refeRHEALTH

User Handbook for Referrers

For Version 3 released 2020

Last Updated November 2021

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1   Contents

2   About refeRHEALTH

Current Version: 3.0 (released 2020)

refeRHEALTH is a secure online referral tool that can be used to effectively manage resources, referrals, and performance for health services.

Any service provider contracted by the DDWMPHN or WQPHN for mental health services is required to use refeRHEALTH. This has been included in your contract as the means of collecting the Primary Mental Health Care Minimum Data Set (PMHC-MDS). All PHN funded services for mental health are required to report on the PMHC-MDS, a requirement set down from the Department of Health. refeRHEALTH has been designed to make this as easy as possible for service providers, as well as provide referrers with a convenient tool to track the progress of their referrals to different PHN funded services.

3   Profile/Account

To edit user details and notification options, log in to refeRHEALTH, click on the username at the top left-hand corner, and select one of the options: My Details, Change Password, Notifications, My Departments, or Log out.
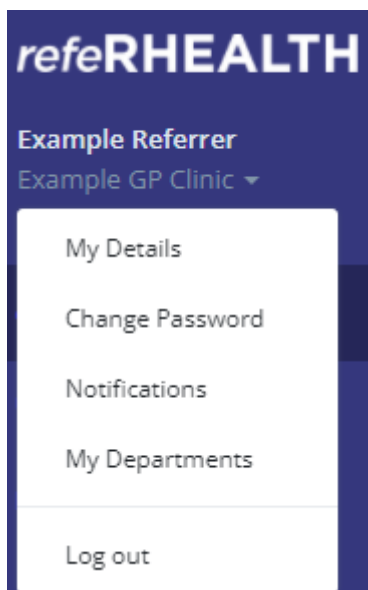
3.1 Changing Departments

Some users will have access to multiple departments in refeRHEALTH. To swap between departments, click on the username in the top left-hand corner and select the appropriate department.

Note: When entering referrals, ensure the correct department is selected first, as this will be transferred to any referrals created.

3.2 My Details

Note: Two-factor authentication is required for data security. RHealth strongly advises that every user provide a mobile number so that the code can be received by SMS. This avoids the issue of emails being blocked or delays in receiving an email causing log in issues.

- **Your Name** – any changes to a user's name must be requested via email to Helpdesk
- **Username** – any changes to the username must be requested via email to Helpdesk
- Edit **Email** and/or **Mobile** number and Save Changes.
  Note: please ensure these are correct as a two-factor authentication code will not successfully send to an incorrect email or mobile.

3.3 Changing password

Users can change their passwords here. Passwords must meet the following criteria:

- ✓ Be at least 8 characters long.
- ✓ Contain at least one number.
- ✓ Contain at least one non-alphanumeric character.

3.4 Notifications

Referral notifications can be received via refeRHEALTH (web), email, or SMS.

3.5 My departments

Allows the user to view their permissions and the departments to which they have access.

3.6 Reset password

Users must send a password reset request via email to helpdesk@rhealth.com.au.

3.7 User Permissions

Note: User permissions can only be updated by refeRHEALTH Administrators.

- **Clinical Referrer** – Allows the user to create referrals and view sessions that have been recorded by the service providers.

- **Non-clinical Referrer** – Allows the user to create referrals and upload files to them but cannot view sessions recorded by the service provider.
- **Officer –** Allows the user to view all referrals made regardless of their department referral sharing setting (see Referral Sharing).

4   Dashboard

The Dashboard provides an overview of New Referrals (i.e., these are referrals **to** the user's department, so will only be useful to Providers), Recently Updated Referrals, and Latest News articles. From the dashboard, in the top right-hand corner, a user has the option to Make Referral.

5   Notifications

Referral notifications are now received in a mailbox within refeRHEALTH. These are titled "Web" notifications. These are accessed through an envelope icon at the top right-hand corner of refeRHEALTH when logged in.

When a note is created on a referral for the user's department, and the option to receive web notifications for that program is ticked under the user's Notifications, a red number will appear on the icon.

## 5.1   View Notifications

To view notifications, click on the envelope icon in the top right-hand corner of refeRHEALTH and select the new notifications or **All Notifications**. Click on the unread notification and select to **Go to Referral**. Notifications can be deleted at any time.

5.2   Edit Notification Options

Click on the username at the top left-hand corner and select Notifications.
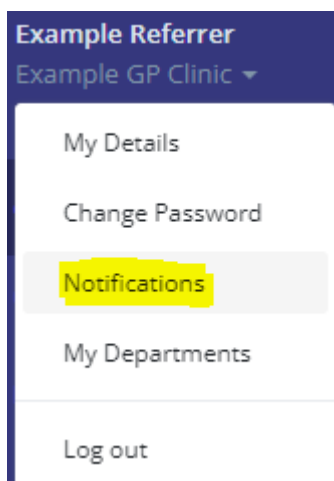
6   Patients

Only patient records that have/had a referral connected to the user's department (as a referrer or a service provider) are viewable by users within that department.

6.1   Search Patients

Patient records can be searched by selecting Patients from the left-hand menu. Patients can be searched by first and/or last name, suburb, or Department of Health ID. To view the patient, click on the patient's name shown in blue, which indicates it is a link to the record.

6.2   Create a Patient

Patient records can only be created when entering a referral (see Create a Referral). If the referral process is not completed, the patient details will need to be entered again.

6.3   Edit a Patient

A patient's contact details, next of kin, and GP details can be edited through the patient record, accessed from the Patient menu or while in the patient's referral (see Patient record). Once the patient record is open, select **Edit patient** from the Actions menu on the right-hand side of the screen.
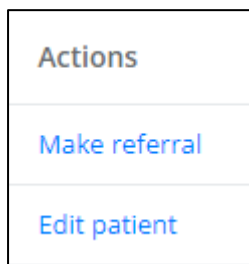

Once the patient contact details have been updated, select Save Changes at the bottom of the screen.

Note: The patient's name, gender, and DOB can only be amended by refeRHEALTH Administrators. To request this, add a note to the patient's referral and select to Notify refeRHEALTH Administrators.

7   Referrals

7.1   Search Referrals

Select Referrals from the left-hand menu. If the user's department both makes and receives referrals, the user will see two tabs under a referral search: 'Referrals to Me' and 'Referrals I've Made'. 'Referrals to Me' are all referrals made to the department by another referrer (i.e., the user is the Service Provider). 'Referrals I've Made' are all referrals made as a referrer (i.e., the user is the Referrer).
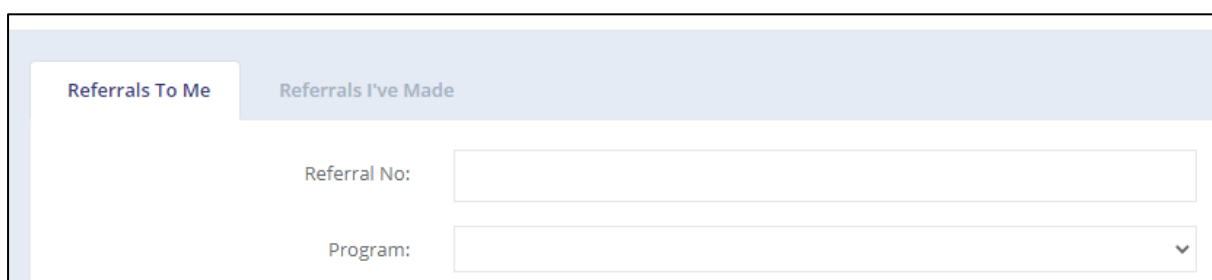
Referrals are colour coded to show when they have been viewed by the provider.

■ Not seen by provider   ■ Seen, no sessions   ■ Seen, with session within 90 days   ■ Seen, last session outside 90 days

Search by: Referral No, Program, Referrer, Referral date range, Patient name, Patient suburb, and/or Most Recent Session.

Note: to include closed referrals, the user must change the Status option to "Any status" or "Closed", otherwise only Open referrals will be displayed.

Click Q Search

7.2   Export Referral Lists

Search the referrals first (see Search Referrals above) to display the required data.

Click ⬇ Export

Data will be downloaded as a .CSV file (open with a spreadsheet program).

7.3   Create a Referral

==NOTE: The referral fields to be completed differ between programs. This is an example.==

1. Select Make Referral from the Dashboard, Referrals screen or Patient Details screen.
2. Patient Name: On the 'Create Referral' screen enter the patient's name, DOB, and either mobile or suburb, or both.

Note: If the referral was created from the patient record (see Search Patients) or the referral (see Make new referral), this step is skipped.

Patient Name *	First	Last
Date of Birth *		
Mobile		
Suburb		
	Continue... Cancel	

3. Existing or New:

Either select an existing patient if one is shown or create a new patient. If the patient is already entered in the system with the same details, the existing patient can be chosen.

Create Patient			
Existing Patients		If name, DOB, and either location or mobile match an existing patient, you have the option to 'Choose' the existing patient, rather than create a duplicate record.	
Here are some existing patients of the same name. If any of these match your patient, please choose that patient instead.			
Name	**Date of Birth**	**Location**	**Phone**
Marco Polo	01/01/1999 (age 21)	TAABINGA QLD 4610	Choose

OR a new patient can be created following the flow of the form. Fields that have an asterisk (*) are mandatory.

Note: If the patient address or mobile number have changed, you can still choose the existing patient file. The patient contact details can be edited after choosing the patient. ==**Please DO NOT create a new patient file unnecessarily.**==

Create Patient

Existing Patients

No existing patients were found with the details you provided.

Create New Patient

Name *	Albert	Einstein
Gender *	○ Male ○ Female ○ Withheld ○ Other	
Date of Birth *	14/03/1879	
	○ Estimate ● Accurate	
Phone		
Mobile *		No number given
Email		
Address *		
Suburb *	TOOWOOMBA QLD 4350	
Country of Birth *	Australia	
Aboriginal *	○ Yes ○ No ○ Unknown	
Torres-Strait Islander *	○ Yes ○ No ○ Unknown	
Language Spoken at Home	English	

4. Additional Patient Details: Guardian/Next of Kin and GP Details can be entered but are optional. Once details have been completed click Create Patient.

Guardian/Next of Kin Details

Name

Relationship

Phone

Address

GP Details

GP Name

GP Clinic

GP Phone

Create Patient   Cancel

5. Program: Select the program the referral/s (multiple referrals can be created at this point). Press Continue... at the bottom of the screen.

Make Referral

You are making referrals for **donald duck** on behalf of **PHN Referrer Demo**.

Choose which programs you want to make referrals for. To view the program description and eligibility select the program on the left.

Available Programs

☐ ! Suicide Prevention - The Way Back Support Service   **4999** referrals available

☐ Aboriginal and Torres Strait Islander Social and Emotional Mental Health Support   **5000** referrals available

☐ Health Service Navigator (HSN)   **5000** referrals available

Note: Ensure that the correct program is selected at the first creation screen, as this cannot be changed later.

6. Provider: Choose a Service Provider. Use the search function to find providers by name or region.

Note: if multiple referrals are being created, the SP needs to be selected for all programs.

7. Referral Details: Referrer's Name will be prefilled with the user's name and Referral Date.

Note: Ensure the referral date is the date the referral was made, as no sessions can be dated prior to the referral date.

8. Patient Consent: Indicate patient consent for all programs selected. Patient consent is required.

9. Additional Referral Details: Note the asterisk is present on required fields. Different programs may require different information.

10. Referrer Details: This section is to capture details of the **source** of the referral. If the referrer is entering the referral, they can simply select 'No' from the dropdown list to avoid entering their own information.

Has this referral been entered by a service provider?

Select "**No"** (i.e., the referral is being entered by the referrer, therefore, the referral source information will be collected from the user's profile).

11. Finish: Select Make Referral at the bottom of the screen and confirmation will show that the referrals have been created successfully (if not, and error message with specific error information will show in red at the top of the screen).
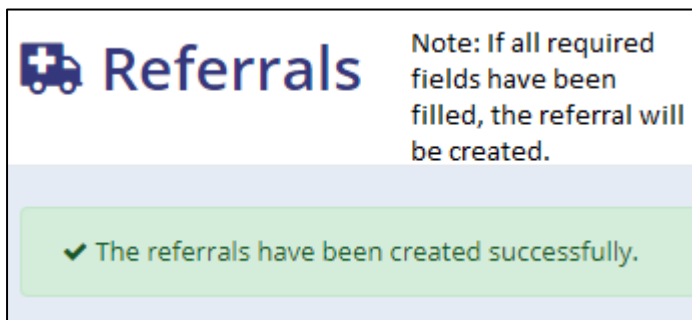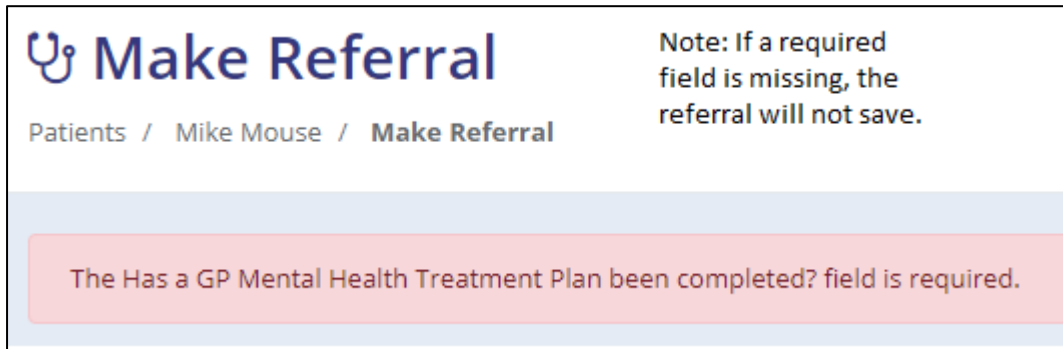

Note: Once the referral has been created, files such as a MHTP/MHCP can be uploaded under the Files Tab (see Upload a file).

7.4   Add a note

A note can be added to a referral to communicate to the Referrer, Provider, and/or refeRHEALTH Administrators. Examples of when you might need to contact Admins is when requesting additional sessions for a referral, fixing a data entry error, or requesting assistance relating to that referral or patient.

1. While you have the referral open, in the Overview tab, click on 'Add a note' (you can see this under the word 'Latest Activity' in the middle of the screen').
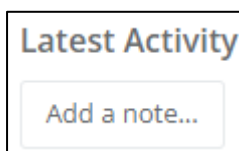
2. Enter your request (see screenshot below), select the organisation to notify, and select Add Note.
3. **Notes to Admins:** Admins will see this request, make the appropriate changes, and notify you through the Notes. You will see the Notification that you have a new note under the Mail icon at the top right-hand side of the screen.

4. **Notes to Referrer/Service Provider:** A Referrer or Provider will see a Notification via Web/Email/SMS depending on the Notification settings they have selected (see Notifications).

7.5 Upload a file

Files can be uploaded to referrals, such as MHTPs, referral forms, GP letters, outcome measure forms, etc. Any type of file can be uploaded; however, it is suggested that users stick to a standard type of format such as a word document (.docx) or a PDF.

1. Go the Files tab while in an open referral.

2. Then select to ⬆ Upload File

3. Choose a file to upload, then select Upload File.

Note: To notify other users that the file has been uploaded, post a Note from the Overview Tab.

7.6   Actions

When in a referral, there is an Actions menu on the right-hand side of the screen that provides shortcuts to actions the user has available for that referral.

The **Referrer** on the referral will see the below options:

Actions
Print referral

7.6.1   Print referral

A user can download a printout of a referral which will contain the following information:

- Referral Information
- Patient Information
- Contacts
- Sessions
- Non-Attendances

7.6.2   Close referral – Provider only

Only providers and refeRHEALTH Administrators can close a referral.

Note: Some referrals will close automatically if they expire (see Expiring Referrals).

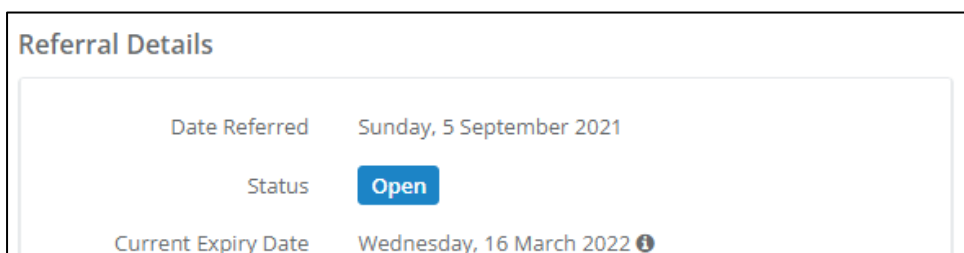## 7.7   Links

7.7.1   Patient record

This is a shortcut to the patient file that is linked with the referral. To quickly change patient contact details, click this link and select to Edit patient (see Edit a patient).

7.7.2   Make new referral

This is a shortcut to create a new referral for the patient that is linked with the referral. This will allow the user to skip the step of entering the patient's name at the beginning of the referral creation process. It will also ensure that a duplicate patient is not entered.

7.8   Expiring Referrals

Some referrals will close automatically if they expire. This happens if they have no activity (i.e., no notes, contacts, sessions, or non-attendances recorded) for a program specific period of time. The expiry date is shown on the Overview Tab under Referrer Details (see below). To see what the expiry period is for that program, hover over the information icon next to the expiry date.

Referral Details	
Date Referred	Sunday, 5 September 2021
Status	**Open**
Current Expiry Date	Wednesday, 16 March 2022 ⓘ

8 Service Provider Directory

The Service Provider Directory can be accessed through the Provider Directory menu.

8.1 Search

Search the Provider Directory by entering organisation name, region, and/or program, and selecting

9 Organisation Settings

9.1 Referral Sharing

Organisations have the below options regarding what referrals users can access. This is mainly used for GP clinics.

- Private Setting
    - Referrers – the user who entered the referral can see the referral, however, if the referrer is updated by refeRHEALTH Administrators, the Referrer Name shown on the Overview Tab is the user with access to view the referral.
    - Service Providers – Provider users can see all referrals.
- Shared Setting – All users can see all referrals.

9.2 Notification Email

Organisations can nominate an email address to receive all notifications alongside separate user notifications (e.g., an email address like 'intake@provider.com.au'). If you would like to set this up, please email helpdesk@rhealth.com.au (this is optional).

9.3 Programs Referring

Each organisation is provided access to refer to PHN funded programs. If there is a program the organisation refers to, but this is not listed when creating a referral, please contact Helpdesk.

10 Reports

Reports are currently available for Providers only.

11 Glossary

11.1.1 Referrer – The professional/practitioner who referred the client, the referral source (e.g., GP)

Note: some services delivered in primary mental health care allow clients to refer themselves for treatment. This would be considered a self-referral.

11.1.2 Provider (also Service Provider) – PHN-commissioned provider organisation/clinician

11.1.3 Patient – also called Client in the PMHC MDS

11.1.4 Referral – also called Episode in the PMHC MDS

11.1.5 Session – also called Service Contact in the PMHC MDS

11.1.6 PHN – Primary Health Networks are independent organisations that are funded by the Australian Government Department of Health to manage health regions

11.1.7 PMHC MDS – The Primary Mental Health Care Minimum Data Set

Note: "The data reported by PHNs through the PMHC MDS will form the basis for production of key performance indicators (KPIs) used to monitor services delivered across the 31 PHN regions covered by PHNs." (see https://pmhc-mds.com/)

12 FAQ

12.1 How to get Helpdesk assistance

Requests for assistance will generally be answered within 1 hour during Helpdesk hours: Mon-Fri 9:30am to 3:30pm.

First Option – refeRHEALTH Note
When requesting assistance for on a referral, open the referral and send a Note to refeRHEALTH Administrators (see Add a Note).

Second Option – Email helpdesk@rhealth.com.au
If contacting Helpdesk regarding a patient or referral via email (helpdesk@rhealth.com.au), please use the referral number (e.g., CPTBAS-00001) to identify the referral/patient. This is so all communication outside of refeRHEALTH is de-identified.

Third Option – Phone 07 4638 1377
When a client/patient name needs to be disclosed (e.g., not in refeRHEALTH and unable to create a referral), please contact Helpdesk via phone, 07 4638 1377.

12.2 How to register for a login

Request a User Registration Form from helpdesk@rhealth.com.au or use the links provided on the log in screen.

12.3 How to reset my password

Send an email to helpdesk@rhealth.com.au requesting a password reset.

12.4 How to add a referral when the program is unavailable

Sometimes a client will have an existing referral in refeRHEALTH for the program you want to select. Only one referral can be active for a program at a time and some programs do not allow for the client to have other programs active concurrently (e.g., a TPT Supplementary referral cannot be open at the same time as a TPT Better Access Support referral). The client should contact the other service provider and have the other referral closed. If this is not possible, please contact Helpdesk for assistance.

12.5 Getting an Error when attempting to login

First Step – Clear your browser cache and try again.

Second Step – Check the URL being accessed. This should have nothing after .com.au.

Third Step – Contact Helpdesk.

12.6 Not receiving a two-factor authentication code

If you have selected to receive the code via email, this may take some time to come through, may be blocked by email security, or may be diverted to your Junk folder. Please contact Helpdesk to have your authentication code changed to be delivered via SMS. You will need to provide a mobile number.

12.7 Not receiving email notifications from refeRHEALTH

First check you have email notifications turned on under your setting (see Edit Notification Options).

Secondly, add the following email address to your safe senders list and check your Junk mail folders:

noreply@referhealth.com.au

Adding a safe sender in Outlook: On the Home tab, click Junk, and then click Junk E-mail Options. On the Safe Senders tab, add the above email address.