

3.1: Referrals

Hello everyone, this is Steve from Lamplight. Welcome to Lamplight basic training part 3, Referrals, showing you how to create and edit referrals in, and out.

This short video is an introduction to the concept of referrals.

You can download a transcript of these videos if it's helpful for you and can read along. You can pause the video at any time and try what we've done in your own system or our test system. We'd encourage you to do this regularly during the video – after all you can pause as often as you like. We've found practice and building muscle memory are by far the best ways of learning.

Referrals

If you're adding information in to Lamplight, there are really only two different types of page you'll see. Once you've experienced both of these, everything else will look quite familiar. The first type is the demographic type profile tab, and the second is activity type record. These are things that happen, which is to say, the work and other types of activity you do with your service users.

Depending on your system, these records can be for referrals, work, outcomes, evaluations, communications, or grants.

For most organisations you'll take referrals into your service and you'll make referrals out to other services. Lamplight is built to record these and to be able to report on them in a number of different ways.

Let's navigate to the profile of our training user using the search box in the top right of the screen, and once we're in their profile, we'll click on the referral tab.

You can also enter referrals from the main menu, using Work > add new > referral, but many people will enter from the profile page as part of their workflow, and that's what we'll do now. The process is essentially the same.

We use a referral form to enter each referral, which allows us to enter either a referral in to our organisation, or a referral out, using the same form. This form and the record it creates are called a 'referral record'. To add a referral to

Lamplight we use the 'Add' button which, as in other pages, can be found over on the right.

Clicking this opens up the referral record as a pop-up box in Lamplight, with several tabs. I'm going to take you through them a step at a time.

Before we start I want to remind you that the record you're seeing can be used to enter referrals in or out, from different organisations, and recording different information for different types of referrals. This means that each time you use it, you'll have a range of options available, but will only use the ones you need for the referral you're entering. You enter one referral at a time.

Some of the fields in the referrals tab may be ones that you don't complete right away but come back to complete later. We'll show you how to do this.

We suggest you take a short while now to repeat what you've learned in your own system, referring back to this video if useful. Keep rolling to the next video to see how to enter and edit referrals, otherwise thanks for taking this training video.