S2S Service Coordination Glossary of Terms

Agency

An organisation which may host several services. Ex; Banyule Community Health Service

Service

Service based disciplines within an Agency such as Occupational Therapy, Physiotherapy, Social Work, Counselling etc

Roles

There are two main types of users within the system.

1. The Coordinators - who will function within the system in an intake worker position
2. General users - a role which can be the standard role/title of a staff member within the organisation ex. Case Manager, Allied health practitioner, Nurse, Medical Practitioner, Ward Clerk etc.,

The coordinators:

- **Service Coordinator**
  A Service Coordinator receives 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**
  A Referral Coordinator receives 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.

General users:

Users with this level of access will be able to receive and send referrals, and may be allocated referrals from the Referral or Service Coordinator. General users have a separate role in the system for each service that they are registered with.

Status

A range of options exist for updating a referral when its status changes during the course of the care planning or service delivery process e.g. when the client is placed on the service's Waiting List or reaches the top of the List and service provision commences; when the assessment or investigation process starts prior to the provision of services; when the client's needs change and an adjustment in service level is required or when the client indicates that the service is no longer required.

Electronic Service Coordination

The "**Change status"** button that is available from the Incoming and Open referrals area allows users to change the status of a referral. Generally, services will use a standard set of statuses for processing referrals within their service.
The system relies on the practitioners using the status options and the notes area available in a responsible manner that will facilitate good service coordination.

Acknowledged

The creator sends a referral to a selected service(s), and the particular service(s) can use the **Acknowledge** status to indicate that the referral has been received by the service. It is not an indication that the referral is accepted. This is consistent with the PPPS definition of "Acknowledgement of Referrals".
It is advisable to put in a short sentence of what the receiving intends to do with the referral such as "Thank you, will contact client" in the notes area.

Allocate

A referral has been received by a Referral Coordinator or a Service Coordinator in a Service. The coordinator can allocate the referral to a practitioner/s.

Assessment

Assessment status can be used to indicate that the client will undergo some form of assessment. It is preferable to add some notes to give an indication of the kind of assessment. The user will need to put in the start and end dates.

Assigned for Action

Assigned for Action status can be used to indicate that practitioner has planned for the provision of services for a client. The action may be that an appointment has been made or it may indicate that the referral has been passed on to the relevant department.

Action Initiated

Action Initiated status can be used to indicate that the practitioner has arranged for the provision of a service or services or it can simply mean that the client has been contacted which is the first step in the process of providing the services.

Under Investigation

The under investigation status indicates that the client is under investigation for the specific provision of a service or services. It may indicate that the service is investigating the eligibility status of the client in cases where there is some ambiguity.

Change in Service Level

Change in service level status can be used to indicate that there has been a change in service level for this client. For example the client may not require the current level of service and the service may be less frequently provided

Referred Back

This status can be used to send the referral back to the sending Agency/service for a number of reasons. Several options/reasons are available from a drop down menu including:

- ✓ Requested by client
- ✓ Waiting list too long
- ✓ Client ineligible
- ✓ Inappropriate service
- ✓ Insufficient information supplied or
- ✓ Other

Waiting List

The client has been referred to the Waiting List for a high demand Service, for example, Occupational Therapy or Dental services.

Service Provision

The service provision status can be used when the service is able to confirm that the service/s can be provided. A specified start and end date of any Service Provision will be required.

Closed

The closed status is used to indicate that the referral process in complete. It is very important to briefly indicate the outcome of the referral e.g. the Client will be attending the centre monthly for the next 12 months/Meals will be provided on an ongoing basis etc. Generally, the referral can be closed but the nominated Service will continue to provide services to the client and the client will be managed within the client management system of the service.
The closed status can also be used to indicate that the service has either been provided or is no longer required

Closed by system

The closed by system status is automatically generated by the system to close referrals that have been sent via the Fax or PKI method.

Withdrawn

The withdrawn status indicates that the referral has been withdrawn from the Service/s requested. The referral can also be withdrawn by the sending service.
Several options/reasons are available from a drop down menu including,

- ✓ Requested by client
- ✓ Waiting list too long
- ✓ Other

Other Definitions:

Compressed View:

The compressed view is an unformatted view of the SCoTT data that has been completed by the sending practitioner. The compressed view provides a basic view of inputted data for practitioners to check to ensure it is accurate and relevant. The compressed view is the most efficient version for printing and storing. This view has the identical information that is available in the normal view.

Client Consent

Client consent must be gained at key points where Client information can be viewed, stored or transmitted. There are a total of five points at which Client consent is required in the system.

These include:

- Consent to search the S2S Referral System.
- Consent to view a list of referral events.
- Consent to view referral details.
- Consent to view Service Summaries.
- Consent to transmit referral information.

Information Access Levels

- ✓ **Standard;** All information and attachments can be accessed by practitioners subject to consumer consent
- ✓ **Limited;** Basic information such as 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 is visible.
- ✓ **Sender/Receiver only;** The referral is only visible to sender and receiver and other parties cannot see that a referral has been made

File Attachment

The file attachment facility operates as in all conventional software. The browse option enables the user to search for a file/s that maybe saved within the user's own computer or other portable drives. These files can be downloads of the SCTT from client management systems, or other profiles or documents that are required by services as part of a referral.

Reports

There are five basic reports that are available to all users

- **Sent and Received Referrals**
  The report shows the number of referrals sent and received by your service, grouped by months. The total is shown at the end. There is no start and end date, all referrals are reported on.

- **External Referrals**
  The report shows the number of external referrals sent by your service via fax or PKI, grouped by months. There is no start and end date, all referrals are reported on.

- **Allocated Referrals**
  The report shows the number of referrals allocated to each user in the service at the time of the report.

  The system does not keep historical records of allocations and so cannot report on historical information e.g. it cannot show the total number of referrals allocated to each user over a month.

- **Response Time**
  The report shows the Average, Minimum and Maximum time it took for another service to respond to a referral your service sent, for each month. There is no start and end date, all referrals are reported on.

- **Total Referral Time**
  The report shows the Average, Minimum and Maximum time it took for another service to close a referral your service sent, for each month. There is no start and end date, all referrals are reported on.

Lists/Tabs

Homepage
The Homepage of the eReferral system is the first page that you will see after you login.
This page can be customised to suit individual requirements. It can be set to Incoming, Open, Sent, Draft or client search page. The date and name format of the client lists can also be changed according to user preferences.

- **Incoming**
  A list of incoming referrals for review.
- **Sent**
  A list of referrals you have sent.
- **Open**
  A list of open referrals that have been received, acknowledged and/or have undergone a status change by your service. When a referral is closed it will no longer be visible in this area.
- **Draft**
  These are referrals that have been started but haven't yet been completed and sent.
- **Client Search**
  The initial process to be undertaken before adding a new client to the eReferral system. It is important to check the eReferral system for existing client records.

✓ **Edit Referral**
The Edit Referral page allows a new referral to be made.

Receivers

The destination of the sent referral can be selected here. There are three different options for selecting the service to send a referral to, **Top 10, Browse & Search**

- **Top 10:** This method shows the last 10 services that you have sent a referral to.
- **Browse:** This allows you to view all services that are currently registered with eReferral.
- **Search:** This option is used only to send referrals via fax or email. To send referrals to services that are not registered with the S2S eReferral system, you will be able to use both a fax gateway and a PKI-encrypted email option. The fax gateway allows referrals to be sent via fax from within the system to a direct, secure, fax number, whilst the PKI facility allows referrals to be sent to services which have the secure PKI facility installed.

Fax

The internal fax gateway is an alternative option for sending referrals. This option can be used where the service you want to send the referral to isn't part of the S2S eReferral system. You can send the referral directly from your computer to their fax machine without printing a hard copy. BUT it is not possible to include attachments including with your documentation when using the fax option.

PKI

(Public Key Infrastructure) is Information Technology (IT) infrastructure that enables the secure exchange of data. The PKI Encrypted referral option provides a secure electronic alternative for eReferrals between services that are part of the S2S system and services outside the system. It is possible to attach documents with this option.