

Tracking the Progress of a Referral & Obtaining a Report



This Quick Reference Guide provides a step by step guide to tracking the progress of a referral and obtaining a report

1. Log in using your **Username** and **Password**
2. Select **Records**
 - N.B. Every referral you have ever made will be located under records
3. Select **Referral Type** i.e. Performance & Attendance Management Referrals
 - N.B. If you do not know the referral ID or Service Line you can search via employees under the Records Tab
4. Type the **Referral ID** into the search facility available and press **Enter**
5. The referral will be displayed
6. Select the **Referral ID** highlighted in blue
 - N.B. this will take you to the **Referral Summary Screen**
7. Along the top of this screen is a timeline providing a high level overview of the status of the referral
8. Specific information about scheduled appointments and referral interventions is also available
9. For a more detailed understanding of each step in the referral process, select **File Notes**

Records

Performance & Attendance Management Referrals
Comprehensive list of all referrals logged for Performance & Attendance Management

Performance & Attendance Management Referrals

ID	Employee Name	Customer	Logged By	Logged On	Referral Status
3223	Mr testing testing	DEMO MAN	pshealth.admin	5 Apr 2017	●

1 Item

3223

Records / Performance & Attendance Management Referrals
Mr testing testing - 3223 Focus Update Ref

Draft Pending Approval Pending Consent **In progress** Closed - all interventions complete

Employee Details

Name	Mr testing testing	Customer Name	DEMO MAN
Gender	Male	Job Title #	dsdsdsds
Date of birth	29 March 1973	Customer Identifier #	ci
Email	testing12@gmail.com	Secondary Telephone No	N/A
Primary Telephone	3213213321		
No			

Referral Details

Referral ID	3223	Referral Reason	Current absence
Logged By	Mrs pshealth.admin	Employee Budget Code	ABC123
Service Name	OH Advice Main	Employee Business Unit	Krakow
Logged Date	05/04/2017 15:18		
First Day of Absence	20/02/2017		

Records / Performance & Attendance Management Referrals
Mr testing testing - 3223 Focus Update Referral

Draft Pending Approval Pending Consent **In progress** Closed - all interventions complete

Appointment(s)

Name	Created Date	Appointment Start Date	Appointment Completion Date	Practitioner	Status	Intervention Outcome	Report Document
OH Advice MH Tel Man	5 Apr 2017 15:19				Closed - all tasks completed	Completed	-
Appointment 1	5 Apr 2017 15:24	6 Apr 2017 15:22	6 Apr 2017 15:22	Occupational Therapists	n/a	-	-

File Notes

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10. Every action related to this particular referral will be found here
11. Each file note gives a live detailed description of each and every action that has taken place for that referral, including time, date and person carrying out the action
12. The referring manager will receive an email notification following the completion of every intervention in the referral process (if enabled)
13. When a report becomes available, an email notification will ask the referring manager to log in to the system to view the report
14. The report will be accessible in the referral record under **documents** on the left hand side of the referral summary screen

Note Type	Title	Description	Created By	Created Date
System	Intervention Status Update	Intervention Status has been updated from In progress - pending appointment booked to Closed - all tasks completed	System	05/04/2017 15:38
System	Employee Identity Confirmed	Employee's identity verified against DOB	pshealth admin	05/04/2017 15:25
System	Start Intervention Task Assigned	A task to start the intervention has been assigned to Occupational Therapists - Third Party - Practitioners - Casual Associates; Admin - Casual Associates	System	05/04/2017 15:24
System	Intervention Status Update	Intervention Status has been updated from In progress - pending appointment booking to Appointment - In Progress	System	05/04/2017 15:24
System	Intervention Status Update	Intervention Status has been updated from In progress - pending appointment booked to Appointment - In Progress	Occupational Therapists	05/04/2017 15:24
System	Booking Task Completed	Referral Booking Details Practitioner: Occupational Therapists Scheduling Time: 06/04/2017 14:22 Booked by: pshealth admin	pshealth admin	05/04/2017 15:24
System	Booking Task Assigned	Booking Task is assigned to (Group: 1458)	System	05/04/2017 15:19
System	Referral Updated	Referral status updated from In progress to In progress	System	05/04/2017 15:19

Dear Line Manager,

Intervention Completed for the referral 21794

Subsequent Actions

No Action Selected

DO NOT RESPOND to this automatically generated e-mail.

The information contained in this e-mail is confidential and intended solely for the attention and use of the named addressee(s). If you are not the intended recipient, you may not disclose, copy, distribute or retain this message or any part of it without the prior agreement or consent of the sender. If you have received this in error please delete it and inform the sender to avoid transmission problems for the future.

Document	Referral ID	Title	Document Type	Date on Document
Full Report (Mc Chris Training) 02032017 14:19	11940	Full Report (Mc Chris Training) 02032017 14:19	Release of information forms	02032017
Full Report (Mc Chris Training) 02032017 14:38	11940	Full Report (Mc Chris Training) 02032017 14:38	Release of information forms	02032017
GP Cover Letter (Referral ID: 11940) (Customer: Training) Employee: Mc Chris Training	11940	GP Cover Letter (Referral ID: 11940) (Customer: Training) Employee: Mc Chris Training	Report form	02032017
Cover Letter - 11940 Chris Training	11940			02032017