



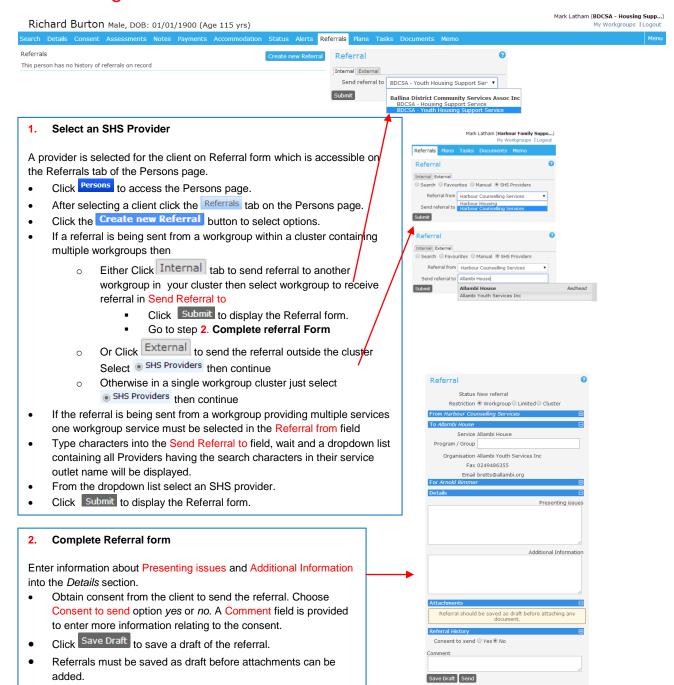
Referrals Quick Reference Guide

Referrals are used to transfer client files between SHS Providers. The referral includes selected parts of the client file, including initial assessment information, and is transferred in PDF format. The provider accepting a referral will have access to a PDF version of the information sent. This information is accessible for all workgroup referrals on the Referrals tab of the Home page and for individual client referrals on the Referrals tab of the Persons page.

This quick reference guide is for the Referrals function in CIMS and includes:

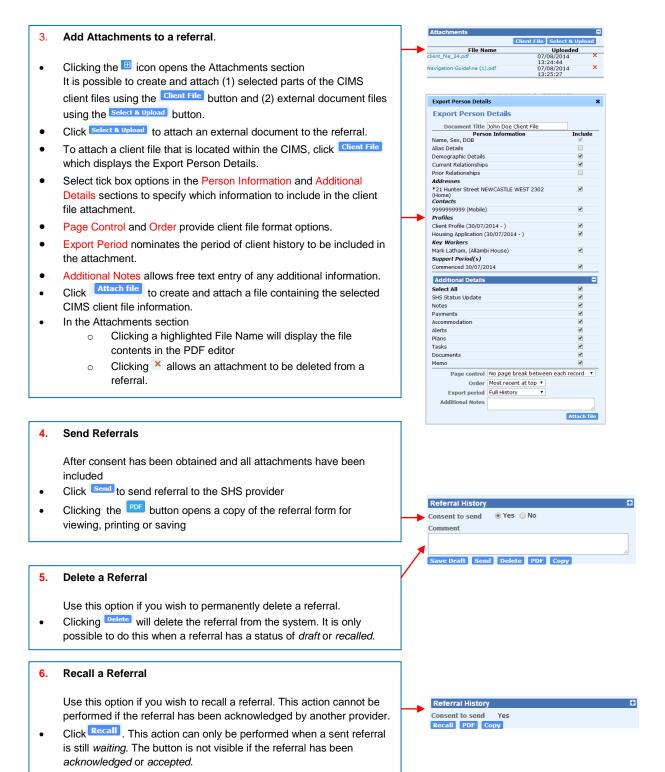
- 1. Create a referral form for a client and perform workflow actions Save Draft, Send, Recall and Delete.
- 2. Manage all referrals to and from the Workgroup
- 3. Receive a referral and perform workflow actions Acknowledge, Decline and Accept.
- 4. View referrals for an individual client

1. Creating a Referral













2. Managing all referrals to and from the Workgroup

Incoming and outgoing referrals for a workgroup are managed on the Referrals tab of the Home page.

- To navigate to the Workgroup referrals page
 - o Click the Home button
 - Click the Referrals tab
- Workgroup referrals can be viewed by selecting one of the following tabs:

Received Accepted Declined Sent Draft to display one of the following lists

o Incoming Referrals - not yet Accepted or Declined with status waiting or acknowledged

Incoming Referrals - Accepted with status accepted

Incoming Referrals - Declined with status declined

Outgoing Referrals - by Status with status waiting, acknowledged, accepted or declined

Outgoing Referrals - not yet sent with status draft or recalled

Click the icon:

If to open the referral form for further processing.
 Within a referral form, click por to print or save a copy of the Referral form.

Click the icon:

to navigate to a client's details

Received Accepted Declined Sent Draft

Incoming Referrals - not yet Accepted or Declined							
	Id	Sent Date	Status	Sent From	Sent To	Sent By	Client
A	193	27/02/2015	Waiting	BDCSA - Housing Support Service Ballina District Community Services Assoc Inc	Harbour Housing Harbour Family Support Inc	Mark Latham	Arnold Rimmer DOB: 01/01/1980 Gender: Male
₽	177	11/02/2015	Waiting	Moree Aboriginal Women's Housing Byamee Proclaimed Place Inc	Harbour Counselling Services Harbour Family Support Inc	Mark Latham	Liz Taylor DOB: 01/01/1990 Gender: Female
							1 to 2 of 2

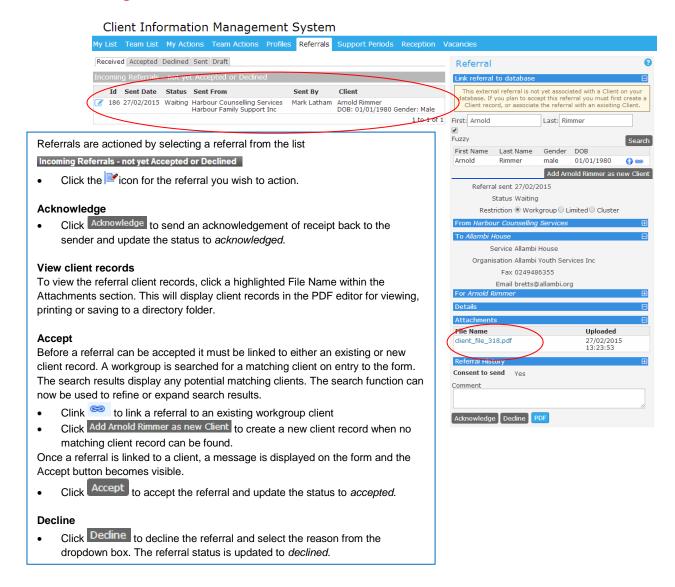


When Receiving a Referral into a workgroup containing multiple services. The name of the service the referral was sent to within a workgroup is included in the **Sent To** column.





3. Receiving a Referral



4. View referrals for an individual client

