3.2: Creating a Referral

Welcome to Referrals, video 2 of 2, entering and editing a referral.

Whenever you enter a record, you always use the first three tabs in the record, entering when and where it happened, who was involved, and the details of what happened. We'll start on the first tab, When and Where, and we're going to enter a referral in to our organisation.

A quick reminder that you may have additional custom fields on any of your tabs that we don't have. A custom field is one created uniquely for your organisation, and so we can't show the ones that you have in this video, though we'll demonstrate some examples. Speak to your system administrator or implementer if you have a question about these.

When and where

We start with the time and date. For most organisations the time of your referral won't matter, so you can ignore it. The date shows by default as the day that you are adding it, and you can change this if needed. If you have a 'Date to' field, the second date will normally be the same as the first.

Workareas

Every time we enter a record we also have to select a workarea, and you'll normally select a subworkarea too, although this is not mandatory. We'll talk about workareas in more detail when looking at work records, but speak to your System Administrator or Implementer if you're uncertain what to select here. In this case the referral I'm recording is for 1:1 support, and so I'll go to the 1:1 support work area then select 'Referral' as a sub work area.

If you use locations you can also select a location here, although it's not required.

Switching tabs

To move to the next tab, either click the 'Next' button in the bottom right, or at the top of the section select the next tab along. A quick tip, if you click the 'Next' button and see a blank screen, try scrolling up!

Attendance

Your next tab may be called 'Attendance' or may use a simpler version called 'Involving'. Both tabs do the same job, allowing you to record who is involved in the referral. In the same way as relationships, you can only add in profiles which are already in the system.

In the Attendance tab as shown on our system, you enter names using the 'Find profiles' box at the top of the section. As with search boxes elsewhere in Lamplight, click into it, start entering the name of the person making the referral and then select them from the dropdown list. As well as people and organisations, you can also add groups or lists of people in one go, by typing the name of the group. If you don't know what a group is – don't worry, you'll cover it in our video on groups.

The table you can see in this tab shows you who is attending. You'll see that for your Service user, it shows their name, whether they attended or not, and their role, in this case 'Service user referred'.

For a referral you need have up to three different profiles (which is to say, people or organisations), attending or involved.

- The service user being referred (they may already be in the table if you started from their profile)
- The person or organisation who is referring the service user (who will attend with the role 'referrer'.) Let's enter in the name of our referrer now.
- Who they are being referred to, which in this case is our organisation.

Of course, if you are recording a referral out, some of these roles will be swapped. For example, the referral would come from your organisation, making you the referrer, and the external organisation would be who they are being referred to. Depending on your system set-up, you may make referrals from your organisation as a whole, or you may have different departments entered as separate profiles to refer from.

Once you've entered the records check that each profile is shown as attending in the right capacity, by looking at the 'role' column in the attendance table. You can change the role by left clicking on the name of the role in the table (for example service user referred), and then clicking again to access the drop-down list and choosing a new option.

Involving

If your tab is called ‘Involving’ instead of ‘Attendance’ then you have a simple version of recording who is involved in referrals. You have a field or search box for each of the different roles: the person being referred, the referrer, and who they are being referred to. Simply start to enter the appropriate profile names in each search box, and then choose the name you are looking for from the drop-down list that appears.

Now we’ll move to the next tab.

Details

The third tab is the ‘Details’ tab.   As you would expect, we use this to record the detail of the referral. Let’s look through the fields.

Referral direction: This field records whether the referral is being made in to you, out to another organisation, or is an internal referral. Recording this is often very important for your reporting.

Referral reason: This is the equivalent of the subject line in your email. It’s what appears when you look at the table of referrals to show you what’s been happening, and it’s normally best to keep it short, sweet, and to the point.

Referral)) notes: This gives you a space to record any further details you need to note down. This could be notes from your referral form or from a telephone conversation about the referral. Simply pop them in here.

Waiting lists: If you have the waiting lists module then you can add someone directly to a waiting list from the referral. You’ll learn more about this in our waiting lists video.

Referral success: Most clients use this in some form. This is a way of recording whether the referral has been accepted by you, or by the external agency. Your options may simply be yes or no, or there may be additional ones for you to choose from.

Finally, you may have some custom fields in this tab. For example, a common one is ‘Referral organisation type’, which could let you report not just on exactly which Social Services referred to you, but how many social care organisations referred to you altogether. If you have any doubt about any of your custom fields, do speak with a member of your team.

You may have some additional tabs in your referral record too. Some may be custom tabs, and do look through these. Others, such as expenses or media, are tabs that come with particular modules, and we'll go over these more as we go through the basic training.

It's worth saying that while we've spent some time going through the details of each tab here, you'll fly along once you get used to entering them.

As always, when you've finished creating your record, it's important you go to the bottom right of the section, and click save, to save it to Lamplight.

If you've entered the record from within a profile tab, when you save you'll see the table showing you all of the referrals in and out for that person. This table works in the same way as those for any other type of activity record, and we'll cover this next, in work records.

You can go to any profile and see the table showing referrals they have been involved in in the same way. So for example, you can also go to the referral tab in an organisation's profile and see all of the referrals relating to them.

Before you watch the next video, why not create at least one referral in, and one referral out, either in your own system or our test one? You can pause the video and take a moment to try this. See the next group of videos to learn about Work Records in Lamplight.