

Transfer a referral

The **Current referral owner** field on the Referral/IAR-DST screen controls where the intake data belongs to.

To transfer a referral, change the value in the **Current referral owner** field and save the record.

Once saved, if you are transferring from one PHN to another, the system will take you to a screen advising it has been transferred. If you have access to that PHN, it will display a button to automatically change your account to that PHN and then open the referral record.

PHN Intake staff can transfer from PHN to another, so long as they have access to the PHN they need to transfer to. If a referral needs transferring to a PHN you do not have access to, then system support need to do this on your behalf. In this case, send the referral ID link or URL to: pmhcis.support@nwmphn.org.au

Transferring a referral that is already Sent

When a referral is Sent it becomes locked, and can no longer be changed. In some circumstances, it may need to be sent to another Hub/Centre. In this case, these are the steps to transfer:

1. Once in the referral that you wish to change the referral owner of, toggle off 'referral sent' and click save. This will change the referral's status from 'Sent' back to 'Complete'
2. You will be taken back to the main (editable) referral screen, and be able to change the value in the **Current referral owner** field.
3. Click save

Notes

- This function is only available to PHN Admin users.
- Ensure that the receiving organisation is notified of the move so they know to expect the referral.