Uploading a Document to an Open Referral

This Quick Reference Guide provides a step by guide to Uploading a Document to an Open Referral

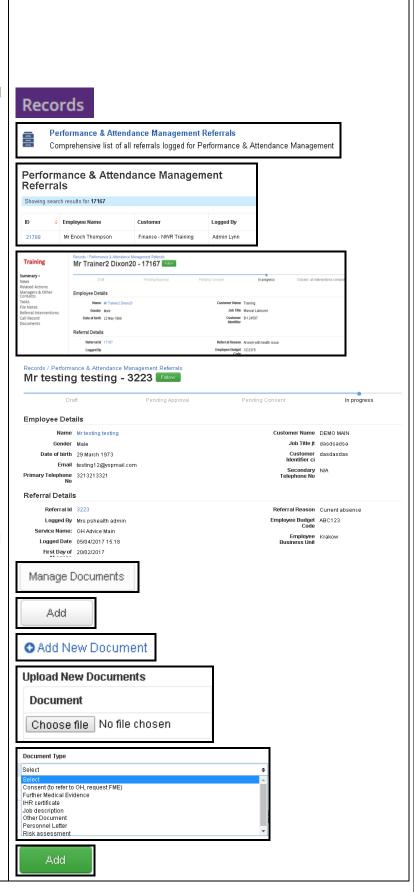**If you know the Referral ID and the Service Line the Employee was referred for:**

1. Log in using your **Username** and **Password**

2. Select **Records**
   - N.B. Every referral you have made or are associated with can be located in records

3. Select **Referral Type** i.e. Performance & Attendance Management Referrals

4. Using the search facility available , type in **Referral ID** and press **Enter**

5. The referral will be displayed

6. Select the **Referral ID** highlighted in blue
   -N.B. this will take you to the **Referral Summary Screen**

7. Select **Documents** from the menu to the left of the screen

8. Select **Manage Documents** Select **Add** and **Add New Document**

9. Select **Choose File** and navigate to the document you wish to upload, then select **Open**
   - N.B. Document needs to be saved as you would like it to be called in the system

10. Select **Document Type** from the drop down menu

11. Select **Add**, then **Yes**
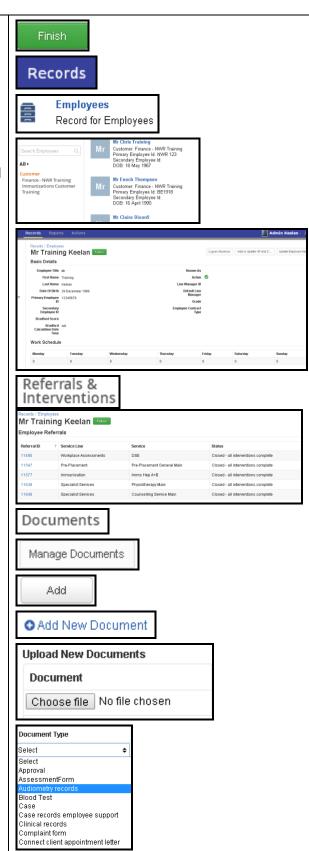
12. Select **Finish**

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If the Employee name is known but the Referral ID and Referral Type is not known:

13. Log in using your **Username** and **Password**

14. Select **Records**

15. Select **Employees**

16. Using the search facility available, type in the **Employee Name** and press **Enter**, the Employee details will be displayed

17. Select **Employee Name** highlighted in blue -N.B. this will take you to the **Employee Summary Screen**

18. From the menu to the left of the screen select **Referrals & Interventions**

19. The following screen will show a list of all referrals that have been registered for the **Employee**

20. Select the appropriate **Referral ID**

21. Select **Documents** from the menu to the left of the screen

22. Select **Manage Documents**

23. Select **Add**, then **Add New Document**

24. Select **Choose File,** Select **Document** to upload, then select **Open**
    - N.B. Document needs to be saved as you would like it to be called in the system

25. Select **Document Type** from the drop down
    menu

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26. Select **Add**, then **Yes** 27. Select **Finish** 28. Document now stored under that Referral	**File Type** Select / Health / Welfare Add Finish