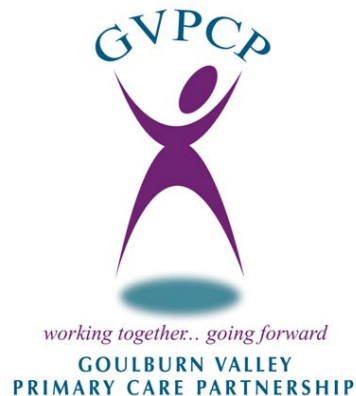


Goulburn Valley PCP
E-Referral &
Service Coordination Readiness
Survey & self-assessment tool



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We request that you completed and return pages 3 & 4 to GV PCP office by 4th April 2008.

Version Jan 2008

Introduction

Connectingcare is an online services directory that provides a platform for secure messaging and referral, and does so in a simple, low cost and effective way.

Connectingcare's services directory, messaging and referral system are tools that further enable human service agencies to communicate with one another to meet clients' needs.

These electronic tools are not intended to replace existing means of communication and referral between agencies. Instead, it is expected that *Connectingcare* will be another means of working with others and should complement current tools such as the telephone and fax for referring clients.

This Document

The purpose of this survey is to obtain an understanding of the member's knowledge of E Referral & *Connectingcare*. For Agencies that require clarification of these systems please call Belinda Beer, on 5823 3265.

We request that you complete and return pages 3 & 4 to GV PCP by 19th Feb 2008.

This document aims to help individual agencies to assess their readiness to implement e-referral via *Connectingcare* by using this tool.

It makes the assumption that agencies have defined a business need to implement e-referral and that implementation is technically feasible.

This tool consists of three checklists:

- Service Coordination Tool Template (SCTT) survey
- *COI Checklist* – five steps for member agencies to prepare themselves for Community Of Interest (COI) certificate
- *Connectingcare Checklist* – seven steps for member agencies to prepare themselves to send and receive e-referrals via *Connectingcare*.

Note:

This document is set up as a form to support you to electronically record your progress in the checkboxes and notes sections. The hyperlinks within the checklists take you to supporting information.

Although this is a 'do-it-yourself' guide, your PCP Officer can provide further assistance.

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We request that you complete and return pages 3 & 4 to GVPCP by 4th April 2008.

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Projects@gvchs.com.au or Fax 03 58 233 299

Agency Name: _____

Name of person completing survey: _____

Position Title: _____

Date: ___/___/2008

Service Coordination Tool Template (SCTT) Survey				
Step	Tasks	Yes	No	Identified Issues/Barriers
1	Does your agency use SCTT?	<input type="checkbox"/> Entire agency <input type="checkbox"/> Certain programs (please specify % of agency) <input type="text"/>	<input type="checkbox"/>	
2	What are your agency's future plans in the use of SCTT?			
3	What role can PCP facilitate to assist you with the use of SCTT?			
4	Has the use of the SCTT benefited your agency and how?			
5	Go to COI Checklist			

Community of Interest (COI) Checklist				
Step	Tasks	Yes	No	If No, why & when do you plan to undertake this task
1	Have you registered for COI?	<input type="checkbox"/> Go to 2	<input type="checkbox"/> Go to COI Application	
2	Have you configured your e-mail system for e-referral?	<input type="checkbox"/> Go to 3	<input type="checkbox"/> Go to COI Configuration	
3	Have you installed your digital keys and certificates?	<input type="checkbox"/> Go to 4	<input type="checkbox"/> Go to COI Installation	
4	Have you tested sending and receiving e-messages?	<input type="checkbox"/> Go to 5	<input type="checkbox"/> Go to COI Testing	
5	Have you developed procedures for managing COI digital certificates?	<input type="checkbox"/> Go to 6	<input type="checkbox"/> Go to Managing COI Certificates	
6	Go to Connectingcare Checklist			

We request that you complete and return pages 3 & 4 to GVPCP by 4th April 2008.

Projects@gvchs.com.au or Fax 03 58 233 299

Connectingcare Checklist				
Step	Tasks	Yes	No	If No, why & when do you plan to undertake this task
1	Have you registered for <i>Connectingcare</i> ?	<input type="checkbox"/> Go to 2	<input type="checkbox"/> Go to Registration	
2	Have you appointed a content manager for your agency?	<input type="checkbox"/> Go to 3	<input type="checkbox"/> Go to Content Management	
3	Have you registered your staff as users with <i>Connectingcare</i> ?	<input type="checkbox"/> Go to 4	<input type="checkbox"/> Go to User Registration	
4	Have your content manager and users attended training?	<input type="checkbox"/> Go to 5	<input type="checkbox"/> Go to Training	
6	Have you considered how to manage the changes that using an e-referral system will bring about?	<input type="checkbox"/> Go to 7	<input type="checkbox"/> Go to Managing Change	
7	Have you developed procedures for intake and referral that includes using <i>Connectingcare</i> ?	<input type="checkbox"/> Go to 8	<input type="checkbox"/> Go to Referral Procedures	
8	Connectingcare recommends using 512K or 1.5MB with dial-up and broadband connections. Does your current internet connection meet this requirement?	<input type="checkbox"/>	<input type="checkbox"/>	

We request that you complete and return pages 3 & 4 to GVPCP by 4th April 2008.

Projects@gvchs.com.au or Fax 03 58 233 299

Thank you for your valuable time.

Community Of Interest (COI)

COI Application

The name of Medicare Australia's, Health Electronic Signature Authority (HESA) has now been changed to the E-Certificates Team. The E-Certificates team which will continue to operate federally through Medicare Australia will handle applications and renewals through State based E-Service Centres. To receive e-referrals, member agencies must first apply for digital certificates by registering with the Medicare E-Certificates Team.

The Public Key Infrastructure (PKI) Location Certificates used with Connectingcare e-referral are now referred to as Non-known Communities of Interest (COI) Site Certificates. These COI will no longer be accessible through HESA's web based application process.

Agencies participating in Connectingcare E-Referral in the Hume Region must send completed and signed Non-known COI Site Certificates applications accompanied by the Acceptable Referee Identification Form Site certificates (ARIF), to the Manager of the Victorian eBusiness Service Centre GPO Box 9822 in Melbourne 3001. (See related links below)

The Site ARIF is not required for organisations who are already known to Medicare through a previous COI application or who possess a Medicare provider number. Participating organisations are still required to have a Duly Authorised Officer (DAO) who will be legally responsible for managing digital keys and certificates, to sign off the application and provide 100 points of individual identification (as per any bank application) plus the agencies (Health Sector Entity) ABN / ACN.

Evidence of identity for the DAO may be provided in the following manner:

1. One piece of Primary Identification (worth 70 points, such as Passport, Birth Certificate, Citizen Certificate)

And

2. One or more pieces of Secondary Information (worth 25 and 40 points, such as driver's license, utilities bill) (More Secondary information the better just to make sure the application is approved).

Completing the COI and the ARIF only takes a few spare minutes assuming you've got the right information at hand. The COI Site Certificates usually take around 4 weeks to be processed and received by the applying organisation, all agencies wishing to participate in Hume Connectingcare E-Referral are encouraged to begin this process as soon as feasible.

Information regarding COI is gradually being listed on the Medicare Australia website (medicareaustralia.gov.au). If you require any assistance completing a COI Site Certificate application or want to find out the status of an existing application contact the national enquiries number on 1800 700 199 selecting the 3rd automated response to option 3.

Related Links

To access the Registered Medicare Australia Communities of Interest Site Certificate form click on the link below:

<http://www.medicare.gov.au/provider/business/online/register/files/non-known-communities-of-interest-col-site-certificate%20application%20form.epdf.pdf>

To access the Acceptable Referee Identification form:

<http://www.medicare.gov.au/provider/business/online/register/files/10a-acceptable-referee-identification-form.pdf>

[Return to COI Checklist](#)

COI Configuration

Your business will need to consider how it wants intake staff to access e-referrals and manage the sending and receipt of e-referral.

If you have a common or central intake system you will most likely want e-referrals to be sent to a common, dedicated e-referral e-mail box. You will also need to consider whether staff have one common login that accesses both their individual email accounts and the e-referral account, rather than having multiple logins.

Once you have decided how to structure your e-referral service, your IT resource can then configure your e-mail setup and desktop interfaces so that COI encryption and decryption work in a way that best suits your work practices.

[Return to COI Checklist](#)

COI Installation

Once you have submitted your application for a digital certificate, it will take about four weeks for E-Certificates to process it and get back to you.

You will receive a disk with COI key and digital certificate software on it and a letter with instructions for acknowledging receipt of the package and for installing the COI software and certificate.

Although the installation processes is straight forward for a computer literate person, it is recommended that you contact your IT resource to install the software.

There is also some helpful information on installation at the web site below.

Related links

Connectingcare help: <http://www.connectingcare.com/help/>

HeSA Installation Guide: http://www.hesa.com.au/toolkit/installation_process.htm

[Return to COI Checklist](#)

COI Testing

In this step, you will be testing your COI set up to verify that you can send and receive encrypted electronic messages. These steps should be carried out by your IT resource:

1. *Sending e-messages*

The Connectingcare website will have a drop down list of member agencies registered. Note, when making a referral you can only refer to those services within organisations that have a double astrix (**) along side the service name.

2. *Receiving e-messages*

The Connectingcare website will have a drop down list of member agencies registered. Your agency should have a double asterix (**) following its name once you are able to receive secure electronic emails.

Once this has been done, arrange to have test encrypted e-mails sent to you, or send "e-referral ready" agencies a test e-message yourself and ask them to acknowledge it with a return encrypted e-message.

Testing can sometimes be an interactive process until you get it right, so be sure to develop a procedure to track each test and its outcomes. For example, you may be able to receive encrypted e-mails but not be able to read them, or an error message might appear; so some lengthy problem solving may be required.

Once you have confirmed that you can send and receive encrypted e-messages you are technically ready to e-refer.

[Return to COI Checklist](#)

Managing certificates

Your Duly Authorised Officer (DAO) is responsible for the security and access to digital keys and certificates within your organisation.

The DAO is also responsible for handling any necessary actions should a certificate need revocation, renewal or reinstatement. Note these roles and responsibilities are detailed in the documents sent to your DAO and downloadable from E-Certificates Team website once you submit and online application.

Additional information can be found at the web link below.

Related Links

Policies: http://www.hesa.com.au/forms_pubs/policy_docs.htm
[Return to COI Checklist](#)

Connectingcare

Registration

To use *Connectingcare* for referral, member agencies must first register with *Connectingcare*.

This involves entering information about your agency, its sites and services on *Connectingcare* so that others can search and locate these services and make a referral should they want to.

At this time, *Connectingcare* can load any current COI e-mail addresses against each service you nominate to receive e-referral. If you do not yet have COI e-mail address you can still use *Connectingcare* for sending online faxes or simply use it as a web site to advertise your services – it's up to you and the information you provide.

To arrange registration on *Connectingcare* please contact your PCP Office for registration forms. If you have already registered, please inform your PCP office so you can be linked to the correct PCP.

[Return to Connectingcare Checklist](#)

Content Management

Once your service information is loaded on to *Connectingcare* it will need to be maintained.

Usually this will be the task of someone in your agency who has adequate computer literacy skills and knowledge of your agency services to do this.

This is an important role as your content manager ensures that your service information is up to date and accurate, and can be easily located by others wishing to view these services or make an e-referral to you.

For that reason each agency or independent service must nominate at least one content manager to maintain its service information.

An outline of the prerequisites needed for the role of content manager is given at the web link below.

Related Links

Prerequisites: <http://www.connectingcare.com/help/userroles.asp>
Content Manager training: [Training](#)
[Return to Connectingcare Checklist](#)

User Registration

Users are strongly encouraged to register their contact details on *Connectingcare*. Registering your details allows e-referral recipients to follow up with you should they need to and, for the sender, it has the added advantage of automatically populating the SCTT form with your contact details and saving you keystrokes.

There are two ways you can register:

1. you will be asked to provide a list of all users at the time your agency registers on *Connectingcare*
2. you can register whenever you are presented with a login screen on *Connectingcare*, usually before you make a referral

Please enter your user name as your first initial and last name eg. jsmith.

Note: you can change your user details at any time by logging on at the home screen of *Connectingcare* and following the prompts.

Related Links:

Login access at: <http://www.connectingcare.com/>

[Return to *Connectingcare* Checklist](#)

Training

There are two types of core training available on *Connectingcare*:

1. **User training:**
This covers searching for services, sending e-referrals using the online SCTT form as well as using an e-mail file attachment; mandatory for all new users.
2. **Content manager training:**
This training is for content managers nominated by their agency, and covers the input of service information and allocation of descriptors to make services locatable; mandatory for all content managers.

Contact your PCP Office for more information. It is expected that as e-referral implementation becomes embedded within the PCP that member agencies will progressively develop the capacity to provide training for their own users.

Related Links:

User Guide: <http://www.connectingcare.com/help/userguide.asp>

Training resources: <http://www.connectingcare.com/help/training.asp>

[Return to *Connectingcare* Checklist](#)

E-Referral MOU

All agencies wanting to send and receive electronic referrals through *Connectingcare* must first read and sign the PCP's Memorandum of Understanding.

This Memorandum requires member agencies to formally sign-off on a specific commitment to use the Service Coordination Tool Templates and to implement e-referral/feedback as part of your business practice.

[Return to Connectingcare Checklist](#)

Managing Change

Introducing new ways of communicating and referring clients with agency partners will require changing the way your agency works. The impact of this will vary greatly between agencies, depending on how flexible your current systems are, and how accepting of change your staff and management are.

There is no doubt that strong leadership is a powerful enabler of change and that significant and sustained management support is required over an extended period of time.

A number of other factors can be identified as powerful drivers to implementing e-referral change:

- identifying an agency 'change champion' who has the support of senior management and the role and responsibility for the change process
- formalising e-referral roles and responsibilities within the current agency work structures
- involving staff involvement in intake system design and development
- training staff in e-referral competencies as part of service coordination training and development

[Return to Connectingcare Checklist](#)

Referral Procedures

Agencies using *Connectingcare* to send and receive e-referrals will need to make some changes to existing policies and procedures related to intake and referral.

Agencies should review and redesign, if need be, agency intake and feedback processes; e-referral has enabled many agencies to centralise their intake processes where the emphasis is on e-referral between agencies and not individual workers.

Additionally, agencies will need to consider the information management implications for their services of e-referral. For example, what processes need to be developed to handle the receipt which includes a generic email address, storage and use of e-referral messages in a way that is quite distinct from current methods of processing hard copy referrals.

The PCP Office offers support to member agencies by way of facilitating workshops and forums on e-referral policy development.

[Return to Connectingcare Checklist](#)