



One TYS Handbook

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Handbook

CAPITA

Revision History

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01 / Introduction

Services

The Targeted Youth Support (TYS) module of One IYSS encompasses three services:

- Teenage Pregnancy
- Crime Prevention/Antisocial Behaviour
- Other Targeted Youth Support (OTYS).

This handbook is to help TYS workers use the TYS-specific functions of IYSS, and should be used in conjunction with the other IYSS handbooks where appropriate. A separate TYS handbook is available for system administrators.

MORE INFORMATION

One IYSS End User Guide
One IYSS Substance Misuse Overview Handbook
One TYS System Administration Handbook
One Youth Justice End User Guide

Each of the three services is governed by a unique set of permissions. If you require access to additional TYS functionalities, contact your system administrator.

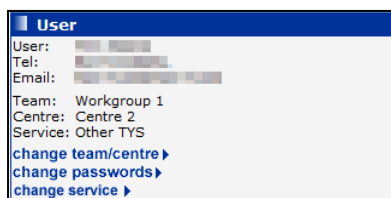
The three TYS services operate in the same way. Unless otherwise indicated, the instructions in this document apply to all three services.

Multi-service Users

Your current service is indicated in the right-hand side of the breadcrumb trail header bar when navigating client records:



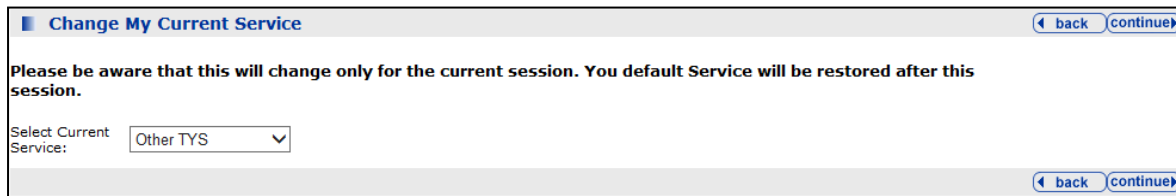
In the **my homepage** view, your current service is displayed in the **User** panel:



Any cases or episodes you create are owned by your current service at the time of creation. If you need to change your current service:

Introduction

1. In the **User** panel in my homepage, click the **change service** hyperlink to display the **Change My Current Service** screen.



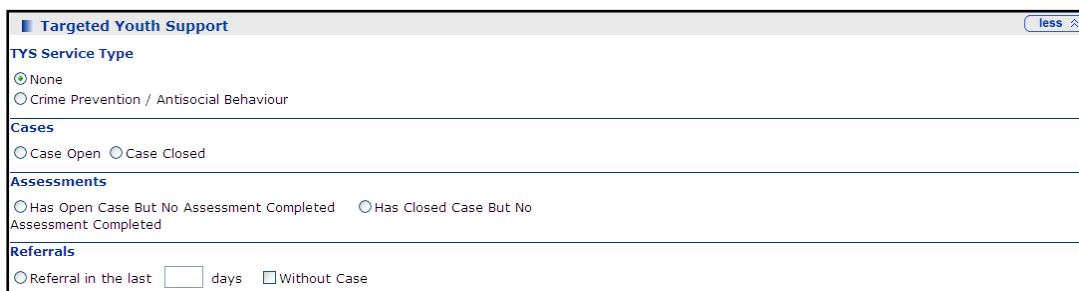
2. Select the required service from the **Select Current Service** drop-down and click the **continue** button to return to **my homepage**.

The **User** panel and breadcrumb trail header bar are updated to display the new service.

TYS Search Criteria

TYS users can access the **Targeted Youth Support** panel in the **Client Search** screen. This enables you to search for clients with existing or previous TYS cases or referrals for the services to which you belong.

After selecting the **TYS Service Type** you wish to search, select the required options to add the criteria to your search:



NOTE: This panel is governed by the TYS - Client Search Criteria permission. If the panel is not displayed, contact your system administrator.

02 / Processing a TYS Case

Introduction

A TYS case begins when a referral is received. The referral either progresses into an open case or is closed. Clients can only have one open inbound TYS referral or TYS case per service type at any one time. Existing referrals or cases must be closed before subsequent ones can be opened. Clients can have multiple outbound referrals to other agencies open simultaneously.

NOTE: The following processes use the Other TYS (OTYS) service as an example. The processes are the same for Crime Prevention and Teenage Pregnancy, unless otherwise stated. If you are opening a Crime Prevention or Teenage Pregnancy case, replace Other TYS with the appropriate service type.

Users must have the following permissions to add, edit or close referrals in and cases:

Action	Permission Example
Open referral	Other TYS Referral - Add
Edit or close referral	Other TYS Referral - Change
Open case	Other TYS Case - Add
Edit case	Other TYS Case - Change
Close case	Other TYS Case - Close

Recording an Inbound Referral

OTYS referrals are managed through the **Other TYS Referrals In** panel. If no previous referral has been entered, the panel header will be grey and read **No Other TYS Referral**.



To record a new inbound referral for a client:

1. Open the required client record.
2. In the **Other TYS Referrals In** panel, click the **new** button to display the **New Other TYS Referral** screen.

A screenshot of the "New Other TYS Referral" form. The form has a green header bar with the title "New Other TYS Referral" and "back" and "continue" buttons. The form fields include:

- Referral Date: A date picker.
- Referral Source: A dropdown menu with "(none)" selected.
- Referred By: A text input field.
- Case Type: A dropdown menu with "(none)" selected.
- Referral Notes: A large text area with an "insert" button.
- Case Worker: A dropdown menu with "(none)" selected.
- Additional Case Workers: Three checkboxes, each followed by a blurred name.
- Referral Outcome: A dropdown menu with "(none)" selected.
- Closed On: A date picker.

 The bottom of the form has a green bar with "back" and "continue" buttons.

Processing a TYS Case

3. Complete the **Referral Date**, **Referral Source**, **Referred By**, **Case Type** and **Case Worker** fields.
4. If required, enter any **Referral Notes** and select **Additional Case Workers**.
5. If the referral does not have an outcome at the time of recording, click the **continue** button to display the **Referral** screen.

If the referral does have an outcome at the time of recording, complete the **Referral Outcome** and **Closed On** fields, and then click the **continue** button to display the **Referral** screen.

The screenshot shows a software interface with a sidebar on the left containing 'Actions' (View Client, Open Case, Delete Referral) and a main panel titled 'Referral'. The main panel has a 'change' button in the top right. The form fields are: Referred: (text field), Source: Doctor (dropdown), Referred By: (text field), Closed: (text field), Outcome: (text field), Service: Other TYS (dropdown), Case Worker: (text field with user icon), and Additional Case Workers: (text field with user icon).

The referral is now displayed in the **Other TYS Referrals In** panel.

Referred	Lead Case Worker	Outcome	Service
from Doctor		Referred to Youth Workers on	Other TYS

Closing a Referral at a Later Date

To close the referral at a later date without opening an OTYS case:

1. Open the required client record.
2. In the **Other TYS Referrals In** panel, click the referral information in the **Referred** column to display the **Referral** screen.

This screenshot is identical to the one above, showing the 'Referral' form with fields for Referred, Source, Referred By, Closed, Outcome, Service, Case Worker, and Additional Case Workers.

3. In the **Referral** panel, click the **change** button to display the **Change Other TYS Referral** screen.

The screenshot shows the 'Change Other TYS Referral' form. It has a 'back' and 'continue' button in the top right. The form fields are: Referral Date: (calendar icon), Referral Source: Doctor (dropdown), Referred By: (text field with 'MD'), Referral Notes: (text area with 'insert' button), Referral Outcome: (dropdown), and Closed On: (calendar icon). A 'back' and 'continue' button are also in the bottom right.

4. Complete the **Referral Outcome** and **Closed On** fields.
5. Click the **continue** button to return to the **Referral** screen.

Opening a TYS Case

Generic Process

The Generic Process topic describes how to change a referral into an open TYS case. The Case-Specific Fields topic provides additional information for changing Crime Prevention/Antisocial Behaviour and Teenage Pregnancy referrals into open cases.

To progress a referral to an OTYS case:

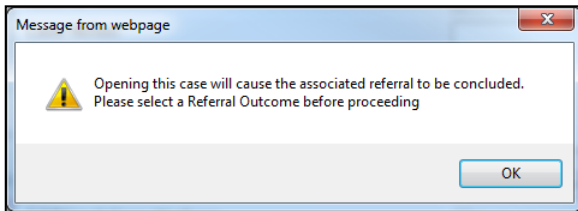
1. Open the required client record.
2. In the **Other TYS Referrals In** panel, click the referral information in the **Referred** column to display the **Referral** screen.

3. In the **Actions** panel, click the **Open Case** hyperlink to display the **Change Other TYS Case** screen.

4. Enter a **Case Opened Date** and, if required, update the **Case Type**, **Case Worker** and **Additional Case Workers** fields.

Processing a TYS Case

5. If the referral that led to the case being opened has not been closed, select a **Referral Outcome** from the menu. You cannot create a case without closing the referral. If you attempt to do so, the following warning dialog is displayed:



6. As required, complete the remaining fields and enter any relevant notes.

NOTE: If the **Current** radio buttons for **On Child Protection Register** or **Subject to CAF** are selected, an alert is displayed in the client header. Only users with the 'Show On Child Protection Register Indicator' or 'Show Has CAF Indicator' permissions can view these alerts.

7. After you have entered all the relevant information, click the **continue** button to display a summary of the referral and new case.

Case-Specific Fields

Crime Prevention/Antisocial Behaviour

The **History of Offending / Anti-social Behaviour** panel is displayed in the **Change Crime Prevention / Antisocial Behaviour Case** screen. It contains the following fields that should be completed during case creation:

History of Offending / Anti-social Behaviour	
History of Offending Notes:	<input type="text"/> <input type="button" value="insert"/>
Custody Number:	<input type="text"/>
Age at first Police Contact:	<input type="text"/>
Frequency of Police Contact Known:	<input type="radio"/> Not Applicable <input type="radio"/> Yes <input type="radio"/> Don't Know
Family Offending Background:	<input type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Don't Know
Victim Type:	<input type="checkbox"/> Racially Motivated <input type="checkbox"/> Victim(s) not known to them <input type="checkbox"/> Repeat Victim(s) <input type="checkbox"/> Vulnerable victim(s) <input type="checkbox"/> General Community <input type="checkbox"/> Specific, targeted victim(s)
Impact on Victim Notes:	<input type="text"/> <input type="button" value="insert"/>

After the case has been created, you can enter new community resolutions in the **Community Resolution** panel.

No Community Resolution	<input type="button" value="new"/>
-------------------------	------------------------------------

To enter a new community resolution:

1. In the **Community Resolution** panel, click the new button to display the **New Crime Prevention / Antisocial Behaviour Community Resolution** screen.

2. Complete the fields as appropriate and click the **continue** button.

The resolution is displayed in the **Community Resolution** panel.

Offence	Recommendation	Outcome	Officer in Charge	Location	Recorded By
Multiple Offences		Referred to YOS Prevention			

Teenage Pregnancy

The **Teenage Pregnancy Details** panel is displayed in the **Change Teenage Pregnancy Case** screen. It contains the following fields that should be completed during case creation:

Recording Outbound TYS Referrals

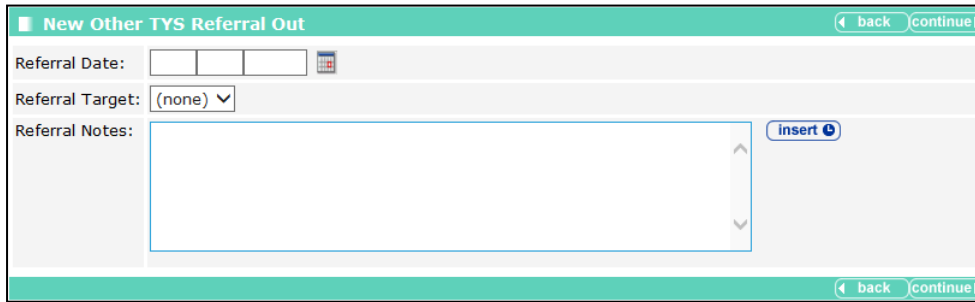
To record an outbound TYS referral for a client:

1. Open the required client record.
2. In the **Other TYS Current Case** panel, click the details button to display the referral and case details. The **Referrals Out** panel is displayed at the bottom of the screen, below the **Case Details** panel and any assessments, plans or reviews recorded against the case.

Subject to CAF::	No Assessments, Plans and Reviews	new
	No Referrals Out	new

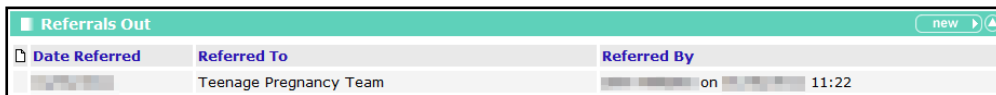
Processing a TYS Case

3. In the **Referrals Out** panel, click the **new** button to display the **New Other TYS Referral Out** screen.



The screenshot shows a form titled "New Other TYS Referral Out" with a green header bar containing "back" and "continue" buttons. The form fields are: "Referral Date" with a date picker, "Referral Target" with a dropdown menu showing "(none)", and "Referral Notes" with a large text area and an "insert" button. A second "back" and "continue" button pair is located at the bottom right of the form.

4. Enter a **Referral Date**, a **Referral Target** and any **Referral Notes**.
5. Click the **continue** button. The referral is displayed in the **Referrals Out** panel.



The screenshot shows a table titled "Referrals Out" with a green header bar containing a "new" button. The table has three columns: "Date Referred", "Referred To", and "Referred By". The first row of data shows a date, "Teenage Pregnancy Team", and a user name followed by "on" and a date and time "11:22".

Date Referred	Referred To	Referred By
[Redacted]	Teenage Pregnancy Team	[Redacted] on [Redacted] 11:22

03 / TYS Reports

Introduction

One TYS provides several predefined reports to run against your cases.

If you have the necessary report permissions, you can run the following TYS reports:

- Assessment Journey
- Case Demographics
- TYS Cases Opened
- TYS Cases Closed
- TYS - No Plan Reviews

Assessment Journey

The Assessment Journey report documents the progression of clients for whom TYS assessments were created during the specified period. It displays the **Initial Score** that was calculated the first time the assessment was recorded, and the **Current / Final Score** that was calculated on the most recent assessment. The **Difference** indicates whether the clients are progressing or not.

Client Journey, Assessments Created Between [redacted] and [redacted].

Client	Assessment	Created On	Initial Score	Current / Final Score	Difference
Other TYS		Average Scores	21	19	-2
Individual Clients					
[redacted]	OTYS	[redacted]	21	19	-2
Teenage Pregnancy		Average Scores	20	19	-1
Individual Clients					
[redacted]	Teenage Pregnancy Case A	[redacted]	20	20	Same
[redacted]	Teenage Pregnancy Case A	[redacted]	23	17	-6
[redacted]	Teenage Pregnancy Case A	[redacted]	19	19	Same
[redacted]	Teenage Pregnancy Case A	[redacted]	19	19	Same

Case Demographics

The Case Demographics report produces a breakdown of cases in each workgroup by demographic categories and groupings, e.g. age and gender, for each of the TYS service types. Clients included in the report are listed at the end of each service section, however no individual demographic information is given. Each of the demographic categories is displayed as a table,

TYS Reports

with the workgroups on the y axis. Only cases that were opened during the timeframe specified when running the report are displayed.

Cases opened Between [redacted] and [redacted].
Demographic Analysis

Client	Age		
Crime Prevention / Antisocial Behaviour	Total	16	19
Total	3	2	1
Workgroup 2	3	2	1

TYS Cases Opened

The TYS Cases Opened report displays the number of cases in each **Case Type** that were opened during a specified period. These are organised by TYS service type, and then by workgroup and worker. At the end of each section, a list of clients is included, their worker and **Case Type** is displayed.

Cases Opened Between [redacted] and [redacted].

Client	Worker	Referral Date	Case Opened	Case Type
Crime Prevention / Antisocial Behaviour	Total	Substance Misuse	Victim Awareness	YOS Prevention
Total	6	1	1	4
Workgroup 2	Total	6	1	4
	[redacted]	4	0	4
	[redacted]	2	1	0

Victim Awareness
YOS Prevention
YOS Prevention
YOS Prevention
YOS Prevention
Substance Misuse

TYS Cases Closed

The TYS Cases Closed report displays the number of cases in each **Case Type** that were closed during the specified period. These are organised by TYS service type, and then by

workgroup and worker. At the end of each section, a list of clients is included, their worker and the case outcome is displayed.

Cases Closed Between [redacted] and [redacted].

Client	Worker	Case Opened	Case Closed	Outcome
Crime Prevention / Antisocial Behaviour		Total	YOS Prevention Service	
Total		1	1	
Workgroup 2	Total	1	1	
		1	1	
Other TYs				Total CAF Started - [redacted]

TYS - No Plan Reviews / Overdue Reviews

The TYs - No Plan Reviews Overdue Reviews report produces a list of all current clients who do not have a case plan review date in the future. This includes plans with no review date or a review date that is in the past. Clients are organised by TYs service type and listed alphabetically.

Open Cases With No Plan Review Dates, or Overdue Plan Review Dates

Client	Case Opened	Case Type	Case Worker	Plan Date	Review Date
Crime Prevention / Antisocial Behaviour					
		Victim Awareness		10/08/2012	20/09/2012
		YOS Prevention			
		YOS Prevention		08/08/2012	16/08/2012
		YOS Prevention			
		Substance Misuse			
Other TYs					
		Single CAF			
Teenage Pregnancy					
		Short Term Case Work		13/11/2012	10/01/2013
		Short Term Case Work			

Running Reports

To run a report:

1. In the **IYSS Links** panel on **my homepage**, click the **View Reports** hyperlink to display the **View Reports** screen.

View Reports [back] [continue]

Report Category

Audit Reports M.I. TYs

Reports

[back] [continue]

TYS Reports

- In the **Report Category** panel, select the **TYS** radio button to display the available TYS reports.

View Reports [back] [continue]

Report Category

Audit Reports M.I. **TYS**

Reports

TYS - No Plan Reviews Overdue Reviews
 Case Demographics
 Assessment Journey
 TYS Cases Closed
 TYS Cases Opened

[back] [continue]

- In the **Reports** panel, select the desired report.
- Click the **continue** button to display the **Enter Values** dialog.

Enter Values

Enter Assessments Created From: [text field] [calendar icon]

Enter Assessments Created To: [text field] [calendar icon]

[OK]

- Define the period to be covered by the report by entering the start and end dates into **Enter [...] From** and **Enter [...] To** fields. You can do this by either:
 - Typing the date into the field in dd/mm/yyyy format.
 - or
 - Clicking the calendar icon next to the field to display a calendar dialog. Select the required date and then click the **OK** button.

Enter Values

Enter Assessments Created From: [text field] [calendar icon]

Enter Assessments Created To: [text field] [calendar icon]

[OK]

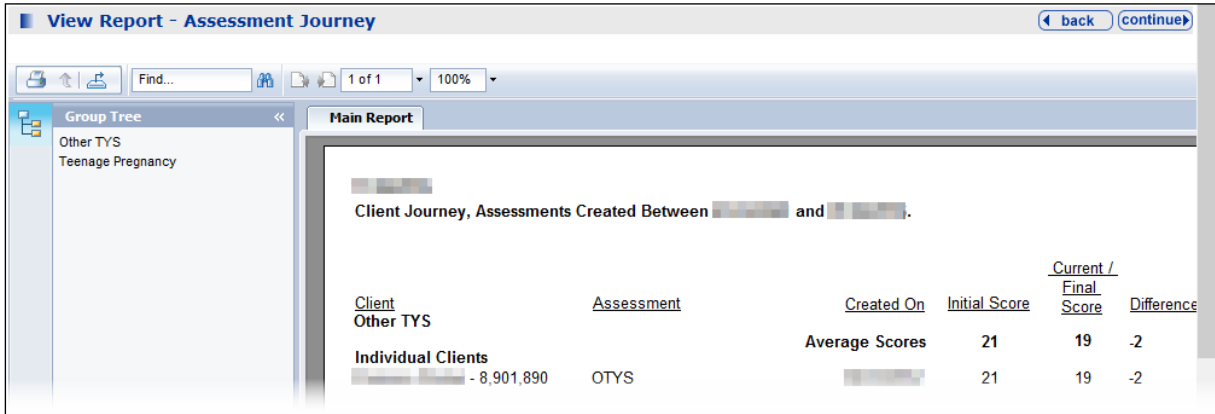
APRIL

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

[OK] [Cancel]

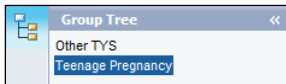
TIP: You can use the up and down arrows on the left to change the month, and the up and down arrows on the right to change the year.

- 6. Click the **OK** button. After the document has been processed, the **View Report - [Report Name]** screen is displayed.



Using the Reports

- To navigate to a certain TYS service type in the report, click the required service in the **Group Tree** panel.



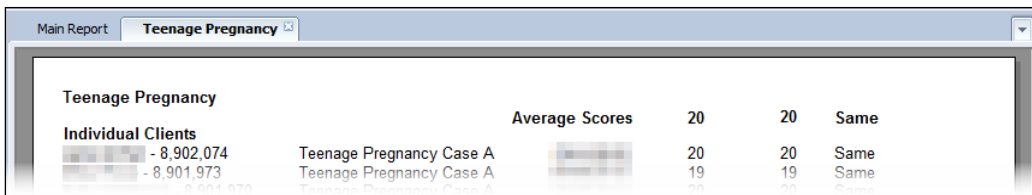
The report navigates to the requested section and the service is highlighted.

Teenage Pregnancy		Average Scores	20	20	Same
Individual Clients					
- 8,902,074	Teenage Pregnancy Case A		20	20	Same
- 8,901,973	Teenage Pregnancy Case A		19	19	Same
- 8,901,970	Teenage Pregnancy Case A		20	20	Same
- 8,901,950	Teenage Pregnancy Case A		19	19	Same

- To display the results for a single TYS service type in a new report, in the **Main Report**, click the required service.

Teenage Pregnancy		Average Scores	20	20	Same
Individual Clients					
- 8,902,074	Teenage Pregnancy Case A		20	20	Same
- 8,901,973	Teenage Pregnancy Case A		19	19	Same

The new report is displayed in a separate tab.

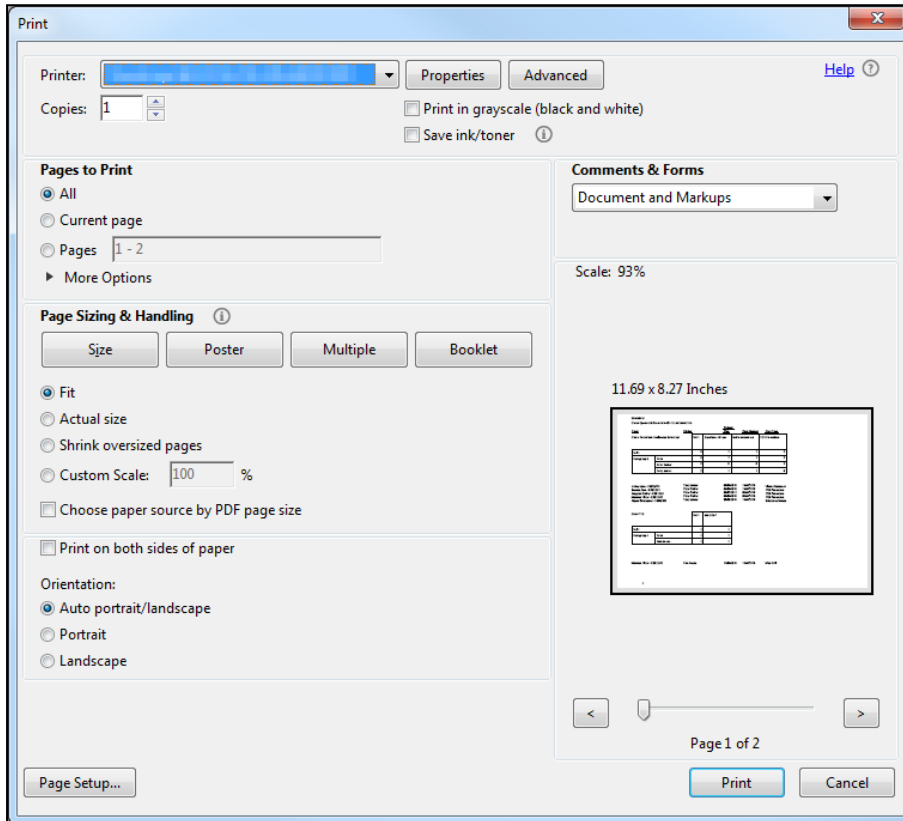


Printing a Report

To save a report for future reference, you must print it or export it to your local machine.

To print a report:

1. Click the printer icon above the **Group Tree** panel to display the **Print** dialog.



2. If required, configure the print options.
3. Click the **Print** button.

Exporting a Report

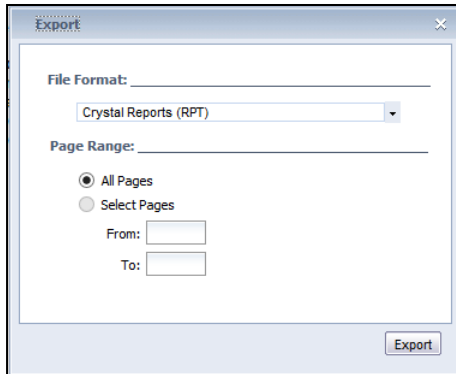
To save a report for future reference, you must print it or export it to your local machine. You can export reports as Word or Excel documents, or as PDF files.

To export the report:

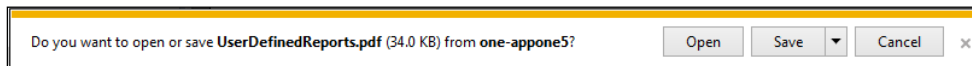
1. Click the export icon above the **Group Tree** panel to display the Export dialog.



Export icon



2. Select the output document type from the **File Format** menu.
3. If required, select the **Select Pages** radio button and enter the page range in the **From:** and **To:** fields.
4. Click the **Export** button. You are given the option to **Open** or **Save** the document. If you click **Save**, it is automatically named and placed in your default download location.



NOTE: You can rename the file and select the download location by clicking the arrowhead next to the **Save** button, and selecting the **Save as** option.

04 / Assessments, Plans and Reviews

Introduction

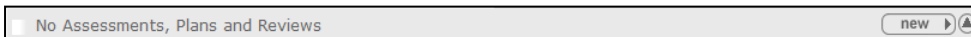
TYS assessments are configured by your system administrator and so may not contain the same elements or element values as in the following example. TYS assessments are similar to other One IYSS assessments, e.g. the APIR assessment.

NOTE: The following processes use Other TYS (OTYS) as an example. The processes are the same for Crime Prevention and Teenage Pregnancy. If you are opening a Crime Prevention or Teenage Pregnancy case, replace Other TYS with the appropriate service type.

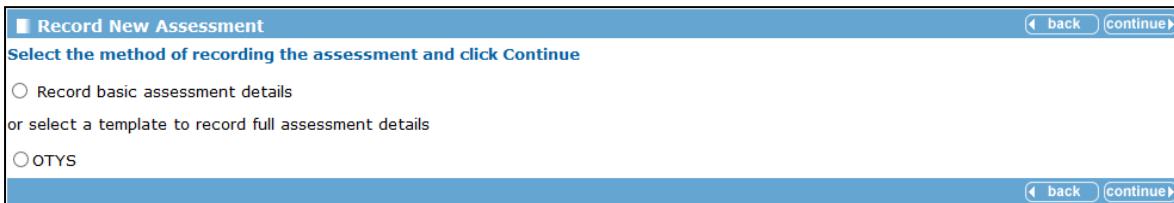
Creating New Assessments

To create a new OTYS assessment:

1. Open the required client record.
2. In the **Other TYS Current Case** panel, click the details button to display the OTYS case. The **Assessments, Plans and Reviews** panel is displayed at the bottom of the screen, below the **Case Details** panel

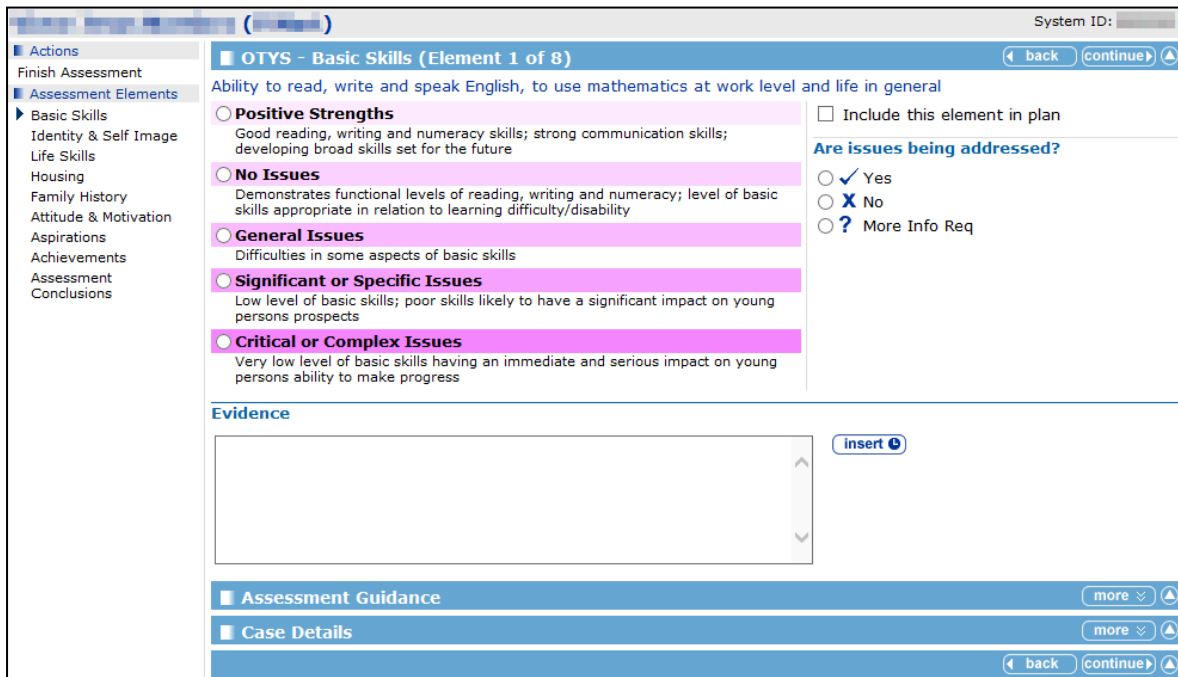


3. In the **Assessments, Plans and Reviews** panel, click the **new** button to display the **Record New Assessment** screen.



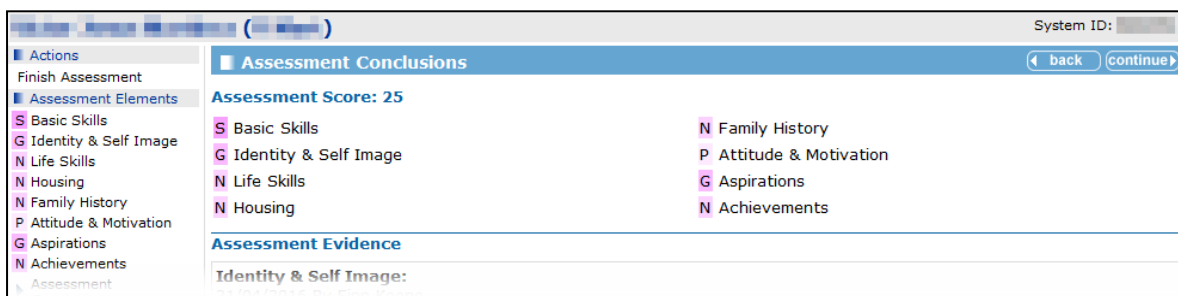
4. Select the **OTYS** radio button and click the **continue** button to display the first assessment element (in this case **OTYS - Basic Skills (Element 1 of 8)**). The elements are listed in the

Assessment Elements panel on the left-hand side. The element being assessed is described underneath the **OTYS - Basic Skills (Element 1 of 8)** panel header.



5. Work through each of the elements as follows:
 - a. Select the radio button for the option that best describes how the element applies to the client.
 - b. Select the appropriate **Are issues being addressed?** radio button.
 - c. If you want to include the element automatically in future plans created from this assessment, select the **Include this element in plan** check box.
 - d. Enter **Evidence** justifying your assessment.
 - e. Click the **continue** button to advance to the next screen.

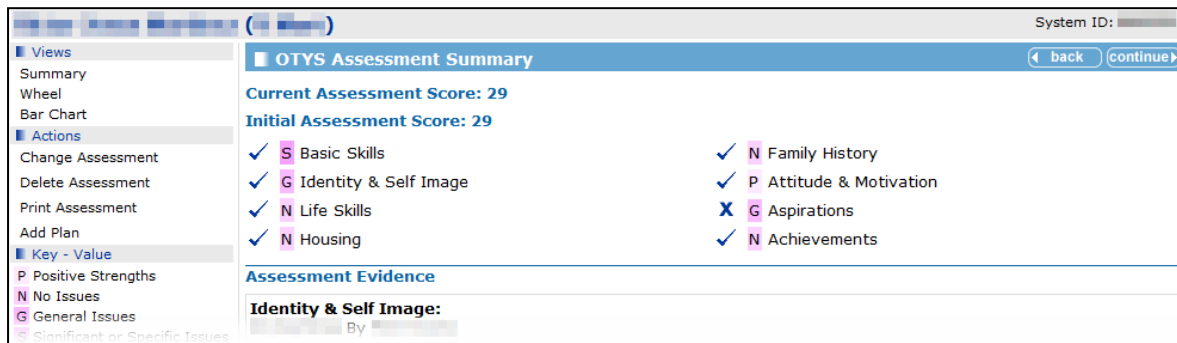
After you have completed all the elements, the **Assessment Conclusions** screen is displayed. The letters beside the **Assessment Elements** indicate how the client scored for each one.



6. Enter any further notes in the **Assessment Conclusions** fields.

- Click the **continue** button to display the **OTYS Assessment Summary** screen.

NOTE: The **Initial Assessment Score** is the assessment score as calculated the first time the assessment was performed. The **Current Assessment Score** is the assessment score as calculated the most recent time the assessment was performed.

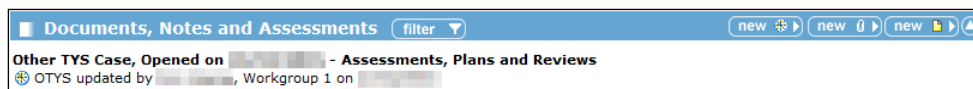


The assessment is displayed in and can be accessed through the **Assessments, Plans and Reviews** panel in the TYS case and in the **Documents, Notes and Assessments** panel in the client record:

- TYS **Assessments, Plans and Reviews** panel:



- Client record **Documents, Notes and Reviews** panel:



Updating Assessments

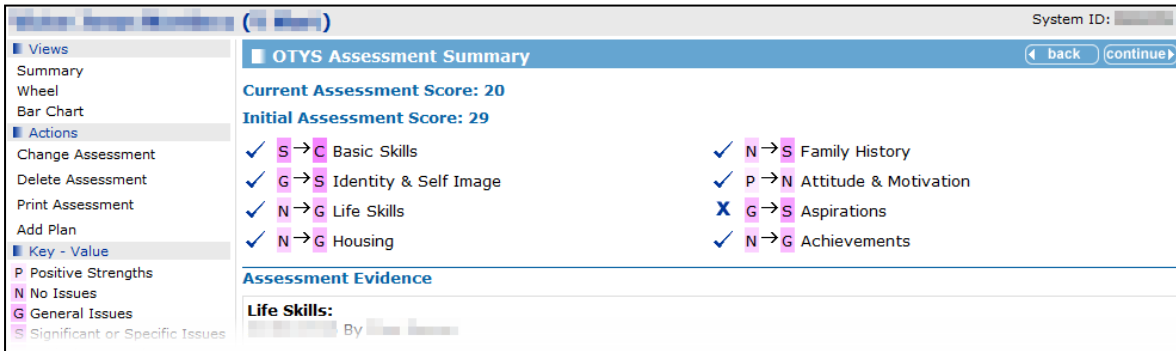
Updating assessments follows the same principles as creating new assessments. For more information, see [Creating New Assessments](#) on page 16.

To update an assessment:

- Open the required client record.
- Open the **OTYS Assessment Summary** by clicking the assessment name in either the **Assessments, Plans and Reviews** panel in the TYS case, or the **Documents, Notes and Assessments** panel in the client's record.
- In the **Actions** panel, click the **Change Assessment** hyperlink to display the first assessment element.
- Update the required elements.

TIP: If you do not need to update every element, you can navigate directly to the ones you do need to update through the **Assessment Elements** panel, instead of working through each element using the **continue** button.

- After you have updated the required elements, click the **Finish Assessment** hyperlink in the **Actions** panel to display the **OTYS Assessment Summary** screen.



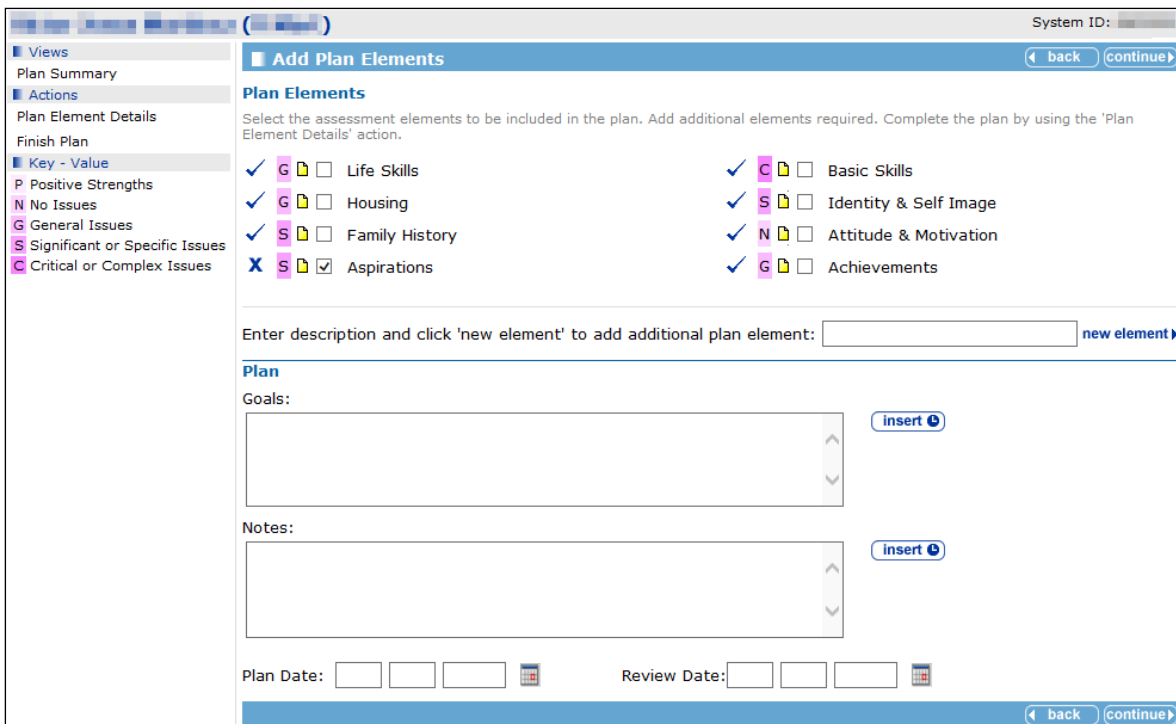
The **Current Assessment Score** is recalculated following the updates, and changes in the individual element scores are displayed.

Plans

Assessments can have multiple plans focussing on different elements. You can include custom elements that do not exist in the original assessment.

To add a plan to an assessment:

- Open the required client record.
- Open the **OTYS Assessment Summary** by clicking the assessment name in either the **Assessments, Plans and Reviews** panel in the TYS case, or the **Documents, Notes and Assessments** panel in the client's record.
- In the **Actions** panel, click the **Add Plan** hyperlink to display the **Add Plan Elements** screen.



- Enter the **Plan Date** (date of creation) and the **Review Date**.
- As appropriate, select or deselect the **Plan Elements**. Any elements with the **Include this element in plan** check box selected are automatically selected in the **Plan Elements** panel.

Assessments, Plans and Reviews

6. If required, add any additional elements that are not part of the assessment to the plan by entering a description in the free text field and clicking the **new element** hyperlink.
7. Enter the aims of the plan in the **Goals** field, and record any other **Notes**.
8. In the **Actions** panel, click the **Plan Element Details** hyperlink to display the first element in the plan.

9. Select the **Status** of the plan element from the drop-down.
10. If required, enter a **Start Date** and a **Target End Date**.
11. Enter a **Desired Outcome** for the element, the **Action** that will be taken to get there and the **Person Responsible** in the appropriate fields.
12. After you have completed the element, click the **continue** button to display the next plan element screen. After the last element is completed, the **Plan Summary** screen is displayed.

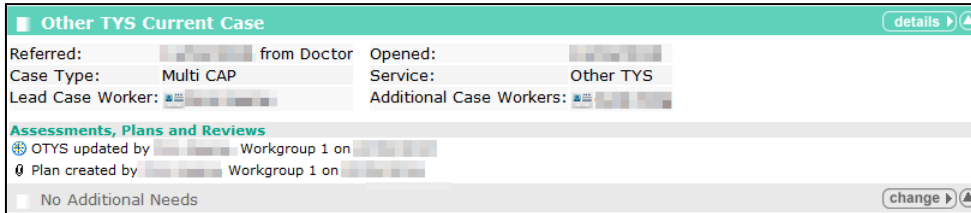
- Click the **continue** button to return to the **OTYS Assessment Summary** screen.

The plan is displayed in and can be accessed from the following places:

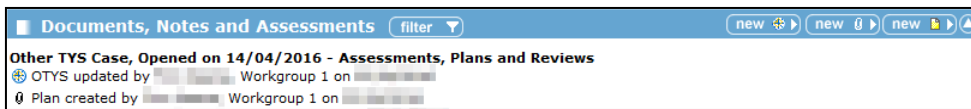
- The **Plans and Reviews** panel in the **OTYS Assessment Summary** screen.



- The **Other TYS Current Case** panel in the client record.



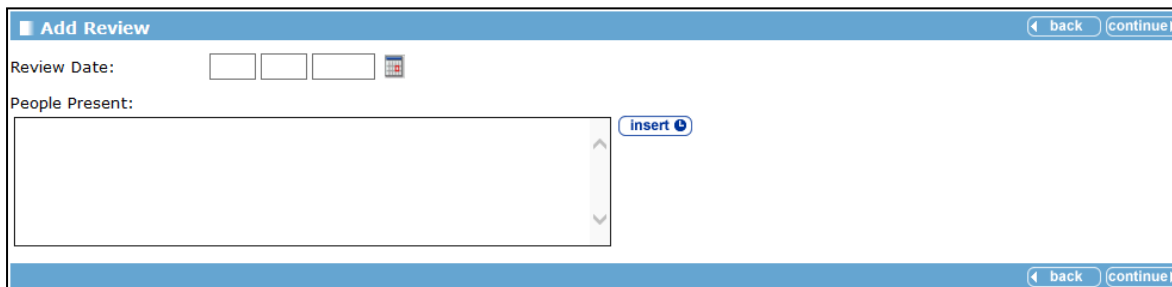
- The **Documents, Notes and Assessments** panel in the client record.



Reviews

To review a plan:

- Open the required plan. You can do this through the **Documents, Notes and Assessments** panel in the client record, or through the **Plans and Reviews** panel in the **Assessment Summary** screen.
- In the **Actions** panel on the left-hand side, click the **New Review** hyperlink to display the **Add Review** screen.



- Enter the **Review Date** and **People Present**.

- Click the **continue** button to display the first element to be reviewed.

- If required, update the **Action** fields.
- Complete the appropriate **Review** fields.
- After you have completed the element, click the **continue** button to display the next plan element screen. After the last element is completed, the **Review Conclusions** screen is displayed.

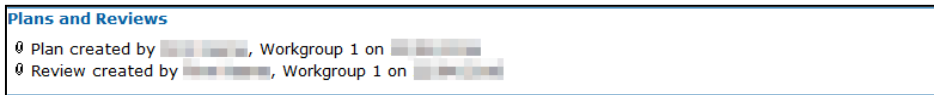
- If required, enter any **Next Steps** and **Notes**.
- Enter the **Next Review Date**.
- Click the **continue** button to return to the **Plan Summary** screen.

The review is displayed in and can be accessed from the following locations:

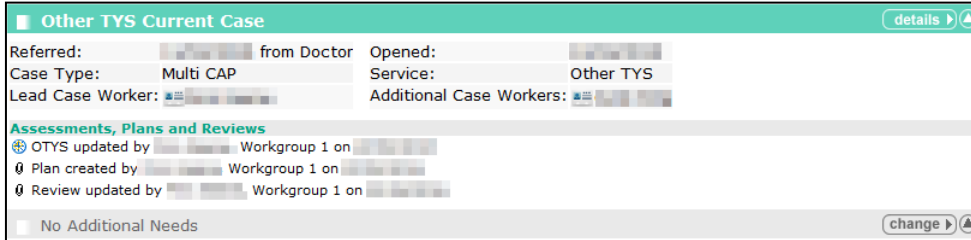
- The **Reviews** panel in the **Plan Summary** screen.



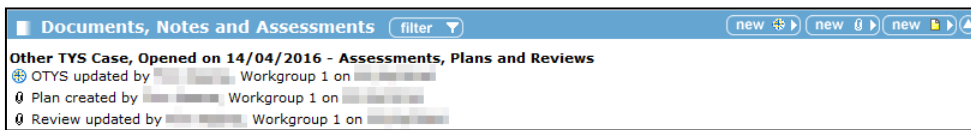
- The **Plans and Reviews** panel in the **OTYS Assessment Summary** screen.



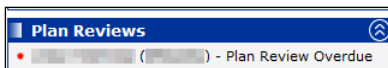
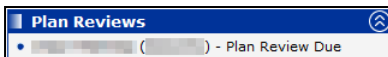
- The **Other TYS Current Case** panel in the client record.



- The **Documents, Notes and Assessments** panel in the client record.



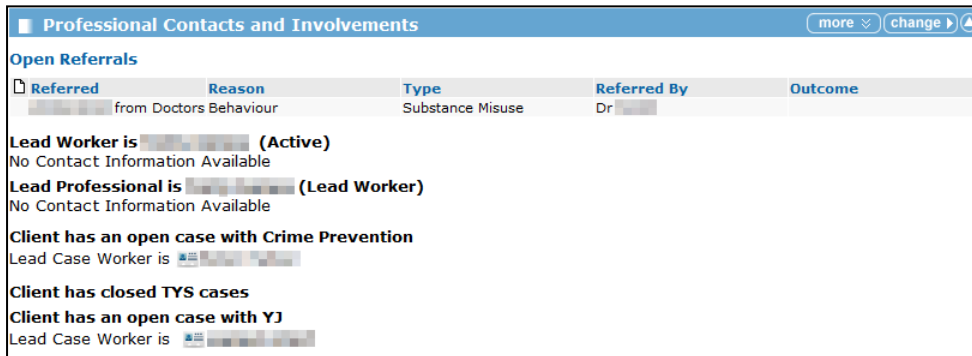
Clients with due or overdue plan reviews are displayed in the **Plan Reviews** panel in **my homepage**.



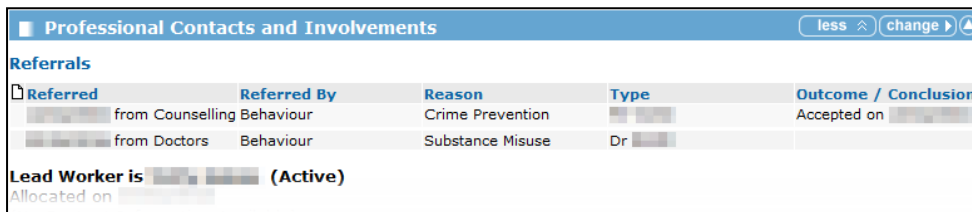
05 / Non-TYS Referrals

Introduction

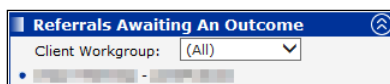
Inbound referrals that are not TYS service specific are recorded through the **Professional Contacts and Involvements** panel. Unlike the TYS service specific referrals, clients can have multiple open generic ones. Generic referrals may precede a TYS referral, or a referral out to a different youth service.



To display the client's referral history, click the **more** button.



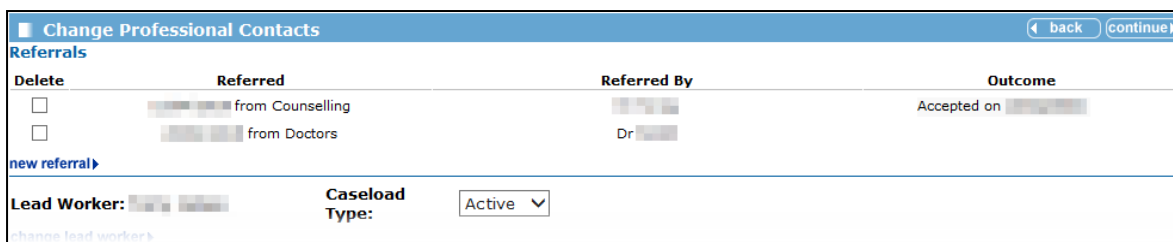
Open referrals are displayed in the **Referrals Awaiting an Outcome** panel in my homepage.



Recording a New Inbound Generic Referral

To record a new inbound generic referral:

1. Open the required client record.
2. In the **Professional Contacts and Involvements** panel, click the **change** button to display the **Change Professional Contacts** screen.



- In the **Referrals** panel, click the appropriate date and referral source in the **Referred** column to display the **New Referral** screen.

- Enter the **Referral Date**.
- Select the **Referral Reason**, **Referral Type** and **Referral Source** from the drop-downs.
- Enter the name of the person who sent the referral in the **Referred By** field.
- Add any relevant **Notes**.
- If required, complete the outcome and conclusion fields.

NOTE: If a **Referral Outcome** is selected, an **Outcome Date** must be entered, and vice versa. The same applies for the **Referral Conclusion** and the **Conclusion Date** fields. If a conclusion is recorded, the outcome fields must also be completed.

- Click the **continue** button to save the referral and return to the **Change Professional Contacts** screen.

Adding and Editing Referral Outcomes and Conclusions

To update or add an outcome or conclusion to a referral:

- Open the required client record.
- In the **Professional Contacts and Involvements** panel, click the **change** button to display the **Change Professional Contacts** screen.

Delete	Referred	Referred By	Outcome
<input type="checkbox"/>	from Counselling		Accepted on
<input type="checkbox"/>	from Doctors	Dr	

new referral

Lead Worker: Caseload Type: Active

[change lead workers](#)

Non-TYS Referrals

3. In the **Referrals** panel, click the **new referral** hyperlink to display the **Change Referral** screen.

The screenshot shows a web form titled "Change Referral". The form contains the following fields and controls:

- Referral Date:** A date picker with a calendar icon.
- Referral Reason:** A dropdown menu with "Behaviour" selected.
- Referral Type:** A dropdown menu with "Substance Misuse" selected.
- Referral Source:** A dropdown menu with "Doctors" selected.
- Referred By:** A text input field containing "Dr [redacted]".
- Referral Notes:** A large text area with a vertical scrollbar.
- Referral Outcome:** A dropdown menu with "(none)" selected.
- Outcome Date:** A date picker with a calendar icon.
- Referral Conclusion:** A dropdown menu with "(none)" selected.
- Conclusion Date:** A date picker with a calendar icon.

Navigation buttons labeled "back" and "continue" are located in the top right and bottom right corners of the form.

4. Update the fields as required.

NOTE: If a **Referral Outcome** is selected, an **Outcome Date** must be entered, and vice versa. The same applies for the **Referral Conclusion** and the **Conclusion Date** fields. If a conclusion is recorded, the outcome fields must also be completed.

5. Click the **continue** button to update the referral and return to the **Change Professional Contacts** screen.

06 / Changing Workers

Introduction

If clients' involvement with TYS services changes their lead or additional workers, you should amend the record accordingly.

Changing the Lead Worker

To change the lead worker:

1. Open the required client record.
2. In the **Professional Contacts and Involvements** panel, click the **change** button to display the **Change Professional Contacts** screen.

3. Click the **change lead worker** hyperlink to display the **Change Lead Worker** screen.

4. Enter the name of the required worker in the search field and click the **search** button to display the results.

5. Select the required worker, and click the **continue** button. The **Lead Worker** is updated, and the worker is added to the **Lead Professional** list.

Changing the Lead Professional

The lead professional can be any of the following:

- Lead worker
- Additional workers
- Agency contacts
- Current TYS case lead worker
- Current TYS case additional workers.

To change the lead professional:

1. Open the required client record.
2. In the **Professional Contacts and Involvements** panel, click the **change** button to display the **Change Professional Contacts** screen.

3. If the required worker is not displayed in the **Lead Professional** list:
 - a. Click the new additional worker hyperlink to display the **New Additional Worker** screen.

- b. Enter the name of the required worker in the search field and click the **search** button to display the results.

- c. Select the required worker, and click the **continue** button to add the worker to the **Additional Workers** panel and the **Lead Professional** list.

4. Select the worker from the **Lead Professional** list and click the **continue** button to save the changes.

Adding Additional Workers

1. Open the required client record.
2. In the **Professional Contacts and Involvements** panel, click the **change** button to display the **Change Professional Contacts** screen.

3. Click the new additional worker hyperlink to display the **New Additional Worker** screen.

4. Enter the name of the required worker in the search field and click the **search** button to display the results.

Name	Role	Team	Centre
[Redacted]	Personal Adviser	Workgroup 1	Centre 2

5. Select the required worker, and click the **continue** button to add the worker to the **Additional Workers** panel.
6. Click the **continue** button to save the worker and return to the client record. The new additional worker is now listed in the **Professional Contacts and Involvements** panel.