**Referral Point**
**Psychological Therapy Services**

# Provider User Manual

## Contents

# 1. General Information
## 1.1. Definitions

| | |
|---|---|
| **BridgeCRM** | Platypus System's base Client Information Management System |
| **GLBTI** | Gay Lesbian Bisexual Transgender Intersex |
| **GP** | General Practitioner |
| **MDS** | Minimum Data Set |
| **MHNS** | Mental Health Nurse Service |
| **PTS** | Psychological Therapy Services |
| **PMHC** | Primary Mental Health Services |
| **Provider** | Clinician subcontracted or employed by a supplier |
| **Supplier** | Alliance Lead contracted to Western Victoria PHN |
| **WESTERN VICTORIA PHN** | Western Victorian Primary Health Network |
| **Referral Point** | Referral Point facilitates the delivery of WESTERN VICTORIA PHN's Psychological Therapy Services |
| **SPS** | Suicide Prevention Service |

## 1.2. Introduction

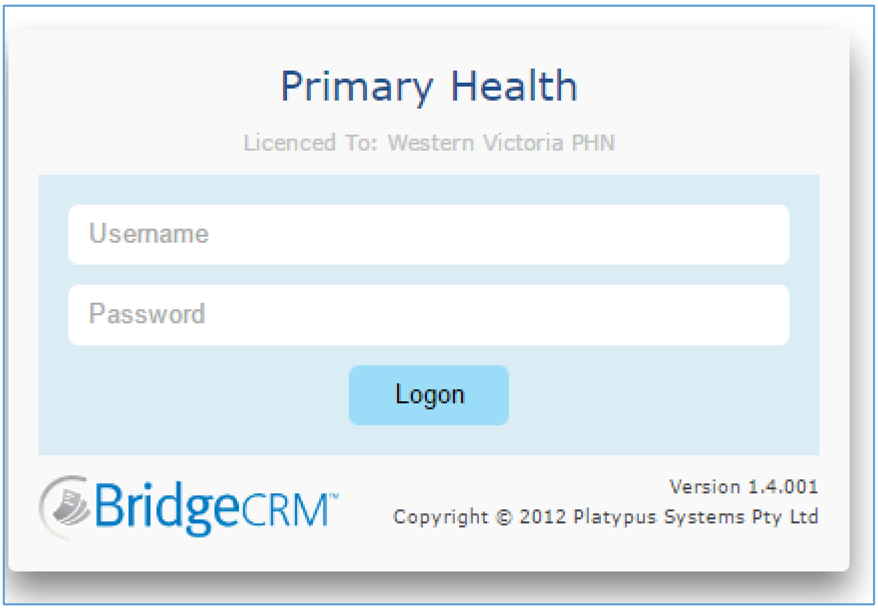
WESTERN VICTORIA PHN's Referral Point facilitates the delivery of focussed psychological strategies by accredited mental health practitioners to eligible consumers through the Psychological Therapy Services (PSYCHOLOGICAL THERAPY SERVICES).

Bridge CRM is a client information management system utilised by suppliers and providers who provide clinical services for WESTERN VICTORIA PHN's PSYCHOLOGICAL THERAPY SERVICES program.

Bridge CRM is accessed via a browser based software solution developed by Platypus Systems Pty Ltd for WESTERN VICTORIA PHN, for which the Referral Point team will provide individual login details.

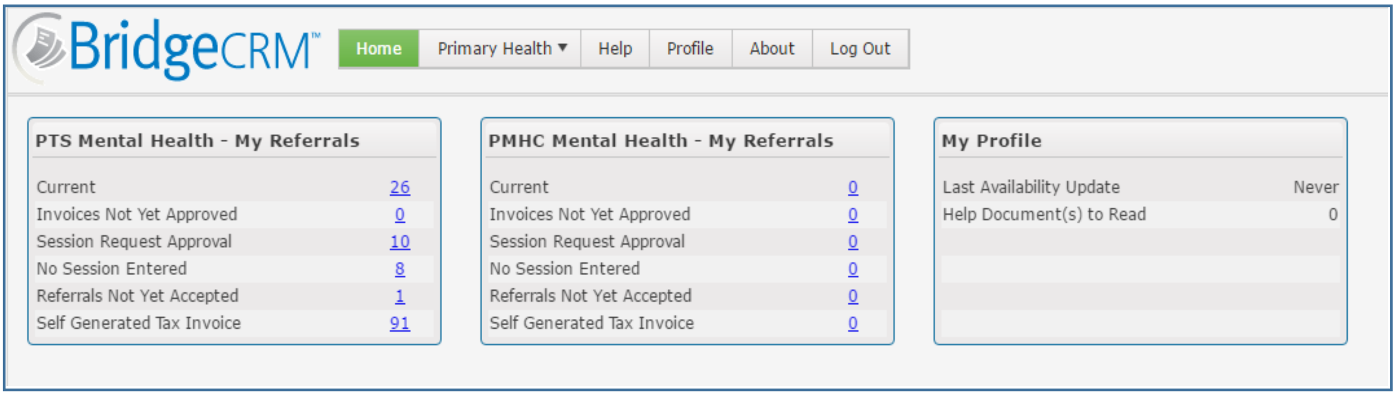
### 1.3. Access – How to Login

In your browser, enter the address: https://referralpoint.westvicphn.com.au




Enter your username and password provided. This information can be requested from the Referral Point team.

## 2. Home Screen




There are 2 sections for your Referrals –

- **PTS Mental Health** - contains referrals received before 1 July 2017
- **PMHC Mental Health** - contains referrals received after the 1 July 2017

Within each of those dashboards there are 6 links:

| | |
|---|---|
| Current | Displays the provider's referrals and provides links to each referral and its details – sessions etc.<br>Referrals that have not yet accepted, do not appear here (see below). |
| Invoices Not Yet Approved | Displays a list of sessions submitted but not yet approved |
| Session Request Approval | Displays the provider's referrals which are pending session review approval |
| No Session Entered | Displays a list of referrals that have been accepted but where no session data has been entered. |
| Referrals Not Yet Accepted | Displays a list of referrals not yet accepted.<br>When the referral is accepted (see 3.2 below) or session is entered the referral will move to the 'Current' dashboard item. |
| Self Generated Tax Invoice | Disregard this is **Not Applicable** |

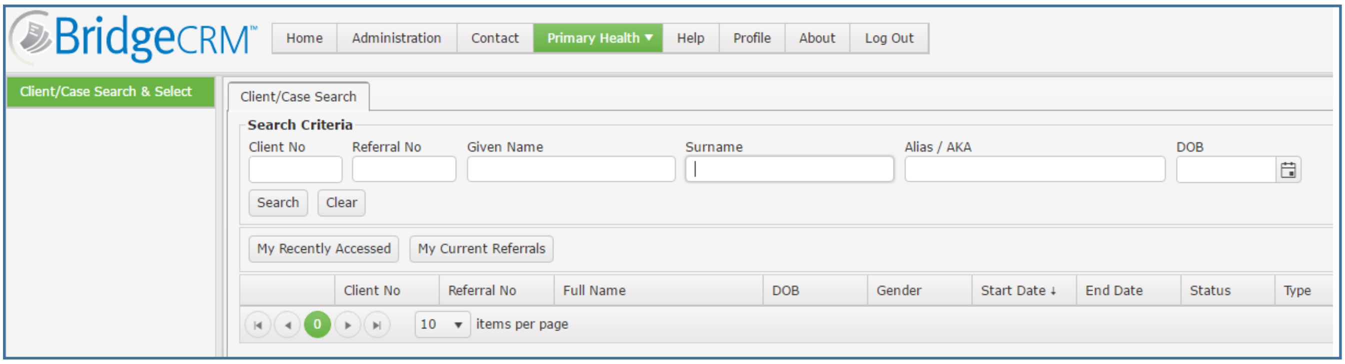
- My Profile.

Within this dashboard there are 2 links

| | |
|---|---|
| Last Availability Update | This field shows when the provider last updated their availability. Clicking on this field take the provider to their calendar where they can update this information. See 5.3 for step-by-step instructions. |
| Help Document(s) to Read | This field shows that new documents have been uploaded by the Referral Point team which providers are required to acknowledge having read. |

## 3. Caseload Management

The provider can access his/her referrals from the dashboard on the Home page:



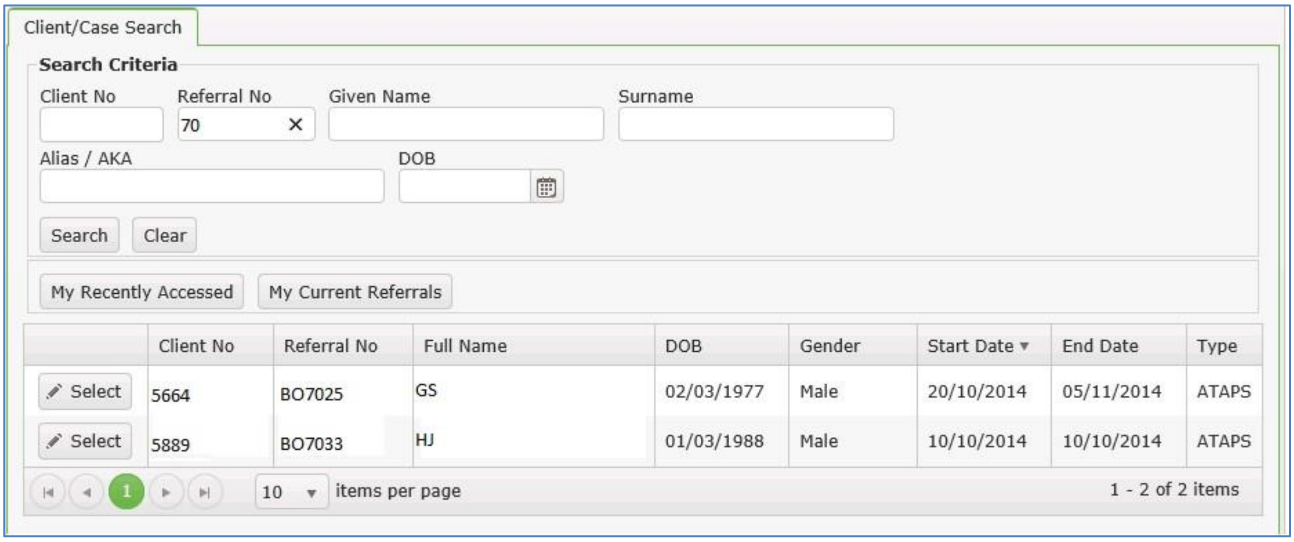

Through this menu item, the provider can access the “Client/Case Search & Select” screen.

On this screen, search by placing the cursor in any of the following fields:

| | |
|---|---|
| Client No | The exact number must be entered. |
| Referral No | Any part of the Referral No. |
| Given Name | Any part of the client’s given name. |
| Surname | Any part of the client’s surname. |
| Alias / AKA | Any part of the alias. |
| DOB | The exact DOB. |

After making an entry in one of the above fields, either press Enter or click on the “Search” button.

To make another search, either delete the previous entry or click on the “Clear” button.



When the referral is found, click on the “Select” button” to open the referral screen.

This will change the screen view to display the referral details.
The left hand pane provides additional menu items:

| | |
|---|---|
| Client/Case Search & Select | Returns to the Search screen. |
| Client Details | Displays the client details – changes cannot be made by providers. |
| Notes | The provider as well as the Referral Point team can add notes regarding the referral. |
| Referral | Displays the referral details |
| Outcome Measure | The outcome measure scores can be added at the time the referral is received as well as during treatment and on conclusion of the referral. |
| Session Request | When allocated sessions have been used, additional sessions must be approved by the Referral Point team. The requests will appear on the dashboard of the provider as well as the dashboard of the Referral Point administrator. |
| Session | Displays the sessions for the referral. |

### 3.1. Referral

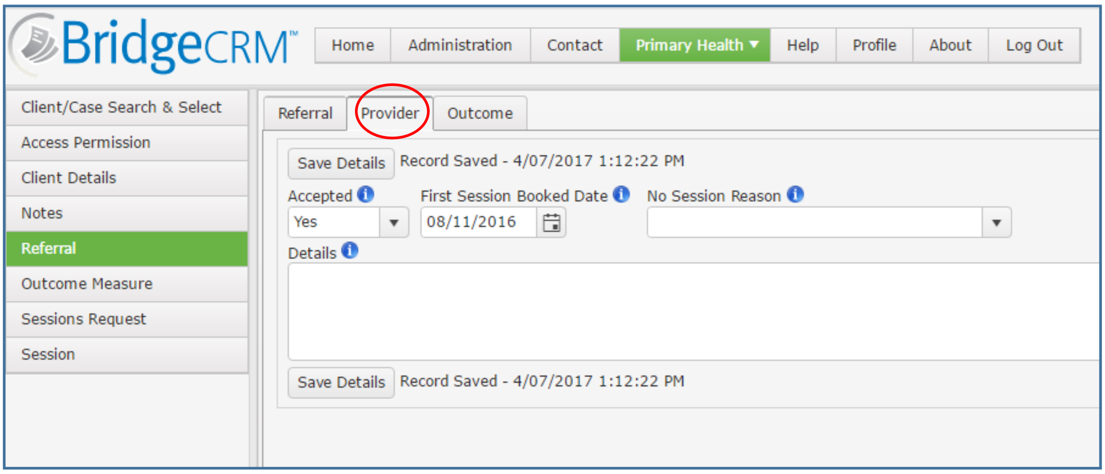
The Referral screen has 2 Tabs:

- The referral tab shows the referral details as recorded from the original referral received by the Referral Point team.
  The provider cannot make changes to the entries on this tab.

  There is also a link to documents uploaded by the Referral Point team.

Also – Please note the ‘Status bar’ at the bottom of the screen showing: as below

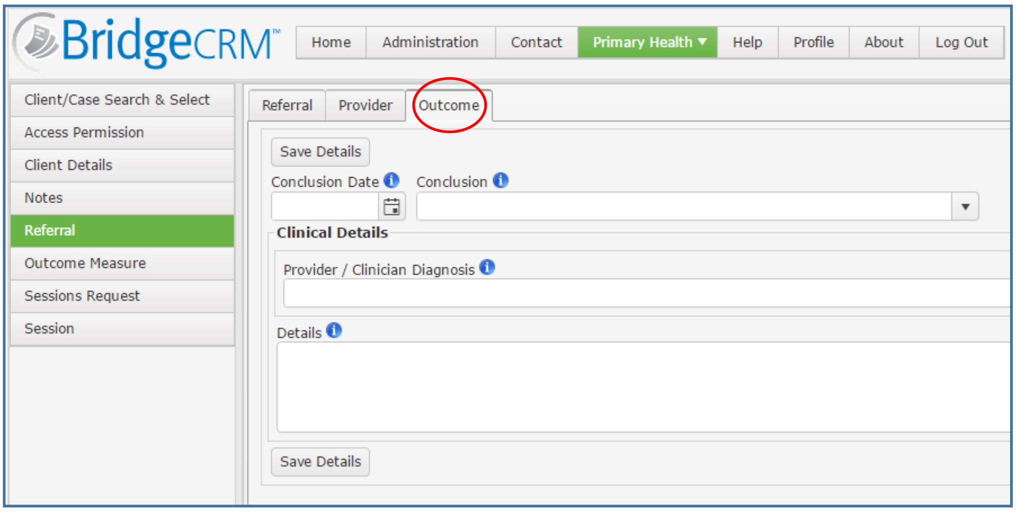
| | |
|---|---|
| Referral No | PTS 00.. etc |
| Client No | 00.. etc |
| Client Name | Joe Blogg |
| Calendar YTD Sessions | Sessions used in the current calendar year (Note: referrals are valid from date of referral not calendar year) |
| Sessions Used | Total sessions used for this referral |
| Alert message in red | If the referral has expired or the referral is about to end (4 weeks or less to the end date), an alert message in red will appear in status bar area. |




The Provider tab (above) allows the provider to accept or reject the referral, add the first session booked date - or to add a reason that a first session has not yet been recorded.

When the referral is accepted, the referral is shifted from the My Referrals dashboard item, “Referrals Not Yet Accepted” to “Current”. (see below)

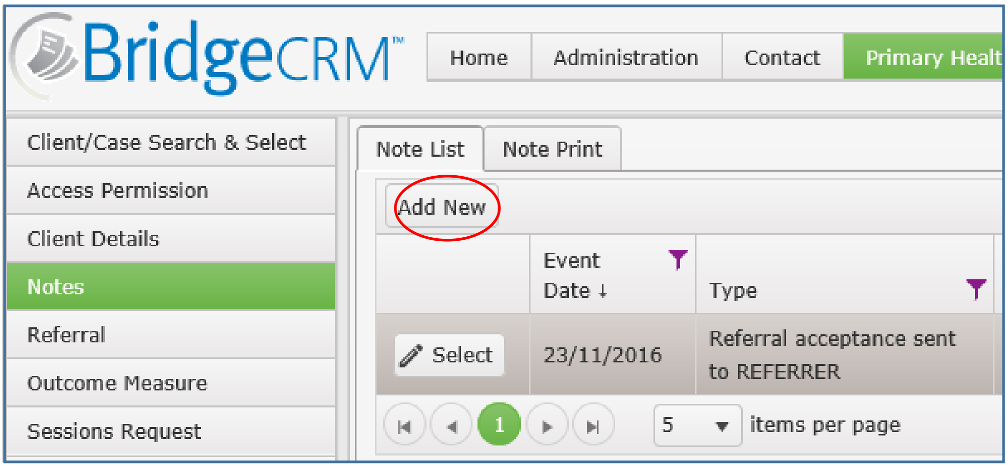

- The Outcome tab (below) allows the provider to close the referral:
  - select a conclusion from the drop down box
  - to add other comments in the Details box.




When the conclusion is saved (& referral closed), the referral no longer appears on the provider’s “My Referrals” dashboard. If the referral needs to be reopened, then please contact the Referral Point team on1300 221 493

### 3.2. Notes

Both the Referral Point team and providers can add notes where the usual "Details" text box is inadequate - (e.g. On the referral screen).

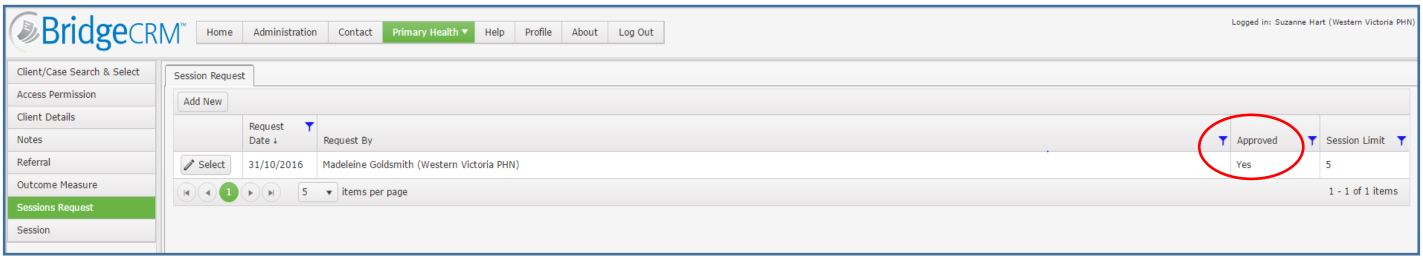



### 3.3. Sessions Request

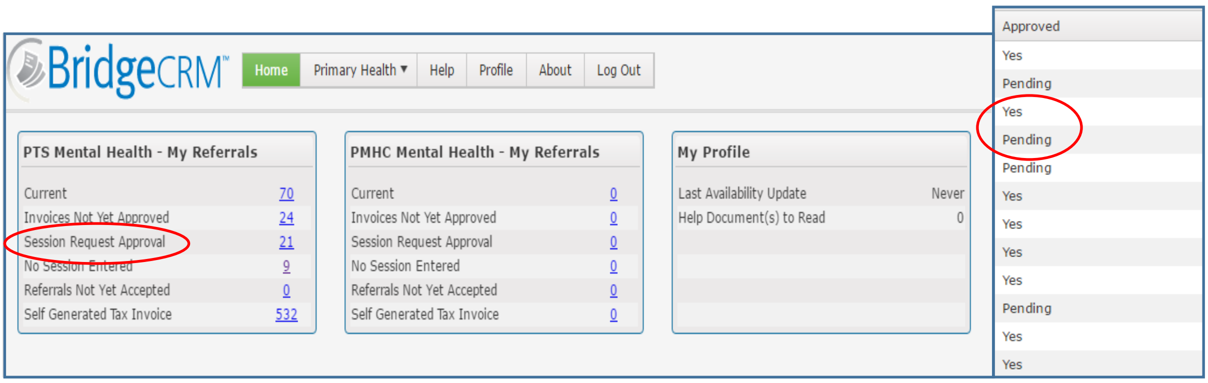
When a referral is assigned to a provider, the number of sessions that are allocated to the referral is set according to the rules defined in the Provider Guidelines.

When the allocated sessions 1-5 have been used (and entered in the Bridge CRM system) the provider must log a Session Request and send an Outcome Report to the referring GP.

To do this, click on the "Add New" button and provide information in the "Details" box to allow the Referral Point team to assess the request.




*Further sessions will only be approved once the Referral Point team have received a Referral Review Form from the referring GP.




When you click on the Session Request Approval tab on your Home Page you will see which have been approved 'Yes' and which are still 'Pending'. The client's name will be visible beside each entry also.

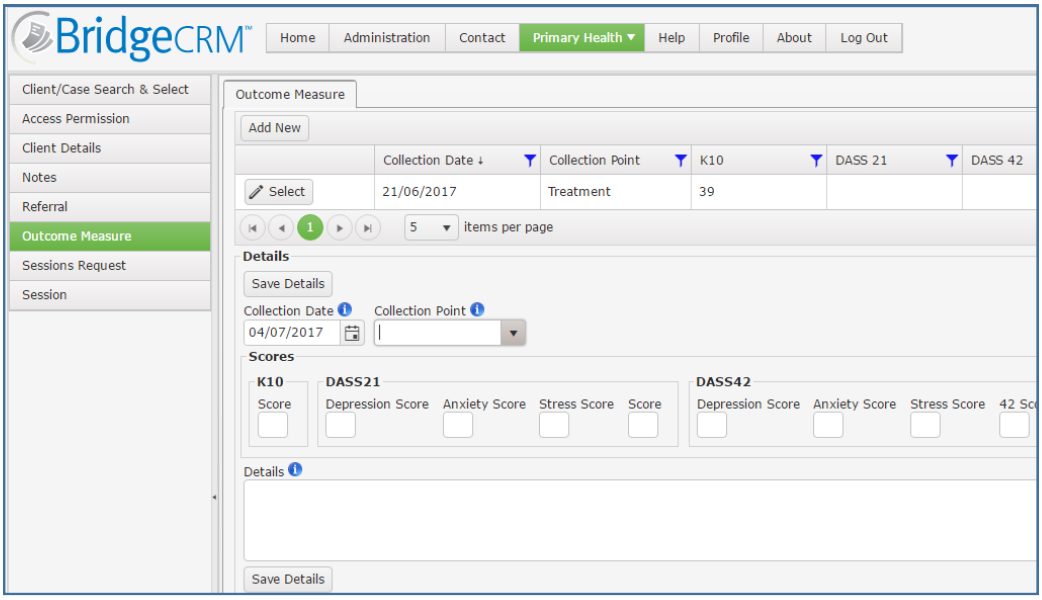
### 3.4. Outcome Measure

Outcome measures must be entered into Bridge at both the start and at the end of treatment. The provider can add additional outcome measure scores at any other time and indicate the "collection point" -

- Referral (where the referrer has provided an initial score)
- Treatment (at the time of any session)
- Completion (at the time of closure of referral)

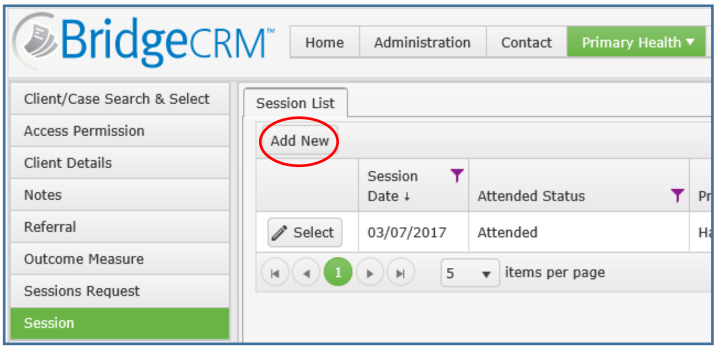
When the provider enters a session, there will be a warning message if either:

- No outcome measure has been entered for the client
- No outcome measure has been entered in the last 2 weeks



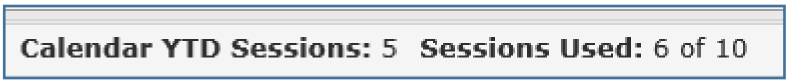

### 3.5. Session

The "Session" screen displays the sessions already entered and allows the provider to add new sessions.




Enter the Session Date, Type and the Attended Status.

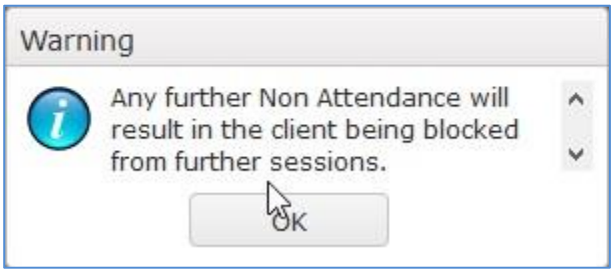
- For an "Attended" session, further fields will appear and must be filled.



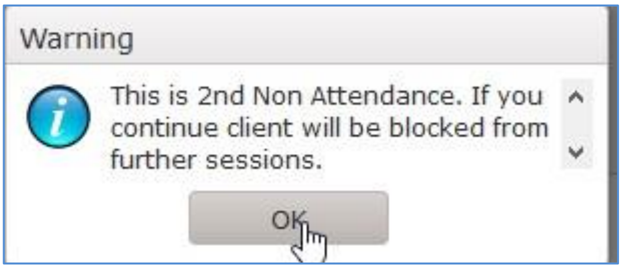

Also, when the session has been saved, the new session then appears at the top of the session list and status bar at the bottom of the screen updates the session information.

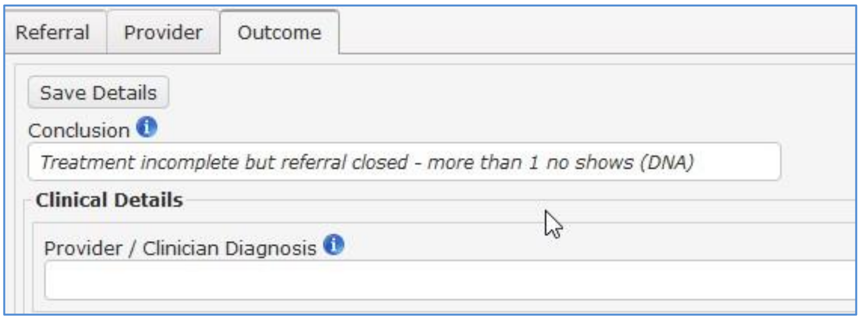
- If the session Attended Status is "Did Not Attend" then a message is displayed.

In this case, click on the "OK" button, enter any relevant remarks in the Details box and then click on the "Save Details" button.




- If a second "Did Not Attend" session is entered, the following message appears.

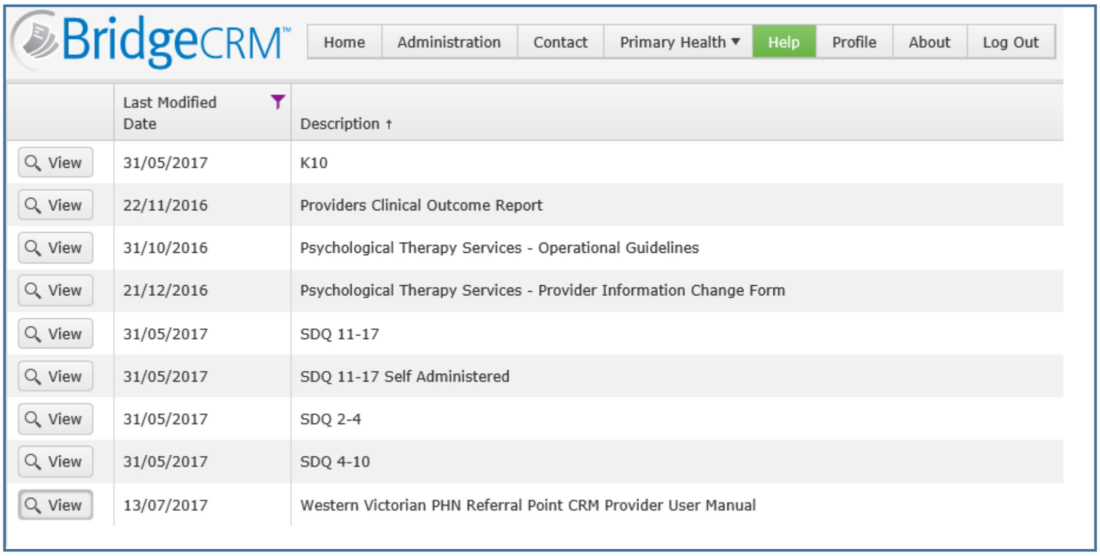



If the session is then saved, then no more sessions will be able to be entered, the conclusion will be automatically added into the Outcome box and the referral will no longer appear on the provider's dashboard.

# 4. Help

This user manual can be found on the Help screen

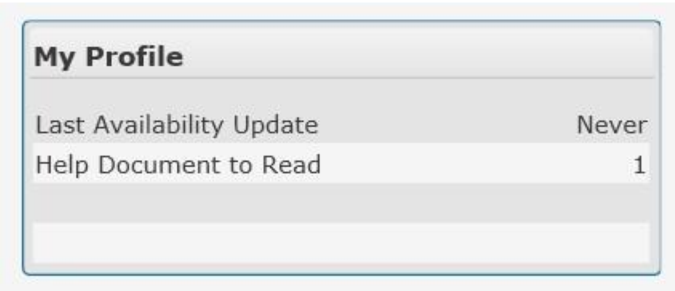



| | Last Modified Date | Description |
|---|---|---|
| View | 31/05/2017 | K10 |
| View | 22/11/2016 | Providers Clinical Outcome Report |
| View | 31/10/2016 | Psychological Therapy Services - Operational Guidelines |
| View | 21/12/2016 | Psychological Therapy Services - Provider Information Change Form |
| View | 31/05/2017 | SDQ 11-17 |
| View | 31/05/2017 | SDQ 11-17 Self Administered |
| View | 31/05/2017 | SDQ 2-4 |
| View | 31/05/2017 | SDQ 4-10 |
| View | 13/07/2017 | Western Victorian PHN Referral Point CRM Provider User Manual |

In future, other documents may be uploaded - e.g. one page instruction sheets.

Yet other documents may be added which will be require acknowledgement from the provider that the documents have been read.

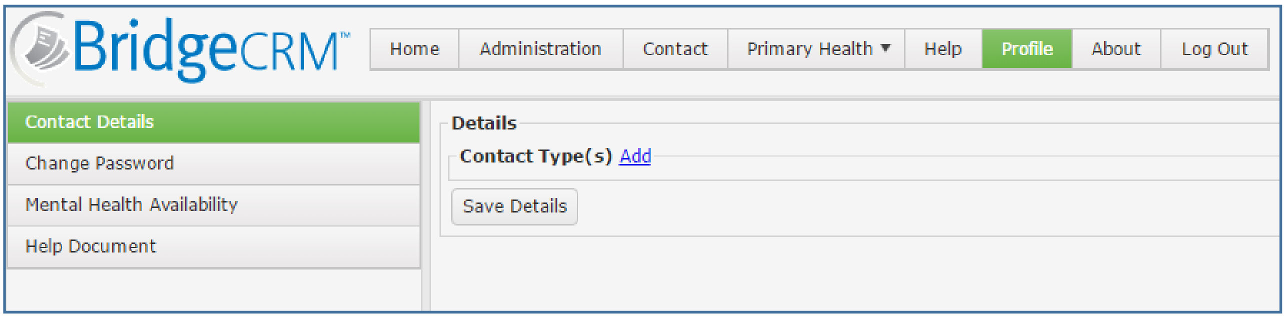
The “My Profile” dashboard includes advice to users that they may need to acknowledge that they have read identified documents.




# 5. Profile

## 5.1. Contact Details

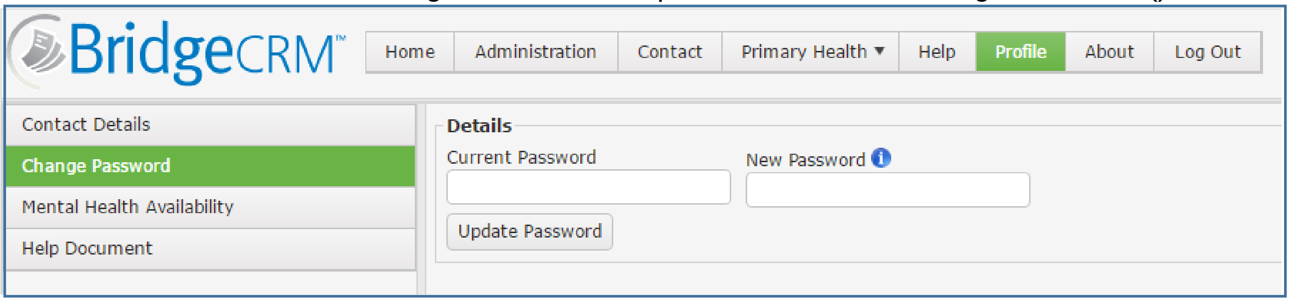
This screen allows the provider to add contact types – e.g. An email address, etc.



### 1.1. Change Password

If you need to change the password for the system, you will need the current password, and the new password must adhere to the following requirements:

Minimum of 6 characters including at least 1 non alphanumeric character e.g. !@#$%^&*()

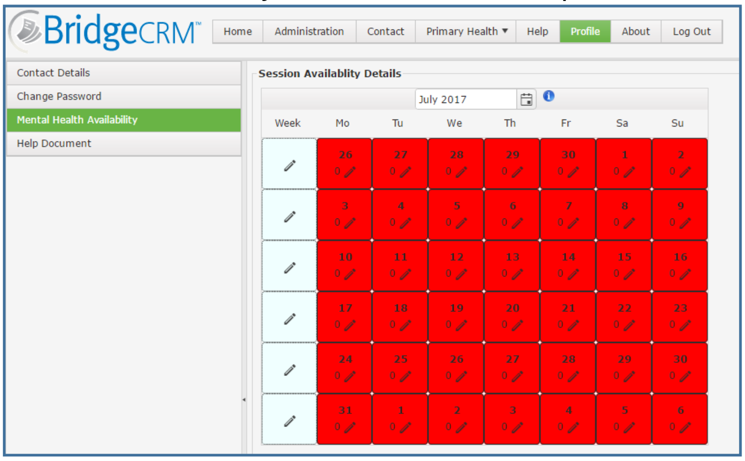



If you forget your login details, contact the Referral Point team – 1300 221 493

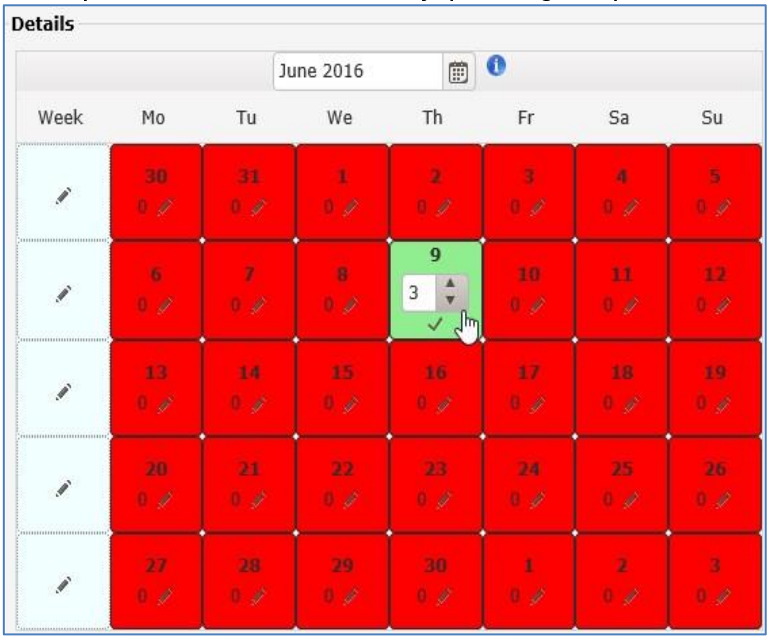
### 1.2. Availability

Each user can add their availability under their profile

a. To edit a date, you can select the edit pencil icon




b. After selecting the edit icon, you can change the sessions available. Once completed select the tick icon to commit the change. The data will be saved and background updated to reflect availability (red or green).



The “My Profile” dashboard now contains a new section to advise users when they last used their availability.