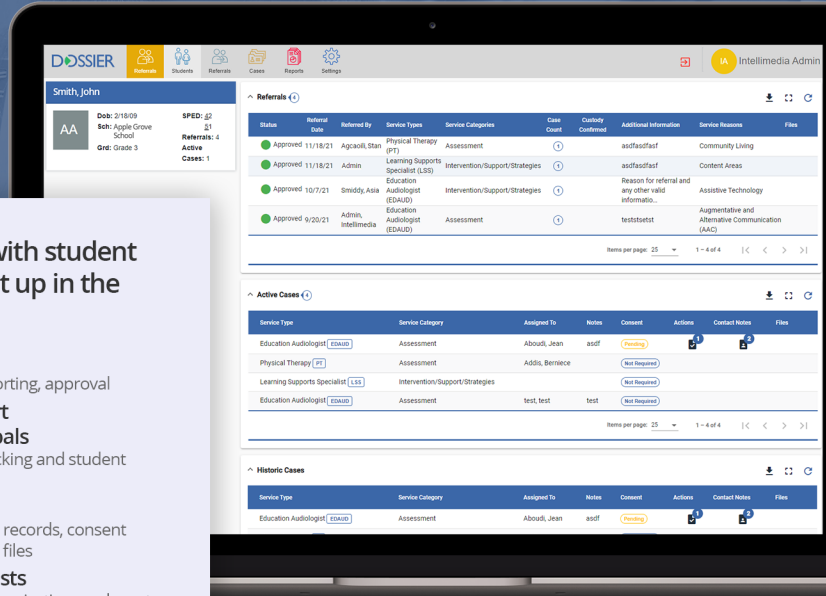




REFERRALS MODULE



Managing student services available, provided, and organized by the school division is an important set of information that requires easy access to those who need it.



The Dossier Referrals Module helps track:

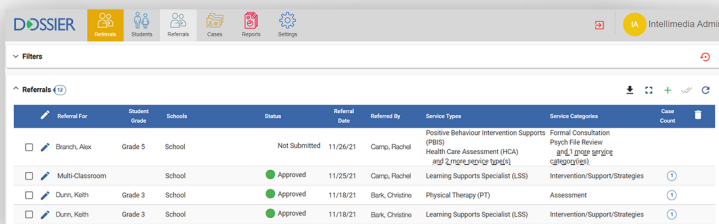
- Referrals for student services
- Approval process
- Service Case creation
- Case Actions
- Consent gathering (physical or electronic)
- Case Notes and Files

Users, who work with student services, can be set up in the system as:

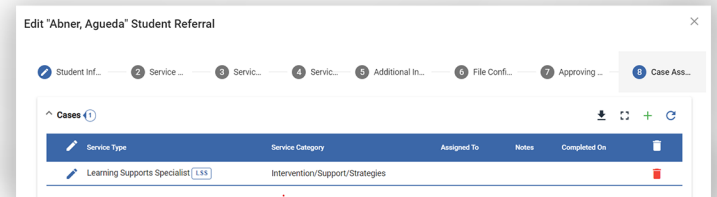
- Managers**
Full data access, reporting, approval
- Learning Support Teachers/Principals**
Submit referrals, tracking and student information
- Therapists**
Case creation, action records, consent gathering, notes and files
- External Therapists**
Users outside the organization can be set up to access case actions assigned specifically to them

The Referrals list lets users:

- View and monitor the referrals that they have submitted
- Approve referrals (Manager user type) individually or check multiple to approve
- Create a Group Referral (not student specific, but resource access for a school, grade or class)



Once approved, Managers and Therapists may create Cases (the referral may require more than a single service provider to work with the student).

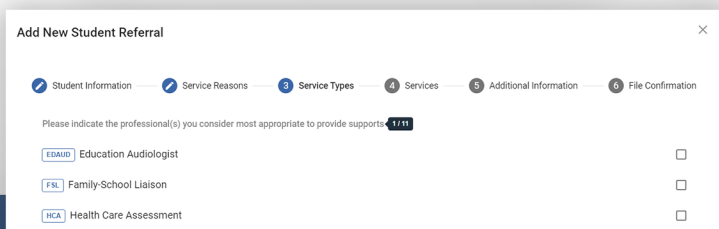


If any case actions require Consent to be gathered from parents/guardians, then the user must obtain and record consent:

- Implied - spoke to the parent and obtained consent verbally
- Manually by sending a form home and scanning/uploading to the consent area
- Electronic - select a consent form and prefill any information needed (Email notification is sent to parent/guardian selected with a one time use token to access, fill in and submit the consent form)

A Referral draws student information from the SIS and the user selects:

- Reason(s) for the referral
- What Type(s) of service is required
- What specific service categories are requested
- Additional information - text description of the reason for referral
- Confirmation of the existence of files required for a referral



As the service providers work with the student Case Notes can be recorded and Files can be uploaded. A case is considered closed with all case actions having been completed.

