

Multi-Partner Referrals Group (MPRG)

User Guide *Making Referrals*



May 2020
Citizens Advice Liverpool

An inter-organisation approach to client referrals across the Liverpool City Region



Background

- Multiple clients, multiple cases, multiple agencies
- Develop a system suitable for use across the Liverpool City Region, providing a single referral portal to meet the needs of multiple agencies.



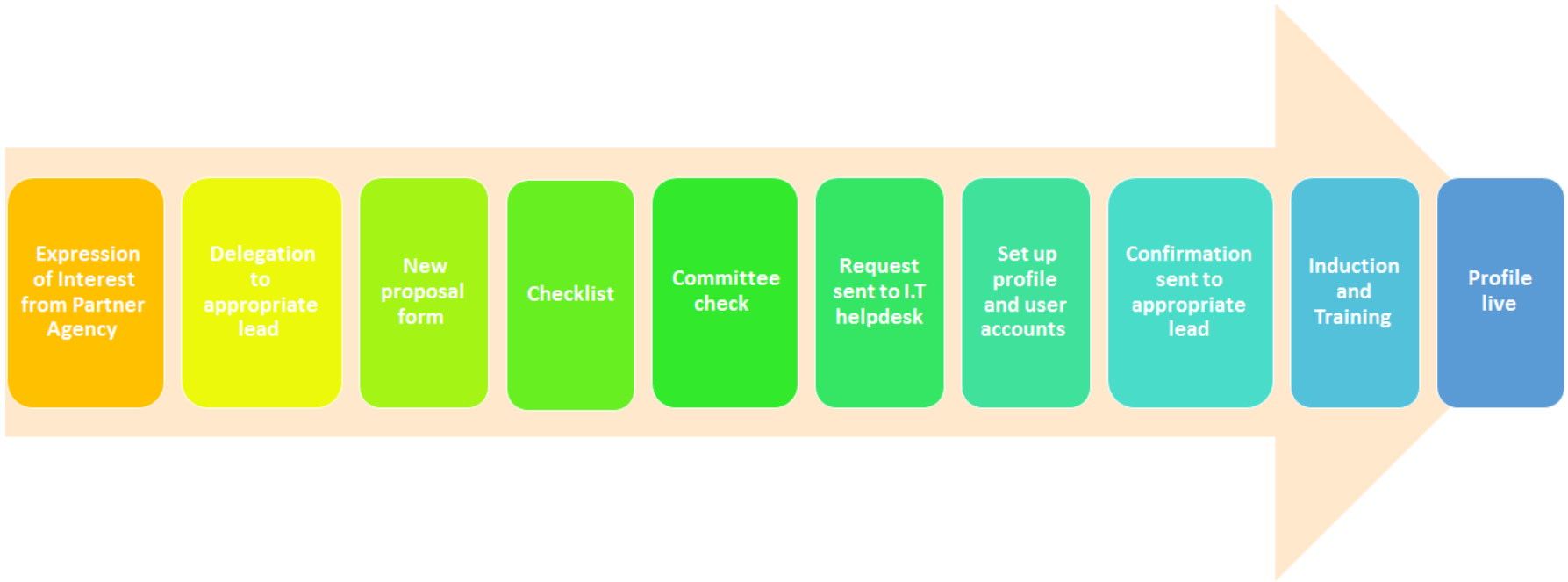
System Features

- Inter-agency referrals,
- Tracking of live referral status,
- Local management of system users (by agency Primary User)
- Customisable data fields, including service types, agency facilities, referral data requirements, outcomes, locations, and much more.
- Statistical reporting of referrals.

Secure, Resilient, Intuitive

- Secure website using https and SSL 2048 bit encryption,
- Tier 3 data centre, ISO27001 and SSAE16 approval,
- 10GB WAN with four separate suppliers,
- Each agency has a primary user – account managed by CA Liverpool,
- The primary user for each agency is responsible for managing their own users access to their agency area of the system.

Procedure for new partners wanting to access MPRG



ReferNet

- <https://liverpool.refernet.co.uk>



Liverpool City Region CA Refernet System

Welcome to the inter-organisation client referral system, hosted by Citizens Advice Liverpool. Refernet supports local organisations working together with Citizens Advice Liverpool and each other to ensure our respective clients receive the advice or service most appropriate to their needs.



We provide free, confidential and impartial advice

Our services

Benefits advice

Click here for agencies offering information and advice on welfare benefits and tax credits, including form filling, better off calculations, and appeals

[View Agencies](#)

Debt advice

Click here for agencies offering debt advice including assessment, financial statements, negotiation with creditors, ongoing casework and representation services

[View Agencies](#)

Help To Claim

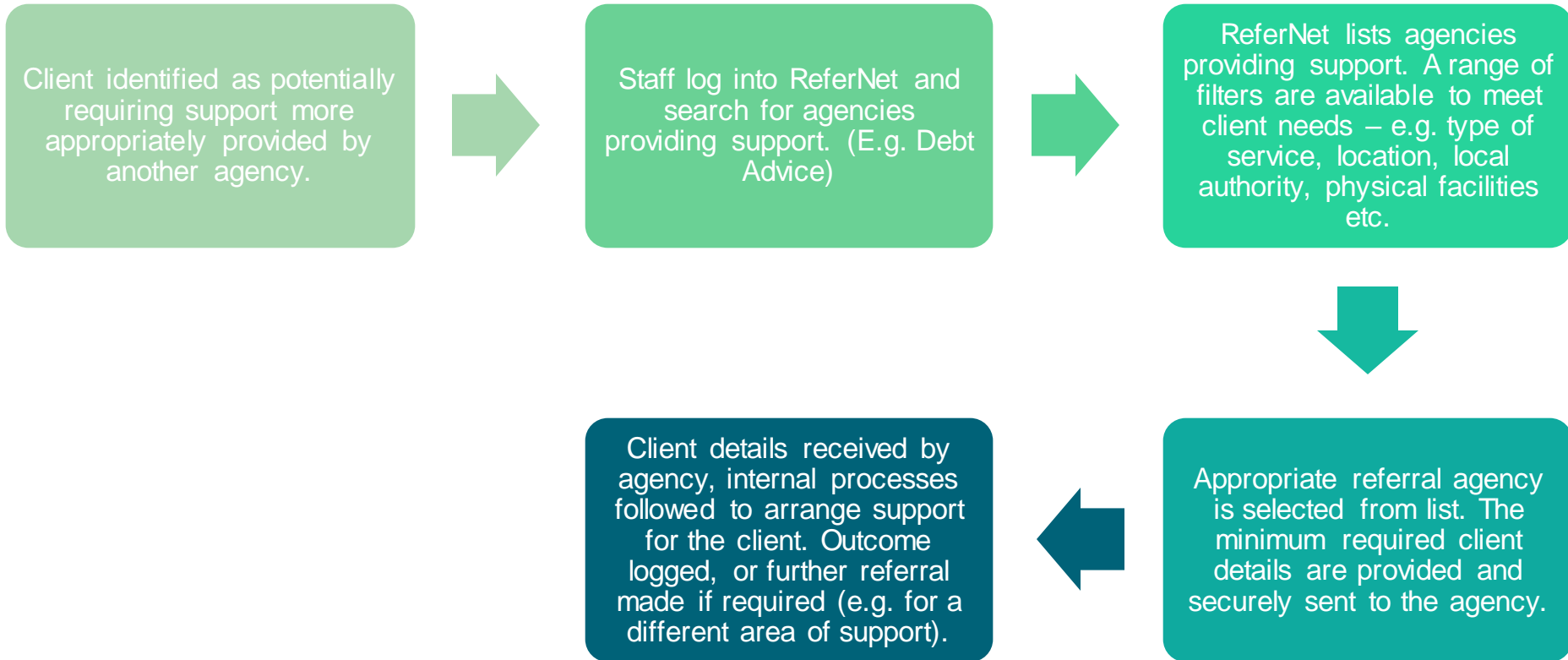
Organisations providing a service to support clients with their Universal Credit claims.

[View Agencies](#)

Housing / Family advice

Housing advice

Referrals – Client Journey



Logging On

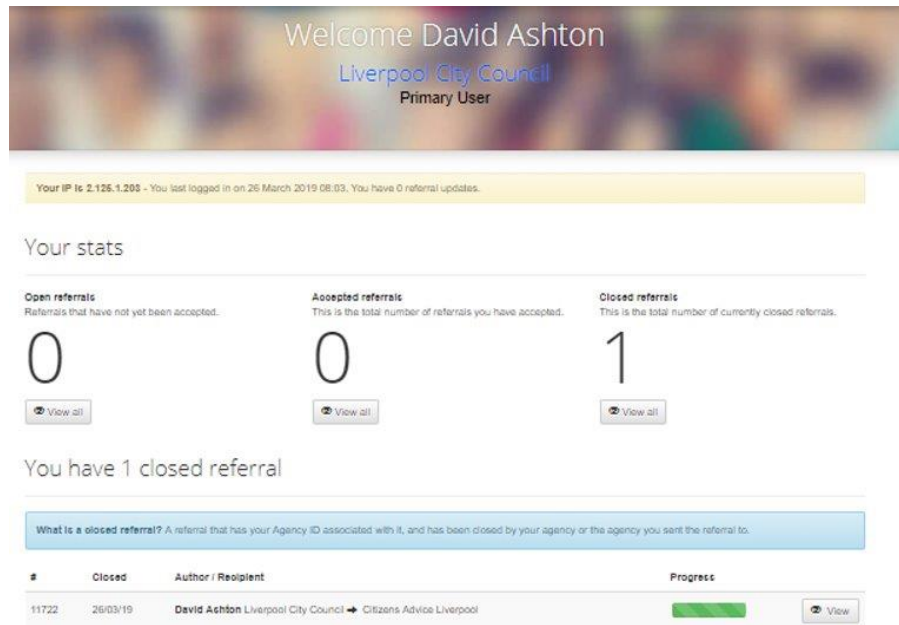
You will receive a unique username and password that will be sent to your email address.

Primary User: The main user who will manage the agency's profile page and additional users that need access. Primary users can also change user details such as username and password and can also access the sites reporting function.

A screenshot of the Refemet sign-in interface. At the top, it says "Sign in" and has the "refemet" logo. Below that, it says "Please enter your username and password to access your Refemet system." There are two input fields: the first is for the username, with "LCC.Primary" entered, and the second is for the password, with "*****" entered. A green "Sign In" button is below the password field. At the bottom, there is a link that says "Don't remember your password? Click here!"

Home screen snapshot

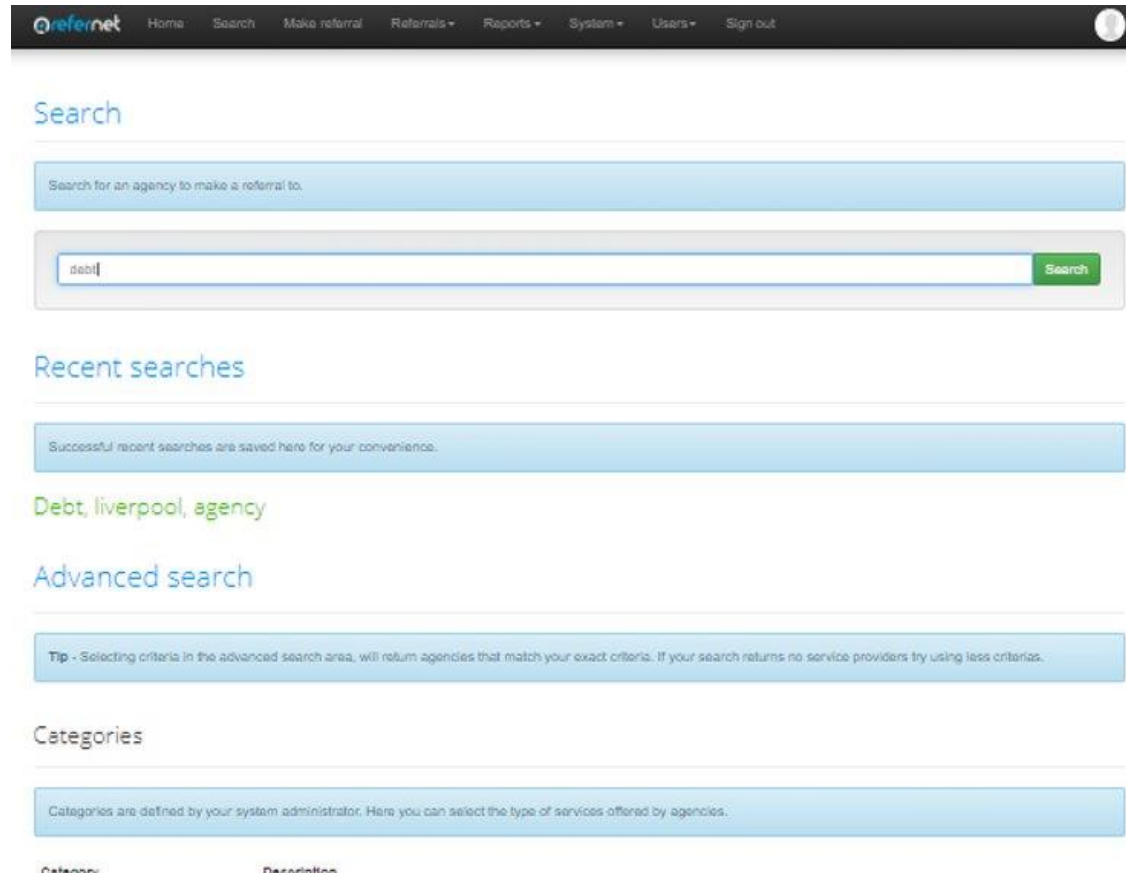
Here you will be able to see how many open, accepted and closed referrals there are. This will include referrals received and referrals sent.



2) Searching for an "Agency"

You will be able to search for names of organisations e.g. "Citizens Advice Liverpool" or you can search by category area such as "Debt, Food, Help to Claim " and also search by Area in "Advanced Search" which limits results to only those within a selected Local Authority area.

Agency: Refers to an organisation/charity/service that is on the online referral system.



The screenshot shows the Qrefernet web application interface. At the top is a dark navigation bar with the Qrefernet logo and links for Home, Search, Make referral, Referrals, Reports, System, Users, and Sign out. The main content area has a light blue header with the word "Search". Below this is a large light blue box with the text "Search for an agency to make a referral to." and a search input field containing the text "debt". To the right of the input field is a green "Search" button. Below the search box is a section titled "Recent searches" with a light blue box containing the text "Successful recent searches are saved here for your convenience." and a single search result "Debt, liverpool, agency" in green text. Below this is a section titled "Advanced search" with a light blue box containing a tip: "Tip - Selecting criteria in the advanced search area, will return agencies that match your exact criteria. If your search returns no service providers try using less criteria." At the bottom is a section titled "Categories" with a light blue box containing the text "Categories are defined by your system administrator. Here you can select the type of services offered by agencies." Below this box is a table with two columns: "Category" and "Description".

Qrefernet Home Search Make referral Referrals Reports System Users Sign out

Search

Search for an agency to make a referral to.

debt Search

Recent searches

Successful recent searches are saved here for your convenience.

Debt, liverpool, agency

Advanced search

Tip - Selecting criteria in the advanced search area, will return agencies that match your exact criteria. If your search returns no service providers try using less criteria.

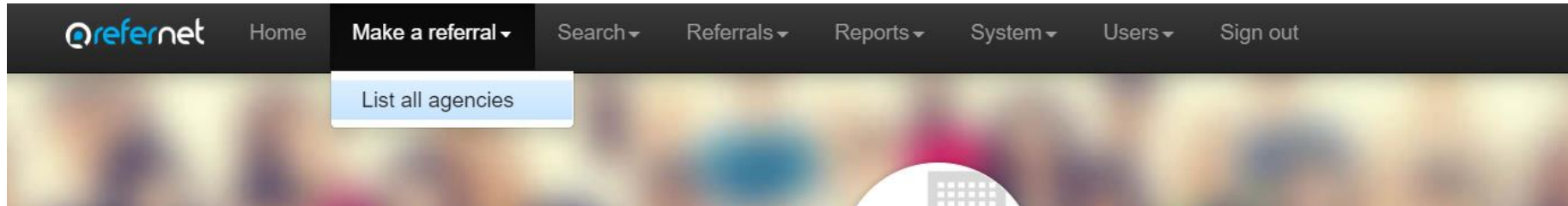
Categories

Categories are defined by your system administrator. Here you can select the type of services offered by agencies.

Category	Description
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Looking for an Agency

You can also see a list of all agencies currently on refer-net.



View location on Google Maps



Agency details

The first Citizens Advice opened in Liverpool on 4th September 1939, established in the aftermath of the first world war and provided, amongst other initiatives, a casework service for families in need. Since then, we have continued to grow as a frontline service, finding innovative solutions to the advice needs of our community through free, confidential and independent advice and information services.

Language

Access to interpreters

Organisation type

Registered Charity

Opening times

Day	AM	PM
Monday	09.00 - 12.00	12.00 - 14.30


3) Making a referral

Once you have found the agency you are looking for, click the green "Make a referral" button. You must also click "View Details" to find out more information about the organisation as they may want you to add specific details to the referral form.



Citizens Advice Liverpool

Make referral



Categories

Debt Advice, Help To Claim, Financial Capability, General Advice, EUSS - EU Settled Status, Hate Crime, Welfare Rights, General Advice ext, General Information, Employment, Energy, Immigration

Description

We can all face problems that seem complicated or intimidating. At Citizens Advice Liverpool we believe no one should have to face these problems without good quality, independent advice. That's why we're here: to give people the knowledge and the confidence they need to find their way forward - whoever they are, and whatever their problem. We can give you advice on a wide range of subjects such as:

- benefits, including help to claim Universal Credit,
- work
- debt & money






[View details](#)

3.1) Referral Form

Please note, each agency may require certain information to be added to that referral form, please ensure you read the agency's profile before making a referral.

Fill out the required details in the referral form, including, client details, address, further details, about the referral, notes attachments and consent.

Client details

Title...	▼
 First name	
 Surname	
 Telephone	
 Email	
 Date of birth	
Preferred method of contact...	▼

Client address

Address line 1
Address line 2
Town
County
Postcode

Further details

Ethnicity...	▼
Disability/Health problems...	▼

About the referral

Tell us a little about the client's circumstance and the case.

3.2) "Assign A Category"

You will then need to “Assign your referral a Category” to the referral. Each agency is linked to the appropriate categories. This links the referral to the right project/service/area of work within the agency and facilitates meeting the clients' needs.

Assign your referral a category

What is a referral category? Referral categories are defined by your system administrator as topics your agency caters for and has an in depth knowledge of.

Select category...

Select category...

Community Group

Debt Advice

EUSS - EU Settled Status

Faith Group

Financial Capability

Foodbanks

General Advice

Health - Ways to Wellbeing

Help To Claim

4) Consent

Ensure the client has given consent to be referred. Tick the consent box at the bottom of the referral page.

Attach a file

This could be an image (jpeg, bmp, png etc), Word document, PDF, Excel document etc to support the client's referral. Once you have added a file you can remove it or add another.

No file chosen

We require client consent.

A referral requires consent from the client to allow us to store personal data and open a referral for them. A referral cannot be opened without consent.

Client consent

I can confirm that my client consents to this referral being made.



Data protection

As referrer I am the data controller for the purposes of the Data Protection Act 1998. I will manage the information provided on this form in accordance with the Data Protection Act. I have explained the reason for collecting their personal information and what it would be used for and they have provided their oral consent to.



Have you double checked the form?
Yes? Let's go!

5) What happens to the referral?

- Once the referral has been sent, the partner agency will receive a notification that they have an open referral and will either accept or decline the referral. The referral will be closed once an action has been completed from the partner agencies side. Receiving agency accepts referral and follows internal process to provide service to the client.
- Updates/outcomes are logged on the referral until the point of closure.

Your Referral has been sent.

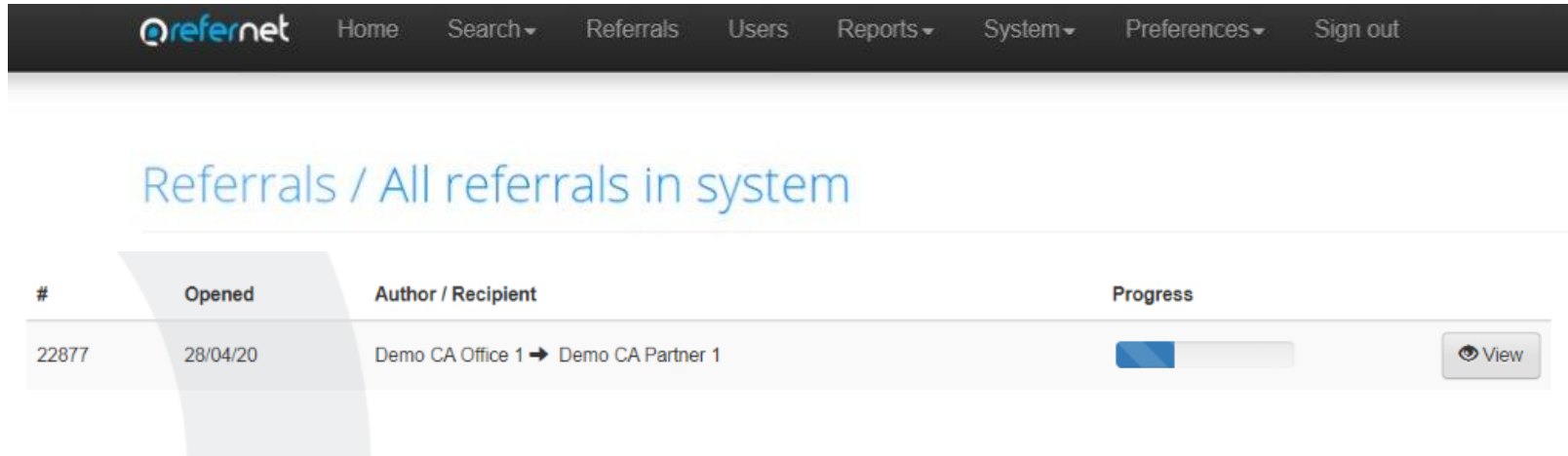
Great news! Your Referral has been opened and sent. We're just waiting for your recipient to accept it.

You have 1 open referral awaiting acceptance

#	Opened	Author / Recipient	Progress	
11722	26/03/19	Liverpool City Council → Citizens Advice Liverpool	<div><div></div></div>	View

6) Checking on referral process

- You will be able to track the progress of referrals by clicking on “Referrals” which is located on the top menu bar and click "View" on the relevant referral.



The screenshot displays the Qrefernet web application interface. At the top is a dark navigation bar with the Qrefernet logo and menu items: Home, Search, Referrals, Users, Reports, System, Preferences, and Sign out. Below the navigation bar, the page title "Referrals / All referrals in system" is shown. A table lists referral details, and a progress bar indicates the status of a specific referral.

#	Opened	Author / Recipient	Progress
22877	28/04/20	Demo CA Office 1 → Demo CA Partner 1	<div><div></div></div>

A "View" button with an eye icon is located to the right of the progress bar.

Referral Outcomes

Currently, there are 6 outcomes that the referral agency can select once the referral has been closed. They are;

	Outcome
Unsuccessful referrals	Client contacted – referral withdrawn by client
	Client contacted – referral not appropriate – referred to another service
	Client contacted – no response received
Successful referrals	Client contacted – representing client
	Client contacted – client advised

7) Updating or adding to the referral

Refer-net allows you to add attachments to the referral and to add notes for the referral partner to view. For example, you want to attach a consent letter, client document or send a note. To do that, click “View” on the relevant referral as shown above. You will see the following screen;

Notes

A private note is only visible to you. A regular note is visible to everyone.

Send notification?

You can select users that will receive an email notification advising that a note has been added. Notifications are **not** sent when adding a private note.

Notes

A private note is only visible to you. A regular note is visible to everyone.

[+ Add note](#)[🔒 Add private note](#)

Referral history

Date	Author	Details	Progress
26/03/19	David Ashton Liverpool City Council	Opened a referral to Citizens Advice Liverpool	<div><div></div></div>
26/03/19	David Ashton Citizens Advice Liverpool	Referral accepted	<div><div></div></div>
26/03/19	David Ashton Citizens Advice Liverpool	Referral accepted	<div><div></div></div>
26/03/19	David Ashton Citizens Advice Liverpool	Outcome assigned: Debt advice: Debt repayment negotiated.	<div><div></div></div>
		Demo outcome	
26/03/19	David Ashton Citizens Advice Liverpool	Referral closed	<div><div></div></div>

Files attached to this referral

To add a file, click the button below and select the file from the dialog box.

[Choose File](#)

No file chosen

Refernet

A simple, user friendly and intuitive system to manage the communication of client referral data between partners within the Liverpool City Region, ensuring continuity of appropriate support for all clients.

Thank you

If you have any questions or feedback about refernet, please contact:

Iqra Mazhir

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Iqra.Mazhir@caliverpool.org.uk

0151 522 1400 Ext:1727

If you require I.T. Support, please go through our I.T. Helpdesk

<https://caliverpool.freshservice.com/>