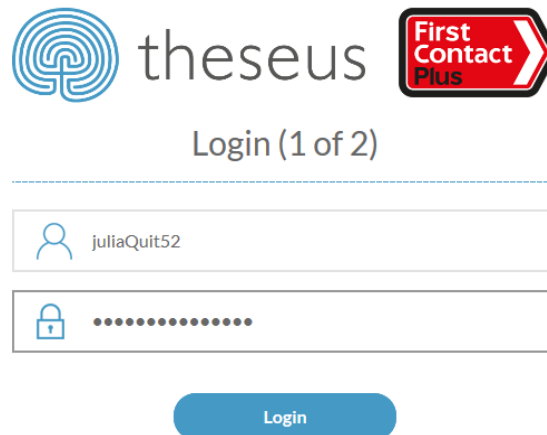


## MAKING A REFERRAL

## LOGIN SCREEN

This is the first screen to access the system. The Login is a two screen system for added security. Screen 1 is your username and password.

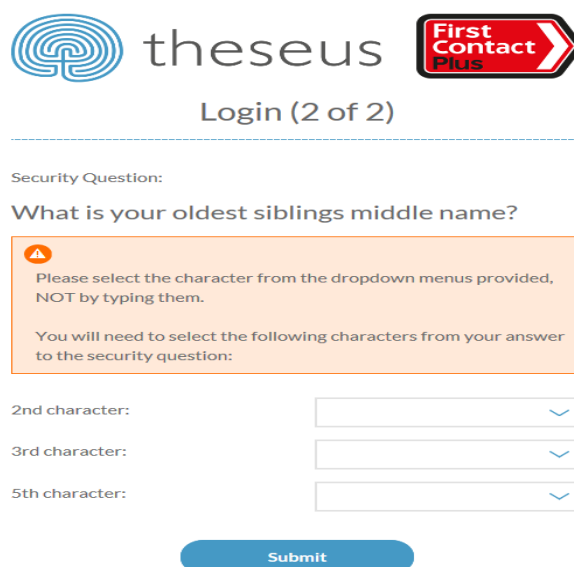


The login screen for 'theseus' features a blue fingerprint icon and the text 'theseus' in a sans-serif font. To the right is a red 'First Contact Plus' badge. Below the header, it says 'Login (1 of 2)'. There are two input fields: the first contains the username 'juliaQuit52' with a person icon, and the second contains a password represented by dots with a lock icon. A blue 'Login' button is at the bottom.

[Forgot password or account locked?](#)

**\*\* If you cannot remember your password click the forgot password link to reset your own password. If you enter your password incorrectly 3 times then your account will lock and you will need to contact your admin user to reset your password for you\*\***

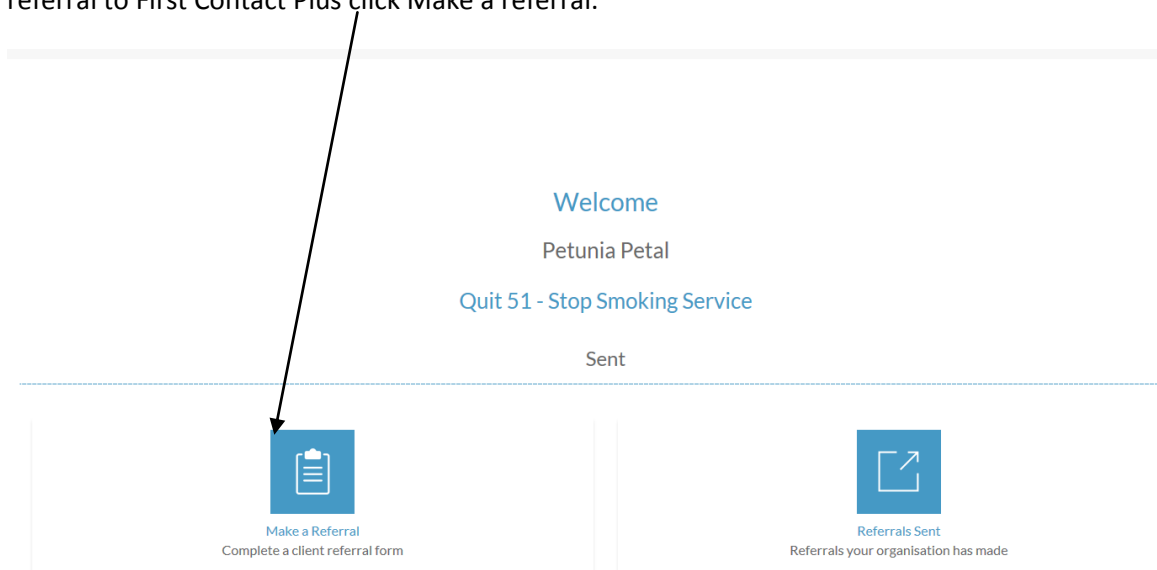
Screen 2 asks you for random letters from your security questions.



The second login screen for 'theseus' has the same header as the first. It says 'Login (2 of 2)'. Below the header, it says 'Security Question: What is your oldest siblings middle name?'. There is an orange warning box that says: 'Please select the character from the dropdown menus provided, NOT by typing them. You will need to select the following characters from your answer to the security question:'. Below this are three input fields labeled '2nd character:', '3rd character:', and '5th character:', each with a dropdown arrow. A blue 'Submit' button is at the bottom.

## HOMEPAGE

Once you have logged in you will see 2 boxes (Make a referral & Referrals Sent). To make a new referral to First Contact Plus click Make a referral.



## CONSENT STATEMENT

There are two screens. Screen 1 is the consent statement, you cannot make a referral unless you have the consent of the client.

The consent covers making the referral to First Contact Plus and our partners, holding the client's data on our system, consent to contact the customer for initial call and follow up, consent for the outcomes to be returned to First Contact Plus and viewed by the original referrer

**Make a Referral (1 of 2)**

Information given on this form will be used for the purposes of providing the client with better support and services.

By providing the information on this form the client agrees that we can hold this information on their behalf.

It will be held on a computer system run by Leicestershire County Council in accordance with the Data Protection Act.

It will be shared on a need to know basis with other agencies involved in providing the client with support services.

These agencies may include Government Agencies, Borough/District Councils, Health, Fire & Rescue Service, Police and Voluntary Sector.

The client consents to their information being shared with First Contact agencies and to be contacted in the future regarding the services they have received.

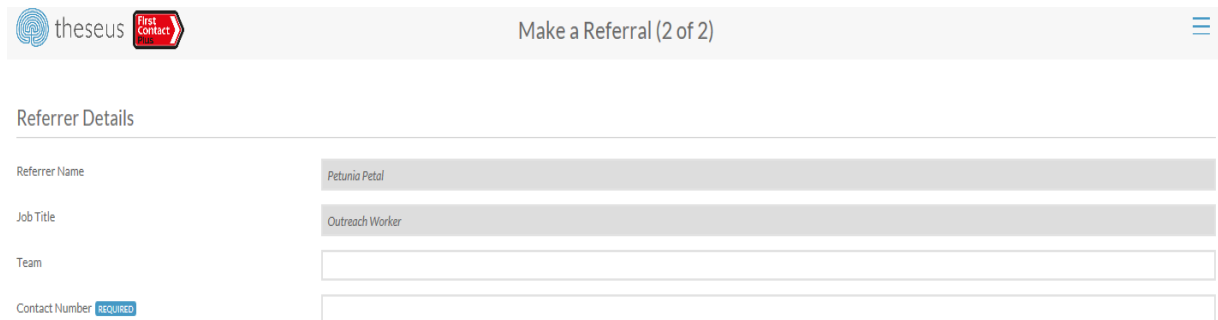
The client also agrees for the partner agencies to inform First Contact Plus and the original referrer of any actions taken.

[I accept, please continue](#)

## REFERRAL FORM

On this screen you will enter the referral details

**Referrer details** – Your name and job role will auto populate. Please add your team and contact number (Contact Number is mandatory). Please do not use acronyms for you team e.g. ASB team, please write antisocial behaviour



**Referral details** - This is where you can explain what are you referring the client for/ What need did you identify? These are - broken up into 8 themes

Falls

Families & Relationships

Work, Learning & Volunteering

Living Independently

Improving Your Health

Feeling Safe

Money, Debt & Benefits

Your Home

Clicking on a theme will generate a list of sub-themes you can select. You can select multiple sub-themes for the same theme and multiple themes.

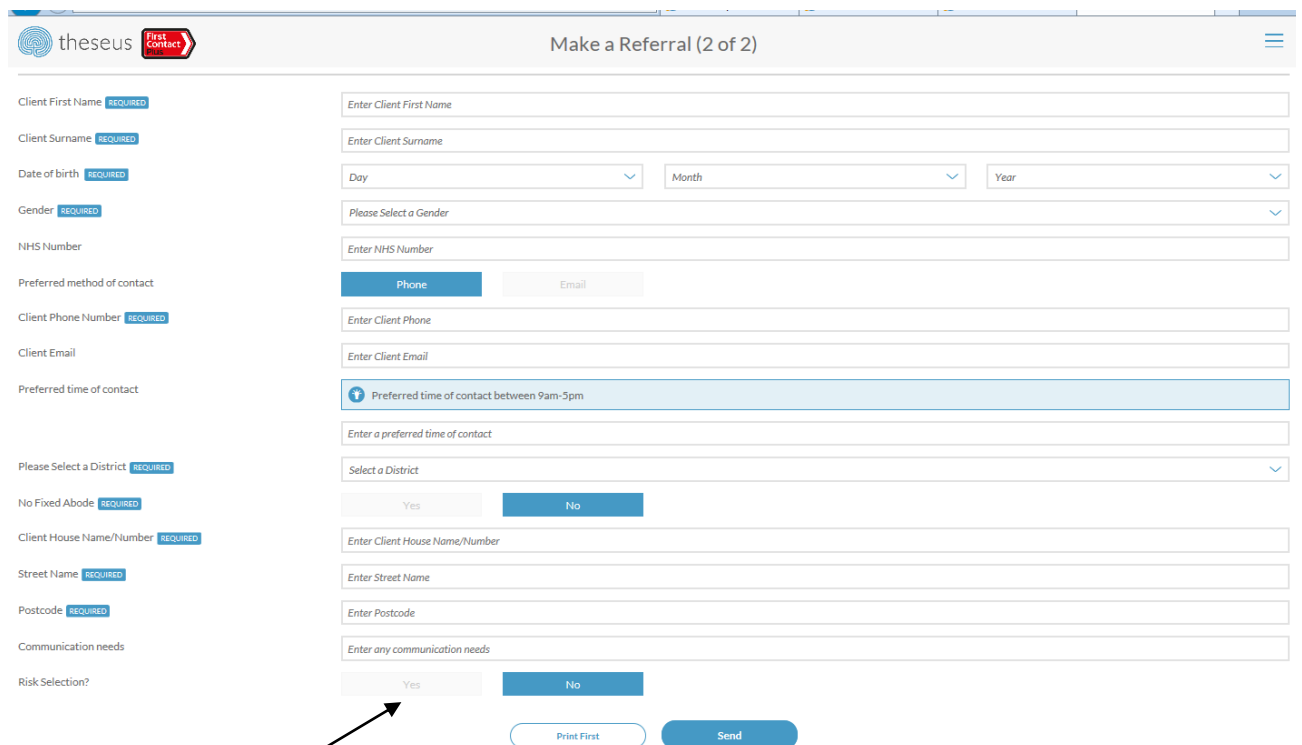
Please enter any supporting information in the additional information box that you think is important for the referral e.g. wants to get back in to learning

The direct referral box is there for **health professionals only** who have already done their assessment of need for an improving your health area and provided information to the client. E.g. a GP referring for substance misuse.

**Client Details** – Please enter the details for the client. One form of contact, either telephone number or email is mandatory.

The district the client is resident in is mandatory however there is the option to select no fixed abode for a client which will open a free text box for you to record details e.g. sofa surfing or confidential address.

Please record any communication needs you feel we should be aware of e.g. Hard of hearing or if the client's first language is not English. If the client does not speak English please be aware that we will require a greater level of detail in the supporting information box as we will not be able to gain this through a call.



The screenshot shows the 'Make a Referral (2 of 2)' form in the 'theseus' system. The form is divided into two main sections: a left-hand sidebar with labels and a right-hand area with input fields. The labels on the left include 'Client First Name', 'Client Surname', 'Date of birth', 'Gender', 'NHS Number', 'Preferred method of contact', 'Client Phone Number', 'Client Email', 'Preferred time of contact', 'Please Select a District', 'No Fixed Abode', 'Client House Name/Number', 'Street Name', 'Postcode', 'Communication needs', and 'Risk Selection?'. The input fields on the right include text boxes for names, dates, phone numbers, emails, and addresses, as well as dropdown menus for date components, gender, district, and risk selection. There are also buttons for 'Phone' and 'Email' under 'Preferred method of contact', and 'Yes' and 'No' buttons for 'Risk Selection?'. At the bottom right, there are 'Print First' and 'Send' buttons. A black arrow points from the 'Risk Selection?' label to the 'Yes' button.

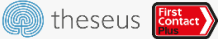
If you are aware of any risks to organisations or individuals who may visit the client please record them here e.g. verbally abusive, visit in pairs.

At the bottom of the referral form there is a button to allow you to print a hard copy of the form for your own records. This must be done prior to sending. When you click send the referral will be securely delivered to First Contact Plus.

## REFERRALS SENT

This area allows you to review previously sent referrals and check them for updates.

When you send a referral, it will take you through to the referrals sent area and a green bar will appear at the top of the screen to let you know the referral has been sent successfully. It will also show you the list of referrals you have previously made. The list will show you client name, the date the referral was sent, the areas referred for and the status of the referral. Specific clients can be searched for or you can filter the list by status to show you referrals which are new, accepted or declined.

 Referrals Sent			
<a href="#">Back to Homepage</a>			
Filter by name...	Any status	<a href="#">Print this list</a>	
Date (Sent)	Name	Category	Status
23 SEP 2016	Tim Taylor	Adult Learning; Substance Misuse (Alcohol and Drugs)	ACCEPTED
21 SEP 2016	Emma Chouhan	No Areas of Concern	NEW
20 SEP 2016	Alice Smith	Adult Learning; Substance Misuse (Alcohol and Drugs)	ACCEPTED

**Status** - There are 3 different status types. Referrals with a **"New"** status have been sent but First Contact Plus have not yet accepted it. Referrals with a status of **"Accepted"** have been accepted by First Contact Plus who will contact the client to discuss the areas of need identified. Referrals with a status of **"Declined"** have been declined by First Contact Plus. First Contact Plus rarely declines referrals however this could happen if the client is out of county, below the age of 16 and or duplicate referrals where there are no new issues identified. Clicking on the client name bar will show the referral detail and at the bottom under **"Updates"** you would be able to see the reason the referral was declined.

Status

**Fred Flintstone**  
01/01/1940 Male

---

Address:  
1, Gave Avenue, LE14 8PP

Address Notes:  
No notes recorded

Agency Referred To: First Contact Plus	Referral Type: Client Referral	Referral Status: Declined	Date Sent: 13/09/2016
Direct Referral: No	Time of Contact: E mail anytime	Method of Contact: Email	Communications Needs: Hard of hearing
Risk Selection: Yes	District: Harborough	Referrer Name: Lisa Manley	Referrer Job: Partnership officer
Referrer Team: Outreach	Referrer Contact: 0116 305 8365		

Risk Selection Notes:  
Any home visits should be with 2 people as Fred can be verbally abusive



Additional Notes:  
Drinks 2 bottles of whisky a day & would like help to reduce this. Is interested in learning how to cook a meal

Referral Categories:  
Adult Learning; Substance Misuse (Alcohol and Drugs)

Updates:  
13/09/2016 - Lisa Manley (First Contact Plus): Duplicate referral

Reason for declining referral recorded by First Contact Plus

You can review the details of any referral in the sent referrals area and check them for updates by clicking on the name bar.

Referral Details

Alice Smith

01/01/1970 ♀ Female

---

Address:

1, Long Lane, LE19 4SA

Address Notes:

No notes recorded

Agency Referred To:	Referral Type:	Referral Status:	Date Sent:
First Contact Plus	Client Referral	Accepted	20/09/2016
Direct Referral:	Time of Contact:	Method of Contact:	Communications Needs:
No	Afternoon	Phone	Hard of hearing
Risk Selection:	District:	Referrer Name:	Referrer Job:
Yes	Blaby	Lisa Manley	Partnership officer
Referrer Team:	Referrer Contact:		
Testing Team	0116 305 1234		

Risk Selection Notes:

Verbally abusive, visit in pairs

Additional Notes:

Interested in GCSEs. Drinking 1 bottle of whisky a day

Referral Categories:

Adult Learning; Substance Misuse (Alcohol and Drugs)

Updates:

20/09/2016 Client has been referred to Turning Point - Drug & Alcohol Service

20/09/2016 Client has been referred to Leicestershire Adult Learning Service

Name, D.O.B and gender appear at the top with address underneath. Agency referred to will always be First Contact Plus and referral type will always be client referral.

The updates section at the bottom of the page will update in real time to show when the referral is accepted by First Contact Plus & what onward referrals have been made as a result, including which member of First Contact Plus team made them.

*\*\* Currently under development – Development is taking place to allow you to see the outcomes recorded by the referral receiving agencies. Once this is complete it will show under the updates section of the client record\*\**

## SAVING A REFERRAL

If you want to save a copy of the referral, click on Print this page, then right click on the opened document and select Save as.

NB Please ensure that any documents are saved and stored in line with GDPR regulations.