

# **Electronic Service Coordination Referral System**

## **User Manual**

<b>1. INTRODUCTION .....</b>	<b>3</b>
<b>2. REGISTERING AS A MEMBER .....</b>	<b>3</b>
<b>3. LOGGING IN .....</b>	<b>3</b>
3.1 First Time Users .....	4
<b>4. ROLES .....</b>	<b>4</b>
<b>5. MAKING A REFERRAL .....</b>	<b>5</b>
5.1 Searching for a Client.....	5
5.2 Adding a New Client.....	5
5.3 Sending the Referral .....	5
5.3 Sending the Referral .....	6
<b>6. PROCESSING INCOMING REFERRALS .....</b>	<b>9</b>
6.1 Acknowledging Incoming Referrals.....	9
6.2 Changing the Status of Incoming Referrals .....	9
<b>7. MONITORING SENT REFERRALS .....</b>	<b>10</b>
7.1 Acknowledging Feedback .....	10
7.2 Viewing Service Records .....	10
7.3 Draft Tab .....	11
<b>7. REPORTS .....</b>	<b>11</b>
7.1 Generating Reports.....	12
<b>8. SUPPORT HELPDESK.....</b>	<b>12</b>
<b>9. ELECTRONIC REFFERAL TEST SITE .....</b>	<b>12</b>
<b>10. TROUBLE SHOOTING .....</b>	<b>13</b>
10.1 Using the Back Button .....	13
10.2 Scanning Documents.....	13
10.3 Internet Explorer Speed Settings .....	13
<b>11. APPENDIX .....</b>	<b>14</b>
11.1 User Registration Form .....	14
11.2 Email Notifications.....	15
11.3 Information Access Guidelines.....	16
11.4 Information Access Levels .....	16
11.5 Information Access Level Setting and Consent Procedures .....	17
11.6 Obtaining Consent .....	18

## 1. INTRODUCTION

This manual describes how to create referrals and manage clients on the S2S Electronic Service Coordination Referral System. This referral system provides a single online hub for case management and communication between health and welfare services across a wide range of service networks.

## 2. REGISTERING AS A MEMBER

All users of the referral system will need to be registered as members of a Primary Care Partnership or as members of Infoxchange.

- 1 Go to the relevant PCP website, listed below, OR to the Infoxchange website.

Inner East: [www.iepcp.org.au/group/Registration/register.shtml](http://www.iepcp.org.au/group/Registration/register.shtml)  
Outer East: [www.oehcsa.infoxchange.net.au/group/Registration/register.shtml](http://www.oehcsa.infoxchange.net.au/group/Registration/register.shtml)  
Banyule-Nillumbik: [www.bnpcpa.org.au/group/Registration/register.shtml](http://www.bnpcpa.org.au/group/Registration/register.shtml)  
North Central Metro: [www.ncmpcp.org.au/group/Registration/register.shtml](http://www.ncmpcp.org.au/group/Registration/register.shtml)  
Barwon: <http://www.barwonpcp.org.au/first.shtml>  
Infoxchange: <http://registration.infoxchange.net.au/group/Registration/register.shtml>

*A registration form will be displayed. See Appendix 11.1*

- 2 Complete the form and click **Submit**.

## 3. LOGGING IN

The welcome page of the eReferral website will ask for a username and password and is shown below.



The screenshot shows the login page of the S2S Referral System. At the top, there is a navigation menu with links: Home, Referral, Waitlist, Client, Admin, User, Logout, Help. The page title is "S2S Referral". The main content area has a heading "Welcome to the Infoxchange S2S Electronic Referral System." Below this is a "Login" form with fields for "Username:" and "Password:", and a "Login" button. A "Please note" section follows, stating: "When using this system your actions are governed by the Australian Privacy Act 1988, the Information Privacy Act 2000, and the Health Services Act 2001. Please <click here> for more information regarding your obligations. Also note: when using the system all your actions are logged and are subject to regular audits, and you may be called upon to justify your access to specific records." At the bottom, there is a paragraph: "This system is designed to facilitate, with appropriate informed client consent, the management of confidential client information and referrals in a secure environment. Agencies and services registered with Infoxchange Australia are able to use this system. Please contact support@s2s.org.au if you would like to register to use this system." and a link: "Please <click here> for a list of agencies/services that are currently registered on the system." A logo is visible in the bottom right corner of the page.

### 3.1 First Time Users

- 1 Enter your **username** and **first password** in the login area.
- 2 You will be prompted to change it and set a secure password.



- 3 Click on **Set your secure password**.
- 4 Fill in the form and click **Save**.  
***NOTE:** Passwords should contain a minimum of 8 characters and should not be a dictionary word. You will need to change this password every three months.*
- 5 When the information is saved you will be prompted to **Logout**.
- 6 Log back in again using the secure **Username** and **Secure Password**.  
***NOTE:** The new secure password is ONLY to access the eReferral system.*

## 4. ROLES

### General users

General users of the system will be allocated a title such as Practitioner, Case Manager, Allied Health Practitioner or one reflecting their job title. Users with this level of access will be able to receive and send referrals, and may be allocated referrals from the Referral Coordinator.

### Service Coordinator

Service Coordinators receive all incoming referrals, can allocate referrals to other users within the service and may also send referrals. They can only view and process incoming referrals for the one service they logged into.

### Referral Coordinator

Referral Coordinators receive all incoming referrals for all services that they are registered to and can allocate a referral to other users within the service. They can send referrals, however, if they are registered to more than one service, they will be asked to select a service they wish to send the referral from.

## 5. MAKING A REFERRAL

Before adding a new client to the eReferral system, a search needs to be carried out to check if the client is already on the system.

### 5.1 Searching for a Client

- 1 Click the **Quick Referral** button or the **Search** tab.
- 2 Enter **Search Data** (*surname, sex and consent are sufficient to start a search*).
- 3 Tick the **Consent to search for the above client** box.
- 4 Click the **Next** button.
- 5 If there are clients matching the search a list will be generated. Click on any of the clients to view the client's details or make a referral.
- 6 Changes to the client record can be made by clicking the **Edit Client** tab and later clicking the **Save** button at the bottom of the screen.
- 7 To continue with the referral click the **Next** button.

### 5.2 Adding a New Client

If the client is not found in this search they will need to be added. A screen will appear prompting the client details to be entered.

- 1 Enter client data (the fields in red are mandatory).
- 2 Click the **Add Client** button at the bottom of the screen.  
*The client data will be saved and appear on the screen.*
- 3 Click **Next** to continue with the referral process.

### 5.3 Sending the Referral

To send a referral you will need to:

- Select an agency to receive the referral
- Complete the Cover Sheet
- Attach the SCoTT information or complete the online forms
- Get Consent
- Send

## 5.3 Sending the Referral

### 5.3.1 Selecting an Agency to Receive the Referral

Referrals may be sent via the S2S System using one of the following methods:

- Electronic referral to member agencies fully registered with the S2S system.
- Fax referral, using the FAX gateway.
- Secure email referral, using the PKI email facility.

Select a service to receive a referral by clicking on one of the following buttons:

- Top 10
- Browse
- Search option



#### Top 10

Clicking **Top 10** lists the last 10 services that you have sent a referral to.

- 1 Click on the **Top 10** button.
- 2 Tick the box next to the service you wish to refer to.
- 3 Click on the **Done** button when the selection is complete.

#### Browse

Clicking **Browse** lists all member agencies fully registered with the S2S system.

- 1 Click on the **Browse** button.
- 2 Click on the arrow besides the relevant region.
- 3 Tick the box next to the service you wish to refer to.
- 4 Click on the **Done** button when the selection is complete.

#### Search

Clicking on **Search** allows referrals to be sent via fax or email to services not registered with the S2S eReferral system. The fax gateway allows referrals to be sent via fax from the system to a direct, secure, fax number. The PKI facility allows referrals to be sent to services with a secure PKI facility installed.

- 1 Click on the **Search** button.
- 2 Type in the service name and suburb.
- 3 Tick **Include External Services** to refer to services not registered with S2S.
- 4 Tick the box next to the service you wish to refer to.
- 5 Enter the fax number if the referral is being sent via fax.
- 6 Click on the **Done** button when the selection is complete.

## 5.3 Sending the Referral

### 5.3.2 Completing the Referral Cover Sheet

**Referral cover sheet**

---

**General referral details**

Client: JON, Jon 12/10/1940  
 From: Happy Infoexchange, Ph: 9999 9999  
 Occupational Therapy, Banyule Community Health Service  
 Date/Time: 2006-07-18 10:26:44

---

**Priority**

This referral has a priority of:  Low  Routine  Urgent

This referral is a Renewal(ACAS/T):

---

**Information Access Level**

Select your information access level for this referral. ?

Standard

---

**Feedback required**

Tick this box if you wish to continue to receive feedback about this referral after it has been accepted.

Feedback required?

---

**Referral notes**

Include here any notes or comments for the receiving service.

The following sections of the Cover Sheet should be completed:

- **Priority**

Select the priority level of the referral: Low / Routine/ Urgent

- **Information Access Level:**

There are 3 levels of privacy to choose from that determine who will be able to view the referral details. The default is set to 'standard'.

Standard:

Client information can be accessed with client consent.

Limited:

Only the referral event may be accessed with client consent.

Sender/Receiver

Only the sender and receiver can see that the referral has occurred.

Only:

- **Feedback Required**

This box is pre-ticked by default. You will continue to receive feedback about this referral after it has been accepted. Untick this box if you do not wish to receive feedback after the referral has been accepted.

- **Referral Notes**

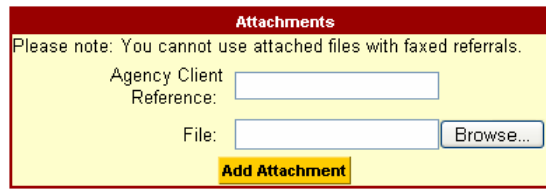
Record any notes as part of the referral, such as the purpose of the referral.

## 5.3 Sending the Referral

### 5.3.3 Completing SCoTT Forms

The SCoTT form may either be completed on-line or attached to the referral from your client management system.

- **Attachments**

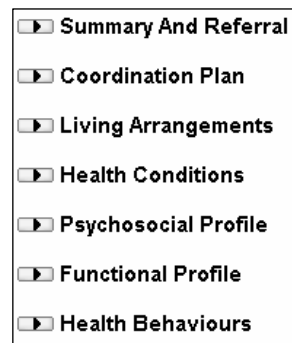


If you have chosen to attach the SCoTT form, click on **Browse** to locate the document and then **Add Attachment** to upload the document.

*Note: You cannot use attached files when faxing a referral.*

- **Online SCoTT Forms**

The online SCoTT forms are found below the attachment area, listed as follows:



To complete online forms follow the steps below:

- 1 Click on the black arrow/triangle to the left of the profile name to open each section.
- 2 Complete the relevant sections required for the referral.
- 3 Click on the **save** button.

When a section has been completed, the profile name in the list will be highlighted in yellow and marked as [Included].

### 5.3.4 Record of Consent

Mark the consent tick box to indicate that you have received consent from the consumer to make this referral on their behalf.

### 5.3.5 Sending the Referral

Click on the **send** button at the bottom of the screen.

## 6. PROCESSING INCOMING REFERRALS

All new incoming referrals will be shown with a status as **new**. The first step in processing a referral is to change the status to **acknowledged**. Further status changes may then be made to reflect where a referral is in the system.

The referring agency will be notified of changes to a referral's status if feedback has been requested.

REFERRAL ID	CLIENT	DATE/TIME	STATUS
10012	CHRIS, Tarrant	15/06/2006 12:05	NEW
9630	WOLF, Peter	07/06/2006 14:58	NEW

### 6.1 Acknowledging Incoming Referrals

- 1 Click on a referral with a status set as **New**.
- 2 Click on the **Acknowledge** button at the bottom of the page.
- 3 Add any notes that may indicate to the sender how you plan to deal with the referral.
- 4 Click on **Next**.

The status of the referral will now be set to **acknowledged**.

### 6.2 Changing the Status of Incoming Referrals

To further process this referral, follow the steps below:

- 1 Click on the referral from either the **Incoming** tab or **Open** tab.
- 2 Click on the **Change Status** button.
- 3 Select the status from the drop down list.
- 4 Add any notes.
- 5 Attach any extra information if applicable.
- 6 Click on **Next**.

This referral will now only be visible in the **Open** tab from where you can further process or close the referral. Once a referral is closed, the information will be visible from the **Service Records** area.

*Note: If you receive referrals via a referral coordinator or service coordinator, the status in your incoming area for new referrals will be **Allocated**.*

## 7. MONITORING SENT REFERRALS

The **Sent** tab is used to store sent referrals that are awaiting acknowledgement by either your service or the receiving service. When both parties have acknowledged the referral it will not be visible in this area. To avoid a build up of referrals in the sent tab, it is advisable to acknowledge changes made by the receiving service.

If you have chosen to receive feedback when sending a referral, the referral will appear here each time a status has been changed by the receiving service.

### 7.1 Acknowledging Feedback

- 1 Click on a referral in the sent tab that has a status other than 'new'.
- 2 Click on the **acknowledge feedback** button.
- 3 Add any notes.
- 4 Click on **Next**.

This referral will disappear from the sent tab and re-appear only when the receiver makes a change to the status.

### 7.2 Viewing Service Records

To view a comprehensive list of referrals sent or received by your service follow the steps below:

- 1 Go to **Referral** in the top menu bar.
- 2 Click on **Service Records**.
- 3 Select either **Sent** or **Received**.

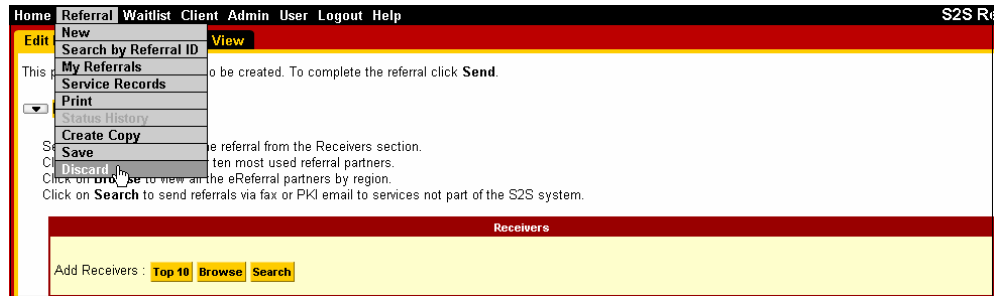
*A list of all sent or received referrals for your service will be displayed.*

Home Referral Waitlist Client Admin User Logout Help						
SCo						
New						
Search by Referral ID						
My Referrals						
Service Records						
Search						
SCoTIs						
Service records - Sent						
RE	Print	Received	DATE/TIME	TO	STATUS	
11	Status History	Deanna, 12/09/1977	19/07/2006 10:38	Paediatric Occupational Therapy, Banyule Community Health Service	NEW	
11	Create Copy	Deanna, 12/09/1977	19/07/2006 10:38	Aged Care Inpatient Physiotherapy, Austin Health, Austin Hospital	NEW	
11360	Save	HORNSBY, Deanna, 12/09/1977	19/07/2006 10:38	Respite Care, Banyule City Council	NEW	

### 7.3 Draft Tab

The **Draft** tab lists referrals that you have started, but not sent. From this area, a referral may be completed and sent or it may be discarded. To complete and send the referral click on the referral from the draft tab and complete the steps above, see 5.3 *Sending the Referral*. To discard a referral, follow the steps below:

- 1 Click on a referral in the draft tab.  
*The Edit Referral page will be displayed.*
- 2 Click on **Referral** from the menu bar.
- 3 Select **Discard** from the drop down menu options.



## 7. REPORTS

Reports may be generated by any user with a role in the system. The following reports types may be generated:

- **Sent and Received Referrals**

This report shows the monthly number of referrals sent and received by your service.

- **External Referrals**

This report shows the monthly number of fax or PKI email referrals sent by your service.

- **Allocated Referrals**

This report shows the number of referrals allocated to each user in the service at the time of the report.

- **Response Time**

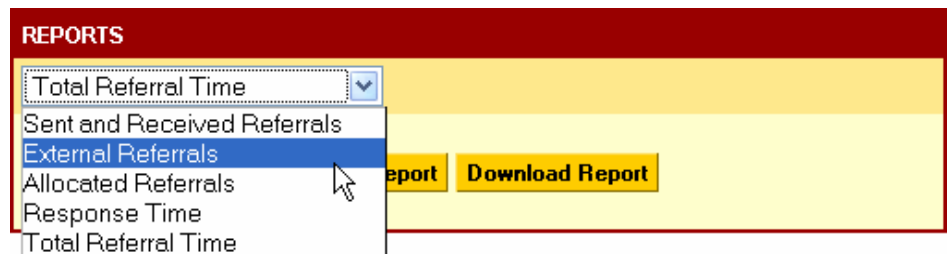
This report shows the average, minimum and maximum time it took for another service to respond to a referral your service sent, for each month.

- **Total Referral Time**

This report shows the average, minimum and maximum time it took for another service to close a referral your service sent, for each month.

## 7.1 Generating Reports

- 1 Go to **Admin** in the top menu bar.
- 2 Click on **Reports**.  
*The Reports page will be displayed.*
- 3 Select the desired report type from the drop down menu.
- 4 Click on **View Report** (to view the report on-line) or **Download Report** (to export the report in Excel format).  
*The Report will be displayed.*



## 8. SUPPORT HELPDESK

Password or system support is available via phone or email:

Monday to Friday: 8:30am - 5:30pm

Email: [referral-support@infoxchange.net.au](mailto:referral-support@infoxchange.net.au)

Phone: (03) 9418 7466

## 9. ELECTRONIC REFFERAL TEST SITE

A test website has been created to allow system users to practice using the eReferral system and avoid errors being made on the real system.

The test site is located at <https://test.s2s.org.au/> and can be accessed using one of the following usernames and passwords:

Username: happy  
Password: infoxchange

Username: grumpy  
Password: Infoxchange

## 10. TROUBLE SHOOTING

This section provides some solutions for common queries or problems that might arise whilst using the S2S Service Coordination Referral System.

### 10.1 Using the Back Button

Using the back button that is a part of the web browser will sometimes lead to system errors. Do not use this button, instead, it is recommended to navigate your way through the system using the available menu options, tabs or yellow buttons.

### 10.2 Scanning Documents

The following scanner settings are recommended when attaching a scanned document to a referral:

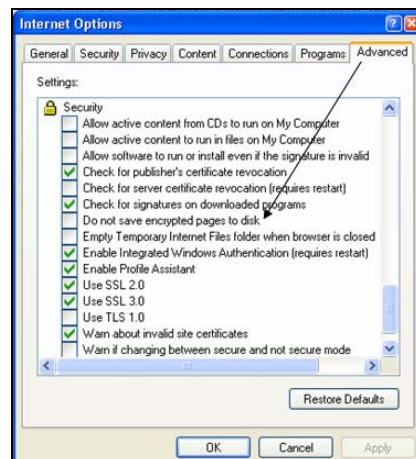
- Black & White image
- 72 - 200 dpi resolution

*Note: Images scanned at more than 200 dpi will have its edges clipped when printed directly from the system. To effectively print such documents first save the file to the hard drive and then print.*

### 10.3 Internet Explorer Speed Settings

Slowness may be experienced when using the S2S system as a result of incorrect Internet Explorer settings. Follow the steps below to adjust the setting:

- 1 From the menu options on the browser select **Tools**, then **Internet Options**.
- 2 Click on the **Advanced** tab.
- 3 Scroll down until you see the **Security** setting.
- 4 Untick '**Do not save encrypted pages to disk**'.



## 11. APPENDIX

### 11.1 User Registration Form

Below is an example of the on-line form that needs to be completed by all users before access to the system may be approved. See part 2. *Registering as a Member* for instruction on completing the form. The username assigned here is a public name, it is therefore recommended to select a username based on your name.

**Please submit your details** (required fields are **red**).

**Given Names:**

**Family Name:**

**Position:**

**Organisation:**

**Telephone:**

**Mobile Phone:**

**Email Address:**

**Please select a state before selecting a region or network**

**State:**

**Region:**

**Network/Program:**

**About Yourself:** Please include any information about yourself that other individuals or agencies may find useful (e.g. details of your particular specialisation, skills and work experience).

**Address Book:**  Add me to the Email Address Book  
(A community networking tool that allows other Infoxchange members to access your contact details and networking information.)

**Note: your Username and Password will be case sensitive -- best to use only lowercase characters**

**Username** (6 to 12 characters. Please enter something sensible since it will be your public nickname):

**Password** (6 to 12 characters):

**Confirm Password:**

## 11.2 Email Notifications

Below is an example of an email notification of a new incoming referral.

Subject: [REF:42995] Referral Notification

\*\* The ID for this referral is: 12345 \*\*

A new referral has been sent to the following agency and service:

Agency: Monash City Council

Service: Property Maintenance (HACC) (Home Maintenance)

Use the following link to connect to the system:

[https://eastern.s2s.org.au/referral/view\\_details.chtml?docid=12345](https://eastern.s2s.org.au/referral/view_details.chtml?docid=12345)

Below is an example of an email notification of a change in status for a sent referral.

Subject: FW: [REF:36979] Referral Status Change

\*\* The ID for this referral is: 36979 \*\*

The referral you sent matching the details below has been updated to a status of: Referred Back

Referral details:

Receiver: Agency: Monash City Council  
Service: Property Maintenance (HACC)

Sender: Agency: MonashLink Community Health Service  
Service: Allied Health Service: Occupational Therapy  
Role: Allied health practitioner

You can use the following link to connect to the system:

[https://eastern.s2s.org.au/referral/view\\_details.chtml?docid=12345](https://eastern.s2s.org.au/referral/view_details.chtml?docid=12345)

### 11.3 Information Access Guidelines

The privacy and consent principles underlying the Electronic Service Coordination System (ESCS) are that the information necessary to provide the most appropriate health/community services may only be accessed (with consumer consent) in order to provide the:

- Right information
- To the right people
- For the right reason
- In the right way
- At the right time.

### 11.4 Information Access Levels

To facilitate service coordination while safeguarding privacy consumers are asked (for a given referral) to give consent for access to information at one of the following levels:

<b>Information Access Level</b>	<b>Information Accessible to Direct Referral Recipient</b>	<b>Information Accessible to Other Providers (with consumer consent)</b>	<b>Service Coordination Levels</b>
Standard	All referral information sent directly to service	All information and attachments can be accessed by practitioners subject to consumer consent.	High
Limited	All referral information sent directly to service	The consumer identification, sending and receiving services, the sending practitioner, the referral date/time, the current status, service start and end dates and the most recent feedback or outcome.	Medium
Sender/ Receiver only	All referral information sent directly to service	The referral is only visible to sender and receiver and other parties cannot see that a referral has been made.	Extremely Limited

## 11.5 Information Access Level Setting and Consent Procedures

1. To make a referral using the Electronic Service Coordination System (ESCS), agencies must obtain consent to do so from consumers. This consent is to be recorded on the Consumer Consent to Share Information form, the document used for general referral consents. This form should be completed in the usual manner including providing privacy information but consents relating to use of ESCS must also be recorded on this form as outlined below.
2. Practitioners should ascertain the appropriate Information Access Level using the bold text laid down on the Consumer Privacy and Consent Information Sheet. A copy of that sheet should be given to the consumer/care/interested person if requested. If the consumer/carer requests further information or if the practitioner believes it should be provided, explain fully the 'Limited' and 'Sender/receiver only' levels. The Privacy and Consent Information Booklet contains the necessary detailed information. Note that selecting the Information Access Level is the prerogative of the consumer.
3. Consent to use ESCS to make the referral and access the system must be obtained. Verification that this has been done should be recorded by entering 'ESCS' into the third column of Section 1 of the Consumer Consent to Share Information form.
4. In addition, the Information Access Level selected by the consumer for a particular referral must be entered in this column i.e. Standard, Limited or Sender/receiver only.
5. The entry in the third column might therefore be: ESCS – Standard. Any other limitations on the use of ESCS should also be recorded at that point.
6. A Consumer Consent to Share Information form remains current and valid for a single episode of care constituting the primary purpose for which information was collected or a directly related secondary purpose the person would reasonably expect.
7. If it is decided that a referral is necessary subsequent to completion of the initial Consumer Consent to Share Information, practitioners should review the contents of that form and, if the situation is already covered, proceed with the referral in accordance with the stated wishes of the consumer.
8. If an existing, current Consumer Consent to Share Information form does not cover the referral in question, a new form must be completed. Again, the practitioner will record the decision by the consumer on general use of ESCS and Information Access Levels.
9. Note that when a practitioner checks a consent box in ESCS, this constitutes permanently recorded confirmation that the practitioner has taken the necessary steps to obtain consumer consent (written, verbal or given by an authorised person on behalf of the consumer).
10. A hard copy of all Consumer Consent to Share Information forms should be retained by the sending agency and a copy must be given to the consumer if requested.

## 11.6 Obtaining Consent

Practitioners provide consumers with the following brief, simple verbal information on interview (much more detailed information can be provided on request or if the practitioner considers a more detailed explanation to be necessary):

1. **To provide the best possible service, I would like to make referrals to ..... using our electronic referral system. Do I have your consent to do this?**
2. **In the future, services wanting to access this information may only do so with your consent. Are you happy for practitioners who have your consent to access all the information in this referral? [*Standard Information Access Level*]**
  - If the consumer has any reservations and/or does not consent to use of the Electronic Service Coordination System (secure web-based electronic referral), then alternative but less satisfactory ways of making the referral are available and the consumer must be advised of these.
  - If the consumer has any reservations and/or does not consent to the 'Standard' Information Access Level, the more restrictive 'Limited' and 'Sender/receiver only' Information Access Levels must be explained.

## 11.7 DHS Consumer Consent to Share Information Form

Below is the DHS Consumer Consent to Share Information form, used to obtain consumer consent when sending referrals via the eReferral system. Use Section 1 of this form to define the level of access for a referral that is being sent.

### Consumer Consent to Share Information

To record freely given informed consumer consent to share their information with a specific agency/ies for a specific purpose/s.

#### Consumer

Name: Homer Simpson

Date of Birth: dd/mm/yyyy 12 / 12 /1981

Sex: male

UR Number: 1234

or affix label here

### Section 1: Proposed Information Uses and Disclosures

The following service(s) are recommended. It is also recommended that relevant information is forwarded to the agency(s) that provide these services, in order that consumers receive the best possible care.

Service Type <small>Code:</small> Examples: – Physiotherapy – Specialist consultant	Name of Agency Examples: – Any agency – Nominated clinic	Type of Information <i>(including limits as applicable)</i> Examples: – All relevant information – Test results only
Physiotherapy	Somewhere clinic	<b>ESCS-Standard</b>
Podiatry	Another clinic	<b>ESCS - Limited</b>
Drug and alcohol withdrawal	Bandwagon clinic	<b>ESCS – Sender/receiver only</b>

**Note** – Only Section 1 of the consent form is displayed here, please refer to [www.s2s.org.au](http://www.s2s.org.au) to access the complete document.