HELIX

FREQUENTLY ASKED QUESTIONS

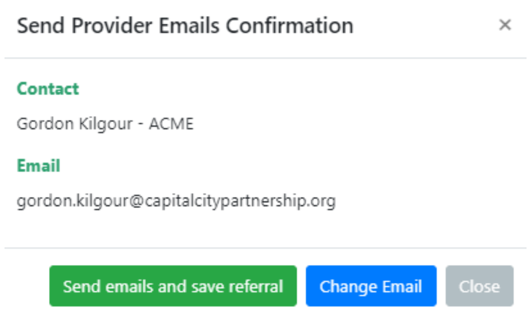
REFERRALS – REFERRING CLIENTS/ REQUESTING AND ACCEPTING REFERRALS

REFERRING A CLIENT TO ANOTHER PROVIDER

- Find the Client Record in Helix, either in Client/Find Client or via Quick Jump List
- Select Action/Referrals
- Click on Add
- Enter a Provider.
  If the provider you want doesn't exist on the system, please email Gordon or Chris with the name, address (inc. postcode), telephone number and a contact name (if you have one).
- Enter a Contact Name from the pop-up menu.
- Enter the Referral Date
- Enter Reason Group. This defaults to Referral.
- Enter a Referral Reason from the pop-up menu

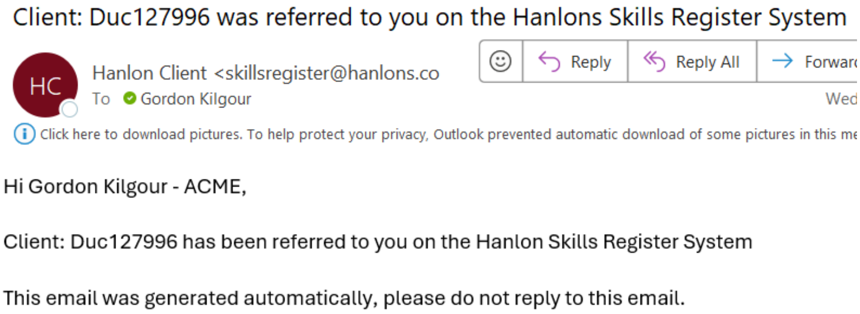
  Client Referred for Debt Advice
  Client referred on for aditional training
  Face to Face Customer
  Fully Digital Customer
  Mixed Customer
  Referred for support
- Enter an End Date if required. This is usually left blank.
- Enter a Referred by Provider, usually your own organisation.
- Enter a Contact Name, usually yourself. If the required name is not appearing in the drop-down, let Gordon or Chris know.
- Enter Notes, if required. The organisation you are referring the client to will see these notes.
- Make sure you select the correct Further Action:-

  Share client to provider site
  Transfer client to provider site
  - If you select 'Share client to provider site' the client's record will be shared with the new provider. You will still have access to the client record.
  - If you select 'Transfer client to provider site' the client's record will be transferred to the new provider and **you will no longer have access**.
  - If you leave this blank, the client record will not be shared or transferred.
- Make sure 'Send Provider Email Notification' is checked if you want the new provider contact to receive an email notification of the referral, otherwise uncheck this. This is checked by default.
- If you want to share the client record but not allow the new provider to edit the record, tick Share Read Only.
- Make From Caseload Inactive – if you check this then the Referred by Contact's caseload will be set as Inactive for this client.
- Click on Save.
- If you have chosen to email the new provider contact, you will see this pop-up:-



Click on Send emails and save referral to complete the referral, or Change email to send to a different email address.

- **NB** Completing the referral will automatically add the activity Referral to the client's record.
- The referral email will look like this:-



- You can then see the status of your Referral in the Client Referrals Awaiting Response tab of Alerts.

Client Referrals Awaiting Response

Copy Excel CSV Print

Date	Client Ref	Client	To Caseload	From Provider	To Provider	Status
19/06/2024	Duc127996	Count Duckula	Gordon Kilgour - ACME	Capital City Partnership	Acme Training (Test)	Pending

REQUESTING A REFERRAL WITHIN HELIX

You can request a referral within Helix, from whoever is set as the client's Main Caseload.

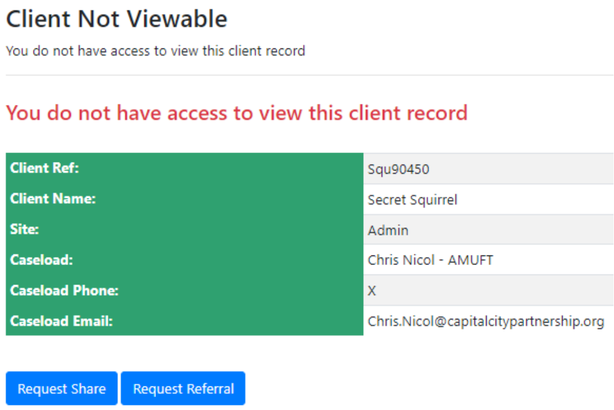
NB It's always a good idea to contact the other caseworker through normal email or phone before requesting the referral in Helix, as not everyone uses Helix on a regular basis, so your request might not be noticed for quite some time unless they are alerted.

Requesting a Client Referral within Helix:-

- Find the Client Record in Helix in Client/Find Client
- If you do not have access to the client record, it will look like this:-

Reference	Forename	Surname
Squ90450	Secret	Squirrel

- Click on the Client Reference, you'll see a screen like this:-



Client Not Viewable

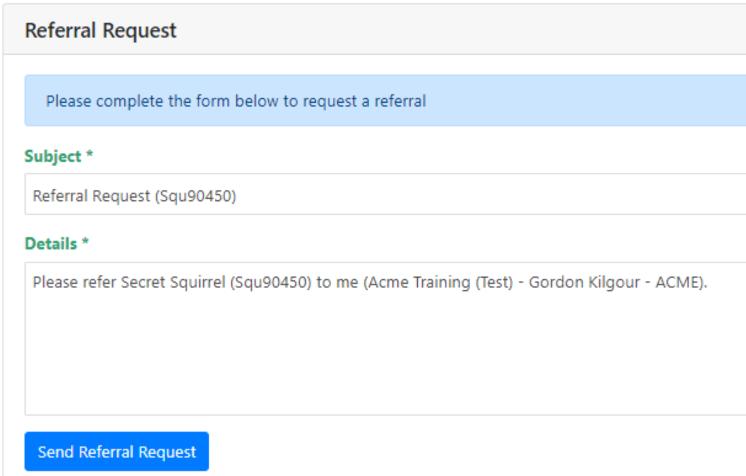
You do not have access to view this client record

You do not have access to view this client record

Client Ref:	Squ90450
Client Name:	Secret Squirrel
Site:	Admin
Caseload:	Chris Nicol - AMUFT
Caseload Phone:	X
Caseload Email:	Chris.Nicol@capitalcitypartnership.org

Request Share | Request Referral

- Click on Request Referral
- You'll then see a form like this:-



Referral Request

Please complete the form below to request a referral

Subject *

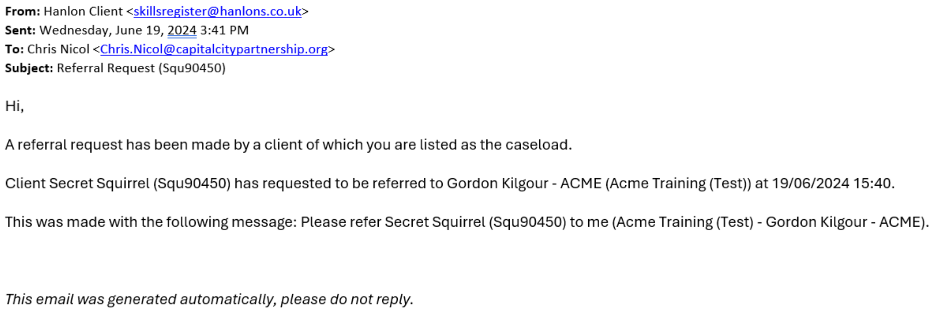
Referral Request (Squ90450)

Details *

Please refer Secret Squirrel (Squ90450) to me (Acme Training (Test) - Gordon Kilgour - ACME).

Send Referral Request

- You can edit the Subject and/or Details, then click on Send Referral Request.
- The recipient's email will look like this:-



From: Hanlon Client <skillsregister@hanlons.co.uk>
Sent: Wednesday, June 19, 2024 3:41 PM
To: Chris Nicol <Chris.Nicol@capitalcitypartnership.org>
Subject: Referral Request (Squ90450)

Hi,

A referral request has been made by a client of which you are listed as the caseload.

Client Secret Squirrel (Squ90450) has requested to be referred to Gordon Kilgour - ACME (Acme Training (Test)) at 19/06/2024 15:40.

This was made with the following message: Please refer Secret Squirrel (Squ90450) to me (Acme Training (Test) - Gordon Kilgour - ACME).

This email was generated automatically, please do not reply.

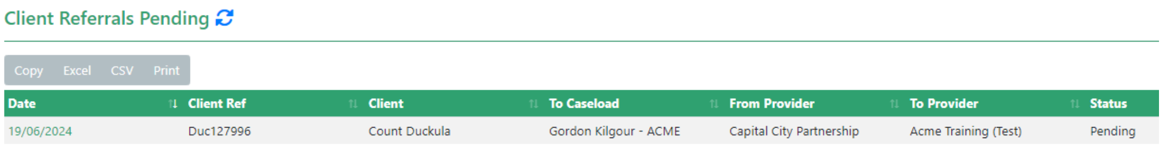
Which they can then action from their Alerts (see below).

ACCEPTING A REFERRAL FROM ANOTHER PROVIDER

When a provider refers a client to you, you will receive an email notification, if the referrer has chosen to enable this option.

To action the referral:-

- Go to Alerts 
- Click on the Clients tab.
- Scroll down to Client Referrals Pending

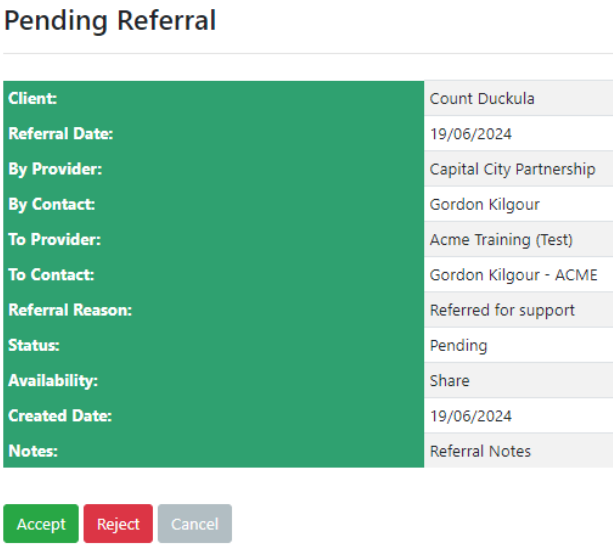


Client Referrals Pending

Copy Excel CSV Print

Date	Client Ref	Client	To Caseload	From Provider	To Provider	Status
19/06/2024	Duc127996	Count Duckula	Gordon Kilgour - ACME	Capital City Partnership	Acme Training (Test)	Pending

- Click on the Date for the relevant referral.
- You will then see a screen like this:-

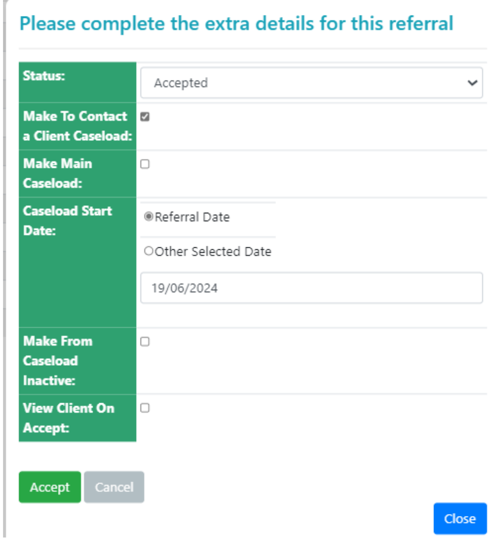


Pending Referral

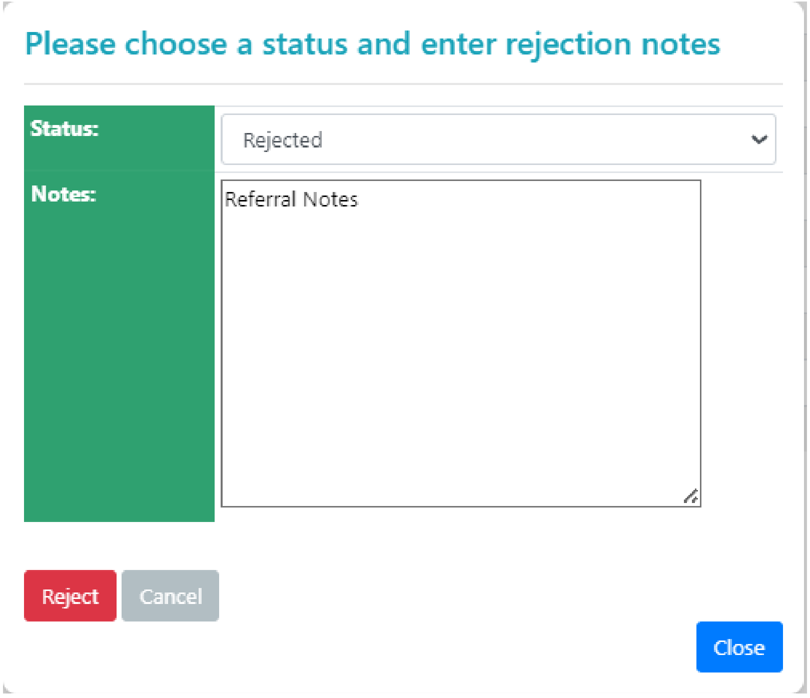
Client:	Count Duckula
Referral Date:	19/06/2024
By Provider:	Capital City Partnership
By Contact:	Gordon Kilgour
To Provider:	Acme Training (Test)
To Contact:	Gordon Kilgour - ACME
Referral Reason:	Referred for support
Status:	Pending
Availability:	Share
Created Date:	19/06/2024
Notes:	Referral Notes

Accept Reject Cancel

- If you click on Accept, you'll see the following:-



  - Leave Status as Accepted
  - Make To Contact a Client Caseload will set you as an active Caseload for the client. This is checked by default.
  - Make Main Caseload will set you as the Main Caseload if checked.
  - Caseload Start Date defaults to the referral date, change this using Other Selected Date if required.
  - Make From Caseload Inactive will set the referrer's caseload to Inactive.
  - View Client on Accept will take you to the client record on acceptance, if ticked.
  - Click on Accept.
- If you click on Reject, you'll see the following:-



- Leave Status as Rejected.
- Enter notes if desired.
- Click on Reject.

- Clicking on Cancel will take no action.