SOUTH WEST PCP

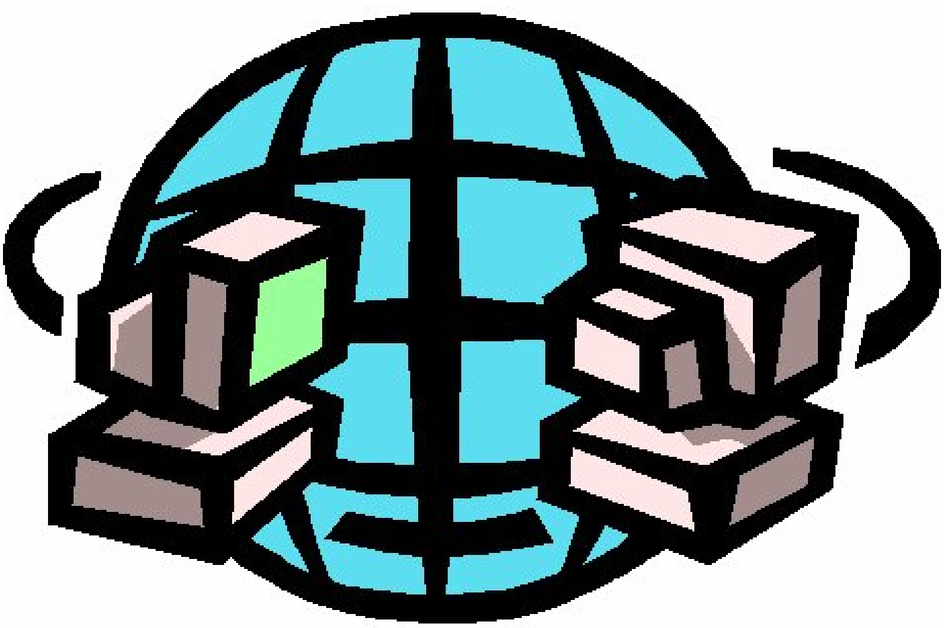
SOUTH WEST ALLIANCE OF RURAL HEALTH (VIC)

Southern Grampians & Glenelg
Primary Care Partnership

# South West Region

# e-Referral

## Reference & User Guide
## Version 6



**August 2007**

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# 1. OVERVIEW

Service Coordination and the use of the Service Coordination Tool Templates (SCTT) across the South West region has been an ongoing project for the past few years. As a result, the majority of agencies in the region have been using the SCTT as their main method of client referral. A natural progression of this referral process is the electronic transfer of the SCTT between agencies. A secure system of e-referral, incorporating Winzip and password protection for the SCTT, has been developed.

This guide has been designed for the South West region to assist workers with electronic referral (e-referral), no matter what client management system is being used. The guide is divided into sections outlining the process and requirements for e-referral. There is some in-depth information about e-referral using the PJB client management system. Other systems in use are also covered, but not in great depth. Users of other systems, who are not confident with how their particular system functions, should seek assistance from knowledgeable fellow workers, system administrators, the manufacturer of their software or their respective IT departments

E-referral in the South West is based on sending referral forms (SCTT), that have been zipped up and password protected, as an attachment to an email. The zipped and password protection acts as the security feature of the referral. The receiver of the referral will need to have the password in order to access the files that have been sent.

In addition, it has been agreed that in the South West region, that standards of referral should exist between agencies. This includes acknowledgement of receipt of a referral no more than 7 days of receiving a referral and that an outcome should occur no more than 14 working days of the consumer being assessed.

Agency workers should take time to read this guide and familiarise themselves with the processes described. If the steps in this guide are followed, staff will find that e-referral is a relatively simple process and will ultimately improve their work practices and prove to be a more time efficient way of managing referrals.

## 2. REQUIREMENTS FOR ALL AGENCIES

The following 2 programs are required for all agencies involved in e-referral

**Winzip**

Winzip is a program that takes your file(s) and compresses a copy of it into a smaller size for easier sending via email. When you Winzip a file, your original file remains untouched and an additional zip file is created in the same location as your original.

In addition, Winzip gives you the option of setting a password on your zipped file. By setting a password the file can only be opened by someone who knows the password.

**Note:** The Winzip process is automated for PJB users. For all others it will be a manual process.

**Snapshot Viewer**

Snapshot is a program that allows you to view the referrals (SCTT) that have been generated from someone using a PJB database. Most client systems will automatically produce SCTT tools in WORD or PDF. However, PJB generates its SCTT tools in a snapshot or picture format. Thus, you will need the Snapshot Viewer to view the file generated out of PJB.

Because PJB is being used by many agencies across the Southwest, Snapshot Viewer will be required by all agencies, as they will inevitably receive an electronic referral from someone using PJB and will need Snapshot Viewer to read the referral information.

**Both Winzip and Snapshot Viewer can be downloaded for free from the internet. If you do not have these programs installed or are unsure about them, please contact your IT person to assist you with getting these programs installed onto your computer or network.**

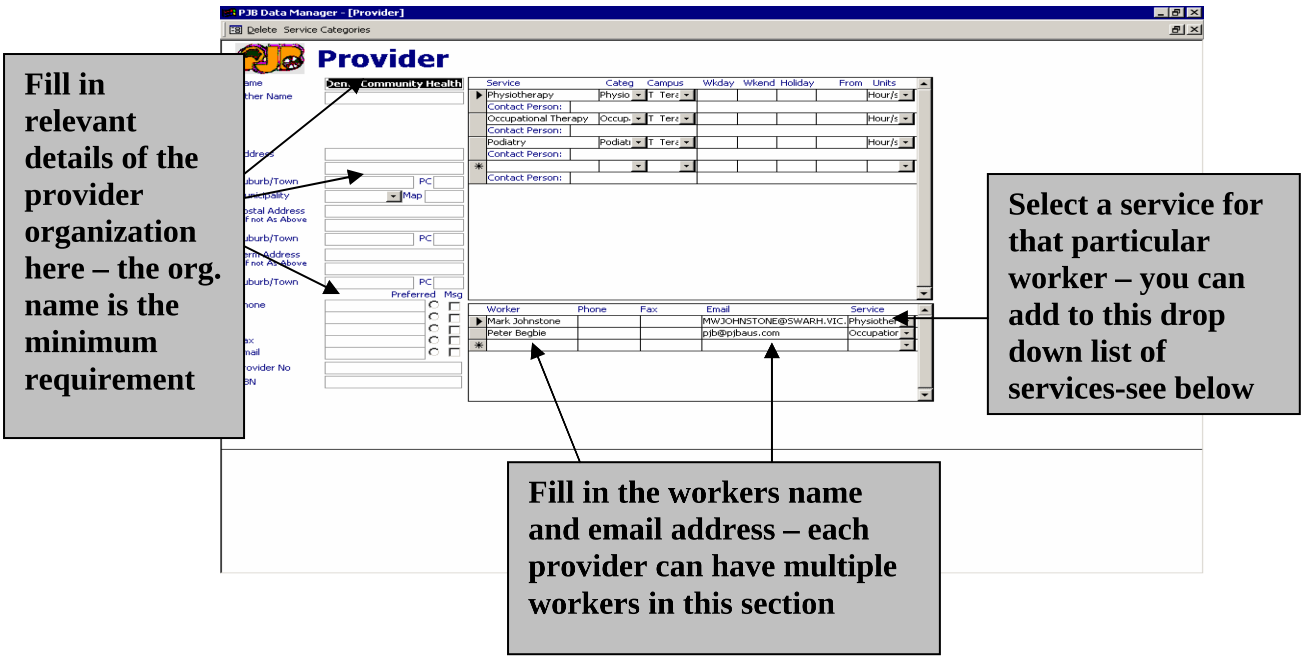
# 3. PJB USERS ONLY

## 3.1 Before You Start

**Someone who has PJB administrator rights or is familiar with the tables and general background set-up in PJB should complete the following set of steps.**

There are some initial set-up requirements in PJB to enable you to utilise the e-referral facility in the program. For all your external referrals, you will need to create a list of providers – people who you refer to on a regular basis. The details of these organisations, including key workers and their email addresses must be entered into PJB before you do any referring. The accuracy of this information is vital to the success of your referral.

- **To set up your provider list**
Once you have logged in to PJB, go the **main toolbar** at the top left of your screen. Select **Tables**, then **Persons/Organisations**, then **Providers**. Click 'open' to bring up a blank screen or use the dropdown menu to select and update a provider already on the list.




- **To add to the list of services**
Go to the main toolbar; select **Tables**, then **Lookups**, then **External Services**. Just add the types of services you want to the list and close down the screen when you are finished.

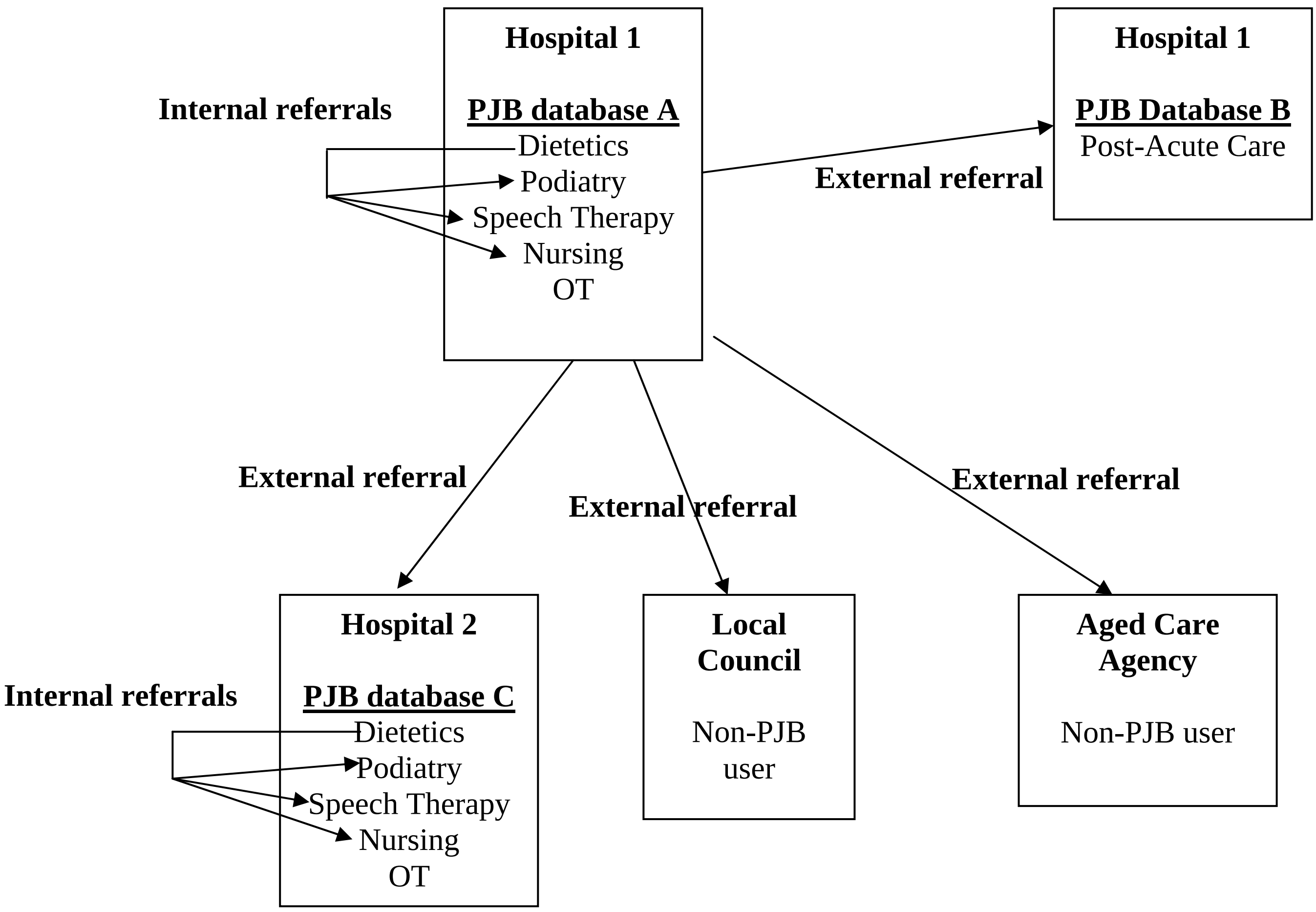
## 3.2 The Difference Between Internal & External Referrals

There is often confusion about what is the difference between an internal and external referral. The following information will assist you in differentiating the two.

**Internal referrals** are those made to people or services that **share your database**.

**External referrals** are those made to people/agencies **outside your database** – this includes other PJB users and people who don't use PJB at all.

**In the example below, Hospital 1 has 2 different PJB databases in use. This means that a referral from one to the other will be classified as an external referral. Consult your IT or PJB administrator to clarify who shares your database if you have any queries.**



## 3.3 Creating and Sending External Referrals

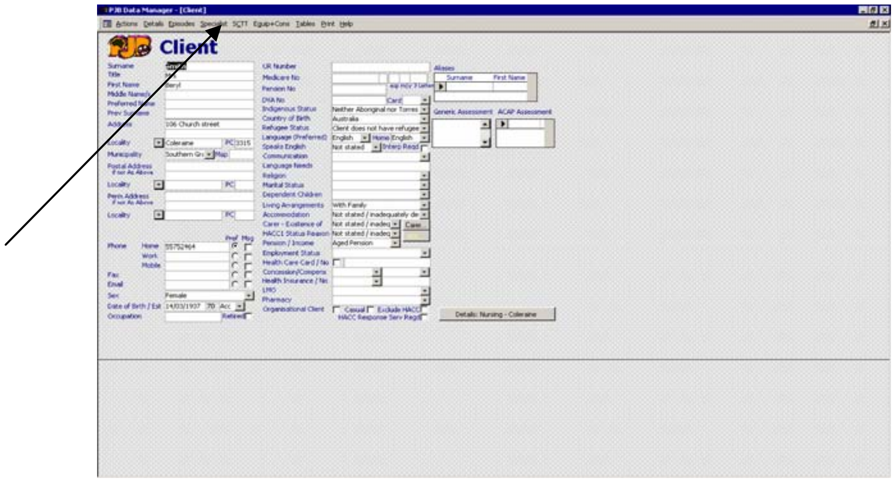
Is your data correct? The e referral system is based around the PJB database and specifically the client demographic page. This means that the information transferred into the Service Coordination forms will only be as good as the information in your database.

**Step 1**

- Open the clients record (the client you will be referring) in PJB. Check that all information is correct especially the **demographic** page and the **Contacts** (found under **Details** on tool bar in the Client Screen). Once information entered is deemed correct the E referral process can be started.

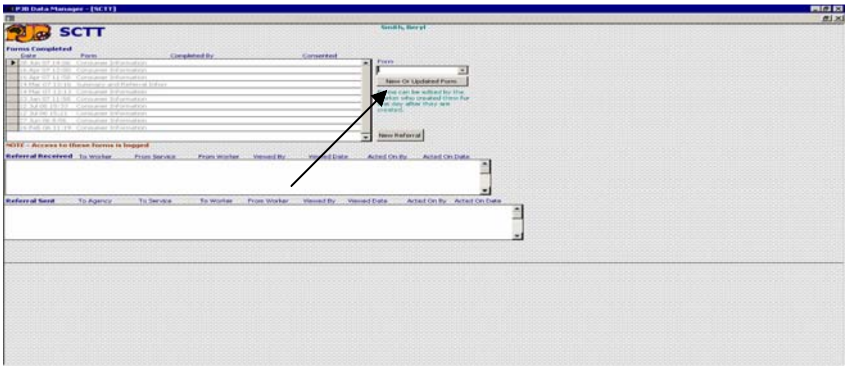
**Step 2**

- Click on **SCTT** in toolbar



**Step 3**

- Click on drop down box near **New Form** tab and choose the appropriate form – select Consumer Information and click on **New or Updated Form** Button.



**The minimum forms for referral are Consumer Information, Summary and Referral and Consent (NOTE: A Confidential Referral Coversheet is automatically generated with these forms). In PJB, the consent form must always be done last.**

**Step 4**

- Complete **Notes (required field)** and ensure the name of the worker and service showing on the screen are correct.


**Step 5**

- Click **Preview** after information entered and check result. **Note:** There may be more than one page to the form. To get to a second page use the arrow keys at the bottom of the screen.

  *** If you do not click on Preview, it will not save**

  *** To Leave Any Page – Click The Closest Top Right Hand Corner X**

**Repeat this process for the summary and referral form and any other forms that are relevant for your particular referral. All other forms will have a 'Save & Preview' button at the top left for saving and previewing the forms.**

**Obtaining Consent**

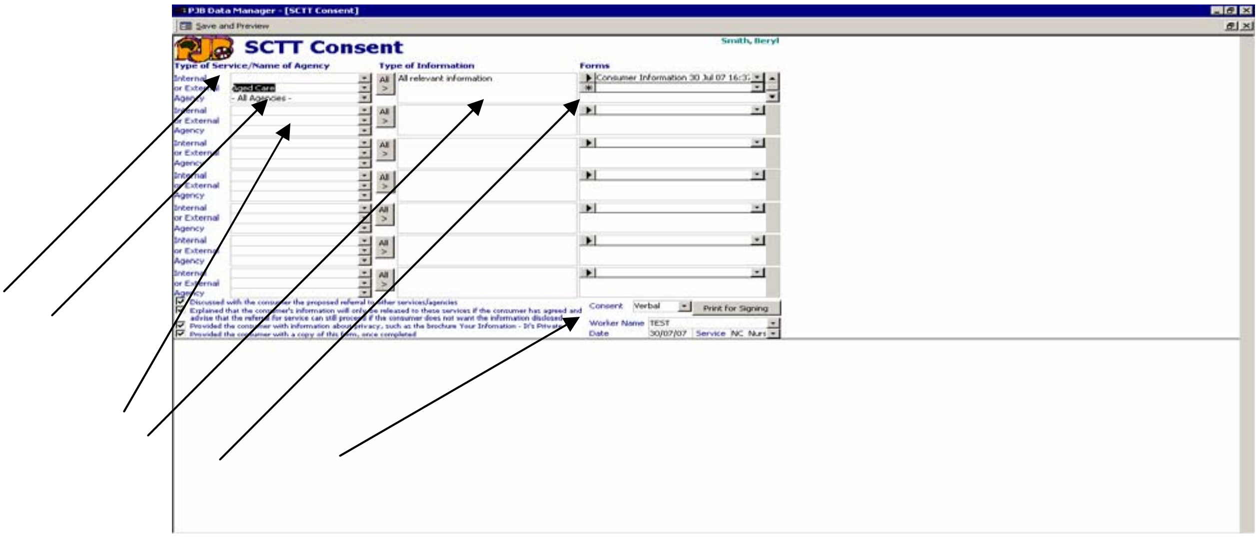
Consent is required for each referral and is generated as per the SCTT forms above.

**Step 6**

- Click on drop down box near **New or Updated Form** tab and choose the consumer consent to share information form and click on **New or Updated Form** button.

**Step 7**

- Key in required information on the consent form: e.g. **Type of Service** - click on **internal** (for internal services) or **external** (for external services) **and agency** for the service's agency; **Type of information** - click on forms to be attached to the referral. If you wish to send all the forms that you have created, click on the **All>** button. Indicate how consent was given (written or verbal) via the **Consent** drop down box - at the bottom of the screen. The consent can be printed if required for signing.




**Step 8**

- Click on **Save and Preview** (the selected form will be displayed)

**Step 9**

- Close Screen – this will return you to the **SCTT** main screen.

## Sending an External Referral

**Step 10**

- Click on **New Referral** – this will take you to the SCTT Referral screen.

**Step 11**

- Determine appropriate consent by clicking on the first drop down box –the **Use Consent** box and pick agency for which consent is required.

**Step 12**

- Choose agency from the **Agency** drop down box and worker from the **Worker** drop down box.

**Step 13**

- Click on **Triage Category** and choose required category

**NOTE:** Ignore the **Other Attachments box** (above the triage section) as when e-referring in PJB you cannot attach other documents. This section can be completed if the referral is to be printed and other documents sent with it.

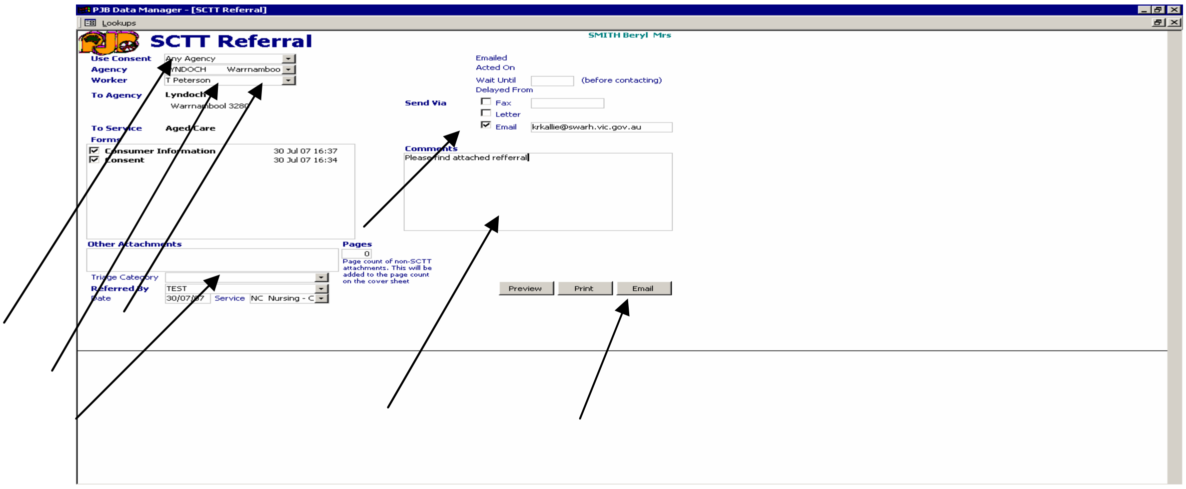
**Step 14**

- Tick the **email** box for address of person receiving the referral and check number of forms to be sent.

**Step 15**

- Add notes in Comments box, e.g. where/who the referral is from, the services required, date of discharge, client initials

**These notes will appear in the message section of the email.**

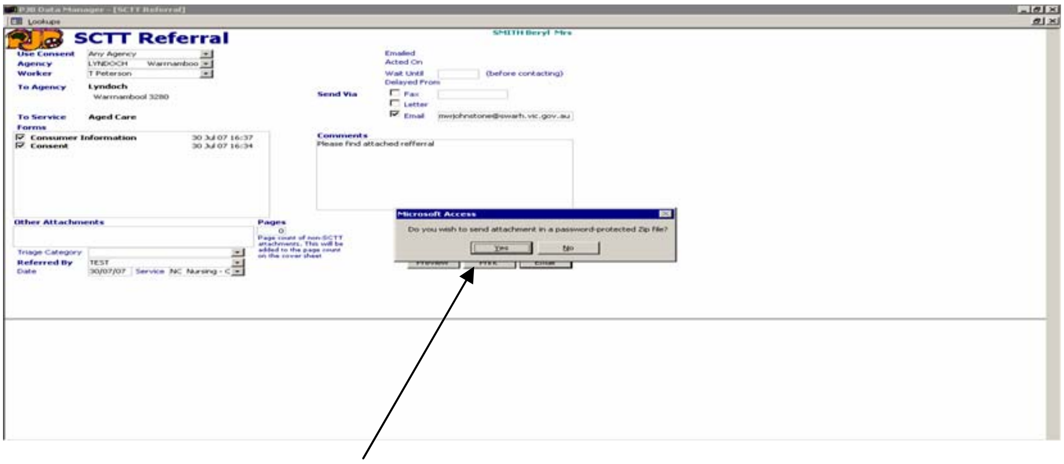



## Step 16

- Click the Email button and follow the prompts.

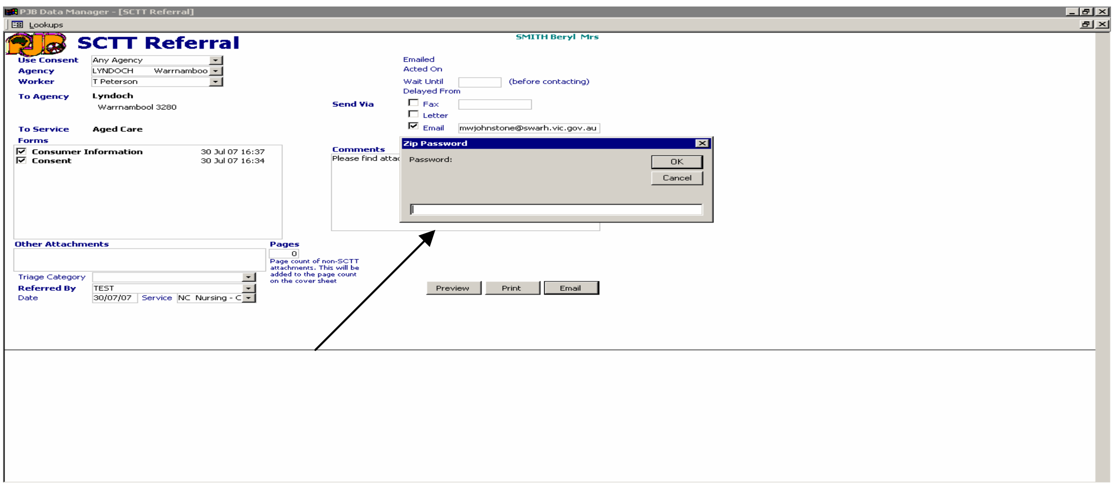
## Step 17

- When asked if you want to send attachment in a password protected zip file, click on **YES**



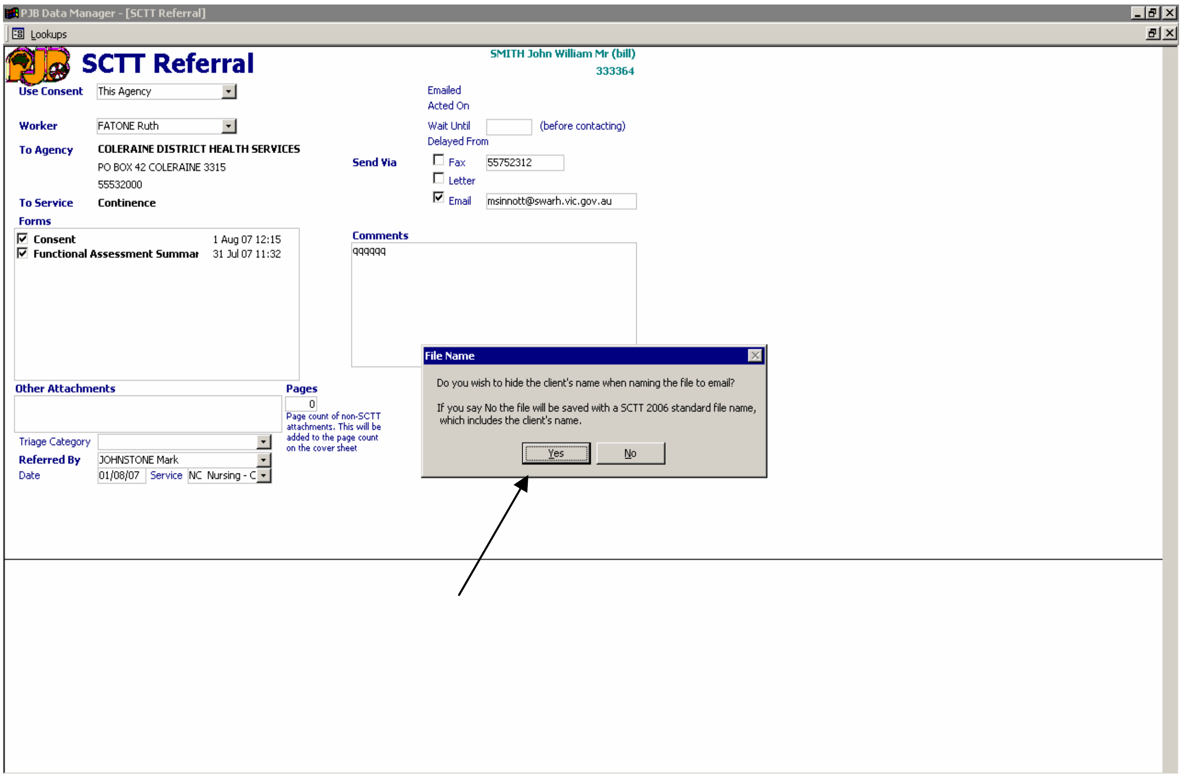

## Step 18

- When prompted for Winzip password, **key** in the agreed password in **lowercase**



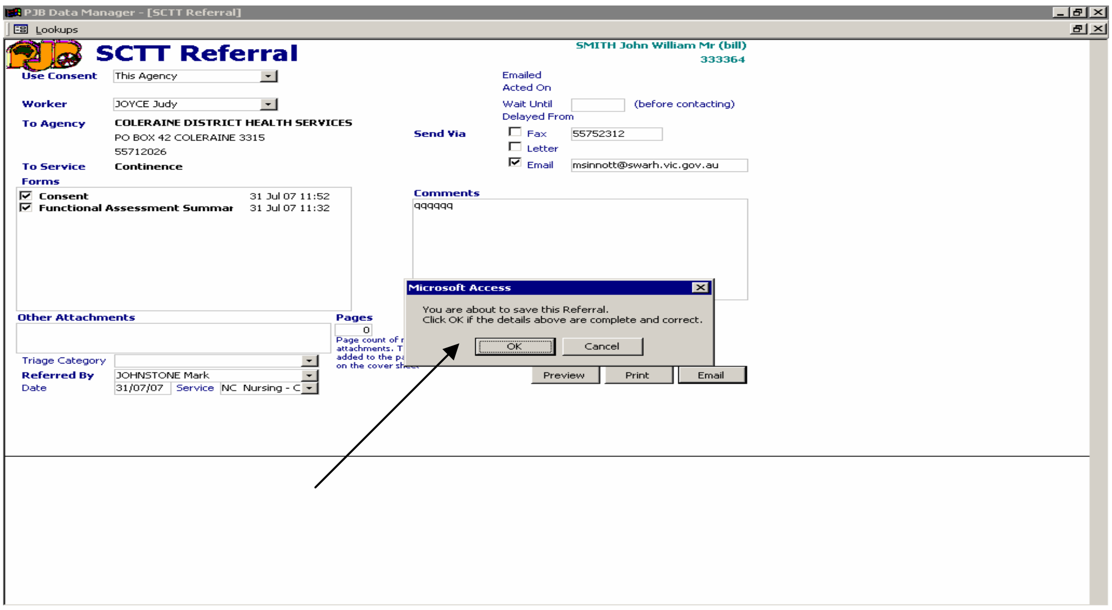
## Step 19

- When asked if you wish to hide the client's name when naming the file to email, click on **YES** to make sure the client's name does not appear in the email



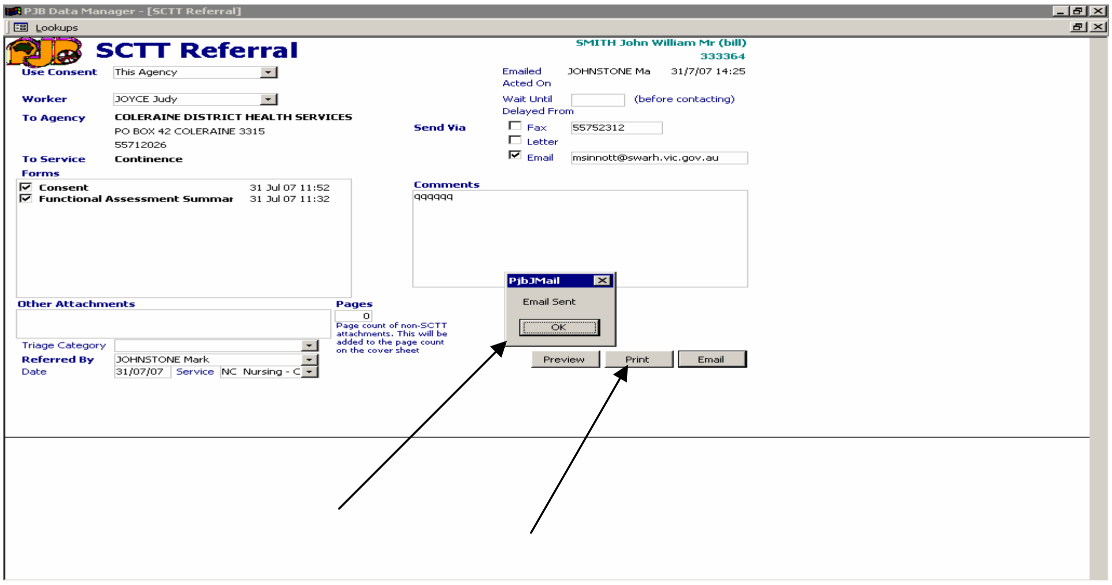

## Step 20

- Click **OK** to save the referral



## Step 21

- **Click OK** when Email sent message appears.




## Step 22

- Click **Print –** all attachments will print. Hold Ctrl & P key to print off the email cover page

## Step 23

- Collate printed forms and insert into client file if required

**Your provider will receive an email with your referral forms zipped and password protected. They will require the password to open and view the forms.**

## 3.3 Creating and Sending Internal Referrals

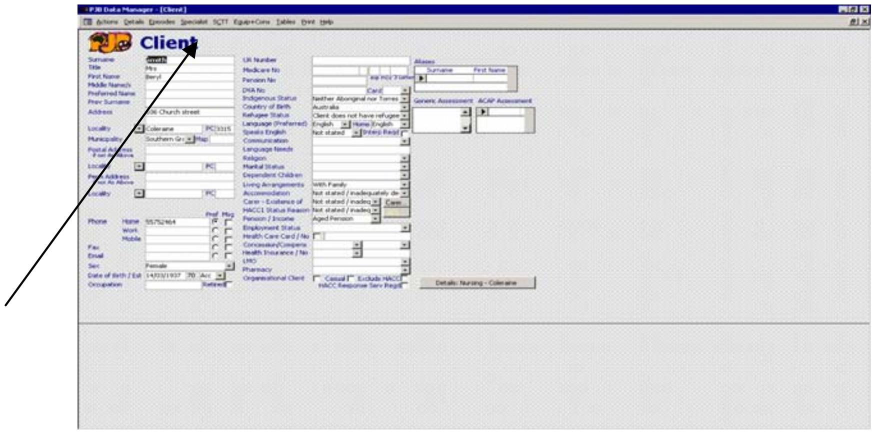
Is your data correct? The e referral system is based around the PJB database and specifically the client demographic page. This means that the information transferred into the Service Coordination forms will only be as good as the information in your database.

**Step 1**

- Open the clients record (the client you will be referring) in PJB. Check that all information is correct especially the **demographic** page and the **Contacts** (found under **Details** on tool bar in the Client Screen). Once information entered is deemed correct the E referral process can be started.

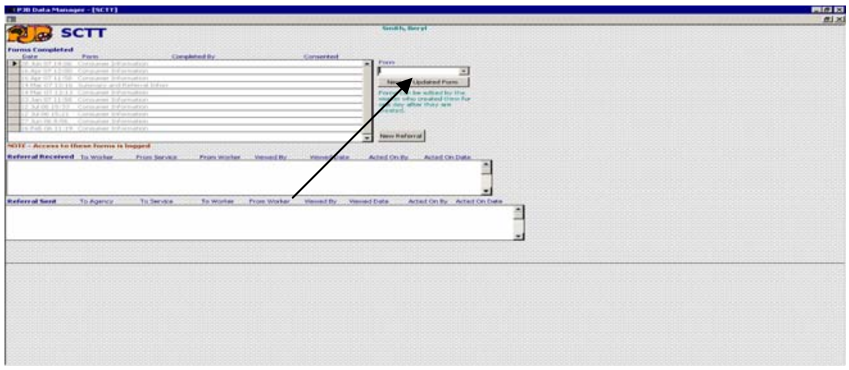
**Step 2**

- Click on **SCTT** in toolbar




**Step 3**

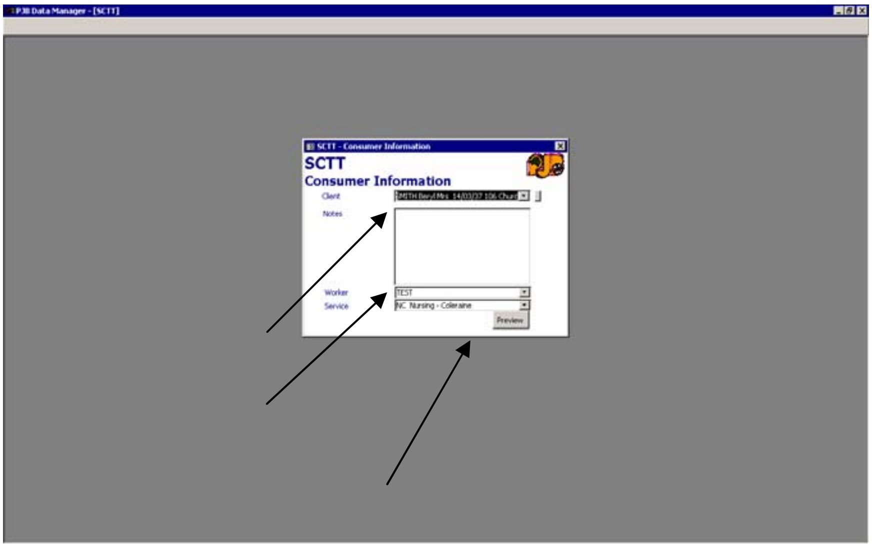
- Click on drop down box near **New or Updated Form** tab and choose the appropriate form – select Consumer Information and click on **New or Updated** Button.




**The minimum forms for referral are Consumer Information, Summary and Referral and Consent (NOTE: A Confidential Referral Coversheet is automatically generated with these forms). In PJB, the consent form must always be done last.**

**Step 4**

-  Complete **Notes (required field)** and ensure the name of the worker and service showing on the screen are correct.




**Step 5**

- Click **Preview** after information entered and check result. There may be more than one page to the form. To get to a second page use the arrow keys at the bottom of the screen.

  *** If you do not click on Preview, it will not save**

  *** To Leave Any Page – Click The Closest Top Right Hand Corner X**

**Repeat this process for the summary and referral form and any other forms that are relevant for your particular referral. All other forms will have a 'Save & Preview' button at the top left for saving and previewing the forms.**

**Step 6**

- Close Screen – this will return you to the **SCTT** main screen.

**Obtaining Consent**

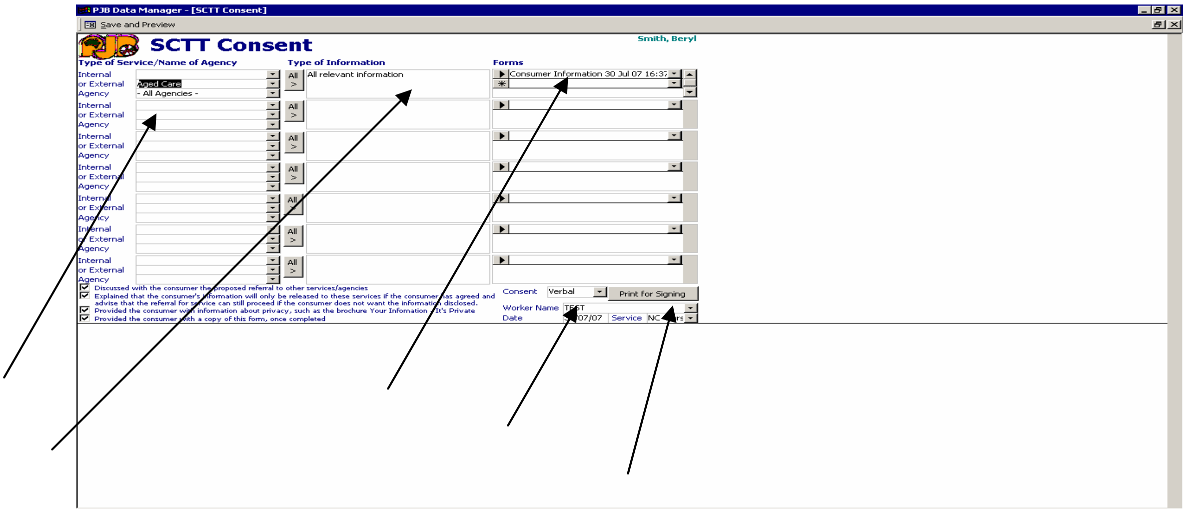
Consent is required for each referral and is generated as per the SCTT forms above.

**Step 7**

- Click on drop down box near **New or Updated Form** tab and choose the consumer consent to share information form and click on **New or Updated Form** Button.

## Step 8

- Key in required information on the consent form: e.g. **Type of Service** - click on **internal** (for internal services) or **external** (for external services) **and agency** for the service's agency; **Type of information** - click on forms to be attached to the referral. If you wish to send all the forms that you have created, click on the **All>** button. Indicate how consent was given (written or verbal) via the **Consent** drop down box - at the bottom of the screen. The consent can be printed if required for signing.



## Step 9

- Click on **Save and Preview** (the selected form will be displayed)

## Step 11

- Close Screen – this will return you to the **SCTT** main screen.

## Sending an Internal Referral

## Step 12

- Click on **New Referral** – this will take you to the **SCTT** Referral screen.

## Step 13

- Determine appropriate consent by clicking on the first drop down box –the **Use Consent** box and pick agency for which consent is required. It will be the consent that says this agency.

## Step 14

- Choose worker from the **worker** drop down box.

**No need to tick email – just closing this screen will generate an internal referral**

## Step 15

- Click on **Triage Category** and choose required category

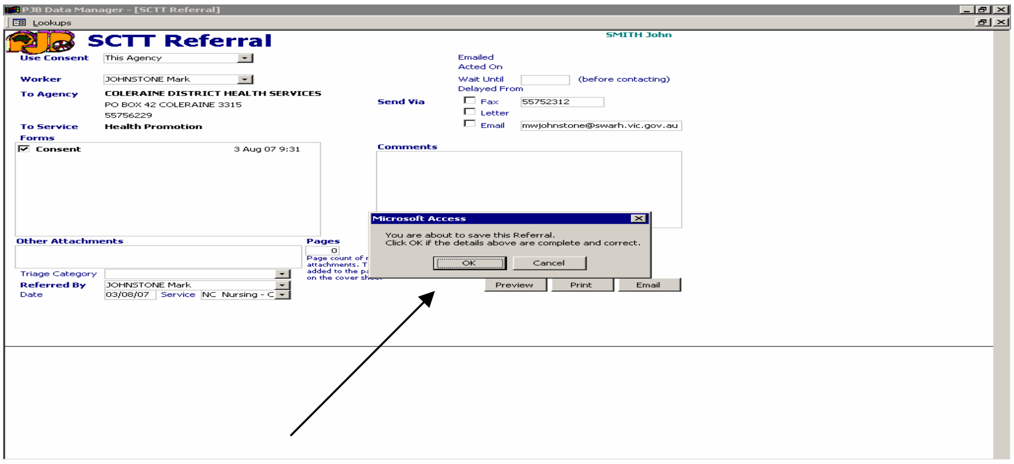
**NOTE:** Ignore the **Other Attachments box** (above the triage section) **as** when e-referring in PJB you cannot attach other documents. This section can be completed if the referral is to be printed and other documents sent with it.

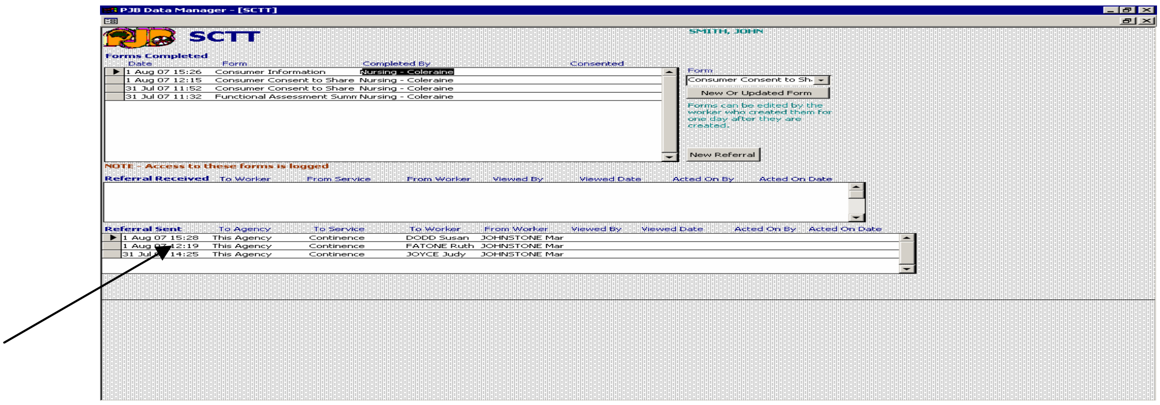
## Step 16

- Close Screen

## Step 17

- Click **OK -** this will return you to the **SCTT** main screen where you will find your internal referral listed under the **Referral Sent** section.





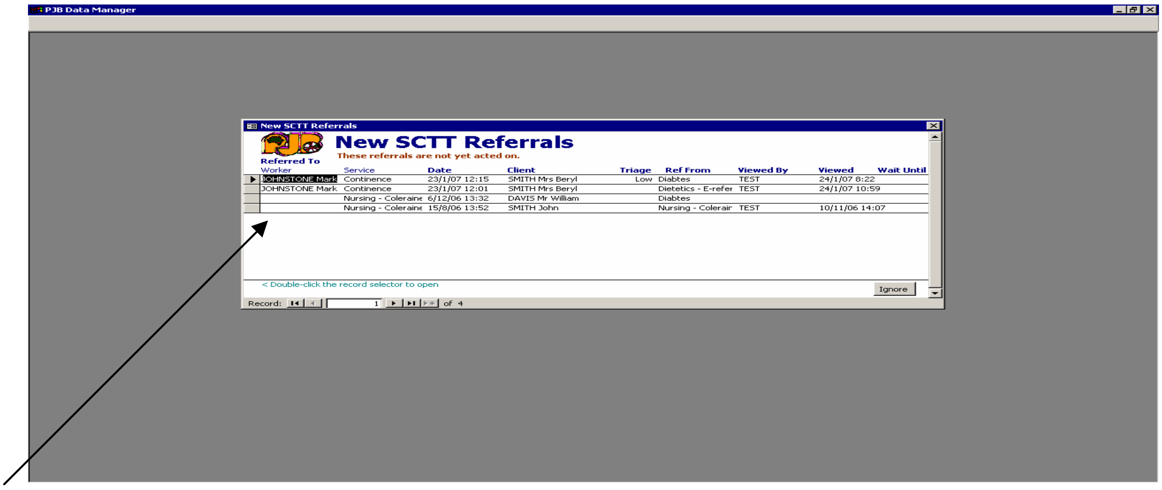
**When doing an internal referral, there is no need to tick the email box in the PCP referral screen. By simply choosing the correct consent form and appropriate worker, PJB will send notification to the worker (and their service) that they have a referral in the form of a pop-up box (see receiving an internal referral).**

**If you do tick the email button, the worker will receive both the internal pop-up notification and an email with the forms zipped and password protected.**

**If you choose to use this method, please consult your PJB administrator or IT support to make sure that all internal workers email addresses have been entered and are correct in the PJB worker tables.**

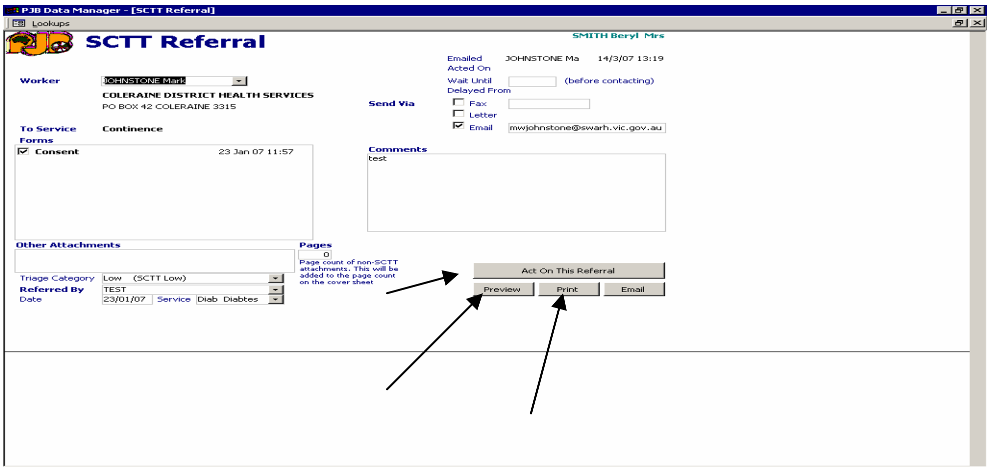
## 3.5 Receiving an Internal Referral

You will receive notice that you have received internal referrals each time you log into PJB (see diagram below). Internal referrals are those referrals that have come from workers who share your PJB database.




**Step 1**

- To view the referral, double click the record (the small black arrow on the left) and the **SCTT** referral screen will appear.




**Step 2 – Optional**
Click on the **Print** button to print the referral

**Step 3**

- Click on the **Preview** button to view the referral documentation that has been sent. (the referral documentation will be saved under the client's record)

**Step 4**

- Close screen to return to **SCTT Referral** screen

**Step 5**

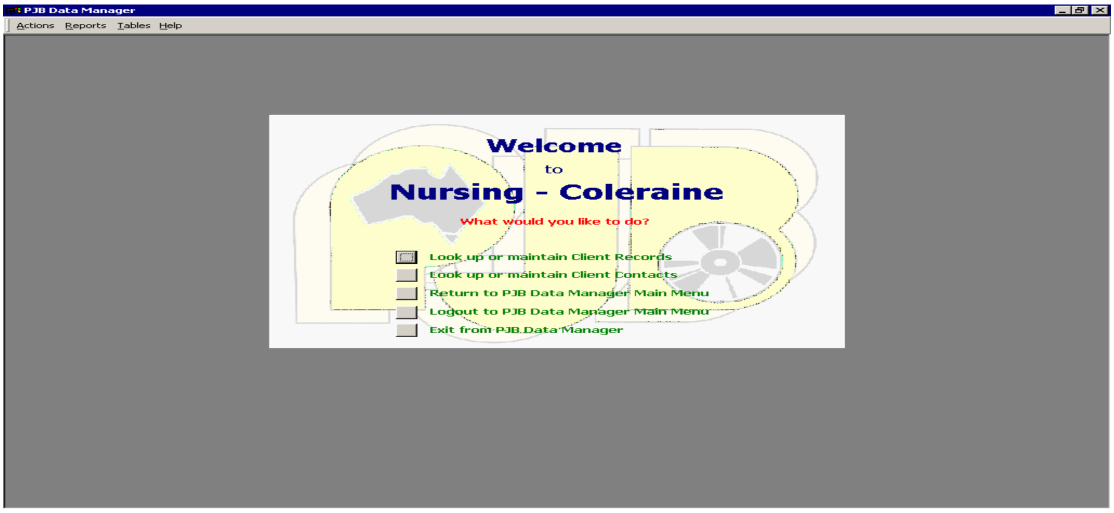
- Click on **Act on this Referral** button to act on the referral (when you do this the button will be removed from the screen)

**Step 6**

- Close screen to return to the **New SCTT Referrals** screen where the referral will no longer appear on the screen

**Step 7**

- Close screen  - this will return you to your **Service** home screen




**NOTE:** there will be a record under the **SCTT main** screen that tells you when the referral was viewed and acted upon and by whom. This part of the record only applies to internal referrals. That information will not be displayed for any external referrals.

# 4. NON-PJB SYSTEMS

## (BDNH, Xpedite, Carelink, Addis, HACCpac, Care Manager)

Other software packages, such as those listed above, also have built in SCTT tools specifically for referral purposes. However these programs do not have the automated process of zipping the files and password protecting them. This portion of the e-referral process will have to be done manually.

All of the above programs will generate the SCTT tools either in a WORD or PDF format. The first step is to access your client record. From within that record you will be able to produce the SCTT tool. Some software packages will have a button that says **export to RTF, or export to WORD, or SCTT forms.** To find out exactly how you can generate the SCTT tool from your software program, please consult your software administrator, software maker, your software manual or IT department.

Regardless of the program you are using, the completed SCTT forms will be saved to a designated folder on your computer or network. This destination folder will be different in most agencies. Once again, if you are unsure of where these files are being saved, you will have to consult software administrator, software maker, your software manual or IT department. You will need to be able to access this folder regularly, so it is important to familiarise yourself with how to get to it.

**<u>Sending a referral</u>**

**Step 1**
- In your database, go to the client's record that you wish to refer.

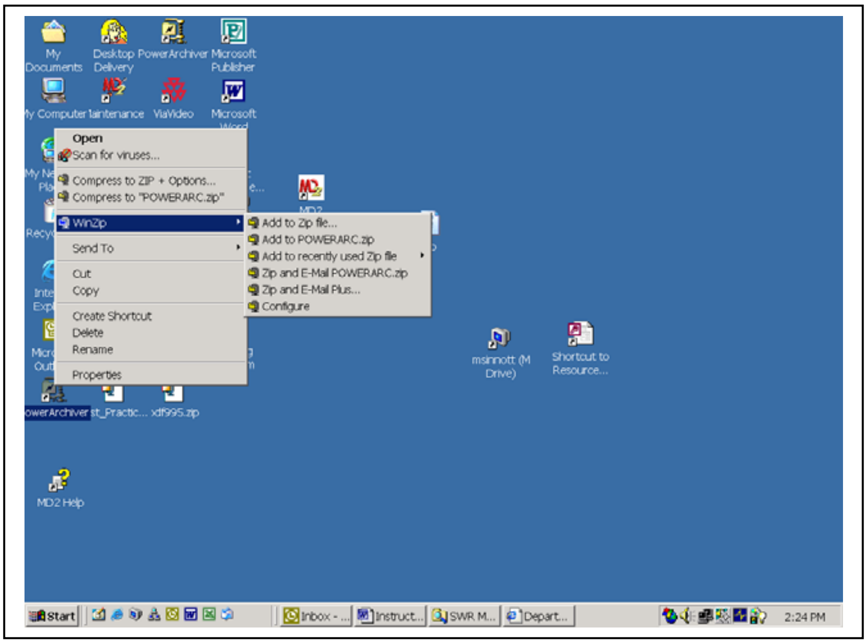
**Step 2**
- Generate the SCTT tools using the relevant steps according to your software specifications. You will be required to type in some information for some of the forms.

**Step 3**
- Using 'My Computer' or 'Windows Explorer', navigate to the folder that contains the SCTT tools that you have just generated.

**<u>Step 4</u>**
- Right click on the relevant file

## Step 5

- Scroll down to Winzip and Click ‘Add to Zip’ file

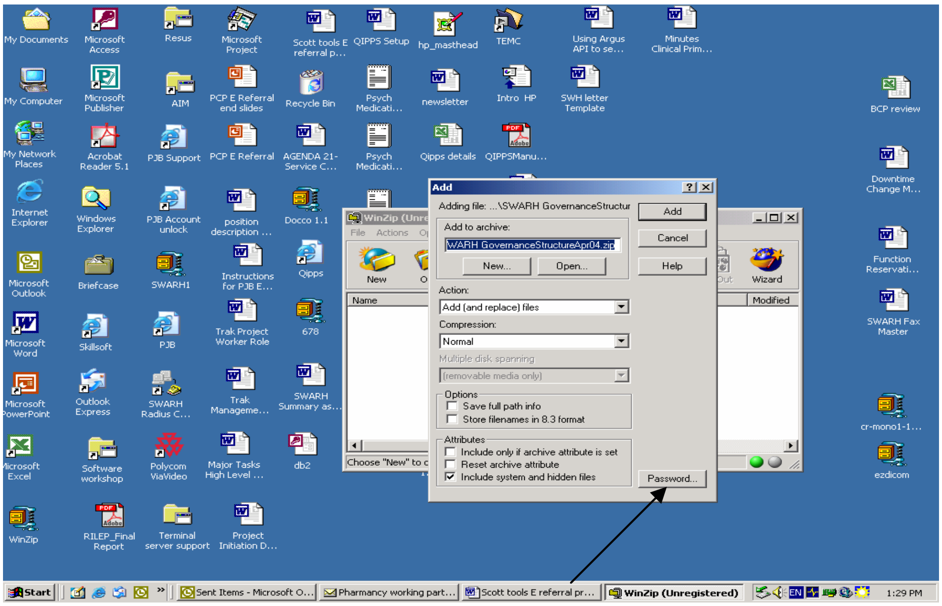



## Step 6

- If you have an unregistered down loaded version of WinZip, you might see an alternate screen - Click “I agree” and/or choose to use Winzip Classic.

## Step 7

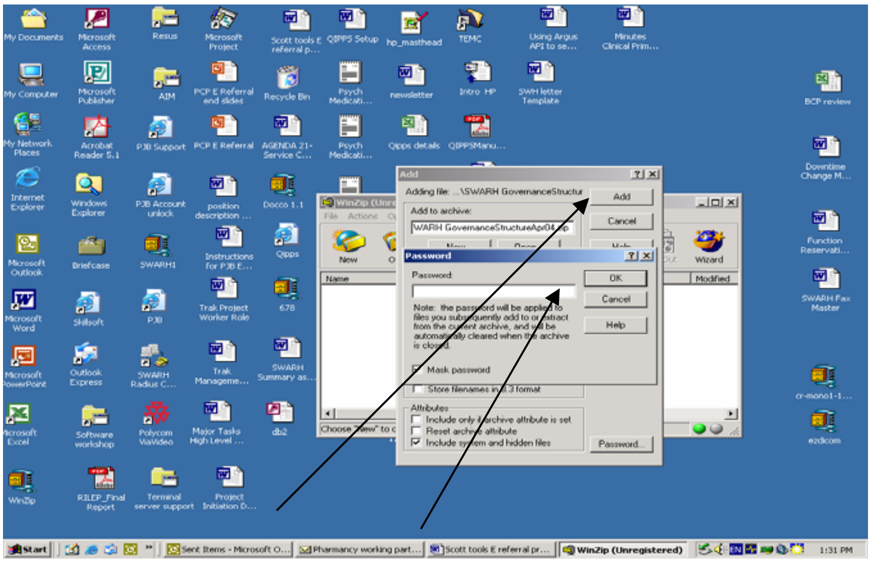
- Click on the ‘Password’ button in the bottom right hand corner




**Some versions of Winzip will not have a button that says password. Instead there will be a tick box that says encrypt files. Tick this box and you will be prompted for a password.**

## Step 8

- Enter the required password and click on OK; re enter the password to confirm and click on OK

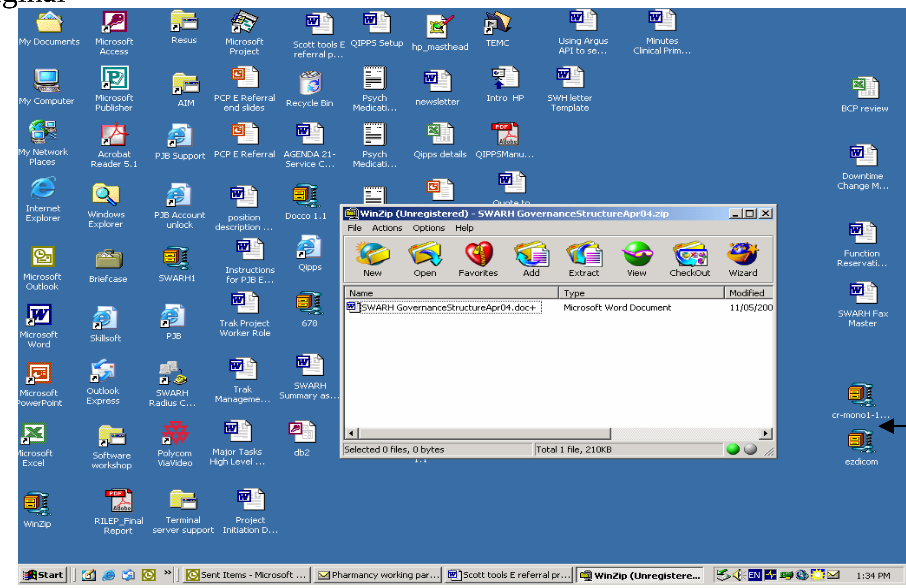



## Step 9

- Click Add

## Step 10

- Close zipped file. The zip file will be saved in the same location as your original




## Step 11

- Send the zip file, as an attachment, as per normal email process. The file can be identified by the small clamp icon.

**To zip more than 1 file, hold the control (Ctrl) key down and select the files you want to zip with your mouse. Your files should be highlighted. Right click on one of the files, select Winzip, then add to zip file and follow the steps as above.**

# 5. RECEIVING AN E-REFERRAL & ACKNOWLEDGEMENT

**Acknowledgement**
If you have received an e-referral, then you should acknowledge receipt of the referral by notifying the sender that you have received it. You will receive the referral via your nominated email account. Open the email. The simplest way to acknowledge receipt of a referral is to use the ‘Reply to Sender’ button on the top toolbar when you have the received email open. Add some text to the email to confirm receipt and then press the send & receive button.

After you have acknowledged receipt of the referral, you will need to open the zip file and access the SCTT forms that have been sent to you. Double click the attachment. You should see the file in its Winzip format. When you double click the file, you will be prompted for a password. Please use the agreed password. The SCTT tools for that referral will now be visible. You may print them off or save them to a specific folder on your computer.

**Acknowledgement - For PJB Users Only**
It is important to understand that when PJB users send a referral, they are not sending it from their personal email accounts. Instead, their PJB database is sending it for them. Each PJB database has a built-in email account. So when a provider replies to a referral, the reply will not come to your personal email, but will come to the PJB database email account, that generated it.

To check your PJB database email account for acknowledgements, you can access the Worldclient email account especially set up for your database.

To access this Site, open Internet Explorer. Click on SWARH Central in the left hand column. In the left hand column again, click on WebMail. This will bring up a link in the main section of your screen called “Open WorldClient”. Click on this link and the WorldClient webpage will now appear.

The email address and password required to access this page can be acquired from SWARH through the SWARH Helpdesk.

Once you access this email account you will be able to confirm if receivers of your e-referral have acknowledged receipt of your referral. If they have not done so within 2 days of sending, then you should then contact them to check on the progress of the referral

**TIP:** To make it easier to access the WorldClient page in the future, follow these steps. When you access the page for the first time, click on Favourites on the main toolbar, then ‘Add to Favourites’ and then OK. After this, you will only need to open Internet Explorer, go to Favourites on the toolbar and then click on WorldClient to bring this required screen up.

**Make sure you ‘Sign Out’ of WorldClient when you are finished checking acknowledgments**

## 6. SOUTH WEST REFERRAL ACKNOWLEDGEMENT AND OUTCOME FORMS

The South West region has adopted the Victorian Service Coordination standards that relate to referral acknowledgement and outcome. The standards are that acknowledgement takes place no more than 7 days of receiving a referral and that an outcome should occur no more than 14 working days of the consumer being assessed. With e-referral, replying to the sender's referral, as described in the previous section, is acknowledgement of receipt.

With regard to outcome, there is a South West region outcome form that is based in WORD. This form is available from SWARH/PCP offices in Warrnambool (contact Margaret Sinnott) and on the PCP websites.

The outcome form is an online version that can be filled in on your computer, then zipped and password protected and sent to the referring agency with the details of the outcome of the referral.

To zip and password protect the form after it has been filled in, please refer to Steps 4 – 11, starting on Page 16 of this guide. This form can then be safely emailed as an attachment.

## 7. AGENCIES WITHOUT SOFTWARE

For those agencies without a software program to manage their clients and generate electronic SCTT tools, there is an alternative that allows you to participate in e-referral.

All SCTT tools are available in WORD and are able to be filled in directly from your computer. Once filled in, these tools can then be zipped, password protected and emailed as attachments to your referring partners (see Step 4-11, p16 of this guide).

**The latest WORD based tools can be downloaded at**
**http://www.health.vic.gov.au/pcps/coordination/sctt2006.htm**

Please consult your local IT administrator about loading these tools onto your PC or network for use by all staff.

## 8. TIPS FOR SUCCESS

**Password**

- The e referral system uses Winzip and password security.
- The password must be typed in **lowercase**
- If you forget your password please contact Margaret Sinnott 55644014

**Better Data – Better Referrals**

The e referral system is based around your client database. This means that the information transferred into the Service Coordination forms will only be as good as the information in your database. Save time and check information in your database before generating any of the forms.

**Referral Practice**

Good referral practice provides the platform for e referral. All agencies participating in e referral must review their practice against the Victorian Service Coordination referral standards contained in the Victorian Service Coordination manual.

**Referral Acknowledgement and Referral Outcome Standards**

The standards are, that referral acknowledgement takes place no more than 7 days of receiving a referral and that an outcome should occur no more than 14 working days of the consumer being assessed.

While a Confidential Referral Coversheet has been developed for hardcopy use statewide, in e-referral, **acknowledgement** is executed using the reply button in Microsoft Outlook.

With regard to outcome, there is a South West region outcome form that is based in WORD. This form is available from SWARH/PCP offices in Warrnambool (contact Margaret Sinnott) and on the PCP websites.

**Communication Regarding Referral Outcome**

Using the **South West Referral Outcome form**, communication regarding the **outcome of referral** should occur no more than 14 days of the consumer being assessed. The Referral outcome form can be sent via email using Winzip and password security

**Which Forms to Send?**

Before commencing e referral, discuss which forms you and your referring partner/s require, agree to send selected forms and make sure all staff knows requirements.

**Resolution of Issues**

If there is a breakdown in communication between referring partners e.g. referral is not acknowledged or outcome not communicated, contact your referring partner (telephone) to let them know about the gap /issue and discuss ways of sorting it out.

**For other assistance and support see contact list below**

| | | |
|---|---|---|
| Kristie Coverdale | Timboon Primary Care - User | Ph. 55221185 |
| Margaret Sinnott | PCP – Practice Support | Ph. 55644014 |
| Fiona Torpy | South West Health Care - Post Acute Care - User | Ph. 55631464 |
| Mark Johnstone | SWARH - Technical Support | Ph. 55644002 |
| Peter Begbie | PJB – Technical Support | Ph. 53348101 |