

S2S

Intro Training

An Introduction to the S2S Electronic Referral System



Training Session Overview

Brief background/context (e.g. what is S2S, what does it do, what are its major features, consent and privacy)

How to access the S2S Demo Site (for practice) and the S2S Live Site

Receiving a referral

Processing a referral (inc. allocating if appropriate)

Searching for clients (and adding new ones to the system/editing old ones)

Sending referrals and attaching documents

Using other key S2S features (e.g. service / referral summaries)

Contacts, website addresses , how/where to get assistance

Background

Service-to-Service (S2S)

- S2S is designed to promote inter-agency communication, making it simpler to effectively coordinate client care. However, the benefits of S2S go beyond service coordination.
- S2S facilitates the sharing of information (with appropriate client consent), building a client history that extends beyond a single service or agency. This supports health and community workers to make better informed decisions about client care.
- S2S also supports record management principles, which are a key driver in increasing organisational efficiency.
- S2S ensures that the right information is at the fingertips of the workforce when they need it, this saves on time spent looking for information and unnecessary duplication.

Why do we use S2S?

- S2S adheres to privacy and accessibility standards
- Developed for the sector in close collaboration with the sector
- Maintained in line with regional, state and national policy changes
- Fully supported by an experienced and helpful team

More information about S2S

- Allows services to send, receive and process referrals electronically (both internal & external)
- S2S is also a powerful Service Coordination tool: it can be used to help coordinate services – particularly for clients with complex needs where a number of different providers are involved in their care
- Web-based: no special hardware or software required - just internet and email access
- Privacy/Confidentiality: client data stored on a *secure* central database; individual passwords required for access; client consent required; audit trail records all system use

What can I see in S2S?

- Referral feedback loop: instant acknowledgements and easy notification of status changes & outcomes
- View client's Referral History, SCTT History & Service Summary
- 'Compressed view': at a glance, easily printable view of client information & referral documentation
- Service Records: view all referrals for agency/ service/program (sent & received)

How does S2S Work?

- **Agency A** obtains client's consent and sends referral via S2S
- **Agency B** receives email notification that new referral received
- Email prompts **Agency B** to log on to S2S website using individual username and secure password
- Referral is in **Agency B's** S2S Incoming Box and can be opened to view/print details and any attached documentation
- **Agency B** instantly acknowledges referral via S2S
- As client progresses through the system **Agency B** uses S2S to notify **Agency A** of further status changes (e.g. 'waiting list', 'assessment', 'service provision' and, ultimately, 'closed')
- **Agency A** receives email notification of acknowledgment and each subsequent status change and can log onto S2S at any time to view/print details

Privacy and Confidentiality

The S2S system has a number of features that ensure the privacy of clients' personal and health information

Only authorised users are allowed to access the system - using individual usernames and secure passwords (no sharing is permitted)

A box must be ticked to indicate the client's consent has been obtained at various points when using the system (i.e. searching for the client, transmitting referral info, viewing referral/service summary and details)

The system allows different 'Information Access Levels' to be selected depending on the individual client's wishes and the sensitivity of the referral (i.e. 'standard', 'limited' and 'sender-receiver only')

The system has strict audit trails – all access by all users can be permanently traced



Privacy and Consent principles underlying S2S

“The right information, to the right people, for the right reason, in the right way, at the right time”

- The S2S database is physically located at the Stock Exchange in Melbourne
- All information on the database is protected by state-of-the-art ‘128-bit SSL’ encryption
- The server is monitored 24 hours
- The client’s information never leaves the system
- In accordance with the Health Records Act, all information is retained on the system for at least 7 years
- The Health Services Commissioner has indicated that she is satisfied with the system’s consent/privacy safeguards
- Infoxchange’s ‘Privacy & Consent Information can be accessed from: <http://support.s2s.org.au/forms-resources/privacy-consent>

S2S in Gippsland

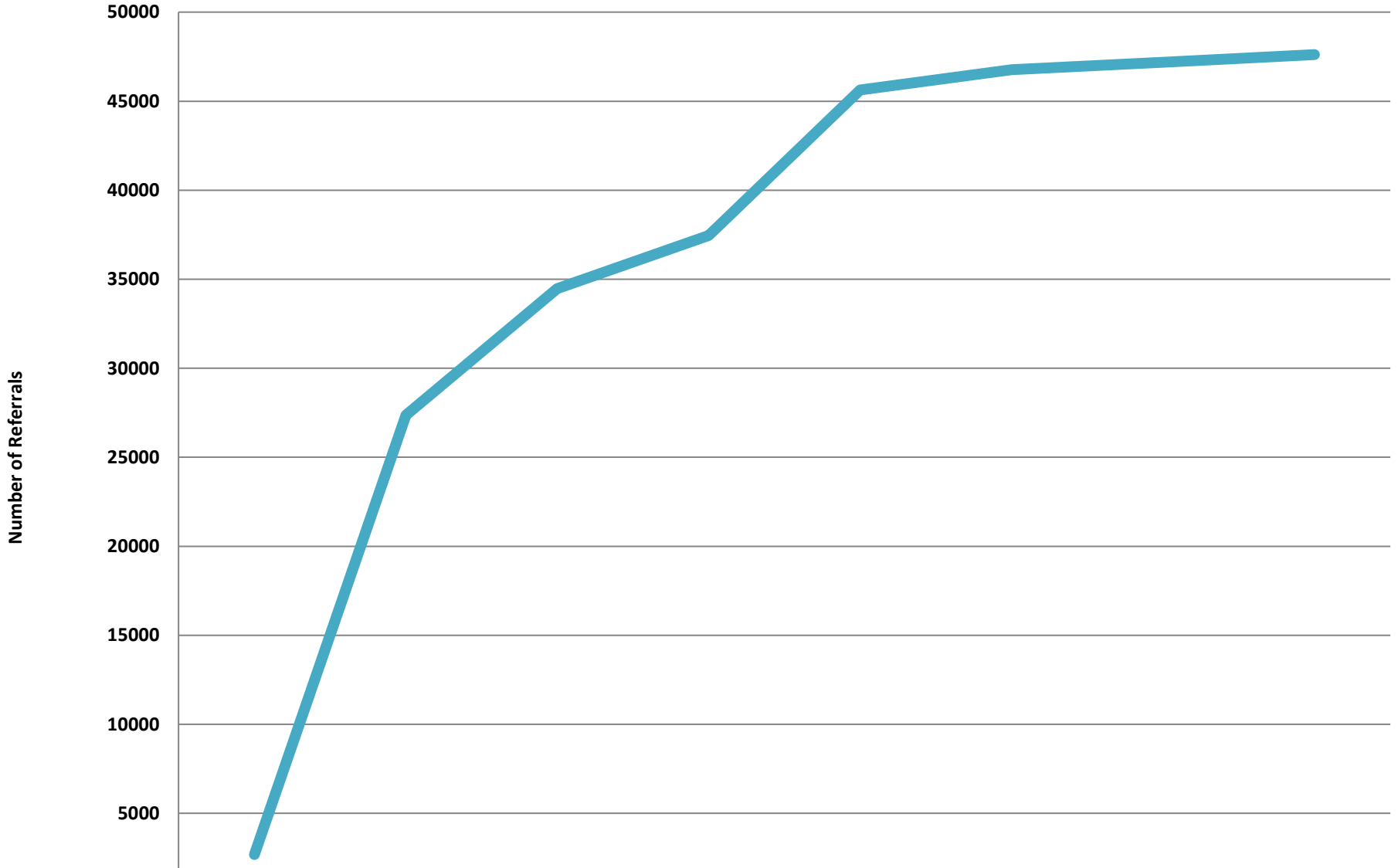
The S2S eReferral system was implemented in Gippsland in 2006.

S2S Today in Gippsland is used by;

- over **70** agencies
- over **467** services
- over **2056** practitioners

And sent/received more than 70,000 referrals across Gippsland in 2013.

S2S Referrals Sent and Received in Baw Baw and Latrobe



	2006	2007	2008	2009	2010	2011	2012	2013
S2S Referrals	2684	27372	34473	37458	45627	46766	47195	47614



How to access the S2S Demo Site

For training or practice purposes:

Go to the S2S Demo Site at: <https://demo.s2s.org.au>

Log in by entering:

- Username: happy, homer, sleepy, mickey, bart, sneezy, grumpy, dopey, bashful or marge
- Password: infoxchange
- Click on 'Login'
- You can use this site any time to practice your eReferrals

Searching for clients

- Click on 'Search' tab at top of screen
- Enter client's last name (minimum 3 characters) and at least one other field
- Obtain client's consent to search S2S database
- Click on 'Next' to search for client
- Click on 'Edit Client' to update existing details
- Enter details and click on 'Add Client' to add new client to database

Who can we send S2S referrals to?

<https://www.s2s.org.au/listservices.chtml>

Latrobe Community Health Service, Gippsland Wide

- Aged Care Services- (NRCPA)
- Case Management Linkages (AGED)
- Day Stay
- Dementia Access and Support (NIU)
- Disability Services
- Early Childhood Intervention Service (ECIS)
- Facilitation, FFYA and AWEP
- Financial Counselling Supporting People with Problem Gambling
- Gamblers Help Financial Counselling
- Gamblers' Help Gippsland
- HACC Initial Response Service
- Innovative Health Service for Homeless Youth (IHSHY)
- Mayfair House Respite
- Mental Health Community Support Service (MHCSS) intake assessment pilot project
- (NIU) Flexible Support Packages
- (NIU) New Service
- (NIU) Veterans' Home Care (VHC)
- (Not In Use) Unused New Service
- TCA/GPMP MBS Referrals (GP use only)
- Volunteer Program
- Volunteer Program NIU

Sending referrals and attaching documents

- Click on 'Referral' then 'New' at the top of the page
- Select the 'Receivers' (i.e. the service(s) you want to send the referral to) via 'Top 10', 'Browse' or 'Search'
- Complete the Cover Sheet i.e. indicate priority, info access level & feedback requirements and add any referral notes
- Attach the SCTT (or other documentation) from your client management system *OR* complete the SCTT Forms on-line
- Click on 'Save' to store the referral as a 'Draft' if you don't have time to complete it then and there
- Once complete, obtain the client's consent and click on 'Send'

Attaching the SCTT

If your agency already has the SCTT stored somewhere in its client management system (CMS), staff may want to save it to a suitable folder on your agency's own computer system (i.e. 'export' it) and then attach it to the S2S eReferral rather than completing the SCTT on-line on S2S

The method of exporting the SCTT will vary depending on the particular CMS

Instructions for exporting the SCTT from some of the most popular CMS (e.g. SWITCH, TCM, Sharikat, ACE) can be found on Infoxchange's S2S website at: <http://support.s2s.org.au/forms-resources> Otherwise, you will need to consult your agency's IT Dept / Support Person)

The method of actually attaching the saved SCTT (or any other document) to the S2S eReferral will always be the same

Receiving a referral

- An email arrives to alert you that a new referral has arrived
- Check under 'Incoming Referrals' - click on 'Incoming' at the top of the page if this is not set as your homepage
- Status of a new referral will be:
 - New
 - Allocated (if receiving via a Referral Coordinator or Intake Worker)
- Click anywhere on the referral to open it & view the details

Receiving Referrals –Email Alert

Subject: FW: [REF:36979] Referral Status Change

**** The ID for this referral is: 36979 ****

The referral you sent matching the details below has been updated to a status of: Referred Back

Referral details:

Receiver:

Agency: Monash City Council

Service: Property Maintenance (HACC) (Home Maintenance)

Sender:

Agency: MonashLink Community Health Service, Glen Waverley Site

Service: Allied Health Service: Occupational Therapy

Role: Allied health practitioner

You can use the following link to connect to the system:

https://www.s2s.org.au/referral/view_details.shtml?docid=36979

Processing a Referral

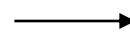
New/Allocated Referral



Acknowledge Referral



Change Status



Assessment etc.,



Close Referral

Processing a referral

An Incoming Referral:

- should ALWAYS be 'Acknowledged' first to indicate that it has been received by your service (this does NOT necessarily mean that you are going to accept it)
- can be 'Referred Back' to the sender e.g. if the client is ineligible, your service is not appropriate, your waiting list is too long or the sender hasn't provided enough info.
- can be 'Withdrawn' e.g. if the client no longer requires the service or has left the area

Processing a referral

Once the referral has been accepted:

- **‘Change Status’** (and add some notes) to update the referral during the course of the care planning or service delivery process e.g. when:
 - the client is placed on your service’s Waiting List
 - the client reaches the top of the List and service provision commences
 - the investigation or assessment process starts prior to service provision
 - the client’s needs change and an adjustment in service level is required

Processing a referral

Once the referral process is complete:

- **‘Change Status’** of the referral to ‘Closed’ e.g. when:
 - the client indicates that the service is no longer required
 - the service(s) requested in the referral have been provided and ongoing service delivery is not required
 - your agency will be providing ongoing services to the client but they will be managed within your own internal client management system
- Remember to add some notes to indicate the referral outcome e.g. “client will be attending the centre weekly for the next 12 months”, “meals will be provided on an ongoing basis” etc.

Using other key S2S features

Compressed View – all the details of a referral, including the SCTT, shown in a compressed view. Allows easy printing & storage of hard-copies for the client's file.

Status History - list of all the 'Status Changes' for the referral, with the most recent at the top and oldest at the bottom of the page.

Service Summary - complete list of current and previous services that the client is receiving or has received.

Referral Summary – a list of all the referrals that have been created for the client in the last 12 months (except referrals made as 'Sender/ Receiver Only').

Using other key S2S features continued...

- **Service Records** – click on ‘Referral’ then ‘Service Records’ to obtain lists of all referrals sent and received by your service *or* to search for particular referrals by criteria such as: name, gender, DOB, referral ID, status, date the referral was created etc.
- **Reports** – click on ‘Admin’ then ‘Reports’ to obtain referral reports for your service which can either be viewed or downloaded onto an Excel spreadsheet e.g. sent & received referrals, external referrals, allocated referrals, response time, total referral time
- **Change Details** - change your eReferral user preferences e.g. password, email address, phone no, date format, client name format, home page preference

Referral Housekeeping

As an S2S user it is your responsibility to make sure that :

- ✓ Referrals are acknowledged promptly
- ✓ Appropriate feedback is provided to referring agencies
- ✓ Referral notification emails are checked regularly and properly managed
- ✓ Referrals are closed at the right time with an appropriate note to indicate why
- ✓ Referrals are sent with the appropriate SCTT and other information

Minimum standards for referrals are as set out in the Victorian Service Coordination Practice Manual 2007 (download from:

<http://www.health.vic.gov.au/pcps/coordination/ppps.htm>)



Activity

Log into the S2S Demo Site and complete the tasks on the activity sheet provided by the trainer.



How to access the S2S Live Site

- Go to the S2S Live Site at: <https://www.s2s.org.au>
- When logging on for the first time, enter your Username and temporary Password
- You will be prompted to select a new, secure Password but your Username will remain the same
- Every S2S user must have an individual Username and secure Password - these cannot be shared by several staff

Password Information

Passwords expire every 3 months.

Password criteria are:

- Minimum of 8 characters
- Must contain at least one UPPERCASE letter
- Must contain at least one lowercase letter
- Must contain at least one digit (e.g. a number between 0 – 9)
- Must not be based on a standard dictionary word

Dealing with lost or forgotten passwords

To reset your password, simply use the 'Forgotten Your Password?' link from the Login page and follow the series of instructions.

To reset your password successfully you'll need to;

- know the email address associated with your S2S account
- be the only person using that email address within S2S
- have access to your email
- choose a password that meets the new password criteria



S2S User Guide Online

The screenshot shows a web browser window with the address bar containing <http://support.s2s.org.au/>, which is circled in red. The browser tabs include "S2S eReferral VIC, Demo" and "Support Home | S2S Usergu...". The website header features the S2S4networks logo, the text "Service coordination system An infochange enterprise", and navigation links for "Support Home", "Forms & Resources", "eReferral User Guide", and "S2S Demo Sites". A banner image shows three people in a call center with the text "S2S support is just a click away." Below the banner, the "Support Home" section includes "S2S User Guides & Resources" and a list of links. The "eReferral User Guide" link is circled in red, with a red arrow pointing to it from the left. Other links include "Forms & Resources" and "S2S Demo Sites". A search bar and two buttons ("Visit the S2S4networks website" and "Visit the AppPac4nfp website") are on the right. A "Login to S2S ..." section lists various regional eReferral and eWaitlist sites. The footer contains "Quick Links", "Related Infochange Services", and "Follow Us through". The Windows taskbar at the bottom shows the date and time as 4:46 PM on 17/02/2014.

http://support.s2s.org.au/

S2S4networks
Service coordination system
An infochange enterprise

Support Home | S2S Usergu... x

Infochange Australia | Text Size

Support Home Forms & Resources eReferral User Guide S2S Demo Sites

S2S support is just a click away.

Support Home

S2S User Guides & Resources

The purpose of this site is to provide information and resources for users of S2S eReferral and eWaitlist.

[Forms & Resources](#)

- This page contains links to commonly used forms and resources for Victorian and NSW users, and information about privacy and consent.
- [eReferral User Guide](#)
 - This is based mainly on the Victorian version of eReferral and therefore around the SCTT templates, however NSW users will still find this guide useful and there is a specific topic heading for NSW. Victorian eReferral terminology uses 'Referrals', whereas NSW terminology uses 'Documents' (e.g. Create New Referral versus Create New Document).

[S2S Demo Sites](#)

- This page contains links to the three S2S demonstration sites; eReferral VIC, eReferral NSW and eWaitlist VIC, that can be used to practice using S2S.

We'd love to hear from you!

You can contact the S2S Support Desk between 8:30am - 5:30pm, Monday - Friday. One of our helpful team will be happy to answer any questions you have.

e | apps@infochange.net.au
p | +61 3 9418 7466

Search this site...

Visit the S2S4networks website

Visit the AppPac4nfp website

Login to S2S ...

- eReferral VIC
- eReferral VIC, Eastern
- eReferral NSW, Far North Coast
- eReferral NSW, Mid North Coast
- eReferral NSW, New England
- eReferral NSW, Southern
- eReferral NSW, Western
- eWaitlist VIC
- eWaitlist SA

Quick Links Related Infochange Services Follow Us through

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S2S User Guide Online ... cont..

http://support.s2s.org.au/s2s-ereferral-user-guide

S2S eReferral VIC, Demo

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Support Home Forms & Resources eReferral User Guide S2S Demo Sites

Home > S2S eReferral User Guide

S2S eReferral User Guide

Search this site...

Introduction

This online user guide illustrates how to use eReferral. Click on the 'topic' headings on the vertical menu bar down the left hand side of this page. If a heading has sub-topics, they will drop-down and display underneath as you click on the heading.

The manual is based on the Victorian version of eReferral however a lot of the content will also be applicable to NSW users.

Logging In

You must be a registered user of the eReferral system and you will need a username and password to login.

Infoexchange

eReferral VIC, Demo

Username

Password

Login

Forgot your password?

Privacy Notice

Users of this system are governed by the Australian Privacy Act 1988 and the relevant State privacy acts. Please refer to the [Office of the Information Commissioner's website](#) for more information regarding privacy laws.

All access to the system are recorded and subject to regular audits. Users may be asked upon to justify their access to specific records.

[Helpdesk Operation and Structure of S2S](#)

Quick Links

- Home

Related Infoexchange Services

- Community web and graphic design - SocialDesign

Follow Us through

- RSS Feeds

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17/02/2014

Contacts, website addresses , how/where to get assistance

S2S Website: <http://www.s2s.infoxchange.net.au/service-service-s2s>

For information about S2S, user manuals and other resources, privacy info., service specific forms etc.

S2S Training Demo Site: <https://demo.s2s.org.au>

Use general username and password to access the site

Live S2S Site: <https://www.s2s.org.au>

Use individual username and secure password to access the site

S2S Support Site: <http://support.s2s.org.au/>

For support resources including how to use S2S

Phone & email support

S2S Support Desk

(8:30-5:30 Mon-Fri)

Email: apps@infoxchange.net.au

Phone: (03) 9418 7466

Thank you

Liz Meggetto

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