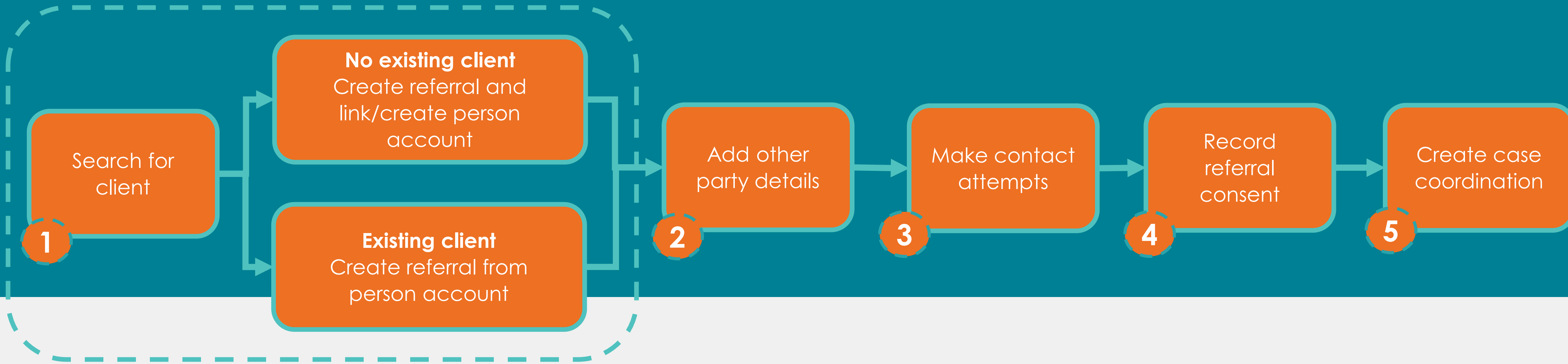
CREATE A MANUAL REFERRAL



1 **Search** for client and create referral

- Search for the client either by using a **Global Search** or from the **Main Menu**, select **Accounts** and use the search bar.
- **If there is an existing client**, create the referral from the person account – select the **Create a Referral** button. Client details will pre-populate. Enter the referral details (e.g., **Referral Type**, **Location**, **Referral date**, **Preferred Service Stream**). Select **Submit** to create the referral.
- **If there is no existing client,** select **Referrals** from the **Main Menu**. On the list view, select **New** to create a manual referral. Complete all required details for the referral (enter as many fields as you can and ensure that you complete the mandatory fields). Select **save** to create the referral. Then select the 'create person account' option to link the referral and create the client person account.

2 **Add** other party details

- Go to the **Related** tab on the newly created referral and select **New** in the other party section. Search for the other party person account by searching their name in the person account field.
- If the other party person account exists, select the account so it is linked to a referral, enter any additional details. Select **Save**.
- If the other party person account does not exist, enter the details in the other party section and select **create person record** so the referral is linked to an other party person account.

3 **Make** contact attempts

- To make contact attempts, scroll to Referral Status on the referral. Update the status to **contact attempt**.
- Record the contact attempt made in both the:
  - **Activity timeline** on the right-hand side of the screen, select the log a call function (phone icon) to record contact attempt details (e.g., phone not answered, phone disconnected, male answered etc.) and,
  - **Referral** (Contact Attempts and Consent section) and record the contact attempt date and mode of contact.
- One contact attempt must be made within one business day of receiving the referral and three contact attempts made over five business days.
- After making all required contact attempts, for referrals with a **'threat'** risk rating and contact was not made or consent not obtained, you can close the referral. Select Closed in the referral status section and select **closure** reason.
- For referrals with a '**serious threat**' risk rating and contact was not made or consent not made, update the referral consent status to **consent not obtained** and keep the referral open. The SAM Coordinator will create a **SAM case** and the referral will remain open until the SAM case is closed.

4 **Record** referral consent

- If you have made contact with the client and they have provided consent for your WDVCAS to support them, then you can record the referral as **consented**.
- Go to the **contact attempts and consent** section of the referral and record the consent date, and referral consent status.

5 **Create** case coordination

- To create a case coordination case, consent must be obtained. Once consent is recorded, the **create new case coordination** will appear in the top right-hand corner of the screen. Select this button to create a case coordination case.
- To open the case, you can select the link in the green pop-up screen or from the related tab of the referral.
- To **record support and services** provided to the client, select the relevant service event/court diary from the quick-action buttons in the top lefthand corner of the case (e.g., Information and Support, DVSAT, External referral, Court Diary etc.)
- If a client requires **case management support**, you can refer the client to case management by selecting the case management service event, create a case management case and assign the case to your manager for their review.
- If the referral has a risk rating of 'serious threat, the SAM coordinator will create a SAM case to list the client on the next SAM.
- When case coordination services area complete, you can close the case coordination case. If it is the last case open, close the referral as well.