Create a referral - quick reference guide

The HSNet online referral tool allows services to locate and electronically refer clients to other human services agencies. Referral enabled services can only refer to other services that have been referral enabled.

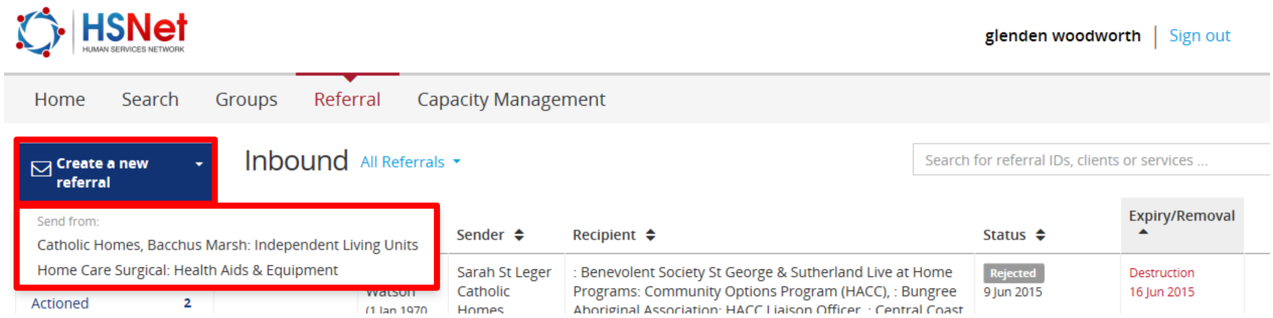
To use the HSNet online referral tool you must ensure:

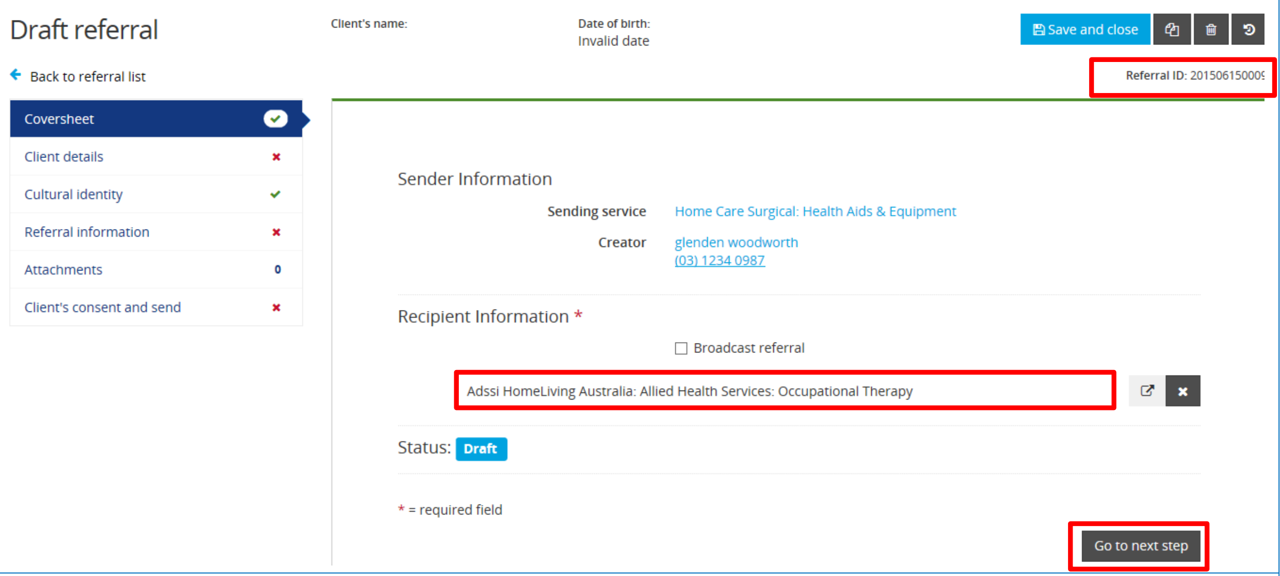
- You are a registered user of HSNet
- Your service has been referral enabled
- Your registered user access has been authorised to create/receive referrals for that service

There are three scenarios for creating a referral:

- Create a referral for a client and send to an identified service.
- Create a referral for a client and broadcast it to multiple services. (See – Create a Broadcast Referral)
- Create a draft referral for a client where the receiving/recipient human service agency has not been determined.

To create an electronic referral for a client, log on to www.hsnet.nsw.gov.au and access the Referral area

Follow these steps to create a new referral for a client:	
1.	Click on **Create a new referral** option. ***Note:*** *Users who represent multiple services can select the most appropriate from a list when creating a referral.*
	
2.	Select the service that the referral is being sent from. ***Note:*** *If you are not linked to multiple referral services, this prompt will not appear*
3.	The referral will be assigned a **Referral ID** number located at the top right hand corner. Enter the name of the service receiving the referral in the **Recipient Information** field. ***Tip****: Start typing a search term in the Recipient Information field to search the directory for available services* ***(This is going to change in a future release)****.* ***Note:*** *Where the recipient service agency is unknown, leave Recipient Information field blank. This information will need to be completed before the referral can be sent.*



4.	Click on the **Go to next step** button to complete the client details information.
5.	**Client details** information screen is displayed. Complete the following fields: ***Note:*** *Mandatory fields are highlighted in red.* ***Tip:*** *You can also use the referral panel to navigate to different areas of the referral form.*

Field	Description
Title	Client's title.
Gender	Client's gender.
First name	Client's first name.
Preferred name	Name that the client likes to be called if it is different to their first name
Surname	Client's surname
Date of birth	Client's date of birth or alternatively enter in client's age in the **Age** field. Where client's date of birth and age is unknown refer to **Date of birth estimate** field for instructions.
Date of birth estimate	Select the Date of birth estimated checkbox where birth date is unknown. When the Date of birth estimate checkbox is selected: **Option 1:** Enter in the client's estimate birth year only in the Date of birth field; the Age field will automatically be filled in. **Option 2:** Enter in the client's estimated age in the age field; the Date of birth field will be automatically filled in with 1 / 1 / year of birth.
Age	Client's age. The age will automatically calculate if the date of birth field is filled in.
Email	The email address that will receive any communications in relation to the referral
Phone number	Contact phone number for the recipient service agency of the referral to contact if they have questions, select **contact number type** from the list. To add additional contact phone numbers, click on the **Add a phone number** button.

No fixed address	Select this option where the client does not have a home address. ***Note:*** *If this option is selected, details on how to contact the client must be noted in to the* ***Contact information*** *field to inform the service agency.*
Home Address	Client's permanent home address
Postal Address	Client postal address is automatically filled in with the Home address, to change postal address uncheck the **Same as above checkbox** and enter an alternative postal address.
Preferred contact method	Advice to the recipient service agency of the client's preferred method of contact.
Automatically notify client of actions	Indicates that the client would like to receive automatic notification from HSNet when an action has been taken on their referral. Select notification option either email or SMS.
Contact information	Additional information to advise the recipient service agency on how to contact the client. Include any issues or special instructions e.g. Beware of dog

6. Click on the **Go to next step** button to complete the client's cultural identity information. Completing this information is optional.

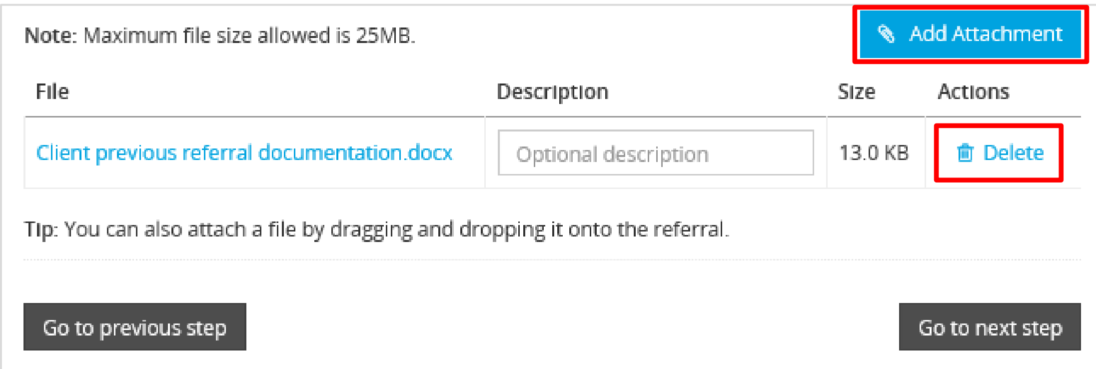
Field	Description
Preferred language	Client's preferred communication language.
Country of birth	Client's country of birth.
Indigenous status	Client's status in relation to Aboriginality or Torres Strait Islander.
Religion	Client's religion.
Language/communication assistance required	Select the checkbox if the client requires an interpreter.
Interpreter language	Interpreter communication language.
Interpreter gender preference	Client's Interpreter gender preference.

7. Click on the **Go to next step** button to complete the client's referral information.

Field	Description
Emergency referral	Referral urgency type. ***Note:*** *If the referral is urgent, it is good practice to ring and talk to the recipient service agency to ensure that they are able to pick up the request for service.*
Response required within days	The number of days before the referral expires? ***Note:*** *This defaults to the number of days that the recipient service has requested for standard actioning of referral requests*
Reason for referral and	Detail reason for referral and the type of service required for the client.

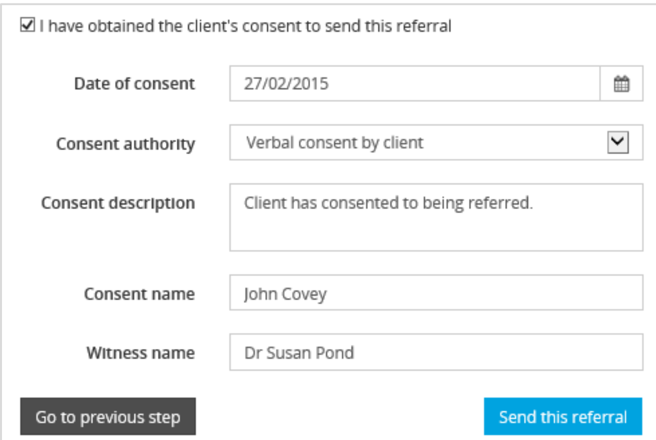
service required	
Other services in place	List of current services that are in place for the client.
Special requirements and alerts	Special requirements or alerts for the client e.g. alert for allergies in referrals to Meals on Wheels or respite or indicate use of mobility devices in transport referrals so that a community transport provider is aware of the type of vehicle they will need to transport the client.
Additional notes for referral	Additional information for the referral e.g. indicate there is more information for this referral that can only be given by phone or contact details of the clients medical practitioner.

8. Click on the **Go to next step** button to complete the **Attachment** section.



9. Click on the **Add Attachment** button to find and select the file to be sent with the referral. Enter a description for the attachment if required.
Tip*: To add multiple files at once, hold Ctrl button while selecting files in the* ***Choose File to Upload window****.*
To delete an attachment click on the **Delete** link next to the file and click on the Yes button to confirm the deletion.

10. Click on the **Go to next step** button to complete the client's consent information.



11. Select the **I have obtained the client's consent to send this referral** checkbox and complete the following fields:

Field	Description
Date of consent	Date the client granted permission to send this referral.
Consent authority	The method of the client's consent.
Consent description	This field is used to capture information for non standard consent. For example if the client is being referred under section 16A of the child protection act
Consent name	Name of the person providing the consent
Witness name	Name of the witness for the consent. Only used where an organisation requires witnessing of consent by a third party.

12. Click the **Send this referral** button to transmit it to the recipient service agency
Note: *If this button is disabled, it indicates that one or more sections of the referral have not been completed.*

13. The referral is sent to the recipient service agency to action and is now listed in your **Outbound** > **Sent** subfolder.
Actioned referrals will be listed in the corresponding **Outbound > Accepted** or **Rejected** subfolder.
Referrals that have reached their expiry date will be listed in the **Expired** folder and withdrawn referrals are listed in the **Withdrawn** folder.