Handbook: How to Use the THCAN Referral System

Contact us if you have any questions or need to report any issues:
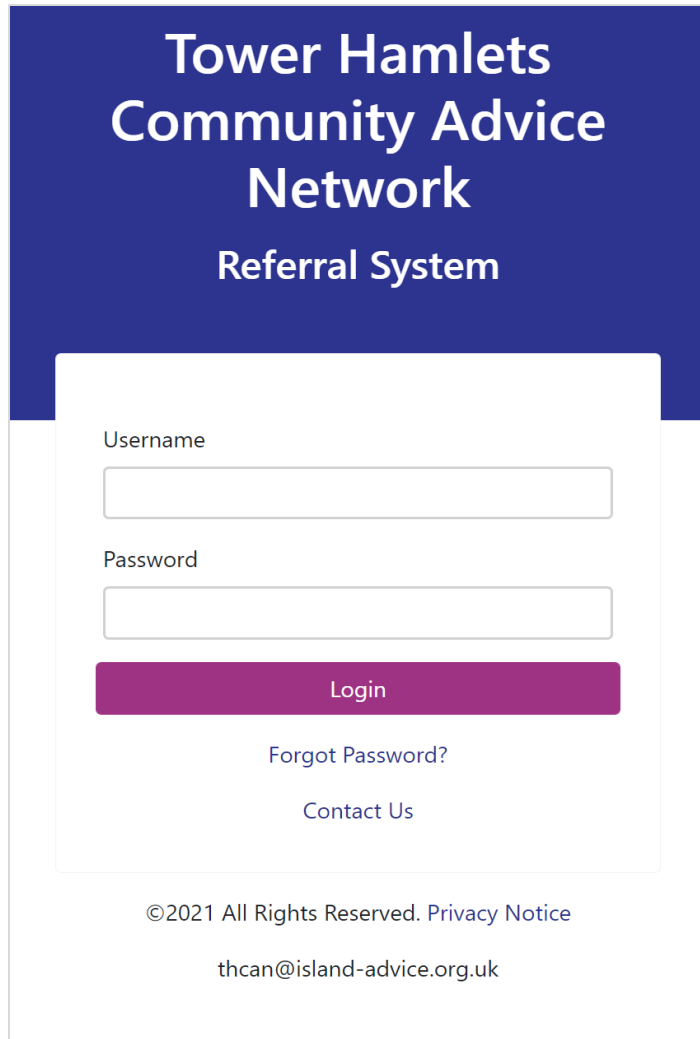Email thcan@island-advice.org.uk or call 020 7 538 0094

Handbook content

Logging in

Tower Hamlets Community Advice Network

Referral System

Username

Password

Login

Forgot Password?

Contact Us

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thcan@island-advice.org.uk

To log in either go direct to https://referralsystem.thcan.org.uk/users/login/?next=/ or click on the "Referral" tab in the toolbar on our website: www.thcan.org.uk/

Your username is your email.

When THCAN add you to the system you will receive an email through which you can follow the instructions to set your password.

Forgot Your Password?
If you forget your password click the 'forgot password' link. It will ask you for your email and username. You must put your email in both fields. You will receive a email with a link to reset your password.
Please note—the email link to set a password is only valid the first time it is clicked on and will expire after 72 hours.

If you input the wrong password more than 3 times your account will be blocked. Contact thcan@island-advice.org.uk and THCAN can reset your password.

THCAN Dashboard Search & Export Manage Organisations Manage Users

The Dashboard

The first page once you log in is the **Dashboard.** This is also the home page.

This shows any new **Announcements** made by THCAN, such as new organisations added, updates or news.

Under **Latest Referrals** you will find referrals your organisation has made (outgoing) and received (incoming). You can filter these by date and by status (if they've been acknowledged or not).

Announcements

There are no new announcements.

Latest Referrals

252 - Mi...	17/02/20...	Debt		Admin	Referral ... ›
251 - Do...	17/02/20...	Debt, Housing		Admin	Referral ... ›
249 - Sar...	12/02/20...	Debt, Welfare Benefits		Admin	Referral ... ›
245 - Jo ...	08/02/20...	Debt, Family		Admin	Referral ... ›
244 - Sar...	08/02/20...	Financial Capability		Admin	Referral ... ›

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The Dashboard

Urgent Referrals ⌃
⊘ 249 Sarah Smith   12/02/2021

Overdue Referrals ⌃
⌛ 244 Sarah Smith   08/02/2021
⌛ 245 Jo Elvis   08/02/2021
⌛ 249 Sarah Smith   12/02/2021

Not Yet Acknowledged ⌃
⌛ 244 Sarah Smith   08/02/2021
⌛ 245 Jo Elvis   08/02/2021
⌛ 249 Sarah Smith   12/02/2021
⌛ 251 Donald Duck   17/02/2021
⌛ 252 Mickey Mouse   17/02/2021

The ⌛ icon on the toolbar indicate overdue referrals.

The ⊘ icon on the toolbar indicates that a referral has been marked as urgent.

Clicking these icons will open up the sidebar (pictured left) with a list of any 'Urgent Referrals,' 'Overdue Referrals,' 'Not Yet Acknowledged' and 'Acknowledged' referrals. Clicking on any ID will take you through to the referral. There red dot on the icon means that your organisation has overdue or urgent referrals that need to be acknowledged.
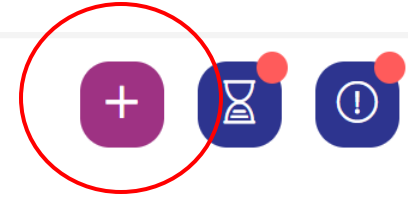
Creating a Referral

To create a referral select the ⊕ icon from the top toolbar. A menu will appear, you can fill this in in any order. The ⓘ icon on the menu prompt missing required fields.

Personal Details	ⓘ
Contact Details	
Referral Questionnaire	
Referral Details	
Files	

In the section **Personal Details** input the client's details. You only have to fill in the fields marked as 'Required' although the more relevant information you can provide the better.

In the next section **Contact Details** you are asked to input a contact phone number for the client. If you don't have a number for the client put "000" in this field. Remember to tick whether the client has given permission to be left a voicemail or permission to receive a text message.

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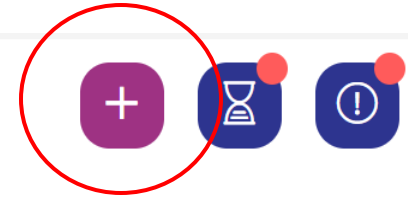
Creating a Referral

The section **Referral Questionnaire** is the main part of the referral.

Personal Details	⚠
Contact Details	
Referral Questionnaire	
Referral Details	
Files	

Reasons for referral, including any particular goals identified by client and background information **Required**

This field is required.

Has client received advice on this matter before from another service? **Required**

○ Yes

● No

Are there any risks the advisor should be aware of? Does the client have any special requirements or need any special arrangements?

Create Referral

1. This is where you explain why you are referring the client. Include information on the client's needs and what they wish to achieve. State here if you have referred the client to any other organisations or is there anything you are support them with. You can include as much or as little information as you want, but remember that more information will result in a better referral.

2. You must indicate if the client have received advice on the matter before. If you don't know, click "No". If you click "Yes" a text box will appear where you can provide more information on any previous advice.

3. This is where you explain why you are referring the client and what they want to achieve. You can include as much or as little information as you want, but remember that more information will result in a better referral.

7

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Creating a Referral

The section **Referral Details** is where you decide where to refer the client.

1. You will only be able to choose your own organisation here.

2. If you tick "Urgent" a text box will appear where you can include information on upcoming deadlines or key dates. Only tick this if the client needs assistance sooner than the 8 working day timeframe e.g. domestic abuse or imminent court date.

3. You must select one or more issues the client needs assistance with. This will help the receiving organisation allocate the referral to the correct staff.

4. Select which organisation to refer to. You will only be able to choose from organisations that deal with at least one of the issues you selected in step 3.
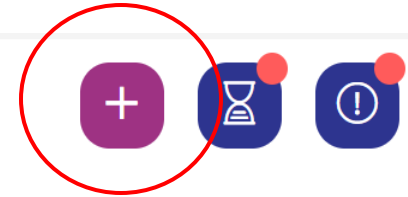
Personal Details   ⚠

Contact Details

Referral Questionnaire

Referral Details

Files

Which Organisation is sending this referral? **Required**

Island Advice Centre

☐ Is this an urgent referral? ⓘ

Issues **Required**

× Debt

Organisation to refer to **Required**

☐ Have you checked that this referral meets the criteria for referrals? Check THCAN Referral Directory **Required**

☐ Please confirm you have the client's consent to send these details **Required**

Consent Granted **Required**

18/02/2021

☐ Would you like to receive email notifications about this referral?

Create Referral

8

Creating a Referral

The section **Referral Details** is where you decide where to refer the client.

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Personal Details ⚠

Contact Details

Referral Questionnaire

Referral Details

Files

Which Organisation is sending this referral? **Required**

Island Advice Centre ▲▼

☐ Is this an urgent referral? ⑦

Issues **Required**

× Debt

Organisation to refer to **Required**

☐ Have you checked that this referral meets the criteria for referrals? Check THCAN Referral Directory **Required**

☐ Please confirm you have the client's consent to send these details **Required**

Consent Granted **Required**

18/02/2021

☐ Would you like to receive email notifications about this referral?

Create Referral

5. If you are unsure how which organisation to refer to, check the THCAN Referral Directory by clicking the link, The Directory will appear in a new window. You must tick this to confirm the referral meets the criteria, which can be read on the directory.

6. You must select that you have the client's consent to make the referral and input the date when consent was granted. You do not have to upload evidence of consent.

7. Email alerts will always automatically go to the email address attached to your organisation. However, you can tick to receive notifications on the referrals you create directly to your inbox.

9
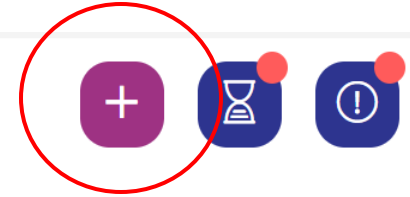
Creating a Referral

The section **Files** section is where you can upload documents related to the referral**.**

Personal Details ⊙
Contact Details
Referral Questionnaire
Referral Details
Files

Select files   Browse
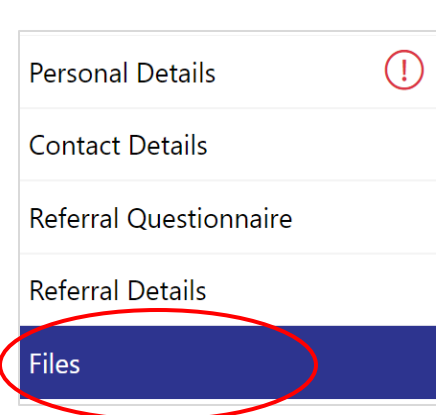
Create Referral

The final section is where you can securely upload files, bundles or other document related to the referral.

Once you have completed all relevant sections, click on the "Create Referral" tab to make the referral. Once you have clicked it you cannot change the information on the referral, but you will be able to add notes and upload additional documents.

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Email notification of referral

Once you've made the referral, the organisation you are referring to will receive an email notification advising them that a referral has been made.

When your organisations signed up they provided an email address as their main contact for referral correspondence. When you have made a referral, an email will be sent to your organisation (and you if you ticked to receive email updates) notifying you when the organisation you referred to has logged into the system and acknowledged receipt of the referral. They are committed to do this within three working days.

The automatic acknowledgment email looks like this:

Another email will be generated when the organisation referred to closes the referral denoting either a positive outcome (referral accepted) or a negative outcome (referral declined). Negative outcomes also require a reason for closure, but the receiving organisations may also leave more details in the notes. You should receive this within a further five working days.

File   Message   McAfee E-mail Scan   Tell me what you want to do...

Referral #7 - Referral Acknowledged - Message (HTML)

Fri 08/01/2021 12:06

postmaster@mg.hut42.co.uk

Referral #7 - Referral Acknowledged

To   Coordinated Community Support

Dear The Children's Society,

Test Org 2 has acknowledged your referral, and will let you know within five
working days whether they are able to make contact with the client and take this case forward or not.

Please use the link below to access further details online.

thcan-referral-system-test.herokuapp.com/referrals/7/

This email has been automatically generated through the THCAN Referral System on behalf of the Tower Hamlets Community Advice Network (THCAN), who are the administering body for the system.

Please contact THCAN at thcan@island-advice.org.uk if you have any queries or technical problems.

11

Receiving a referral

How do I know when my organisation receives a referral?
Your designated organisational email address will receive an email notification which will look like this:

Organisation that made the referral

Issues that referral relate to. This is included so that the email can be forwarded directly to the relevant staff member/team within your organisaion.

Referral's unique reference number

Direct link to the referral

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Referral #7 - Note Added - Message (HTML)

File | Message | McAfee E-mail Scan | Tell me what you want to do...

Fri 08/01/2021 12:04
postmaster@mg.hut42.co.uk
New Client Referred to You - 250

To: Coordinated Community Support

Dear Island Advice Centre,

Island Advice Centre has referred a client to you.

Referral Number: #250
Issue List: Debt, Welfare Benefits
Please use the link below to access further details online and within three working days update the status on the referral confirming it has been received. You then have a further five working days to update the status on the referral confirming whether or not you have made contact with the client and whether you will be taking the referral forward.

thcan-referral-system-test.herokuapp.com/referrals/250/

This email has been automatically generated through the THCAN Referral System on behalf of the Tower Hamlets Community Advice Network (THCAN), who are the administering body for the system.

Please contact THCAN at thcan@island-advice.org.uk if you have any queries or technical problems.

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How to acknowledge a referral

When you get an email notification that you have received a referral, you must confirm that you have received it by acknowledge the referral in the THCAN referral system. To access the referral you can click on the link in the email OR log in and check your list of latest referrals on your Dashboard OR search for the referral in the quick-search bar using it's referral number or name.

Referrer Details   Actions

- Update Status
- Clone
- Print

Sending Organisation	The Children's Society
Receiving Organisation	Island Advice Centre
Case was also referred to	Island Advice Centre

Edit Referral

Organisation:

Test Organisation 3

Referral Status:

Referral Open (Not Yet Acknowledged)
✓ Referral Acknowledged
Referral Closed

Close   Save

Once you are on the referral page:

1. Click on the 'Actions' tab (there are three 'Action' tabs on the referral page to ensure its not missed, it doesn't matter which one you use).

2. Click 'Update Status'.

3. Under 'Referral Status' choose 'Referral Acknowledged' and 'Save'.

4. The organisation that sent the referral will receive a notification email when this is done.

13

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Dashboard   Search & Export   Manage Organisations   Manage Users

How to accept or decline a referral

The way you accept or decline a referral is by closing it.

Edit Referral

Organisation:

Island Advice Centre

Referral Status:

Referral Closed

Reason for Referral Closure:

Extra Details:

Close   Save

1. Select 'Action' → 'Update Status' → 'Referral Closed' → 'Reason for Referral Closure.'

2. Under 'Reason for Referral Closure', you either accept or decline it. There is space in the 'Extra Details' to type any information, such as services offered to the client or to explain why it was declined.

Reason for Referral Closure:

Accepted

Declined

Declined (Other)

Declined (Unable to contact Service User)

14

THCAN   Dashboard   Search & Export   Manage Organisations   Manage Users

How to add a note or a file to a referral

Both the referring organisation and the receiving organisation can add files and notes to the referral.

To add a note, scroll down to the bottom of the referral. Select the '+' under 'Referral Notes' and then type your message and hit 'save.' All notes are saved on the referral in chronological order.

Referral Notes	Referral Files
+	+

To add a file, scroll down to the bottom of the referral. Select the '+' under 'Referral Files' and you will be prompted to browse and add a title before hitting 'save' to upload.

How to print a referral

Referrer Details		Actions
		💬 Update Status
		📄 Clone
Sending Organisation	The Children's Society	🖨 Print
Receiving Organisation	Island Advice Centre	
Case was also referred to	Island Advice Centre	

To print a referral as .pdf, go to the referral and select the 'action' tab followed by 'print'. A new tab will open that will enable you to print or save to your desktop files

THCAN   Dashboard   Search & Export   Manage Organisations   Manage Users

How to forward/copy (or clone) a referral

You can 'clone' the referral if you need to forward it to another organisation (for example if you accidently made the referral to the wrong agency), or if you need to send the referral to two organisations (for example to make one referral for debt advice and one for legal aid). Each new 'cloned' referral has a unique reference number, which makes it easy to track.

Referrer Details		Actions
		Update Status
Sending Organisation	The Children's Society	Clone
Receiving Organisation	Island Advice Centre	Print
Case was also referred to	Island Advice Centre	

The new referral will not indicate it is a clone and will just look like a standard referral, so it is best practice to **leave a note** on the new referral if further explanation is needed.

1. To forward a referral, go to the referral and select the 'action' tab followed by 'clone' – this will copy all the previous information and you will only have the ability to change the 'Referral Details' section as you would when creating a normal referral.

If you need to refer a client to two agencies for two different issues (for example one referral for debt advice and one for immigration advice), make sure to clearly state in both the original and the cloned referral which matter you want which organisation to deal with.

16

THCAN | Dashboard | Search & Export | Manage Organisations | Manage Users

Search and Export Referrals

To search for a referral, you can either click the 'Search and Export' tab on the toolbar, or use the 'quick search bar' in the top right-hand corner.

In the 'Search and Export' tab you can filter and search by:

- A specific date range.
- Organisation that received the referral.
- Organisation that made the referral.
- User.
- Referral status (accepted/declined, acknowledged/not yet acknowledged).
- Reason for closure.
- Referral ID number.
- Client surname.

It is also on the 'Search and Export' that you will find a list of all your referrals, both outgoing and incoming.

Date Range:	
Referred To:	
Referred By:	
Created By:	
Status:	
Reason for Closure:	
Issues:	
Search:	Referral Number or Last Name...

If you click 'Export to Excel', you will export the referrals you have searched for to a Microsoft Excel spreadsheet.

Export to Excel

17

THCAN

Dashboard   Search & Export   Manage Organisations   Manage Users

Change Password

Logout

Managing Your Account and/or Organisations

Users can change their password via the 👤 icon in the top right corner. Here you can also log out. **Organisation Leads** are able to access the 'Manage Organisations' tab on the toolbar. Here you can edit contact email, set referring rights, and edit staff details.

To edit the main contact email, simply edit the 'Main Contact Email' field and click save. All notifications and updates will be sent to this email.

You can select which type of referrals you accept by selecting 'issues'. If you click in the 'Accept Issues' bar a drop-down list will appear from which you can select issues. You can select as few or as many as you wish. Other organisations will only be able to send you referrals for the issues you have selected.

Organisation Details

Organisation Name:

Island Advice Centre

Main Contact Email:

admin@island-advice.org.uk

Parent Organisation:

If this organisation belongs to another organisation, it'll show up as a second-tier option for that organisation when creating a referral.

☑ Currently accepting referrals?

☑ Accept referrals from all organisations?

Accepts referrals from:

Accepted issues:

× Debt   × Housing   × Welfare Benefits   ×

Leave blank to accept all types of issues.

Suspend   Save

Referring rights can be managed by selecting whether your organisation is 'Currently accepting referrals?' If you don't have capacity to receive referrals, you simply untick this box. That means that no other organisations can refer to you. When you are ready to receive referrals again, simply tick the box.

If you wish to receive referrals from any organisation, select 'Accept referrals from all organisations'.

If your organisation only wants to receive referral from certain organisations, you can list which ones by typing them in the 'Accepts referrals from' bar, or by selection from the drop-down list.

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Dashboard   Search & Export   Manage Organisations   Manage Users

Search

Managing Users

Organisation Leads can edit details of staff members within their organisations.

Staff Members

☆ **callum2** Tester	✎
☆ **claire3** Org Lead	✎
☆ **testuser3** ncan coordinator	✎

To edit staff details, click on the pencil icon next to the user you want to change and edit accordingly, then press save. Here you set whether someone is an organization lead or give them permission to turn off and on referring rights.

To change a user's position or phone number, please contact thcan@island-advice.org.uk

Edit Staff Member

Position:

Tester

Phone Number:

01553970034

☑ Referral Acceptance
☑ Organisation Lead

Close   Save