RIVIAM Multi-agency Referral Hub Service

User Guide

6th June 2023

V1.0

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Version Control

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1 Introduction

1.1 Purpose of this document

RIVIAM's Multi-agency Referral Hub enables healthcare, social care and third sector partners to receive referrals and work together in a seamless, efficient, secure way online, co-ordinating care and support for people.

It enables true team co-ordination and collaboration by creating a digital ecosystem where multiple organisations can work together on a single platform, creating efficiencies for all, reducing duplication, and improving patient care.

This User Guide provides new or existing users with a step-by-step guide explaining the different ways referrals can be submitted to the Multi-agency Referral Hub.

It also describes how users can access the RIVIAM Workflow referral management system to triage referrals and progress them through each step to completion.

Measuring outcomes and reporting is an important element of the referral management process. RIVIAM can discuss customer requirements as required.

2 Background

2.1 What is the Multi-agency Referral Hub Service?

The Multi-agency Referral Hub Service enables multi-agency care providers such as Hospital Discharge Teams, Local Authorities, healthcare, social care and third-sector partners to connect, collaborate and co-ordinate care. All partners can work together so people can receive the care they need.

This user guide will illustrate how the service enables partnering organisations to digitally:
- Create and receive referrals in a variety of ways.
- Co-ordinate care provided by partnering organisations. For example, Hospital Discharge Teams, Local Authorities, health and social care providers and various third sector organisations.
- Create efficiencies in the hospital discharge process, improving patient flow, freeing up hospital beds and preventing re-admission.
- Identify and manage people receiving care and see the contacts associated with their care.
- Partners can share information seamlessly in RIVIAM and see a single view of a person's care to deliver a joined-up approach. This is useful for managing MDTs.
- Manage demand. They can create, triage, manage and track referrals, coordinating what has been done for whom, by whom and when.
- Partners will be able to collate data and report on outcomes recorded.

People receiving care want, need and expect organisations and agencies to work well together so their care is organised. As a result, organisations need to avoid repeating information, duplication and wasted resources. RIVIAM's Multi-agency Referral Hub Service meets this need.

2.2 Why is the service so useful?

2.2.1 For Local Authorities, healthcare, and social care providers

RIVIAM's Multi-agency Referral Hub Service enables Local Authorities to work seamlessly with their commissioned service providers and third sector organisations delivering and demonstrating joined-up care for people, improving lives.

RIVIAM's Multi-agency Referral Hub Service is secure, efficient, and easy to use. In addition, the data provided on RIVIAM dashboards can be used to collate and report the services' outcomes.

2.2.2 For Hospital Discharge teams

The Hospital Discharge Service means different authorised teams can digitally:

- Complete one online form that can create multiple referrals sent to various partnering Local Authority services and third-sector organisations.
- Identify and manage people referrals that require discharge-dependent services.
- Easily identify people where an expected discharge date has elapsed and view the status of a referral.
- Update estimated discharge dates and amend the hospital ward as required.
- See the progress of a referral being managed by a partnering organisation.
- See a timeline of activities being managed by a partnering organisation.
- Work seamlessly with partnering health and social care providers, delivering and demonstrating joined-up care for people, improving the flow of patients within a hospital, freeing up beds and preventing re-admission.

RIVIAM provides partnering Local Authority and third sector organisations with a view of the Hospital Discharge dashboard to monitor and manage the progress of a referral via RIVIAM Workflow.

2.2.3   For the third sector

Many third-sector organisations use a case management system specifically for their individual service which does not integrate with other partnering organisations. RIVIAM solves this problem by providing the digital ecosystem where the partnering organisations can work together.

For partnering third sector organisations, the service provides an efficient way of receiving and managing referrals together online, reducing the burden of paper-based and manual processes and duplication.

RIVIAM provides third-sector organisations with a single view of a person's care, helping them and other service providers deliver a more joined-up approach for people.

2.2.4   For social prescribers

For social prescribers based in Primary Care Networks that are partnering with local authorities, health, and social care providers and multiple third sector organisations, RIVIAM makes it easy to create, receive and manage referrals. The service will reduce duplication, give the referrer the ability to track their referrals and enable them to manage referrals and easily onward refer. In addition, RIVIAM will act as their referral management tool.

2.3   RIVIAM support

RIVIAM support is provided from 9.00 am to 5.30 pm every weekday, excluding bank holidays.

We have a Help Centre with lots of useful information for our users: https://support.riviam.com/hc/en-us.

You can also use Webchat to connect with one of our support team or submit a support ticket via the Help Centre or by emailing support@riviam.zendesk.com.

3   Creating a referral

There are four ways in which a referral can be created digitally. All online referrals are created securely via the following channels.

1. A professional referral via the website.
2. RIVIAM Workflow internal forms or Service directory.
3. Re-assign the referral from one pod to another.
4. The Hospital Discharge Service.
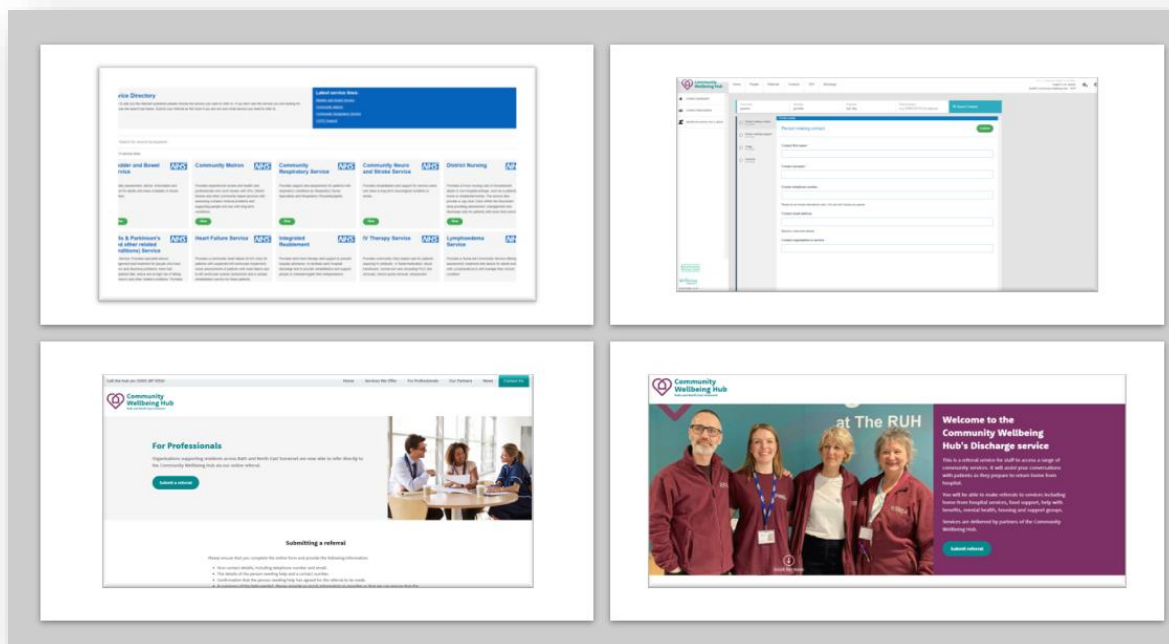
Figure 1- Creating an online referral

3.1   A professional referral via the website

A professional referrer can create a referral via the website. The user can launch the online form on the professional page by selecting Submit referral.
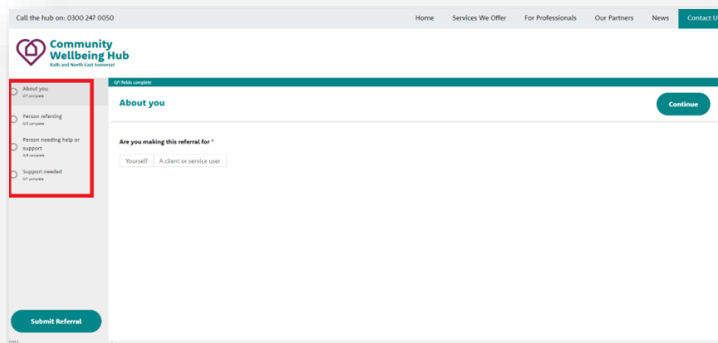
Figure 2 -Professional Referrer Form via the website

This online form can be built to the exact specification required by the customer.

In this example, there are four sections to be completed on this online form.

1. About you.
2. Person referring.
3. Person needing help and support.
4. Support needed.

Some fields on the online form are mandatory based on customer requirement and must be completed to submit the form. When one page has been completed, select Continue to move to the next page.

Once each page has been completed, select Submit Referral.

A confirmation page will appear displaying the referral number and contact details for the customer.
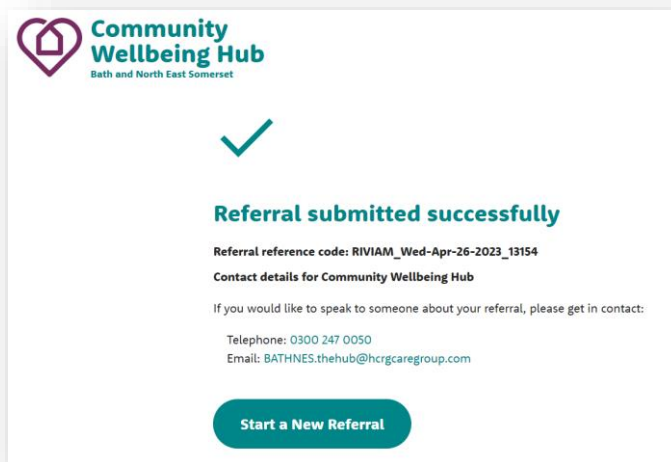
Figure 3- Professional referral confirmation page

	Please Note: The form can be configured to allow professionals to select multiple options for the support needed and generate multiple referrals through a single form submission. Alternatively, the user can complete another referral form by selecting **Start a new referral.**

3.2 Create a referral via an internal form in RIVIAM Workflow or the Service Directory

There are several ways to create a new referral whilst logged in to RIVIAM Workflow. The diagram below gives instructions on creating a new referral depending on whether the person or Contact is already known to RIVIAM.

Please see three scenarios below and instructions on how to create a new referral.

A new referral for a person with **NO** other existing RIVIAM referrals.	A new referral for a person from an existing RIVIAM contact or referrer.	A new referral for a person with existing RIVIAM contact and referrals.
• Go to the Contacts Page • Search for the contact name • No contact found • Search for the person • No person found • Create a referral to launch the referral form	• Go to the contacts page • Search for the contact • The contact will appear in search results. • Select View • The list of the contacts' referrals will appear • Create a new referral.	• Go to the People page • Search for the person • The person will appear in search results. • Select person. • The list of the persons' referrals will appear. • Select new referral.

Referrers are also able to submit a referral from a Service Directory. The Service Directory provides descriptions and customised forms for each listed service.

3.3   Reassigning a referral from one pod to another

If a referral has been received in one pod and the person receiving care requires services offered by another pod – ie the referral is inappropriate - the user can reassign the referral from one pod to another.

Please see section 9.1.7.

3.4   A referral via the Hospital Discharge Service

When a patient is admitted to hospital the Discharge Liaison Officer or Discharge Facilitator can complete an online referral form to identify the support and care a person may require enabling them to be discharged from hospital.

Using one online form, the discharge team can create multiple referrals which will be sent to a variety of partnering Local Authority services and third sector organisations based on the persons level of need.

Discharge Liaison Officers and Facilitators will be able to make referrals to services including home from hospital services, food support, help with benefits, mental health, housing, and other support groups. These are services are delivered by a range of Local Authorities and third sector partners.

The Hospital Discharge online referral form can be built to customer specifications. In this example, the online form has four sections:

- About You (the person).
- Support Needed.
- About Referrer.
- Consent.

3.4.1   NHS Mini Spine check

When the referrer clicks on Submit Referral, RIVIAM will try and match the patient demographics and NHS number to details on NHS Mini Spine. If the NHS number and demographics match no further action is required.

If the NHS number and demographics do not match, a pop-up window will appear as follows. The referrer can close the form and check the patient details again on the referral form. Alternatively, the referrer can continue to submit the referral form anyway.

3.4.2 Confirmation page

If the referrer selects Submit, a referral confirmation page will appear. The referrer will see a list of the referrals that have been created based on the responses completed on the referral form. If there are multiple referrals for the same person, the referral number will be the same with sequential numbers at the end of the referral reference.
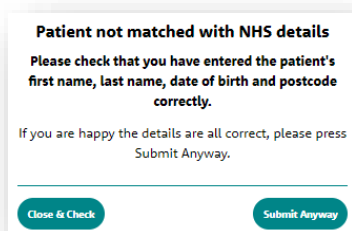
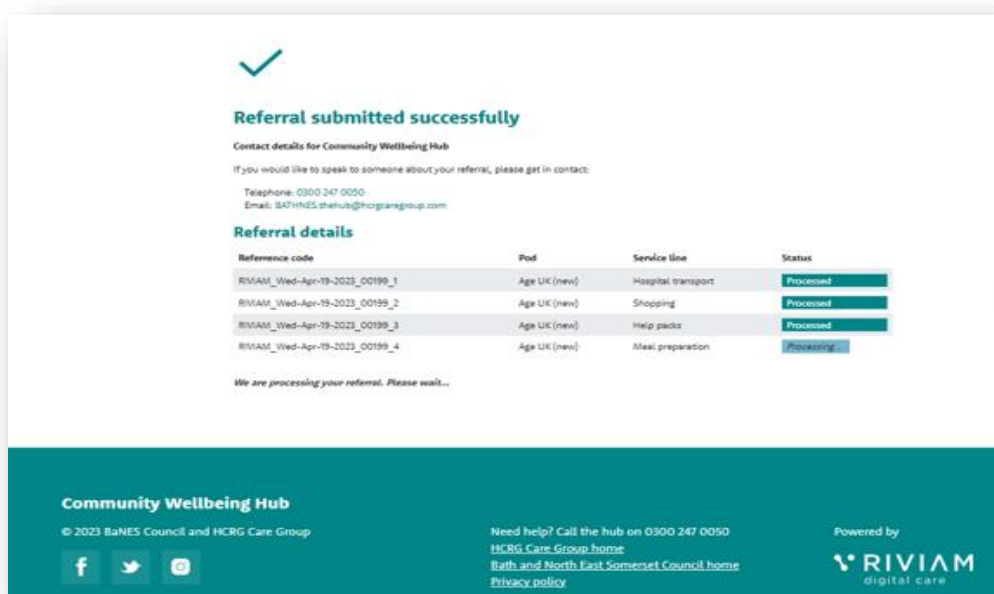

Figure 4 -NHS Mini Spine not matched

Figure 5 - Referral confirmation page for multiple referrals.

The referrer will also be able to see which organisation (pod) the referral has been referred to and which service line requested.

The referrer will receive confirmation of the referral submitted by email. SMS notifications can be set up as specified by the customer.

The email confirmation includes the referral numbers and the organisations they have been assigned to.
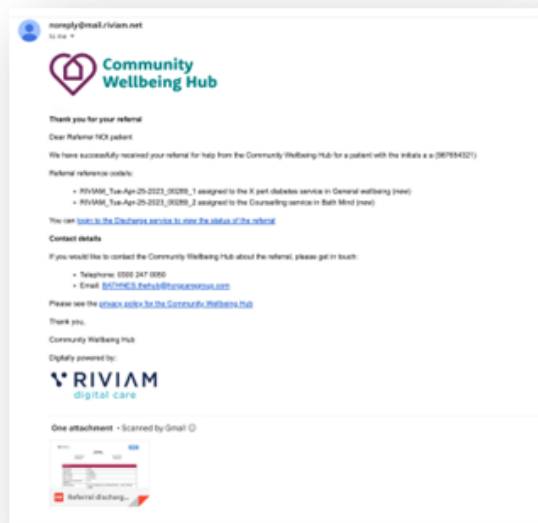
Figure 6- Email confirmation of the referral and PDF attachment

There is a link to the RIVIAM Workflow login page where the referrer can log in to monitor the progress of the referral.

The email contains the customer contact details and a link to their Privacy Policy.

There is a PDF copy of the referral attached to the confirmation email.

3.5   PDF copy of the referral

A PDF copy of the referral will be attached to the referrer's confirmation email.

The documents section of the patient record will show a PDF attached to the referral. The PDFs will be visible referrals submitted via the customer website, the Service Directory, and the Discharge Service.

Figure 7 - PDF of referral

	Please Note: Referrals created from RIVIAM Workflow will not have a PDF in documents section within the patient record.

4   Login to RIVIAM Workflow

4.1   New user

If you are a new user that has not logged into RIVIAM Workflow before you will have to activate your account by completing the following steps. Once complete, you can log in as per the instructions in section 4.2.

Enter the RIVIAM website URL provided by your management team.

Figure 8- RIVIAM Login page

- You will be given a link for your Community Hub; this link will take you to the RIVIAM Workflow login page
- Enter your Email address.
- Select the <u>activate</u> link under the Login button.
- Check your email Inbox for a RIVIAM Activation Code. If the email does not appear, please also check your Spam Folder.
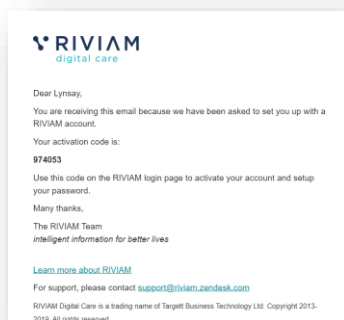

Figure 9 Activation email

Please Note: When you are added as a new user you will be automatically emailed an activation code. This code is valid for up to 12 hours. If you try and use the code after this, it will be invalid. To request a new activation code, select forgot password and follow the on-screen login instructions.

Figure 10- Enter your activation code

- Enter the activation code on the field.
- Enter your mobile telephone number.
- Select Activate.
- Create a password and select "Complete Setup".
- The login page will load.

Figure 12- Enter a password

Figure 13 - Log in page

4.2   Existing users

- Go to the login page.
- Enter your username and password and select log in.
- Some customers have a two-factor authentication process. In these cases, an SMS code will be sent to the mobile number entered when creating your password.
- Enter this SMS code and select log in. The SMS code is valid for up to 8 hours.
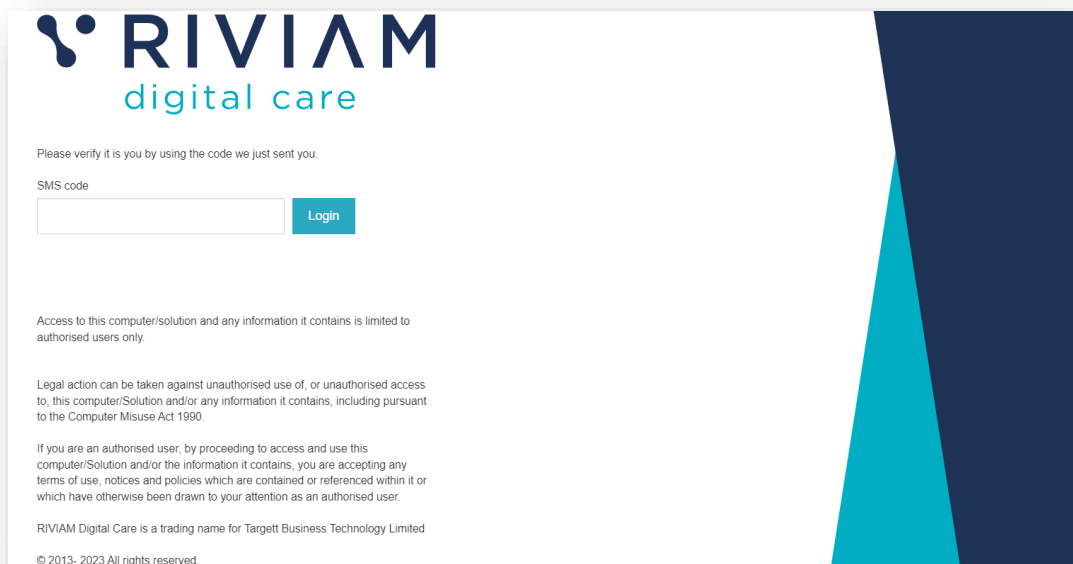

Figure 14- Two-Factor authentication code

4.3 Forgotten password

If a user has forgotten their password, please select "forgotten password" under the Login button and follow the activation process again.

Figure 15- Forgot password

- Select Forgotten password under the Login button.
- Enter your email address.
- Select request code.
- Go to your email inbox to retrieve the code.
- Enter the code on the activation page.
- Enter your mobile number.
- Select Activate.
- Choose a password.
- Select complete set up to login.
- If required, enter a Two-Factor Authentication code which has been sent to your mobile telephone number entered whilst activating your account.

🚨	Please Note: If you change your mobile telephone number, you can update this by selecting forgot password and reactivating your account outlined above.

5   Home page

5.1   Home page overview

Use the Home page in RIVIAM to find out information
and use shortcuts to help manage.

1. A current work list – shows the referrals that are locked for you.
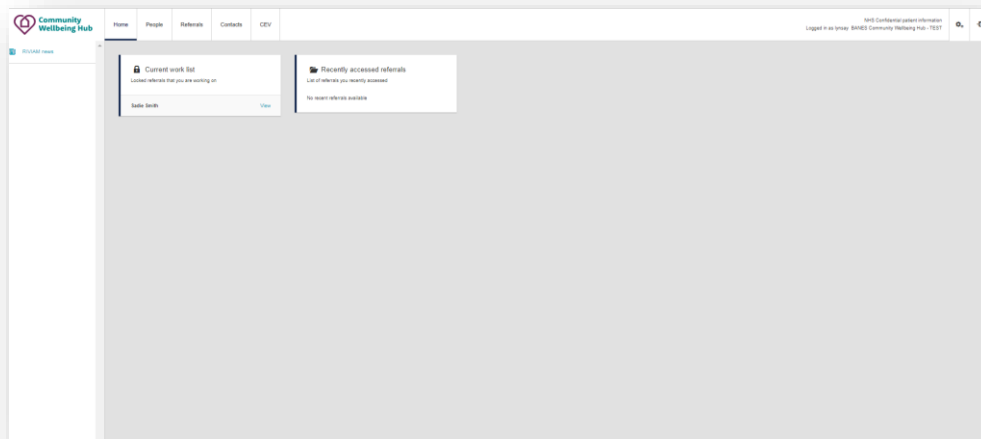
2. Recently accessed referrals.
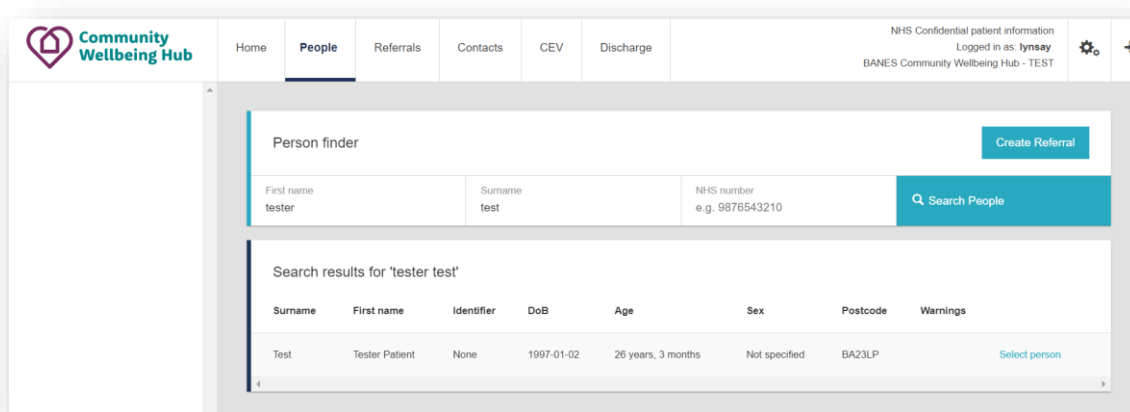

Figure 16 - Home page overview

6   People page

6.1   People page overview

If the user is aware that the person receiving care has referrals already on RIVIAM they should use the People page. The people page has a search function enabling the user to find the person.

6.2   Search for a person

Select the 'People' tab in the top menu and then use the person finder to enter the person's first name and last name or NHS number, then click 'Search People.' RIVIAM will search for the person and list the results.

Figure 17 - Search for a person

You can enter a full or partial first name and surname, or enter the NHS number if known, then select Search People.

If RIVIAM finds the person, a list will be displayed in the research results. For further details Select person on the right-hand side. This will open another page where the user will be able to

1. View existing referrals.
2. Create a new referral.
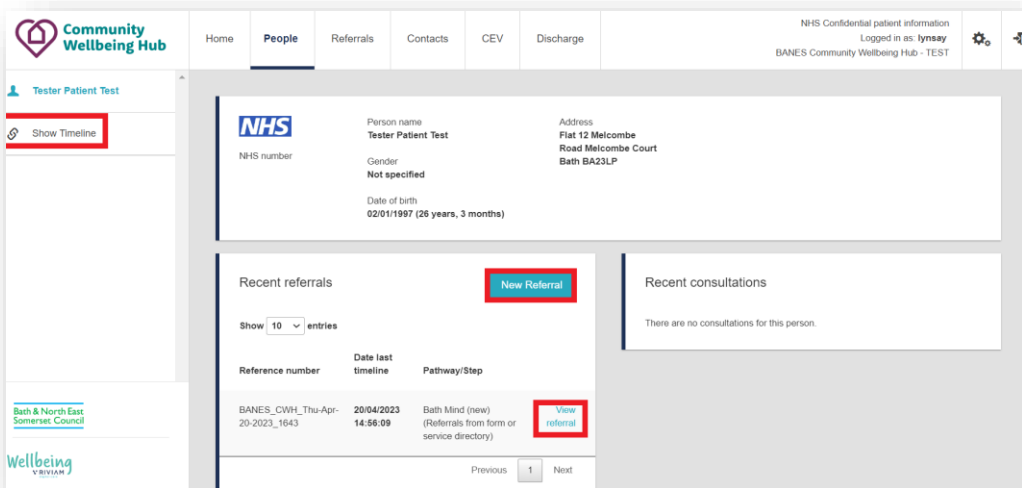3. Show a timeline of activities for the person.

Figure 18- Referrals relating to the person

The people header will display the person's name, address, NHS number and date of birth. In the recent referrals section, they will see a list of existing referrals. The user can view existing referrals, create a new referral for this person or view a timeline for this person.

6.2.1 View an existing referral for the person

Select the View referral link and the patient's referral page will be displayed. Further details on the functionality included in this page is provided in Section 9.
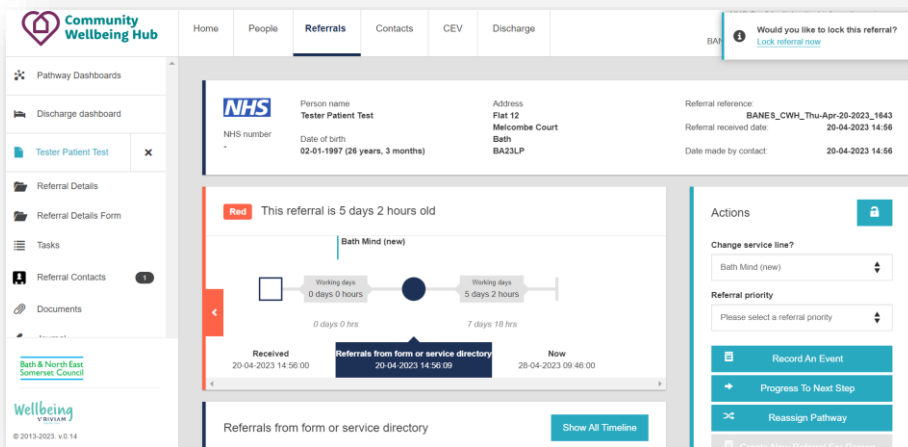

Figure 19- Existing referral for the person

6.2.2 Create a new referral for the person

From the people search results, the user can create a new referral for the person.

To create a new referral, select New Referral link. This will launch the referral form.
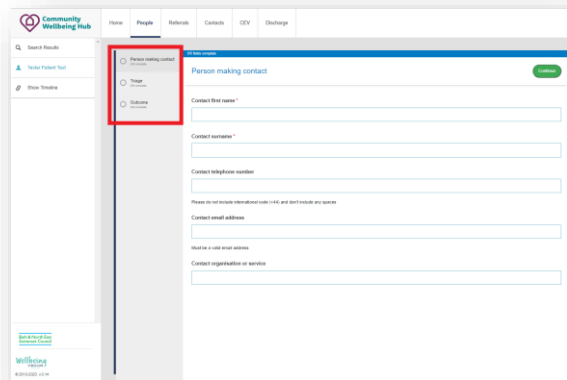
Figure 20- Create a new referral for an existing person

As the person is already known to RIVIAM, only three sections of the form will need to be completed.

1. The Contact/referrer details.
2. Triage.
3. Outcomes.

Complete all the sections on the form and select Submit Referral.

A pop-up will appear confirming that the form has been submitted successfully and give a referral reference code. For example:
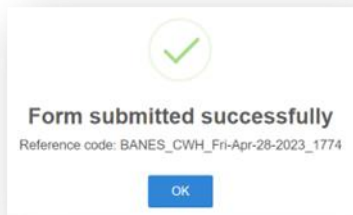
The new referral will be routed to the appropriate service provider (pod). Users assigned to the pod will receive an email notification that a new referral has been received.
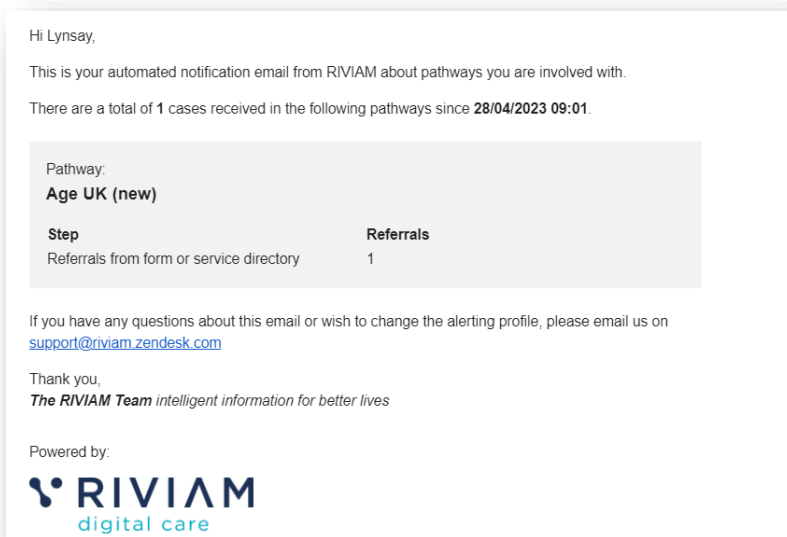
Figure 21- Notification of a new referral by email

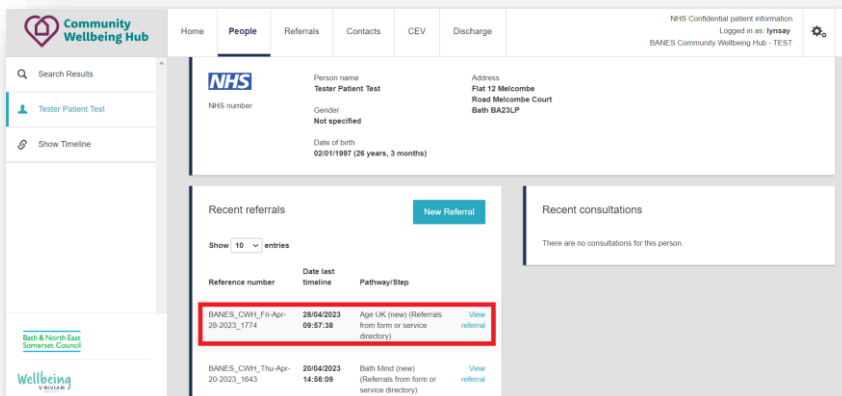If the user uses the People Search, the new referral will be listed.

Figure 22- People search shows new referral

6.2.3   Show Timeline

By selecting this section, the user can see the timeline of events. This can include new referrals created, the referral being progressed to the next step and any activities recorded during the management of the referral. By selecting the arrow on the timeline event, the user can see the additional notes added by referrers.

Figure 23- Show a combined timeline for a person

7 Referrals page

7.1 Referrals page overview

The Referrals page gives you an overview of all the referrals in RIVIAM and the service provider organisations (pods) that the user has been assigned to.

7.2 Dashboard

The Pathway Centre shows data and graphs on the distribution and number of referrals received/updated per day, week, and month. You can filter down specific dates here.
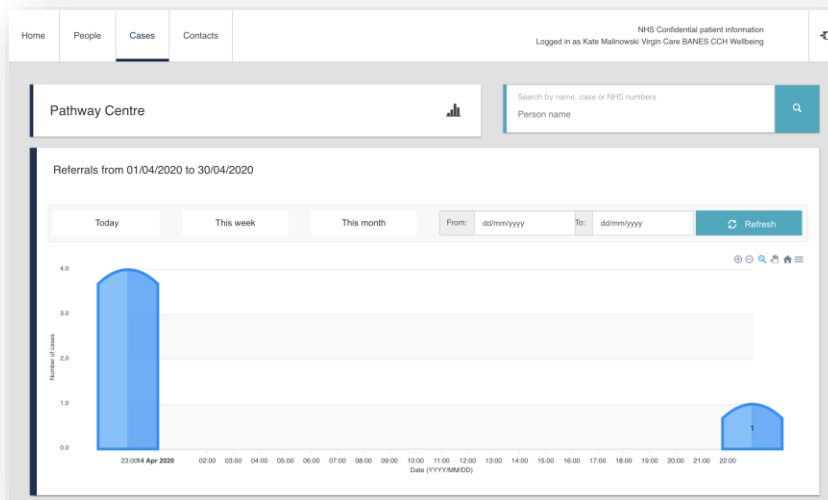

Figure 24 – Dashboard metrics

7.3 Organisational Pods (or Pathways)

Below the distribution graphs, the user will see an overview of all the organisational pathways they have access to. These are sometimes referred to as organisational Pods. The user will only be able to see the referrals that have been assigned to their individual Pods. If a user tries to access a referral in Pods that they do not have permissions to access, they will receive an unauthorised message.

The names of the Pods correspond to the name of the organisation or services provided. By selecting the Pod, the user will be able to navigate into the individual Pod dashboard.
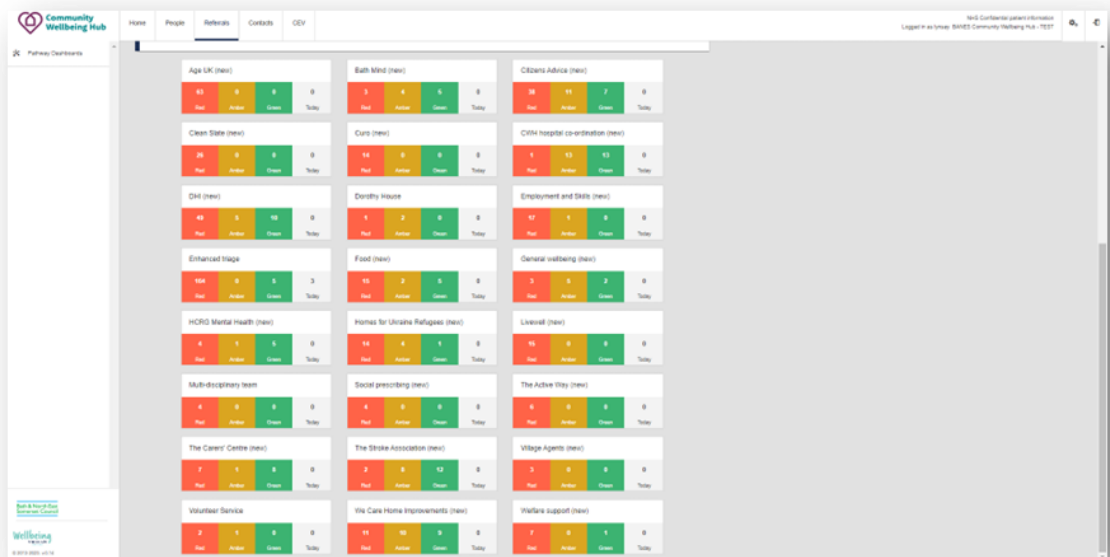
Figure 25 – List of Organisational Pods (Pathways)

	Please Note: A partnering organisation is only given user rights and permissions to access the referrals that have been assigned to their Pods. They may see referrals have been raised for other partnering organisations but will not be able to access them unless they have permissions set up by RIVIAM to do so.
	User rights can only be amended by RIVIAM Support Team with authorisation from customer management team.

8 How to manage a referral in RIVIAM Workflow

8.1 Pathway dashboard

When you click on an organisation's Pod (Pathway), you will be taken to the Pod dashboard. The Pod dashboard summarises all the referrals assigned to the organisation.

The pathways in the Pod show the different steps for a referral, and these have been configured to meet the customer's specific requirements.

Referrals can be managed through each step of the referral management process. Referrals will be received and triaged, then care will be organised and services delivered through to completion of the referral.

The diagram below illustrates the progression through each step of the referral management process. The sub sections will then give more detail on each step.

Figure 26- Steps to manage a referral

	Please Note: Customers can customise the steps above to meet their organisation's requirement.
	Some Pathways or Pods may have bespoke steps set up in their pathways

8.1.1 Referrals in

In this example, referrals can come from

1. Reassigned from another Pod.
2. Referrals received from an internal referral form or Service Directory. This is a form created from within RIVIAM Workflow or from the Service Directory.
3. Referrals from the Discharge Service.

4. Self-referrals **(when available).**

8.1.2 Criteria met

A new referral will remain in the Referrals in column until the user assesses it.

To progress the referral to the next step, the user can decide if this referral is appropriate for the services provided.

The user has the option to choose one of the following steps to progress the referral to criteria met:

1. Accepted.
2. Not appropriate – reassign.
3. Not appropriate – no further action.

If the referral is accepted, it can be moved to Accepted step in the criteria met queue. If the user thinks the referral is not appropriate and needs to be reassigned, or that no further action is required, the referral can be moved to those steps.

8.1.3 Ready

If the user accepts the referral, the user can then start to take action to meet the requirements of the referral. Once this is completed, the referral can be moved to the Service in place step in the Ready column.

To progress the referral forwards from the Service in place step, the user can choose from the following options:

- Person receiving service.
- Need met.
- Need met and additional need identified.
- Need unmet.
- Service declined by person.

8.1.4 In Progress

To progress the referral forward, the user will select the Progress to next step in the patient record and choose another option, for example Person receiving service and this will move the referral forward to that step.

8.1.5 Outcome

When the service has completed, users can progress the referral by choosing from one of the following Outcome steps.

1. Need met.
2. Need met and additional need identified.
3. Need unmet.
4. Service declined by person.

Outcomes selected will be used for reporting purposes.

8.2 RAG status

Referrals in a Pathway or Pod have a [R]ed, [A]mber and [G]reen status that is calculated by the number of hours since the referral was received and the working hours for the service. For example, the working hours might be 9am to 5pm Monday to Friday. This can be configured for each service, in line with their referral KPIs.

8.3 Key performance indicators

0	209	Open	183	Reassign	1	Accepted	6
Received today	In management	Service in place	16	Person receiving service	3		
0	32.89						
Completed today	Average working days in pathway						

Figure 27- Key Performance indicators

A set of key performance indicators are shown for each Pod or Pathway. They include the total number of referrals received today, in management and completed.

9   Referral management

9.1   Referral navigator

When you select a referral, you will be taken to the Referral Navigator page.

The patient header will display the demographics for a person and the referral reference number, date and time submitted.

From this page there are many actions the user can undertake to manage the referral, make updates, or amend the patient record as follows:

- Lock / unlock a referral.
- Record an event or upload a document.
- Progress to next step.
- Reassign to another Pathway or Pod.
- View referral details section.
- View referral details form.
- View Tasks.
- View Referral Contacts.
- View Documents.
- View Journal.
- Actions.
- Change the Service line.
- Change the Referral Priority.
- View the referral status.
- View the related referrals.
- View the last five documents relating to the referral.

The following sections provide instructions on how to perform actions on the Referral Navigator.

The Overview of the Referral Navigator highlights where actions can be completed.

9.1.1 Overview of the Referral Navigator

Figure 28- Features of the Referral Navigator

9.1.2   Lock/unlock referral

The lock icon on the right-hand side enables the user to lock a referral whilst reviewing and editing it. Once completed, the user should then unlock the referral. If the user does not unlock the referral, colleagues will not be able to make any updates until it is unlocked.
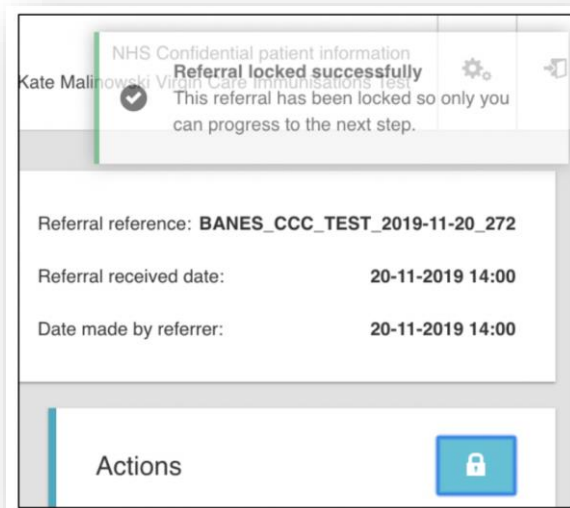

Figure 29 - lock/unlock referral

9.1.3   Change service line

Users can change the service line as required by selecting the arrows on the right and selecting one of the options from the dropdown menu.
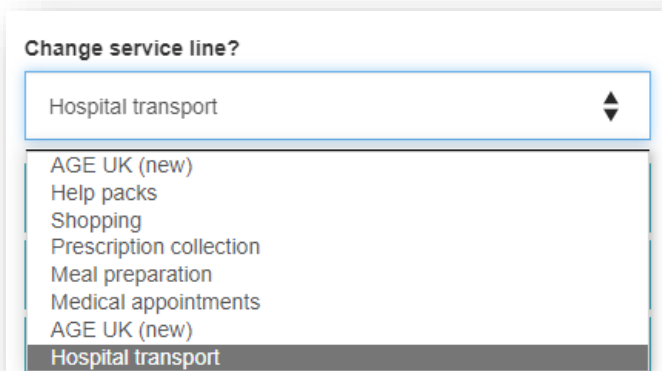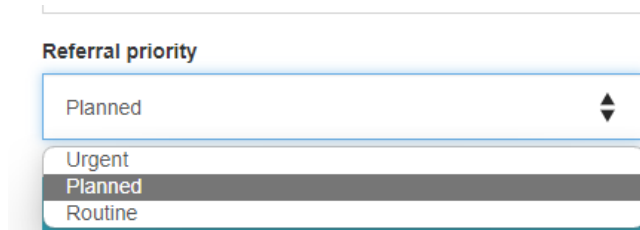

Figure 30- Change service line

When selected you will see a popup window appear in which you will add some notes to explain the change requested. Then select confirm. A timeline event will be added which includes reason for the re-allocation.

9.1.4   Referral priority

Users can assign or amend a priority to a referral. This can be useful for managing the team's workload. This will add a timeline event.
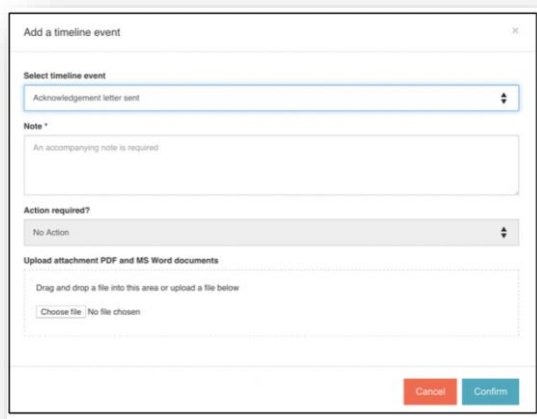
Figure 31- Set referral priority

9.1.5 Record an event or upload a document

Events can be recorded against a referral at any point. For example, an event can be a letter sent or a call made/received.

Figure 32- Record an event

An attachment can also be uploaded here to support an event. To upload a document, select a timeline event for example Inward post and a Note. It is possible to link the event to a contact or referrer. The contacts will be selectable from the dropdown menu. Select Choose file from your device and the file will appear listed. Add a document description and a file type e.g., supporting documents. Then select confirm. A pop-up message will appear to say file uploaded successfully.
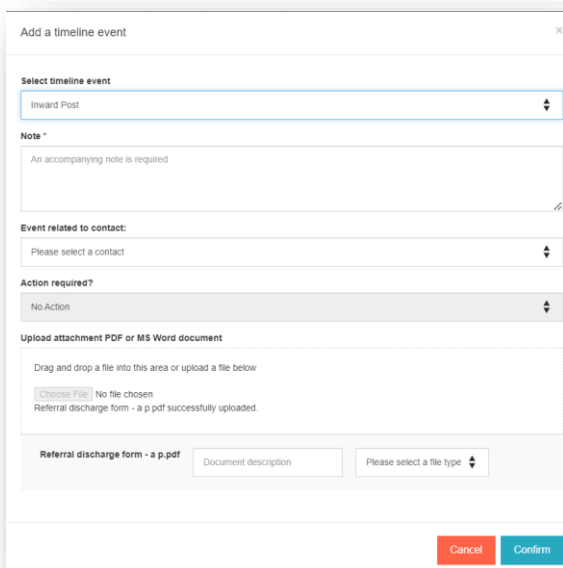
Figure 33 - Upload a document

9.1.6   Progress to next step

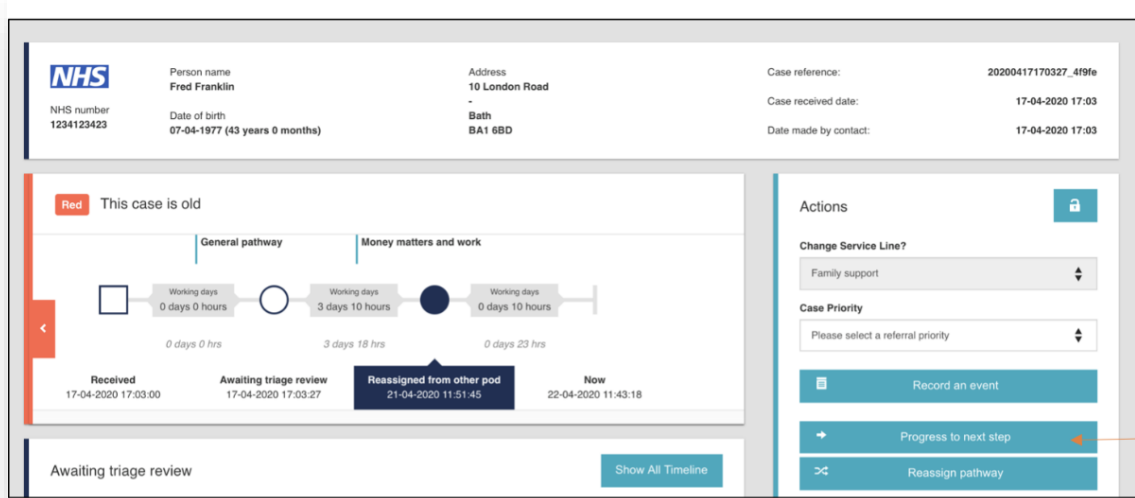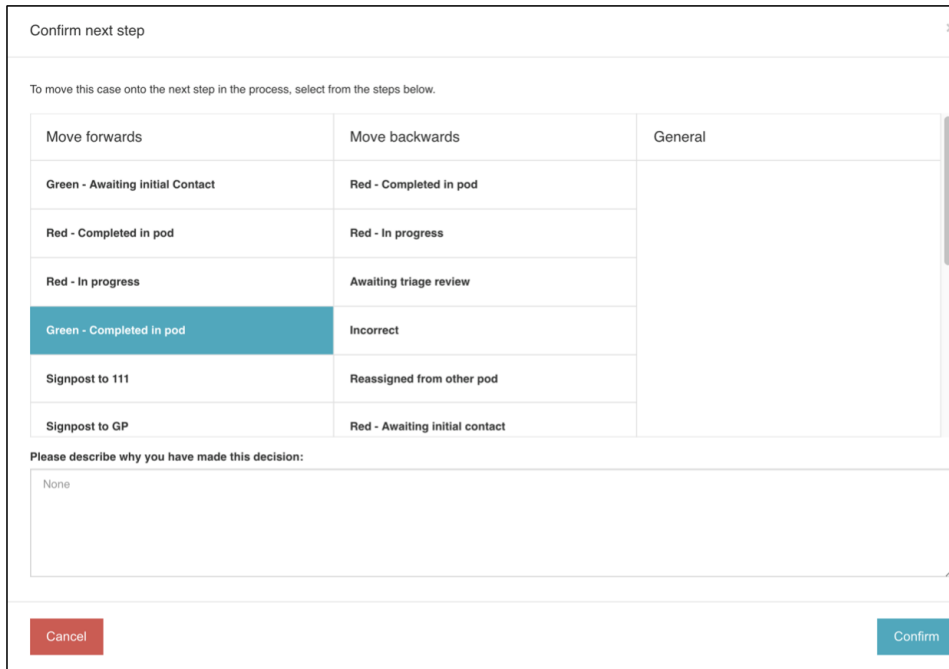Click progress to next step on the right-hand side as shown below.

Figure 34 - progress to next step

Progressing to the next step involves clicking the relevant step under "Move forwards" as shown in the below screenshot. You need to provide an explanation of why you are taking this action.

Figure 35 - confirm next step

By selecting confirm, this will progress the referral to the step. An explanatory note needs to be included. This will appear on the timeline entry for this change.
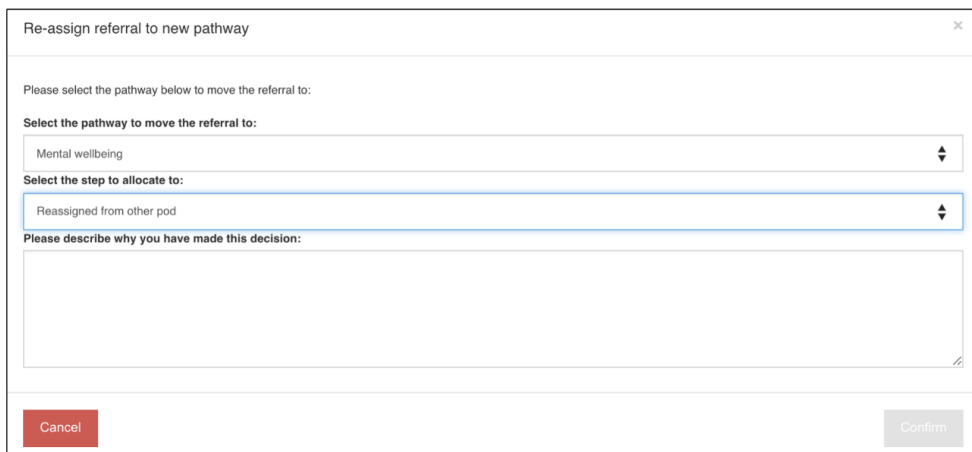
9.1.7 Reassign to another Pod or Pathway

If you decide that a referral needs to move to another Pod or Pathway, you can do this by clicking the "Reassign Pathway" button on the right-hand side of the referral dashboard (under "Actions").

This will allow you to:

1. Select the Pathway where you would like to move the referral to.
2. Select the appropriate step within that pathway (i.e., reassigned to another pod).

You also need to provide a description to support this decision then click 'Confirm'.

Figure 36 – Re-assign to new Pod (Pathway)

Once a referral has been re-assigned, it will appear in the Pod and referral dashboard of the Pod the referral has been reassigned to. This will include the date, time, who the referral was reassigned by, and which Pod (Pathway) it has come from.
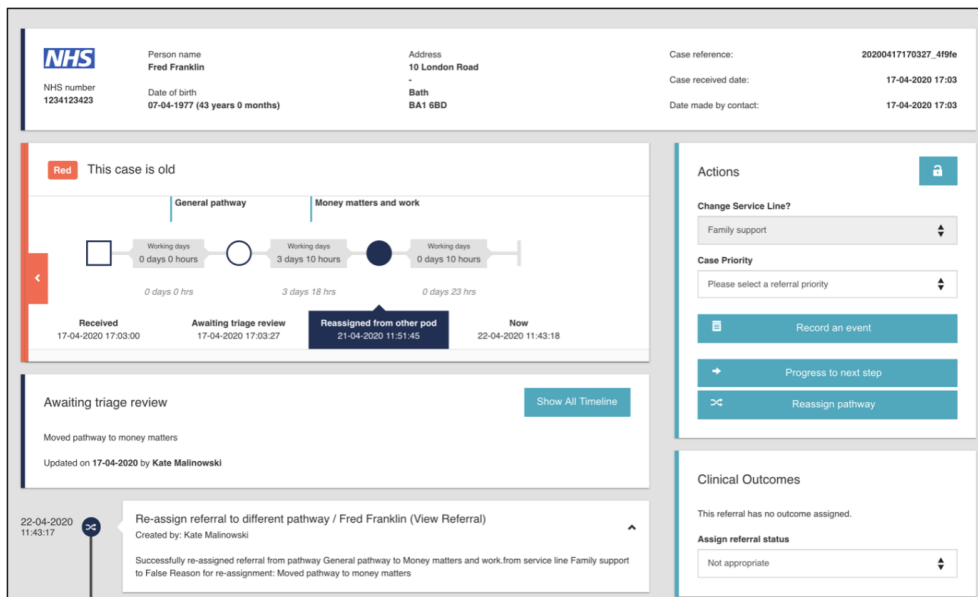
Figure 37 – Referral Navigator timeline

Please Note: Customers are advised that when a referral has been completed in a Pod and it is discovered that the person requires support from another service provider, it is recommended that a new referral is created and assigned to the other Pod.

9.1.8   Referral status

The user can update the status of the referral by clicking on the arrows on the right and selecting an option from the dropdown menu. Note that the Referral status may also be automatically updated when the referral progresses to a new step. This will depend on the customer's set up.
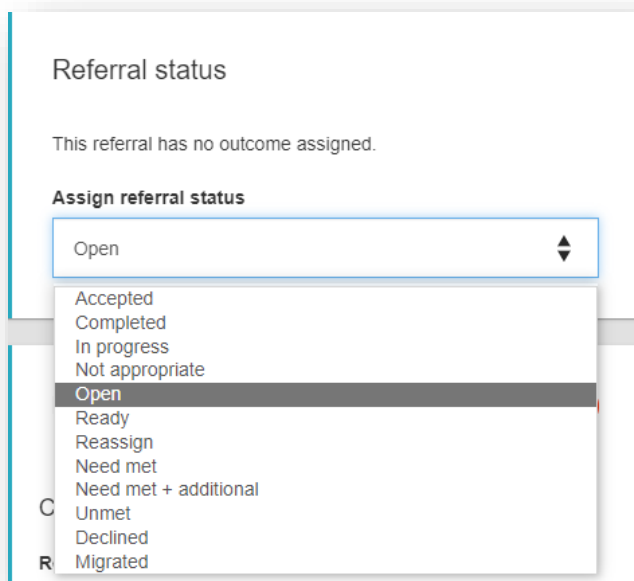
Figure 38- Update Referral status

9.1.9   Discharge status

This section is only seen where a person has been referred by the Discharge Service.

The Discharge Status section gives the user an overview of the person's current location, admission date and expected discharge date.

If other referrals are linked to the same discharge, then they are listed with their curent status.

Figure 39- View Discharge status

9.1.9.1   View combined timeline

By selecting View combined timeline, users can see all events recorded for all referrals for this discharge. These are listed chronologically.

Figure 40 Combined timeline for discharge referrals

Please Note: The user can see a list of related referrals. However, if they do not have the permissions to access another pod, they will see the referral listed but not be able to view the details of that referral.

9.1.10   Related referral(s)

The related referrals section shows the user a list of all related referrals that have been created for this person. In the Discharge tab, the list of related referrals will list the referrals related to the discharge event.

9.1.11   Last five documents

The last five documents section will list any documents that have been produced or uploaded as part of this referral.

To view the referral itself, you can do so as follows;

1. View the referral in the document viewer tab.
2. Download the referral as a PDF to your device.
3. Open the referral PDF in another page.
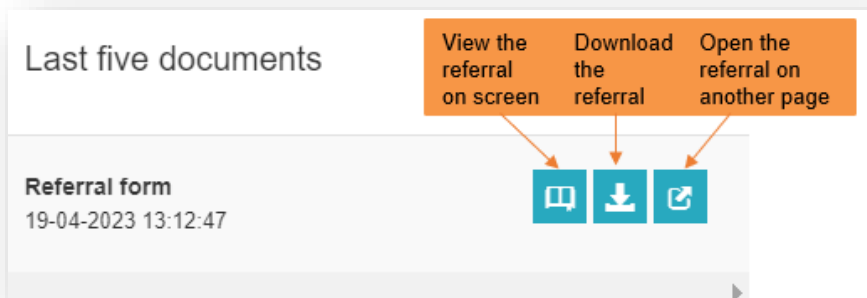
Figure 41- How to view an uploaded document

9.1.12   Update Referral Details or contact details

*   To update the person's details, select Referral Details from the left-hand navigation menu.

*   Choose an option in the Referral information navigator. This will display the current information.

*   To make an update select Update and change the fields as required and select Save.

*   Click on the person's name above Referral Details on the left-hand navigation menu and this will update the patient header.
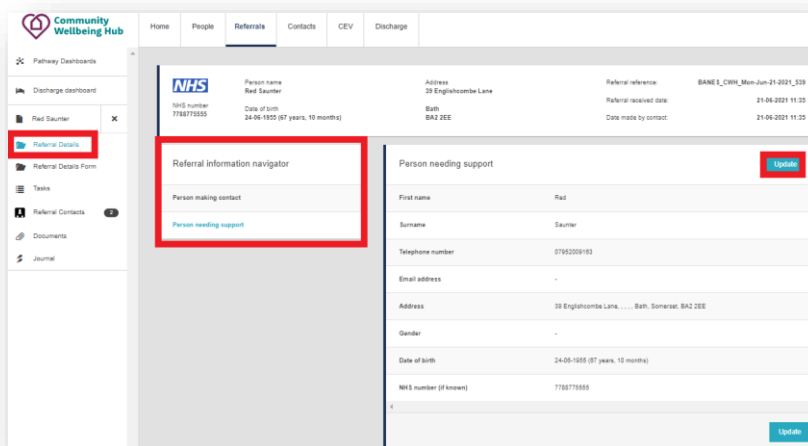
Figure 42- How to update referral details

9.1.13   Referral Details Form

This section will load the referral form and the user will be able to view the details on the received referral form as read only.
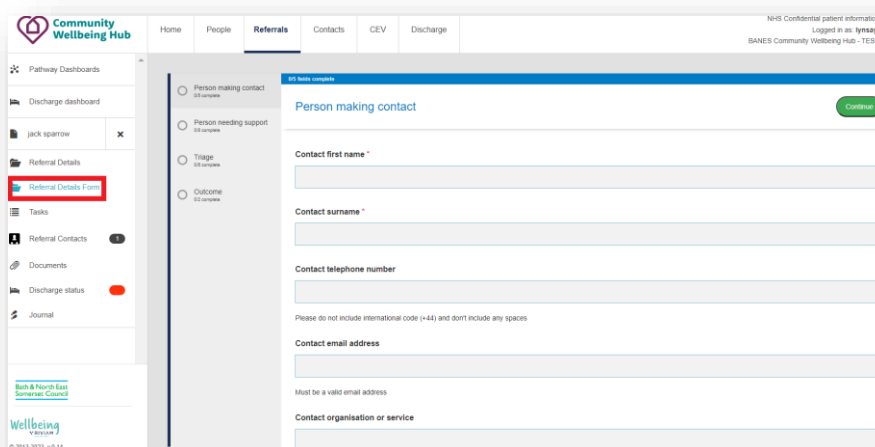
Figure 43- View the referral details form

9.1.14   Tasks

This section is where the user can see any tasks associated with the referral.

This functionality is configurable and may not be used by all customers.

9.1.15   Referral Contacts

In this section, the user can add a new contact or remove/edit an existing contact.
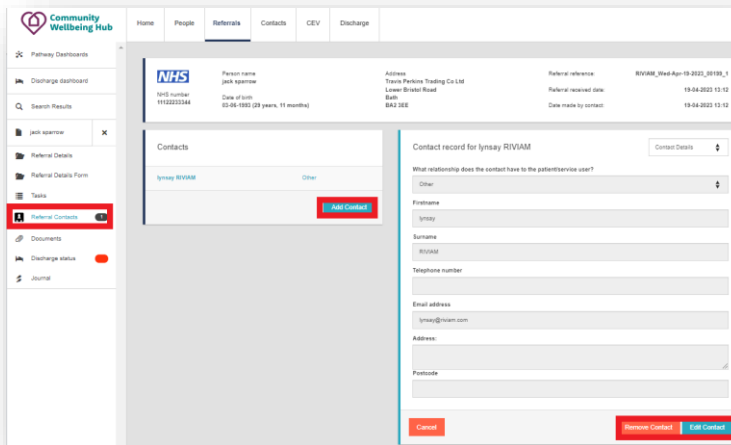
Figure 44- How to add/remove or edit a referral contact

Select referral contacts from the left-hand menu.

To add a new contact, select Add Contact, enter the details, and select save.

To remove or edit an existing contact, select the Contact, and then select remove contact/edit contact. Make the amendments and select Save.

9.1.16 Documents

In this section, the user can view the list of documents that have been added to a referral. Tick the document you would like to view, and the referral form will load in the viewer on the righthand side.
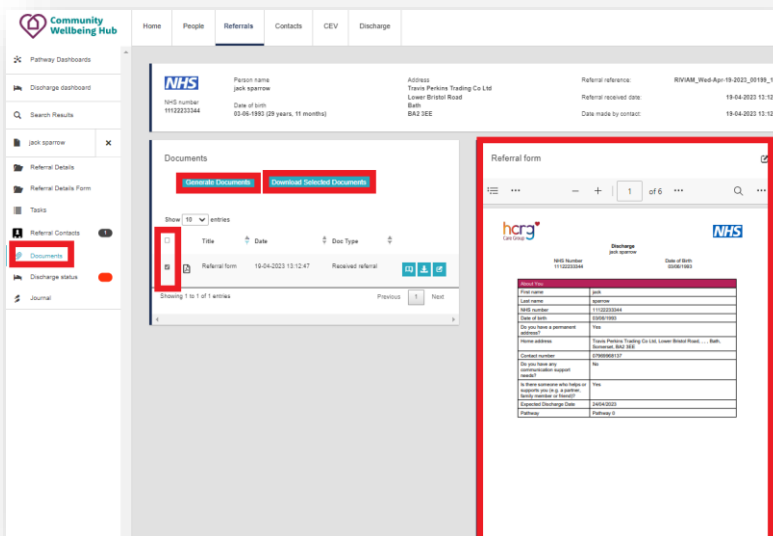
Figure 45- Documents tab

	Please Note: The generate documents functionality is used to generate letters from templates added to RIVIAM.
	This functionality is configurable and may not be used by all customers.

9.1.17 Discharge status

This section will only be displayed for referrals received from the Discharge Service.

Figure 46- Discharge status tab

This page displays further details on the current episode of care and the Referral status flag. Discharge linked referrals will list and the View combined timeline will display the timeline of events related to the referrals.

9.1.18 Journal

This functionality is configurable and may not be used by all customers.

10 Contacts page

10.1 Contacts page overview

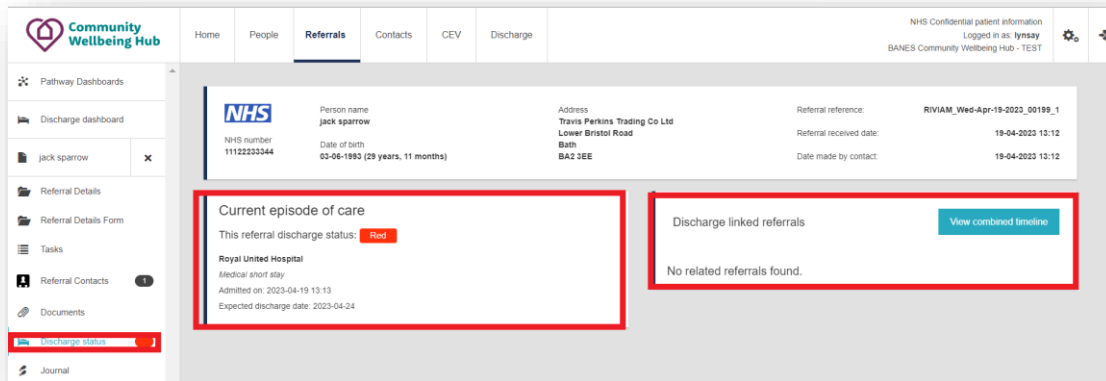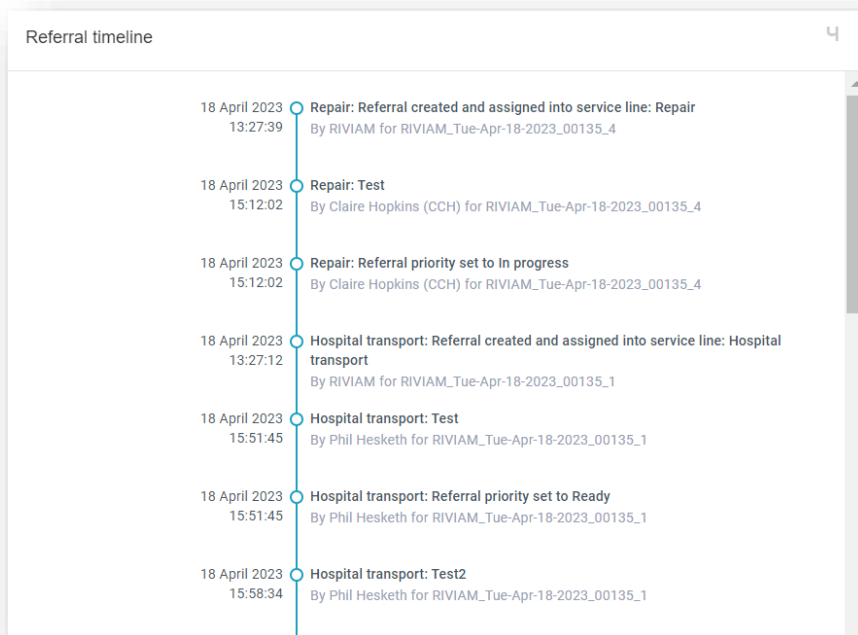If the person or contact is unknown to the user, the user should use the Contact page to begin the referral process.

There are three ways you can use the Contact's page:

1. **Step 1 - Search for a contact** – the first step is to find a contact in RIVIAM. If there is a contact, then you can review a list of related referrals for this Contact.
2. **Step 2 - Search for a person** – if you cannot find a contact, the next step is to search for the person who is receiving the care instead.
3. **Step 3 - Create a new referral** – if there is no existing contact or person in RIVIAM, complete a form to create a new referral. This will capture and create the person and contact details.

10.2 Contacts landing page

Select the 'Contacts' tab in the top menu. Here you will be able to find out information and use shortcuts to help you perform your role.

This includes your:

1. Last 10 contact subscriptions – shows the contacts records that you have subscribed to.
2. Recently accessed contacts – shows the contact records that you have recently visited.
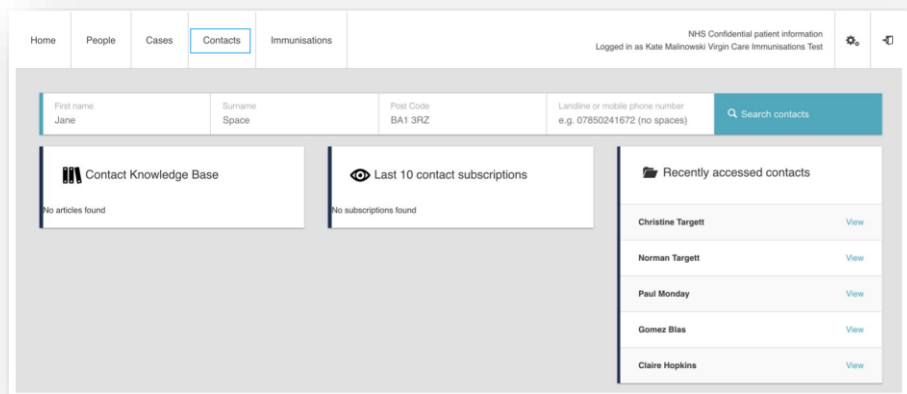3. Contact Knowledge Base – will display useful articles and news.

Figure 47 - Contact landing page

10.3 Search for a contact

Enter the Contact's first name, surname, postcode or contact number. Click 'Search contacts'.
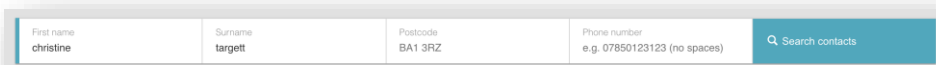

Figure 48 - Search for a contact

This will show all search results for the Contact as shown below. Click 'View' to select the Contact you are looking for.

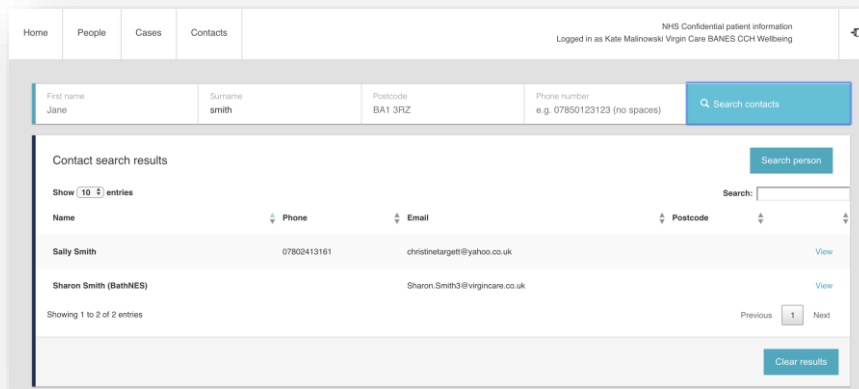*Figure 49 - View contact*

The next page will show all active referrals associated with this Contact. For example, this Contact could be a doctor and all their referrals would be displayed here.

The list will outline the reference number, the person's name, their relationship with the Contact (e.g., carer, doctor or relative) and the pathway step of the referral.
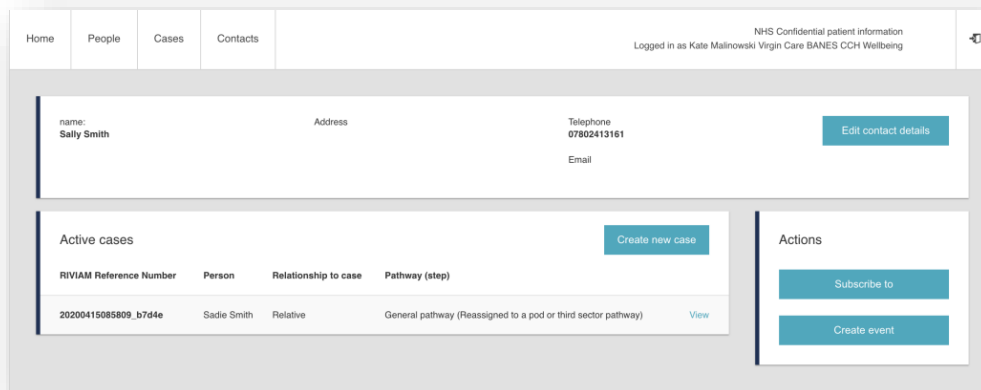

Figure 50 - Active referrals
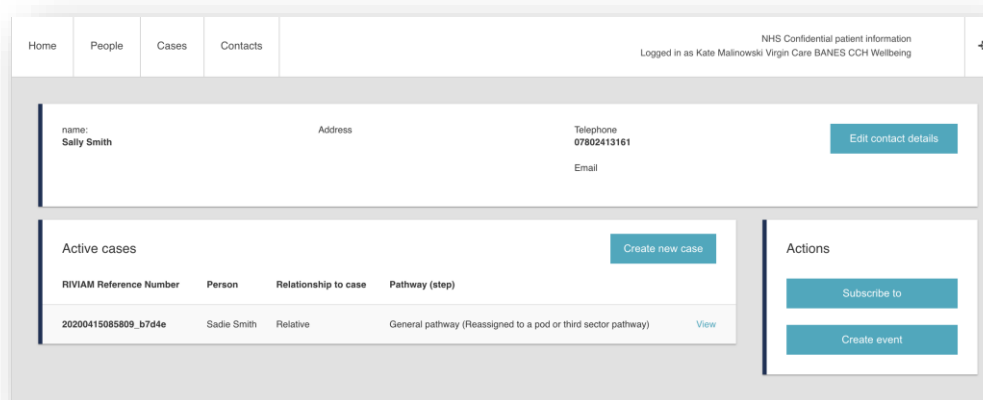
10.3.1 Active referrals page actions

Figure 51 - Active referrals page actions

There are several actions you can perform on this page:

10.3.1.1 Edit Contact's details

You can edit the Contact's name, address, telephone number of email by clicking the 'Edit contact details' button in the demographic header as shown below.

Figure 52 - Edit contact details

10.3.1.2 Subscribe to the Contact

Subscriptions allow a user to register interest in a Contact. This puts the Contact on the 'Last 10 contact subscriptions' list on the home page.

10.3.1.3 Create an event

You can create an event against a contact e.g., call made, or letter sent. This will then appear under the contact timeline on the referral dashboard.

10.3.1.4 View referral

This will take you to the referral dashboard.

10.3.1.5 Create a new referral

The user can create a new referral by clicking the 'Create referral' button. The user will then be asked to search for the person in person finder.

If the user cannot find an existing person with that name, the form will load and include three parts: Person needing support, Triage and Outcome as shown below.
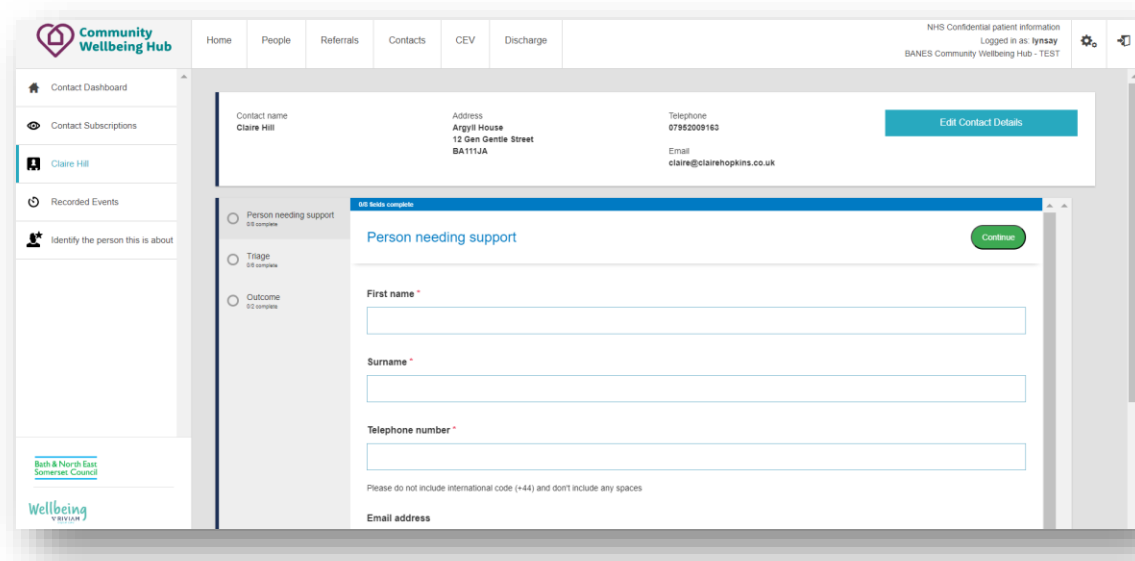
Figure 53- Create a referral

If you do not have an existing contact or person, the form will show four parts: Person needing care, Person making Contact, Triage, and Outcome.

10.3.1.6 Search for a person

If you cannot find the Contact after searching, then you can search for the person who is receiving the care instead. To do this, click the 'Find Person' button as shown below.
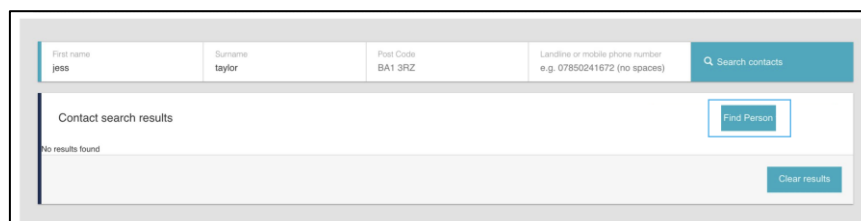

Figure 54 - Search for a person

You can then search for the person instead by entering their full or partial first name and surname or NHS number as shown below.

Please note: There are two search bars on this page. The top search bar is for the Contact and the lower search bar is for finding the person.

Figure 55 - Search bars

If you find the person, then you can click 'Select person' to see more information about this person.
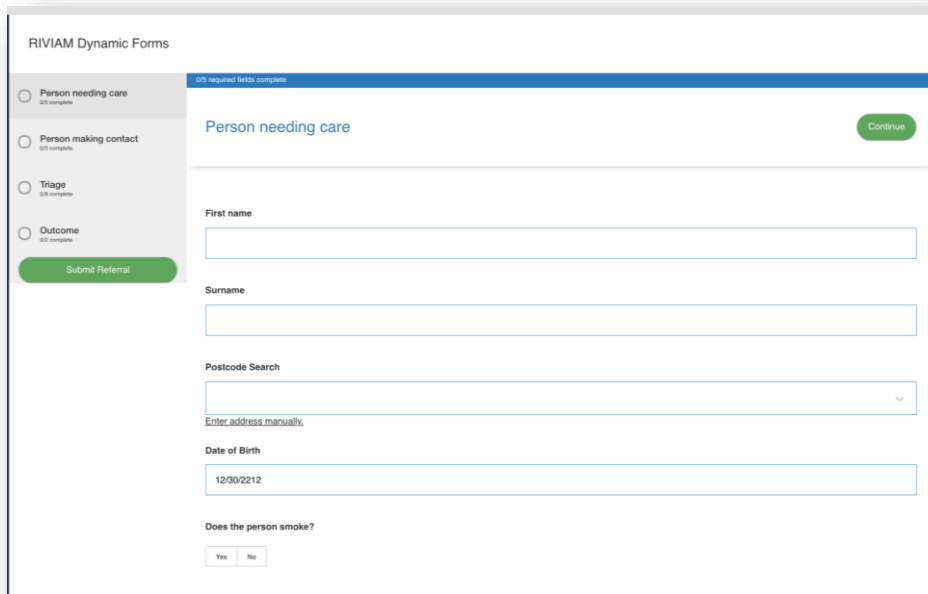
If the person does not exist elsewhere, then you need to create a new referral **Create a new referral for a person.**

If you do not have an existing contact or person, then you can create a new referral for a person. To do this click on the 'Create referral' button as shown below.

Figure 56 - Create a new referral

You can then fill out a form in RIVIAM. If you cannot find a contact, the form will show four parts: Person needing care, Person making Contact, Triage and Outcome as shown below.

Figure 57 - New referral form no contact

11 Referrals received from the Discharge Service

11.1 Overview

If a referral has been received from the Discharge Service, the user will see additional functionality added to the Referral Navigator.
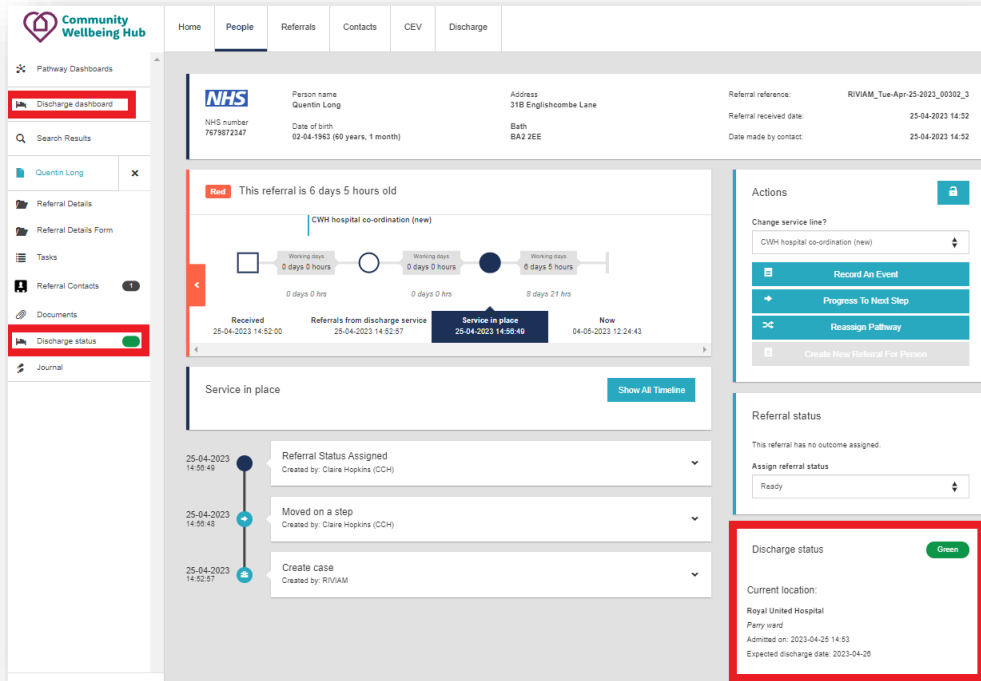
Figure 58- Discharge status on Referral Navigator

11.2 Discharge Status

The Discharge Status section on the right gives the user an overview of the person's current location, admission date and expected discharge date.

For further information, the user can select the Dicharge Status from the left-hand side navigation menu, and a new page will open as follows.
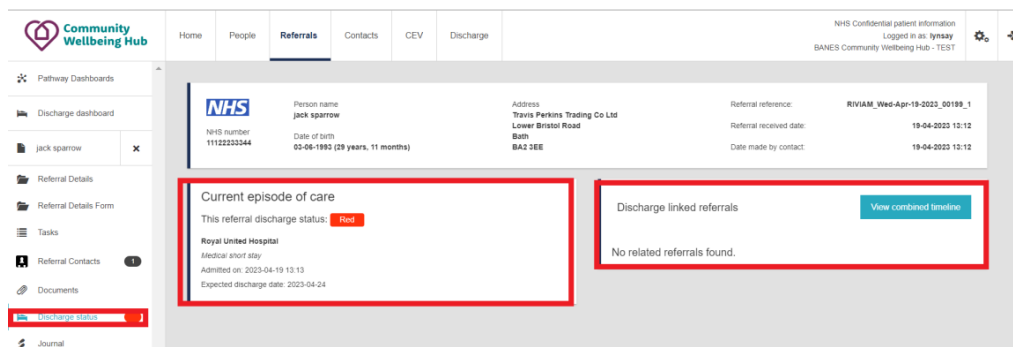
Figure 59- Discharge Status tab

The patient header at the top will display the person's demographics.

The two sections below will give the user information on

1. The Current episode of care.
    a. The referral discharge status flag (Red, Amber, Blue or Green).

b. Details of the hospital admission and expected discharge date.
2. Discharge linked referrals
    a. A list of related referrals created via the Discharge Service.

Figure 60 - List of related referrals

b. View combined timeline. This is a view of the combined timeline events related to the discharge across all referrals for the person in hospital.

🚨	Please Note: The user can see a list of related referrals. However, if they do not have permission to access another pod, they will see the referral listed but not be able to view the details of that referral.

11.3 Discharge Dashboard

The partners Discharge dashboard contains seven sections. Some columns can be filtered, however, only the Discharge Teams will be able to amend expected discharge dates and ward allocation.

- Person with search box.
- Discharge status.
- Expected discharge date.
- Ward.
- Days since last referral.
- Confirmed discharge date.
- Referral status.

11.4 Overview of the partners discharge dashboard

Users will see all discharge records that include referrals for their organisation.
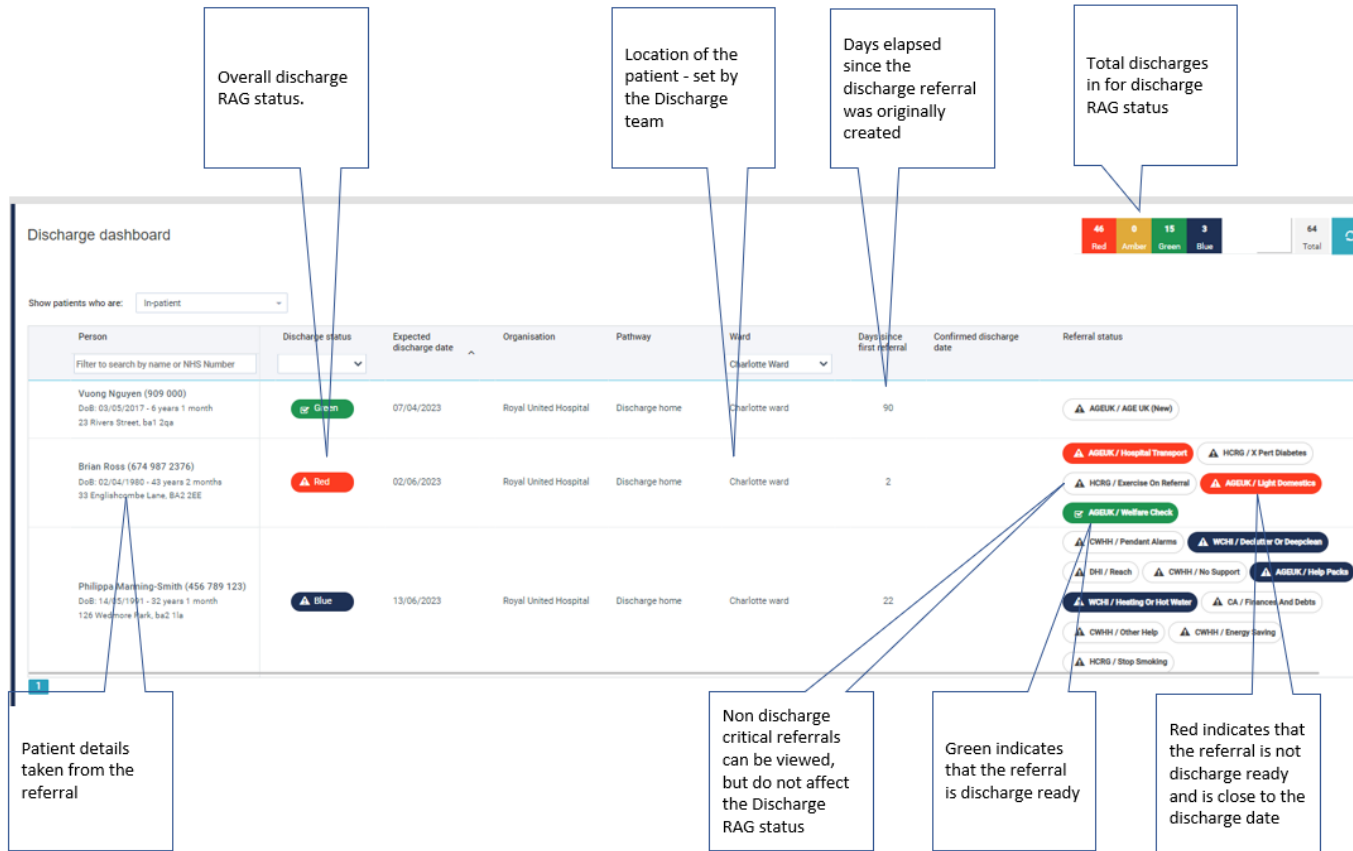

Figure 61- Overview of discharge dashboard for third sector

11.5 Background colour coding of referrals

Discharge referrals that have passed their expected discharge date and have a red overall RAG status will have a background colour yellow and a clock icon.

Discharge referrals that have not passed their expected discharge date will have a background colour white.

11.6 Person

The person column details the patient's name, NHS number, date of birth, address, and postcode.

There is a search bar in the header so that the Discharge Liaison Officer or Discharge facilitator can search by person name or NHS number.

Clicking on the person will open the patient record. For further information on this, please see section 9.1

11.7 Discharge RAG status

Figure 62- Discharge RAG status flag

The discharge dashboard calculates an overall Discharge RAG status for each person. The Discharge RAG status is colour-coded Blue, Red, Amber, and Green. There is a filter box at the top of the dashboard column so that users can select to view each status.

11.7.1 How the overall Discharge RAG status is calculated

The overall Discharge RAG status is calculated by:

1. Checking the Referral RAG status of each discharge critical referral. If the service line for a referral is not discharge critical the referral will always be shown as white and ignored.
2. The highest status level sets the overall Discharge RAG status for discharge critical services only.
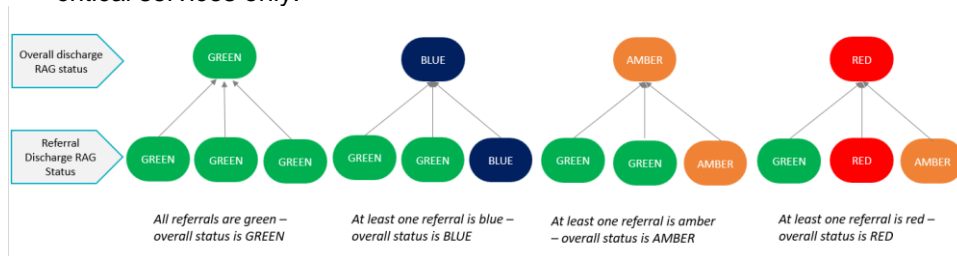

Figure 63- How the overall Discharge RAG status is derived

The Referral RAG status for an individual referral is based on the time to discharge date and whether the partner has progressed the service to a point when it is ready
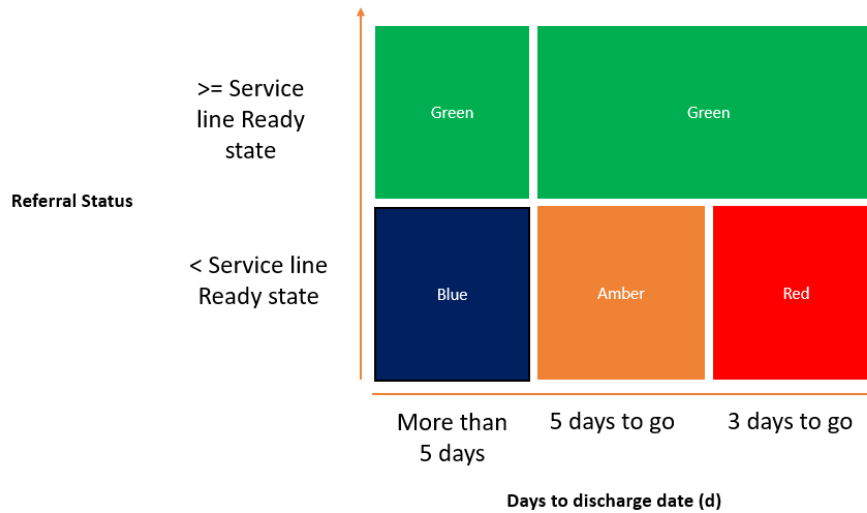
for discharge.

Figure 64- How the referral RAG status is derived

- If the referral has **more than 5 days** until the expected discharge date the discharge status will be **blue**.
- If the referral has **5 days or less** until the expected discharge date the discharge status will be **amber.**
- If the referral has **3 days or less** until the expected discharge date the discharge status will be **red.**
- If the referral is ready for discharge, then it will be **green.**

Non-discharge critical referrals will be shown in the dashboard as **white.** These referrals will have no impact on the overall discharge RAG status.

11.8 Expected discharge date

This is the date that the Discharge Liaison Officer or Discharge Facilitator expect the person to be ready to be discharged from hospital.

11.9 Ward allocation

This section lists the ward the person is in. There is a filter box where you can list people with referrals in all wards or in the specific wards selected.

11.10 Days since first referral

This section gives the Discharge Liaison Officer and Discharge Facilitator a way of seeing how many days has passed since the first referral(s) were raised.

11.11 Referral status

The referral status section lists all the partnering organisations that have referrals for this person. For example, this person has seven referrals across four service providers.
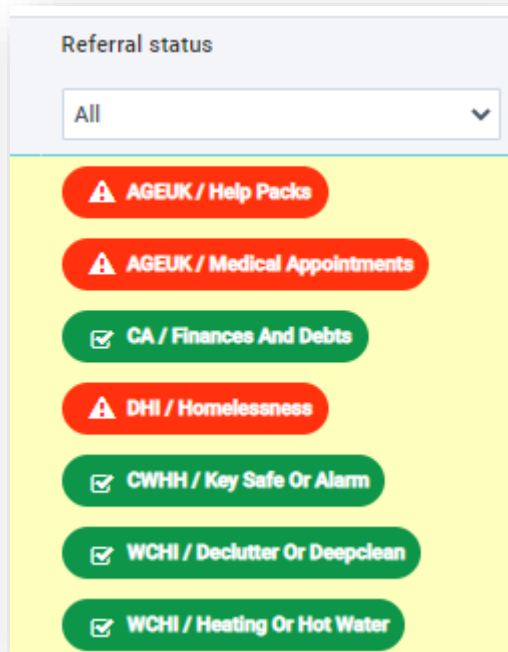
Figure 65- Referral status

The colour coding of these referrals is based on the readiness of the service for discharge and time remaining until the expected discharge date. As shown above.

11.11.1 Referral status colour

The referral status provides a visual cue for users to follow up on discharge-critical services:
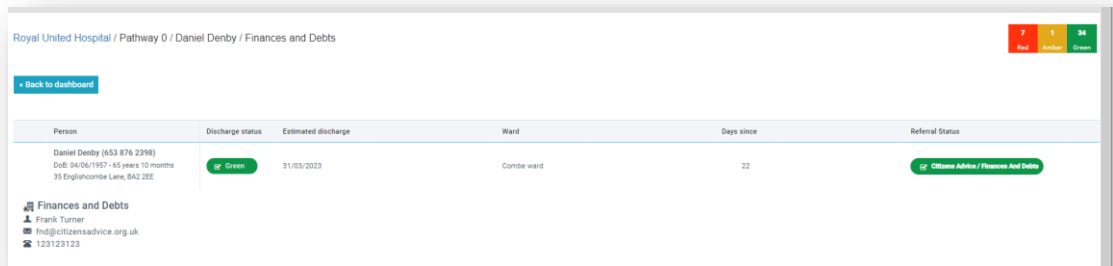
- Red - Services are:
    - critical or discharge dependent
    - not ready for hospital discharge and
    - there are less than 3 days until the expected discharge date.
- Amber - Services are:
    - critical or discharge dependent
    - are not yet ready for hospital discharge and
    - there are between 3-5 days remaining before the expected discharge date.
- Green - Services are:
    - critical or discharge dependent.
    - Ready for hospital discharge.
- Blue - Services are:
    - critical or discharge dependent
    - more than 5 days remain until the expected discharge date.
- White - Services are:
    - not critical or discharge dependent

11.11.2 Opening the referral from the dashboard

If the user clicks on the referral, it will open another page giving more detailed information.

This header section shows the organisation, the pathway, the patient's name, and the support required.

It lists the person's name, date of birth, NHS number, address, and post code. It will list the Discharge Status, Estimated Discharge Date, Ward, Days since the referral was made and the referral status, based on their progress.

Figure 66- Opening a referral

The service provider contact details are listed should the Discharge Liaison Officer or Discharge Facilitator would like to contact them by phone or by email.
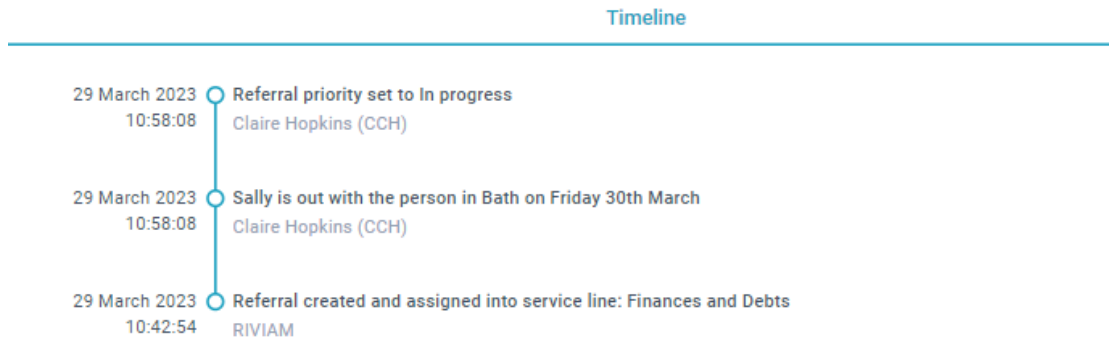
11.11.3 Timeline of activities

Figure 67- Timeline of activities and notes.

- The timeline shows a history of the status update events for a user to review.
- When a partner organisation changes the status of the referral, they include a status reason which is included in the timeline.
- Also, if a user creates a timeline event for discharge, then this will also be included in this timeline.

12 Outcomes

When a referral has been completed it should be moved to the correct outcome referral step.

RIVIAM will produce reports for a customer's management teams with this data.

Our outcome management functionality is currently in development and will include the ability to capture and report on patient outcomes.