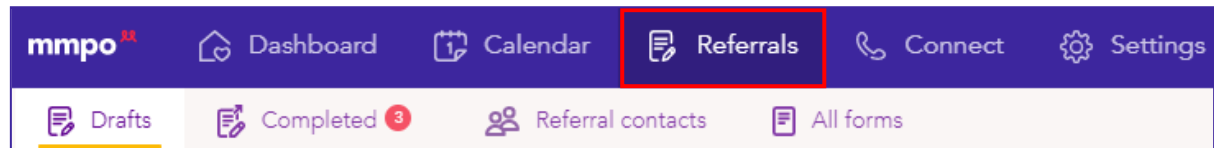# Tiaki – Referrals overview

Overview

During the onboarding of Tiaki you will automatically get referrals associated with your DHB loaded on to your profile. We can also load personalised referrals on to your profile, to do so please get in touch with MMPO.
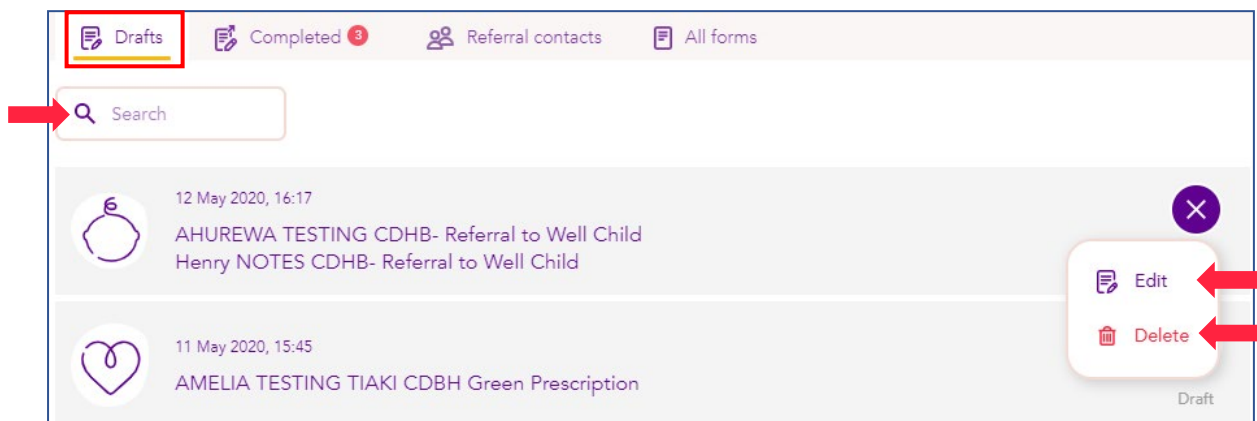

New Referral

To create a new referral, select the purple button as pictured on the bottom right hand side of your screen. If you would like more help on creating a referral, please see our creating a referral document.

Drafts

Under this tab you will see all your draft referral forms, these referrals are partially completed and saved. You can edit or delete these referrals by clicking on the three dots to the right as shown below. When you click on edit it will take you back to where you left off in that referral.

You can search through your draft referrals by a woman's name or by the type of referral in the search function. It will bring up all drafts for that woman or referral and then you can click on the three dots to edit or delete.
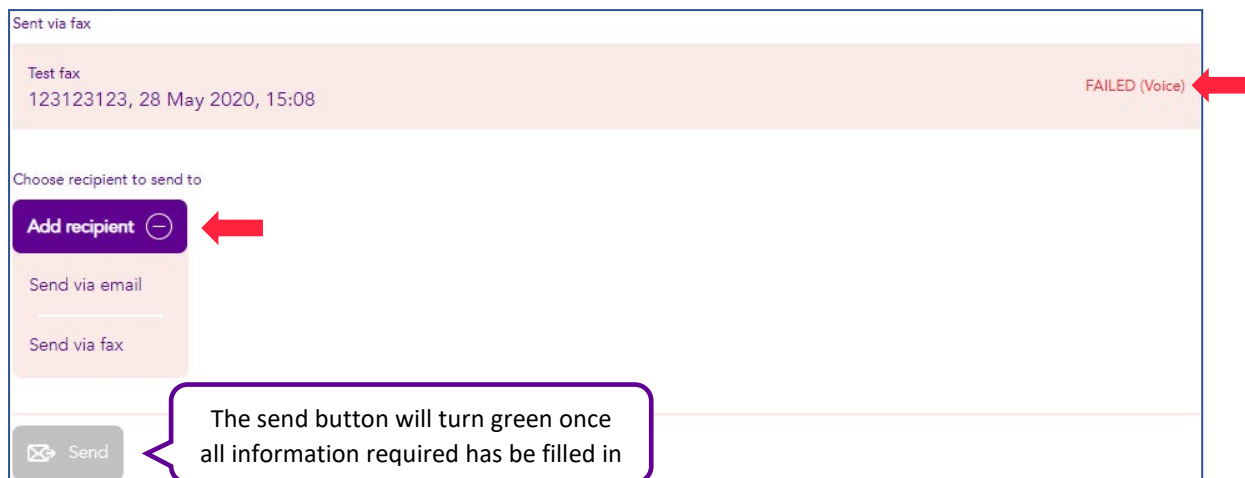

Completed

Here you will see all your completed referrals. At times you may see a circle with a number in it, this means your referral has not made it to its destination and displays as an error. Your errors will always display at the top of this screen and your completed referrals below.

You can search your completed referrals by entering a start and end date or by a woman's name or type of referral in the search function.
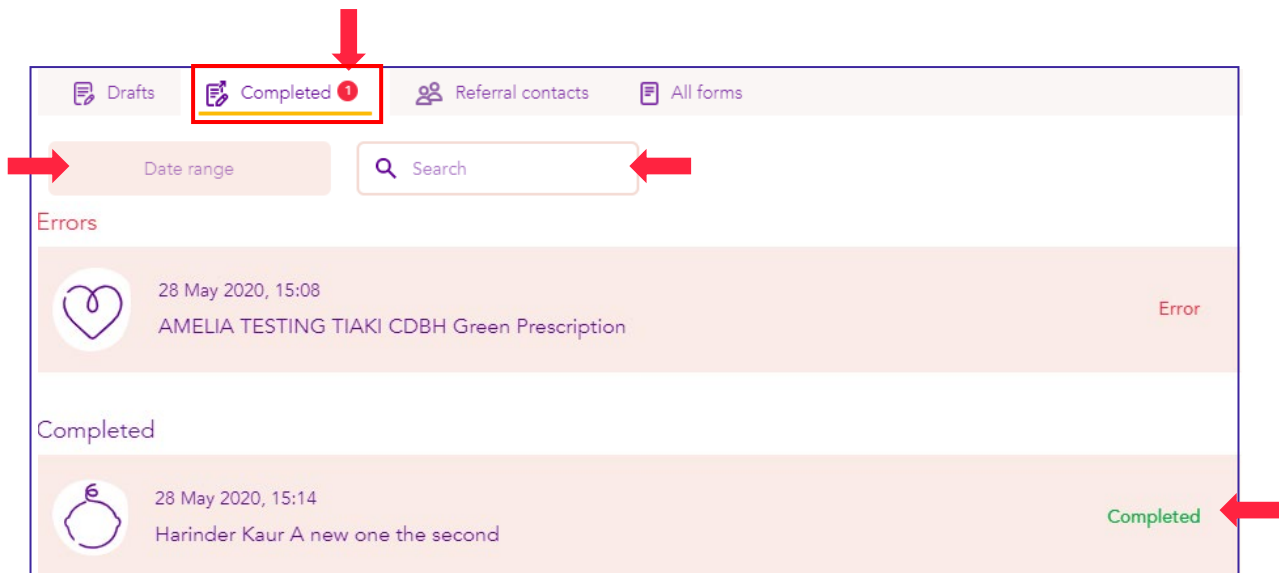
To see why the error referral was not sent, click on the referral banner and you will see the error message next to the recipient. To resend your referral click on the banner and add a new recipient either by email or fax. Once you have loaded a new fax number or email the send button will turn green and you will be able to resend.

Or you can click the three dots at the top right hand corner and mark as complete, this will not send the referral anywhere but it this will move the referral into the completed section and remove the error notification from your banner.

By clicking on a completed banner, it will bring you through to the detail screen of the referral. This page tells you where you sent the referral, the time and date. You can also resend the referral from this page by adding an email or fax then clicking send.

The preview page shows a copy of the completed referral. From here you can also print a completed form. Simply click on the arrow as highlighted below, this will open the referral in another internet browser and from here you can select print on the top right-hand corner of your browser.

Referral preferences

Under this tab you can set up and change your sign off and signature. By clicking the green edit button, small pop up box will appear where you can add or edit then click 'Save' or 'Cancel'.
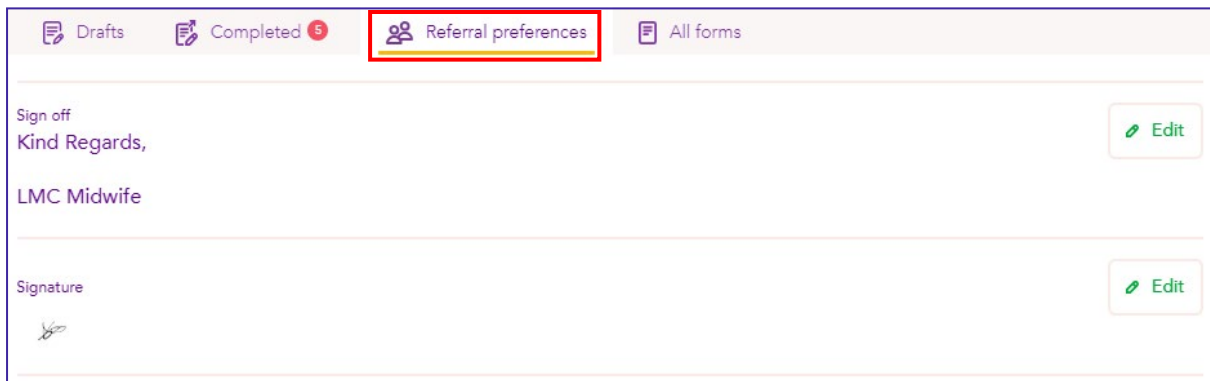
Below your sign off and signature can also create and save your referral contacts. The referral contacts are who you send your referrals to. To create a new contact simply click the purple circle or the 'Add contact' button as pictured below, a small pop up box will display. Here you will fill in the referral contacts name, fax and/or email then click save.

To edit or delete a contact, click the three dots on the right-hand side of the pink banner. If you select edit another small pop up box will display, simply edit what you need to then click save.
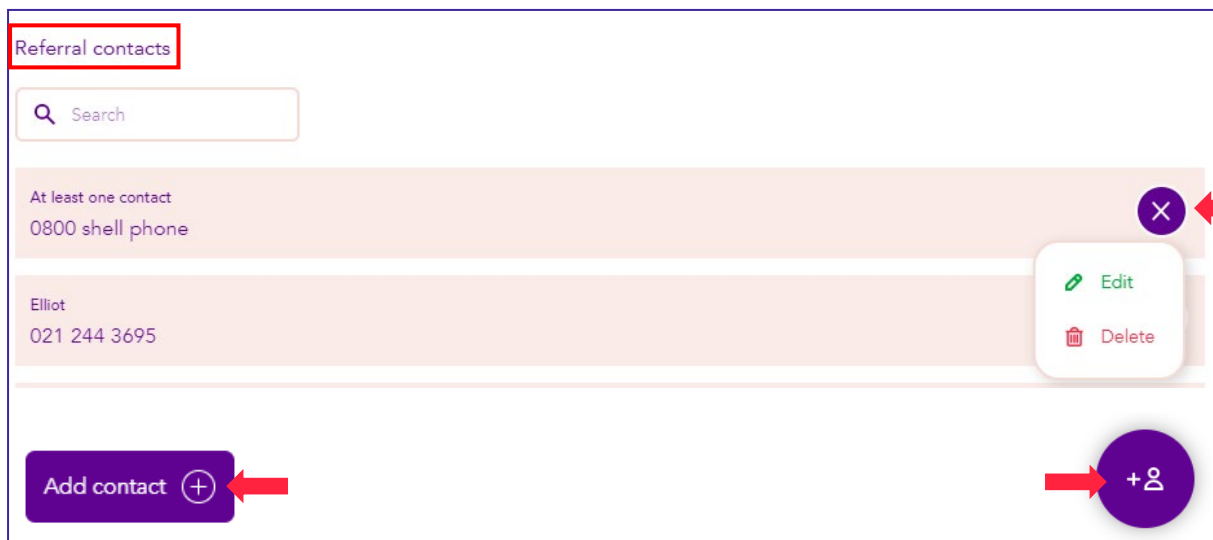

All forms

This tab gives you a list of all the referrals that are available to you and your care location. If you are a part of more than one care location, you will be able to see the forms per care location. To change care location simply click on the drop-down box and select the correct care location. Or you can use the 'search' function by typing in the name of the form. If you would like to add or change any referrals, please get in contact with MMPO.
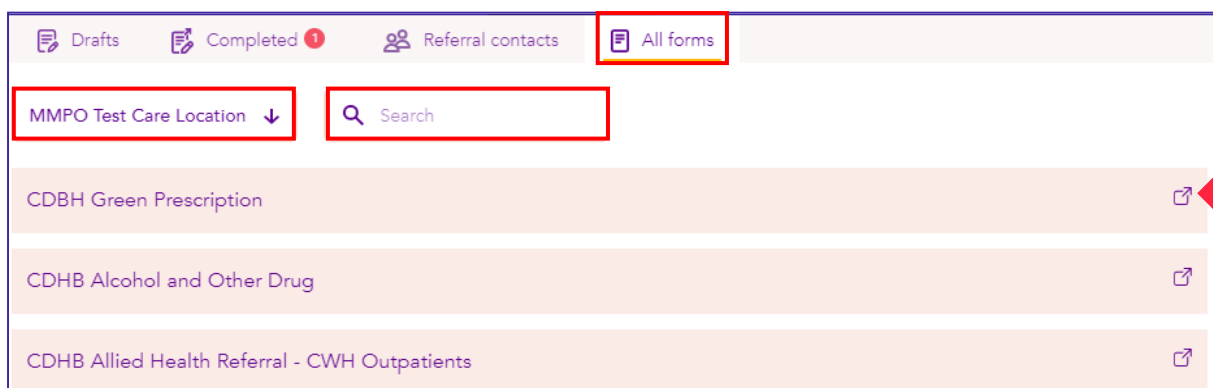
If you would like to print a blank form simply click anywhere on the banner of the form you would like to print, this will open another tab on your internet browser. You will now see the option to print on the top right-hand corner of your screen as shown below.
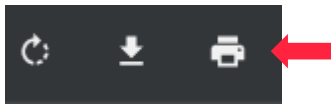
If you would like to print a completed form, please see above under 'Completed forms'.