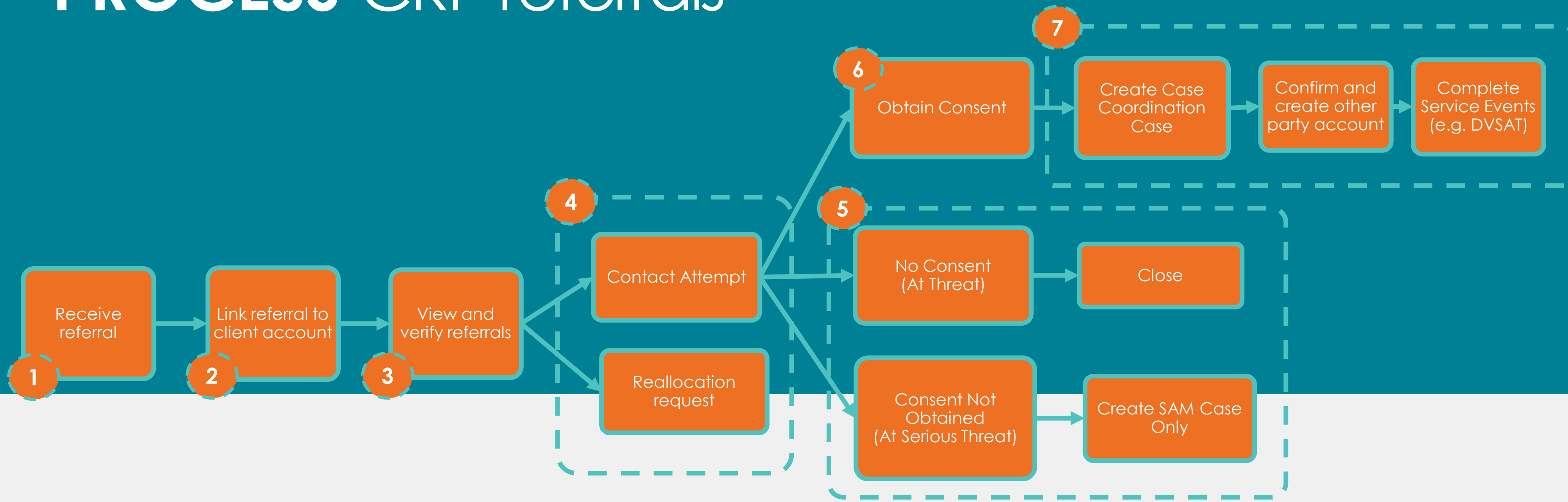
PROCESS CRP referrals



1 **Receive** CRP referral

- From the **Main Menu** drop down, select **Referrals**.
- From the available referral list views, select the **Service Area - Work Allocation** list view. This list will display all referrals allocated to your Service Area (i.e. to your WDVCAS) where consent has not yet been recorded.
- Click on the referral link (e.g., REF-000xxxx number) to access the referral and view its details. You should check the information on the details tab and view the other party and DVSAT information on the related tab of the referral.
- If you want to assign the referral to another worker, click on the person icon next to the **owner** name field and change the owner by searching for the worker's name and select to assign.

2 **Link** referral to a client person account

- On the referral record, in the **client record** field, search for the client.
- If there is:
  - an existing client person account is found, link the account by selecting the name.
  - no existing client person account, select the **create person account** button in the top righthand corner of the screen. The client person account will be created with the information from the referral and automatically linked to the referral.
- If the search result display multiple client person accounts, review each of these accounts and then select the most appropriate.
- Ask your manager to merge identified duplicate client person accounts, if found.

3 **View and verify** referral details

- On the **details** tab of the referral, review and verify the referral and confirm the referral is correctly allocated by checking the client postcode, address and preferred service stream.
- Make sure you review the other party and DVSAT information on the related tab as well to review the referral information.

4 **Reallocate** request **or make** contact attempts

- If the referral has been **incorrectly allocated** to your service area(eg., incorrect postcode/gender), process the **reallocation request** to send referral to the WDVCAP unit. Select the reallocation request button in the top righthand corner and select the reallocation reason and provide a reallocation request comment (e.g., referral has been incorrectly allocated to shared postcode).
- If referral details are verified and the referral has been **correctly allocated**, you can start making contact attempts.
- To record contact attempts, update the referral status to **contact attempt**. Then record the:
  - **details** in the activity timeline on the righthand side of the referral by selecting the 'log a call' function and record the contact attempt description (e.g., called client and left message to call back
  - **date and mode** of the contact attempt on the referral. This information will be displayed on the referral list view once recorded.

5 **Record** no consent, consent not obtained

- If no contact was made or consent was not provided by the client, for referrals with a risk rating of:
  - **threat** – record the consent status and close the referral by selecting closed in the referral status section and provide a closure reason.
  - **serious threat** – consent should be recorded as **no consent** (if client provided no consent) and **consent not obtained** (e.g., you cannot contact client, it is not safe to contact the client etc.). The referral will remain open until the SAM case is closed.

6 **Record** referral consent obtained

- If contact is made and consent is provided, you can:
  - Record referral consent as **consented** and
  - Open a case coordination case to record services provided.

7 **Create** case coordination case

- 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.)