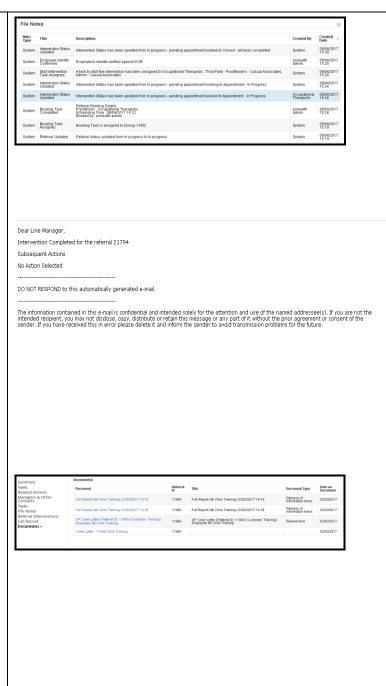# Tracking the Progress of a Referral & Obtaining a Report

This Quick Reference Guide provides a step by 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**

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

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.

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