: or, If you’re satisfied that the person isn’t an existing client, click ‘add as new client’.

The person’s name and any demographic, personal and contact details included in the Referral will automatically be added to the persons record.

[Shot: cursor clicks Add as new client and screen moves to client record highlighting demographic and personal details]

[Narrator speaks]: Once the person is imported or linked, or if they are already a client, you can click accept if you wish to accept the referral. Alternatively, you may choose to decline the referral.

[Shot: cursor clicks accept, followed by decline]

[Narrator speaks]: Once the Referral is accepted, it will move into the accepted folder of the workgroup referral mailbox and appear in the persons referral repository as accepted

[Shot: Accepted mailbox highlighted, followed by accepted status highlight]

[Narrator speaks]: The client files that accompanied the Referral will remain in the Referral within the person’s referral repository. They will not move into the documents tab, case notes or profiles.

[Shot: highlights the client files within the referral]

[Narrator speaks]: You will also have noted that after the Referral is accepted, an optional ‘Referral Outcome’ field appeared. Choosing from a list of Referral outcomes communicates back to the sender the outcome that has occurred as a result of accepting the Referral.

[Shot: highlights referral outcome field and drop down options]

[Narrator speaks]: At any time, both the referral sender and receiver can enter a comment to communicate with each other about the referral. Press update to send a comment.

[Shot: comment typed and update pressed]

[Powerpoint slide: How do I decline an electronic referral?]

[Narrator speaks]: You can decline a referral immediately, after it is acknowledged, or after adding the person’s details.

[Shot: Referrals cannot be declined after they’ve been accepted]

[Narrator speaks]: It may be appropriate to add comments to communicate back to the sender of the referral. Simply click ‘decline’, and a message will appear asking for a reason.

[Shot: shows message for declined reason]

[Narrator speaks]: Choose from the list of decline options.

[Shot: showing decline options]

[Narrator speaks]: The status of the Referral will now appear as ‘declined’ to the sender who can also open the referral and see any included comments.

[Shot: highlights declined status and reason in the referrers sent mailbox]

[PowerPoint slide: How do I recall an electronic referral?]

[Narrator speaks]: If you have incorrectly sent a referral, you can ‘recall’ it while it has a ‘waiting’ status.

Simply click ‘recall’.

[Shot: highlights waiting status and cursor clicks recall]

[Narrator speaks]: Now that the referral has been recalled, it will sit here, in the ‘draft’ area of the referral inbox.

[Shot: highlights draft folder of referral inbox]

[Narrator speaks]: Click the pen icon to open the referral and make any changes to the details and attachments.

[Shot: cursor clicks pen icon and referral opens]

[PowerPoint slide: How do I copy an electronic referral?]

[Narrator speaks]: You can copy a referral from the person referral repository. Click the pen icon to open the referral, then click copy.

[Shot: cursor clicks pen and then copy]

[Narrator speaks]: This will take you to the beginning of the copied referral. Click ‘SRS External’ to re-select the same or a different receiving organisation, then click ‘submit’.

[Shot: Cursor clicks SRS External, types organisation name and clicks submit]

[Narrator speaks]: The referral details will be copied across and can be amended. Save the Referral.

[Shot: Cursor saves referral]

[Narrator speaks]: The same attachments that were in the original referral will be attached to the copied referral. These can now be deleted and new files attached if required, and the copied referral can be sent.

[Shot: Cursor highlights red cross to delete files and then the send button]

[Narrator speaks]: For more information and useful resources go to the AIHW’s SHS eLearning, training and resources at https://www.aihw.gov.au/

[Shot: website address on front of computer screen]

[End]

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