

## **Advice Services Coventry Referral form**

Caroline, Advice Services Coventry network coordinator, has worked with their web designer to set up their web referral page, with funding from the NRF. She developed it with the thought of paper form in mind. All the caseworkers have adopted the system very enthusiastically.

There is a website agreement that all partners have signed up to on how to use the referral system. i.e.: they have to check it every day, there is a defined time period to make referral etc

### **How the referral form is set up:**

The member agency logs in the restricted area of Advice Services Coventry website and access the referral form.

The adviser writes a one line description of referral, and then

- Selects who they want to send it too (dropdown)
- Writes key date- by when it needs to happen
- Tick box highlighting if it's an emergency (if it is they have to ring up to check availability)
- Says whether the client is on benefits (tick box)
- Says whether it is a repeat client (tick box)
- Reports the details of case
- Fills in the consent form- the partner agency will keep it on file
- Fills in the name and address of client- National Insurance Number and telephone number
- Ticks whether the client needs an interpreter/ which language
- Ticks whether access needs, and detail what they are
- Attaches any relevant notes, with the possibility to attach documents in other formats

Once sent, the adviser gets a **confirmation email** ('you have sent referral to X').

The partner agency gets an email saying they've received a referral.

The system also allows you to see whether somebody has picked up the referral e-mail.

The partner agency has then 2 weeks to do an **outcome**:

- Good referral- right to make it, able to make contact with client
- Failed- you could have done it yourself/ we do not deal with this type of cases
- Not able to make contact with client

Coordinator can **monitor** what's going on, if failed referrals, etc can do more training if necessary.

### **Training to use referral:**

Caroline trained caseworkers during their team meetings. Caseworkers were really enthusiastic about the referral system.