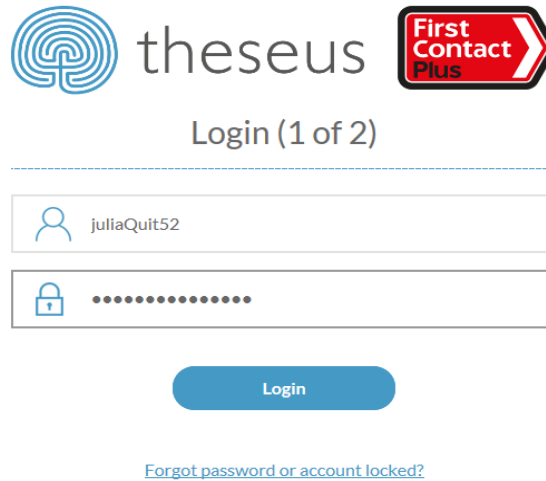


RECEIVING REFERRALS

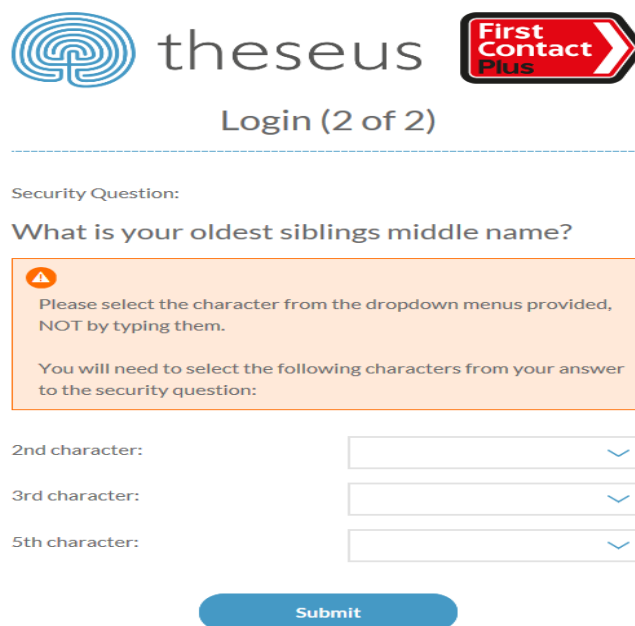
LOGIN SCREEN

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.



**** 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.



HOME PAGE

Once you have logged in you will see 5 boxes. The first 3 relate to receiving referrals from us and the next 2 relate to making referrals to us (see making referrals guide for details of how to refer into First Contact Plus).

The screenshot shows the 'theseus' home page. At the top, there are logos for 'theseus' and 'First Contact Plus'. The main heading is 'Welcome Julia Wiggins' followed by 'Quit 51 - Stop Smoking Service'. Below this, the dashboard is divided into two sections: 'Received' and 'Sent'. Under 'Received', there are three boxes: 'New Referrals' with a blue box containing the number '6' and the text 'Waiting for you to review'; 'In Progress Referrals' with a green box containing '2', and sub-sections for 'Overdue' (0), 'Pending' (0), and 'Upcoming' (2); and 'Archived Referrals' with a blue box containing a folder icon and the text 'Archived referrals received by organisation'. Under 'Sent', there are two boxes: 'Make a Referral' with a blue box containing a clipboard icon and the text 'Complete a client referral form'; and 'Referrals Sent' with a blue box containing a document icon and the text 'Referrals your organisation has made'.

Box1, New Referrals, Shows your new referrals waiting to be accepted by your team. An email prompt will be sent on a daily basis if there are any new referrals which require your attention or any outcomes which are overdue or pending. The email will be sent to the email address registered when your account is created and will send to every user with admin rights within your organisation.

If you click on the new referrals box you will see a list of new referrals sent to your organisation by First Contact Plus.

The screenshot shows the 'New Referrals' page. At the top, there are logos for 'theseus' and 'First Contact Plus'. The page title is 'New Referrals'. Below the title, there is a 'Back to Homepage' link and a 'Print this list' button. The main content is a table with the following data:

Date (Received)	Name	Category	Status
13 SEP 2016	Katie Swann	Client Referral	NEW
13 SEP 2016	John Smith	Client Referral	NEW
13 SEP 2016	Oliver Twist	Client Referral	NEW
06 SEP 2016	Testing 123	Client Referral	NEW
06 SEP 2016	Bassett Hound	Client Referral	NEW
25 AUG 2016	Hopeful Melon	Client Referral	NEW

It shows date of receipt (newest on top), name of client and status, which will always be new. To look at a referral in more detail you can click anywhere along the name bar and this will take you through to the referral details screen.

Katie Swann
01/01/1973 ♀ Female
Client ID: 1099

Address:
1, long lane, LE19 4SA

Address Notes:
No notes recorded

Phone(s):
Home: 0116 305 1234

Referring agency: First Contact Plus	Referral Type: Client Referral	Referral Status: New	Date Received: 13/09/2016
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Notes:
Referral made by First Contact Plus to Quit 51 - Stop Smoking Service.

Details added by Julia Wiggins: would like to try patches
13/09/2016 Please note this client has also been referred to Turning Point - Drug & Alcohol Service on 13/09/2016

Acceptance of Referral:

Please enter details for the referring agency:

On this screen you can see the same information that you currently receive on a First Contact referral template.

- Name, D.O.B, Gender & Client ID number are listed at the top of the page
- Address is recorded along with any notes for example provision of a correspondence address
- Contact number and, if known, email are provided
- Referring agency is always First Contact Plus and referral type is always client referral
- Referral status will always show as new at this point

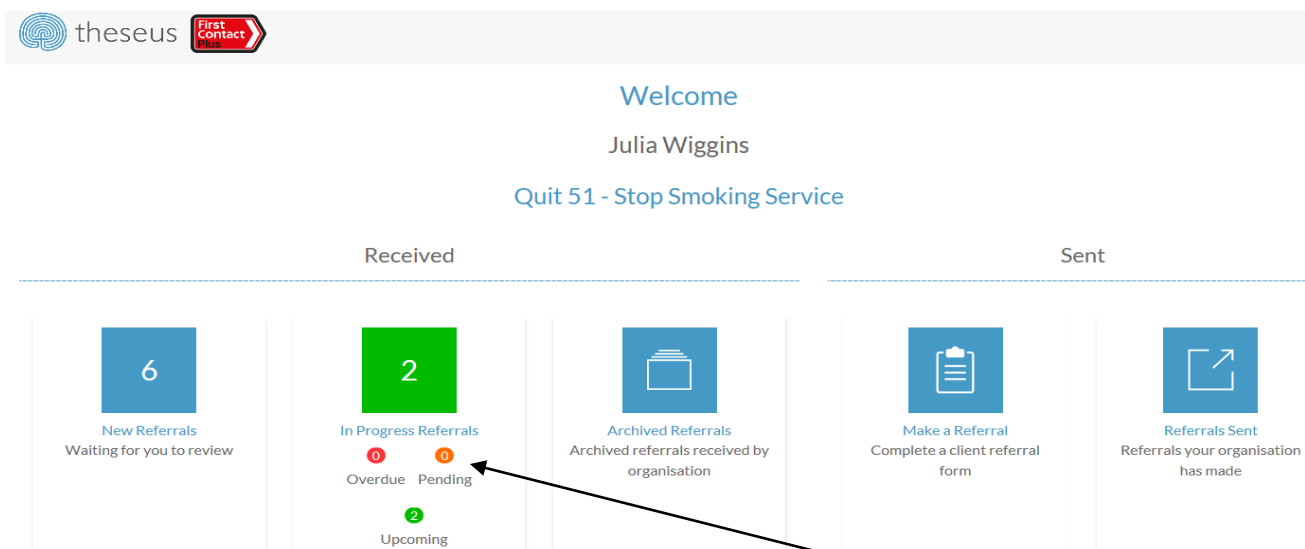
The notes field contains information about original referrer e.g. Leicestershire adult learning, member of First Contact Plus team who processed the referral along with any supporting information gained during the call and any other referrals made for the client.

At this point you will need to decide if you are accepting or declining the referral. If you are accepting the referral simply select yes from the drop down, no additional notes are required. If you are declining the referral please add a reason. Eg already providing services to this customer. If the reason is because you no longer provide service in that geographical area or your service criteria has changed please contact the First Contact Plus team directly to inform us.

Clicking submit will send an update to First Contact Plus to let us know you are dealing with the referral.

This will automatically take you back to the new referrals page so you can continue dealing with new referrals. A green bar will appear along the top of the screen to confirm you have actioned the referral. Accepted referrals will move to the in progress referrals list, Declined referrals will move straight to the archived area.

FEEDING BACK OUTCOMES



Once a referral has been accepted by your organisation it will move it into the “in progress referrals” area. This area contains all referrals you have accepted but are yet to record an outcome against. From the Home screen you can see a brief summary of the number of referrals awaiting outcomes and the number which are upcoming, pending or overdue.

Overdue = These are referrals you have had for 28 days or more

Pending = These are referrals you have had for between 21 and 28 days

Upcoming = These are referrals you have had for between 0-20 days

Clicking into this area shows the referrals in a list format. The oldest referrals will sit at the top of this list. The status reflects what stage the referral is at. You can filter the list to sort the referrals by status, so that it shows all the upcoming, pending or overdue referrals.

Date (Outcome Due)	Client Referred	Category	Status
12 OCT 2016	Darren Alexander	Client Referral	UPCOMING
12 OCT 2016	Rachel Alexander	Client Referral	UPCOMING

Once you have the outcome, and are ready to record it, you can click on the client name bar to bring up the referral details once more. All the referral details that we saw in the new referrals folder are still showing, however the Referral Status has now changed to Accepted

Referral Details

Rachel Alexander
01/08/1978 ♀ Female
Client ID: 1108

Address:
1, long lane, LE19 4SA

Address Notes:
No notes recorded

Phone(s):
Home: 0116 305 6734

Referring agency:
First Contact Plus

Referral Type:
Client Referral

Referral Status:
Accepted

Date Received:
13/09/2016

Notes:
Referral made by First Contact Plus to Quit 51 - Stop Smoking Service.

Details added by Julia Wiggins: wants to try patches
13/09/2016 Please note this client has also been referred to Turning Point - Drug & Alcohol Service on 13/09/2016

Record Outcome:

Please enter details for the referring agency:

Submit

Beneath the referral details is the area to record your outcome. Click on the drop down list to show all options and select the most appropriate outcome for the service you have provided. Please add any additional information in the free type details box below. Any additional information you can provide is really useful in building case studies and helps to inform us of what's happened before we conduct follow up at 6 weeks. Please do not use this as a method of updating us on your service provision and eligibility.

Click submit and this will update First Contact Plus that you have completed your actions for the referral. A green banner will appear at the top of the page to confirm you have successfully recorded the outcome.

**** If you wish to update or amend the outcome please contact us as you will not be able to do it from your log in but we can make changes from our case management system. Any changes we make will be visible to you in the notes section of the referral record. ****

Once you have inputted an outcome the system will close the referral and move it to your archived referrals area.

ARCHIVED REFERRALS

This area holds the list of historic referrals received and completed by your team. Any referrals which you declined will move straight to this area.

When you click into the archive you will see the referrals listed by date order, most recent on top. The status will always be either complete or declined. You can search the archive by client name if you are searching for a particular record.

Date (Referred)	Name	Category	Status
13 SEP 2016	Tulula Tango	Client Referral	DECLINED
13 SEP 2016	Emily dunn	Client Referral	COMPLETE
13 SEP 2016	Lewis Dunn	Client Referral	COMPLETE
13 SEP 2016	Andrew Matthews	Client Referral	COMPLETE

If you click on a client's name bar you will see all the information that was provided on the referral when it came in to you and in the notes section you will also be able to see the date you either accepted or declined it and the details of the outcome you recorded against it.