



Referrals process (manual)

Referrals can be generated using MyWai from Service Providers, Self-Referrals and Manual Referrals. To generate a manual referral from the **Referrals** worklist, click **Create**, complete details and **Submit**.

For step by step instructions, see [MyWai Referrals Manual Entry \(RMS\) QRC](#)

1. From the **Referral** worklist, find the newly submitted referral in the list (by using appropriate filters)
2. From the **Actions** column in the **Referral** worklist, select **Lookup NHI**  to verify NHI details for this person (*If it's not possible to link this referral to an NHI, it can be left for now, but it is very important to confirm the NHI details at the earliest possible time*)
3. Click the Referral icon to open the referral for processing, **Edit** the Referral form if required, click **Submit**
4. Select a **Referral Action** – see below for the action behind each option



Referral Actions

Incomplete	Select a reason this referral is NOT accepted (eg criteria not met, ineligible for service, deceased)
More info required	More info is required before taking any further action on this referral (eg test results)
Complete	Click Complete to move this referral to the Triage worklist
Referred on	This indicates that the referral has been sent to a different organisation (selected from the organisation dropdown) using the Referral template in MyWai

After selecting a referral action, it cannot be reversed, and all referrals are listed in the **Referrals** worklist.

4 parts to the Triage Process

From the **Triage** worklist, referrals for triage can be filtered by Status/Priority from the top of the screen.

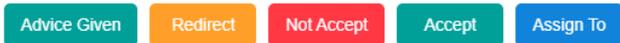
1. Priority

The first step of the Triage process is to indicate a **Priority** for this Referral – all Referrals require a Priority.

2. Triage Form

Once prioritised, **Edit** the Triage Form to open and complete it, then **Submit** (shows as **Completed**)

3. Triage Actions (once selected, the Triage Action **CANNOT** be changed)



On Hold: This holds the Referral in the Triage worklist until an Action is agreed on (add a reason)

Advice given	This indicates that advice has been given relating to this referral
Redirect	Record that this referral has been redirected outside of MyWai (this does NOT redirect)
Not accept	Record the reason this referral is NOT accepted (eg criteria not met, ineligible for service, deceased)
Accept	Click Accept to end triage – the referral can be accessed from Referrals, but not the Triage worklist
Assign To	Community Allied Health and NASC use this to Assign to a Waitlist until the service is able to help

After an action is selected for a Referral, it is no longer visible on the Triage worklist, except those referrals with **Advice Given** OR **Not Accepted** as the action, can be filtered from the Status filter at the top of the list.

Add Collaborative Care Team or Add to Service Waitlist

Once the Triage Action has been Accepted, click **Add Collaborative Care Team** or **Add Services to Waitlist**. A Collaborative Care Team is a Care Team that may include more than one service, allowing collaboration between the services and visibility of clinical records created by all services in the Care Team for everyone in the Care Team. If the Care Team allocation does not occur yet, click **Add Services to Waitlist** until it does.

Add Collaborative Care Team

Add Services To Waitlist

Add Collaborative Care Team

A Collaborative Care Team enables access to this Person's record for ALL full access Care Team Members. A Care Team could include multiple services sharing their clinical records while that referral is current. Services can be added and removed as appropriate for the support required through the journey.

1. Click **Add Collaborative Care Team** to view any existing Care Teams, then either Add your Service to an existing Care Team OR Create a NEW Care Team, then Add your Service. Every Referral requires a Service to be assigned and that service to be attached to a Collaborative Care Team.
2. The name of a care team can reflect the service, or it can be named whatever is appropriate eg Child Health OR Diabetes
3. Once the Care Team has been created, individual members of the Care Team can be added, giving those individuals access to the full clinical record for this Person.

Add new Collaborative Care Team or new service to existing Collaborative Care Team

Add service to pre-existing Collaborative Care Team Add a New Collaborative Care Team

Select

Choose from a list of standard Collaborative Care Team names Create a new name

Choose from a list of standard Collaborative Care Team names

Mental Health & Addictions

Select service

Service

General Adult

General Adult Care Team

This field is required

General Adult Location

This field is required

Reason For Referral

Submit

Name the Care Team here

Add Service(s) for this Care Team

Add Individuals to the Care Team

Add Location for the service

Add Reason for Referral

Submit

Add Services to Waitlist

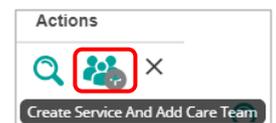
Add Collaborative Care Team

Add Services To Waitlist

If your service is not ready to allocate Care Team Members for this person, click **Add Services to Waitlist**, select the **Service** required, **Location** (if appropriate) and **Reason for Referral**, then **Submit**.

Once submitted, the record sits in the **Service Waitlist** for Care Team allocation.

In the **Actions** column, click the Care Team icon to create a service and add Care Team members. This action also removes this person from the Service Waitlist.



Where to now?

When a Referral has been Accepted and a Collaborative Care Team created, the Person record is now visible in three worklists: 1) **Active Worklist**, 2) **My Caseload** (for all those in the Care Team), 3) **Referrals** worklist.

Crisis Management: Also view Person records in the Crisis Management worklist ([Crisis Management QRC](#))

Inpatient: Referrals are triaged from Inpatient > Waitlist Worklist not in the Triage worklist ([Inpatient QRC](#))

Add Event

Once a Triage Action has been selected, use **Add Event** to record any Triage interaction with the Person.

You can also add this Person to the pre-admission **MDT meeting**