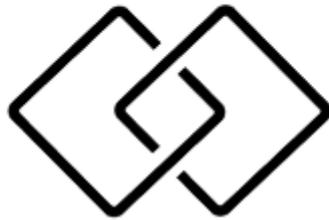


Legal Advice Warwickshire



Referral Service

Members Handbook

Rev 1.0

Welcome to the LAW Referral Service – Members (External Organisations)

Welcome to the new Legal Advice Warwickshire CAB Referral Service. The new online service will enable the Referral Service to fast-track referrals as well as keeping referrers and individual LAW Partners informed of progress throughout.

Please keep your username and password safe and always logout after use.

As a member registered with the LAW Referral Service, You will be able to login to check the status of your referral/s, automatically receive email notification of any updates and be able to send messages to whichever partner is handling your referral/s.

Logging In:

The default URL for submitting referrals is at: <https://www.cabnuneaton.org.uk/referral/>

The screenshot shows the 'Legal Advice Warwickshire Referral Service' website. At the top, there is a navigation bar with links for 'Home', 'News', 'Referral History', 'Submit A Referral', and 'My Account'. Below this is a green banner with the service name. The main content area is divided into two columns. The left column has a 'Submit A Referral' button and a 'Referral History' link. Below these are 'Announcements' and a 'Referral Overview' table. The right column has a 'My Account' section with a welcome message and a list of 'Your Referrals'.

ID	Enquiry	Priority	Partner Organisation	Submitted	Status
16	House Tenancy	Urgent	NotCab	5/15/11 7:55 AM	Open
15	Widow	Medium	NotCab	5/15/11 7:45 AM	In Progress
14	Being checked out of housing	Urgent	Rugby CAB	5/13/11 8:13 AM	Open
13	Legal Rights	High	LDJ Solicitors	5/6/11 9:26 AM	Closed
12	Lost Kitten	Low	Referrals Centre	5/6/11 10:41 PM	Open

Provided you are logged in, any referrals you may have submitted will be displayed along with their current status.

Security

Logging in to the Referral Service is via a Secure Socket Layer (SSL) and no personally identifiable information is available outside this area. All users should ensure they have logged out of the Referral Service once they have finished using it.

Email Notifications

You can opt in or out of email notifications by logging into your account and changing your email preferences. However, to ensure you receive rapid reminders of progress on any submitted referral, we strongly advise you do not do this. Please ensure that system notification emails are approved by your spam filter or you could miss urgent referrals altogether.

Whilst email notifications are certainly useful, they should **not** be relied upon and we suggest that you check the Referral Service via your login *at least* once a week. Response times for new referrals should be no longer than five working days from initial enquiry.

In the interests of privacy and security, individuals referred to the service are given Ref. ID

numbers so it is up to Member to keep track of Ref. ID's and where unsure, to login and cross reference the ID to the individual.

Referrals – Process

- 1) Submitted referrals are initially dealt with by the Referrals Central who will assess the referral based on a range of criteria including immediate needs, geographical considerations and so forth, before transferring the referral accordingly.
- 2) Each referral is automatically given its own Ref. ID (see red square below) which stays with the referral throughout its lifetime on the system. This is also the identifying number used in any email notifications between the Referral Service and you.

Referral Overview				
ID	Enquiry	Priority	Partner Organisation	Submitted
16	House Tenancy	■ Urgent	NabCab	5/16/11 7:55 AM
15	Widow	■ Medium	NabCab	5/16/11 7:46 AM

- 3) Once a referral is moved or transferred to a LAW Partner, both you and the Partner will receive email notification that the enquiry has in fact been moved. You will also be able to communicate directly with the Referral Service or Partner using the reply facility attached to each individual referral.
- 4) Once the referral has been accepted it will be closed on the system.

Submitting A Referral

Providing you are logged in, you will be able to submit a referral using the 'Submit A Referral' link at the top of the page.

Submit A Referral

Referrals Centre

Enquiry

Priority

Client Name

Client Address

Client Postcode

Client Telephone

Is it safe to leave a message if client unavailable? yes no

Does Client consent to details being submitted to Referral Yes - client (or client's guardian) agrees to this

The input boxes for submitting referrals are as follows:

Enquiry: Short description for example “housing enquiry” – do not include any client information in this box.

Priority: Administration is very good at picking up on urgent cases but please select the priority level you feel applies.

The following information is never revealed in system email notifications:

Client Name: Please enter name of person being referred.

Client Address: Please enter address of person being referred.

Is It safe to leave a message if client unavailable? - This is crucial as not all persons wish it to be known to family members that they are using the Referral Service or any of its Partners. If this box is flagged as 'no', the Partner will not leave messages on the persons telephone number and will try to contact that person directly.

Does Client consent to details being submitted to Referral Service? Referrals cannot be accepted without this consent.

Details box: Please summarise the issue being referred.

Submit Referral. You will receive confirmation via email.

Communication.

All referrals are initially handled by Referrals Central, then transferred to the most relevant Legal Advice Warwickshire Partner. Both you and the Partner will automatically receive email confirmation of this change.

When logged in, referrals requiring an **immediate** response from you (a reply for instance) will be flagged up on the screen (highlighted here by a red box for illustration purposes).

Legal Advice Warwickshire Referral Service

Home News Referral History Submit A Referral My Account

Legal Advice Warwickshire Referral Service

Submit A Referral Referral History

Announcements

Welcome to LAWRS -- May 5 2011, 4:13 PM

This is the 'Member' login page for the Legal Advice Warwickshire Referral Service. Please enter your user and password to view any submitted referrals. 'Partner Members' must login to admin to be able to see new and ongoing referrals. All logins are protected by a secure socket layer...

Referral Overview

ID	Enquiry	Priority	Partner Organisation	Submitted	Status
16	House Tenancy	Urgent	WebCab	5/16/11 7:55 AM	Open
15	Widow	Medium	WebCab	5/16/11 7:45 AM	In Progress
14	Being checked out of housing	Urgent	Rugby CAB	5/13/11 8:13 AM	Open
13	Legal Rights	High	LDJ Solicitors	5/6/11 9:26 AM	Closed
12	Lost Kitten	Low	Referrals Centre	5/6/11 10:41 PM	Open

My Account

Welcome testmember.

Your Referrals

- House Tenancy
- Widow
- Being checked out of housing
- Lost Kitten

My Account | Logout

Viewing A Referral

To view details of a referral and any associated actions (ie replies), click the Ref. ID or enquiry heading. The following page will show the date the referral was submitted, the name of the individual, which LAW Partner is dealing with it, and all information relating to the referral including any replies:

Viewing A Referral

Legal Rights		Print	
Ref Id	13	Replies	1
Priority	High	Last Reply	May 9 2011, 9:30 AM
Partner Organisation	LDJ Solicitors	Last Replier	gooding
Submitted	May 9 2011, 9:26 AM	Status	Closed
Client Name	Claire Wainright	Client Address	12 Larch Street Bedworth
Client Postcode	N45 56J	Client Telephone	2342342342343
Is it safe to leave a message if client unavailable?	no	Does Client consent to details being submitted to Referral Service?	No

"Legal Rights" by antony (Edit)	
Claire needs advice following her divorce and whether she can continue living in the matrimonial home	
gooding -- May 9 2011, 9:30 AM	3 Weeks Ago
We have made a provisional appointment for Claire to come in and see an advisor on Weds 25th. Please advise if this will be suitable and that Claire can attend.	

Closing A Referral.

The Law Partner will usually close the referral once they have received it.

Logging Off.

PLEASE make sure you log off **after each session** otherwise unauthorised persons could gain access to any referrals submitted by your organisation or in your care.

Technical Support

For help with referrals on the system please contact denise.wilson@brancab.org.uk. For technical issues only, contact ralph.morris@brancab.org.uk