

RIMS V4 User Manual Guidelines

Definition:

The Referral Information Management System (RIMS) was developed in 2017 by DRC (Danish Refugee Council) Lebanon. The system is designed to provide a common platform for management of information relating to referrals where trends analysis as well as day to day management is done in an effective, user friendly and secure way.

The RIMS set out to deal with issues many organisations face when working on referrals. This included issues around tracking the time it takes for actioning a referral; the time needed for staff to follow up (time and labor intensive); inability to refer cases on sight (offline access to secure system); difficulty in gathering feedback to analyze trends and issues in order to address them; as well as the use of email mainly for referrals which is hard to track and, in most cases, less secure.

The RIMS was developed with the purpose of joining efforts around coordinating referrals between partner agencies avoiding duplication of beneficiaries and benefitting from follow up support options. To better manage the RIMS, partners acknowledges the importance of having a common structure through which the system can be collectively managed and further developed to include more partners after the initial testing is done. RIMS currently have more than 100 partners, Local and International, whom are all subscribed to the platform.

I - How to login to RIMS?

To login to RIMS the DRC IM team should create a username and a password and send it to the users' outlook mail.

Once received the user should:

- 1- open this URL <https://...> to enter to the system. The login page will open as demonstrated below in figure nb 1.

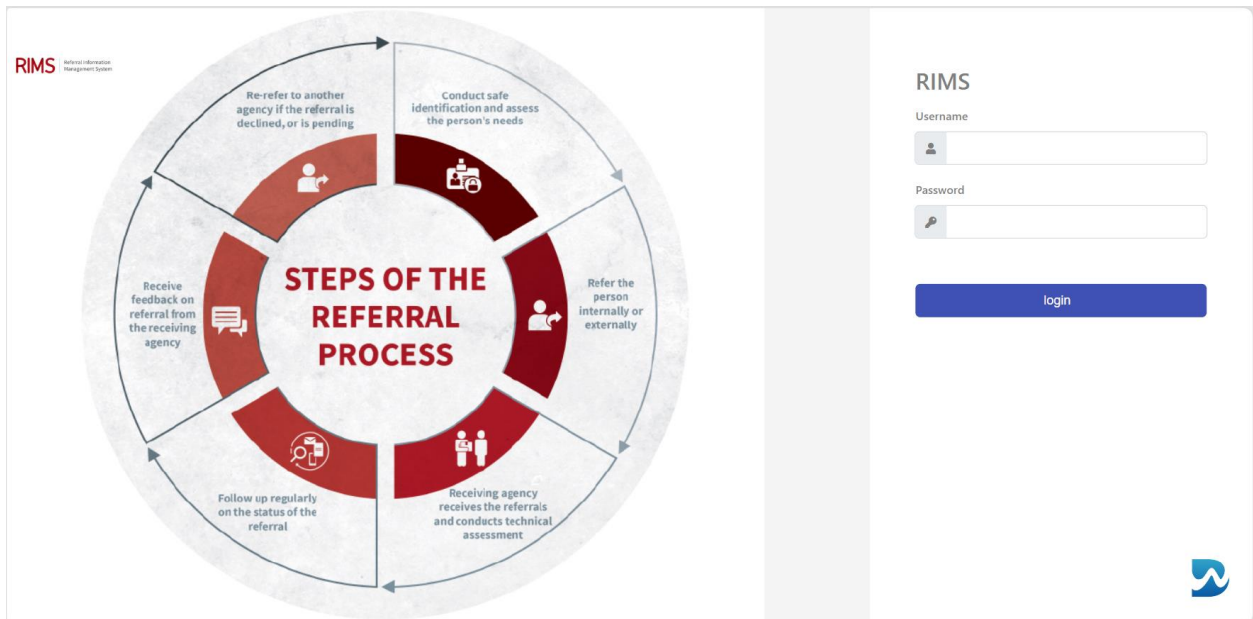


Fig 1: RIMS Login page

- 2- Enter the username and password sent to you as demonstrated in the below figure:

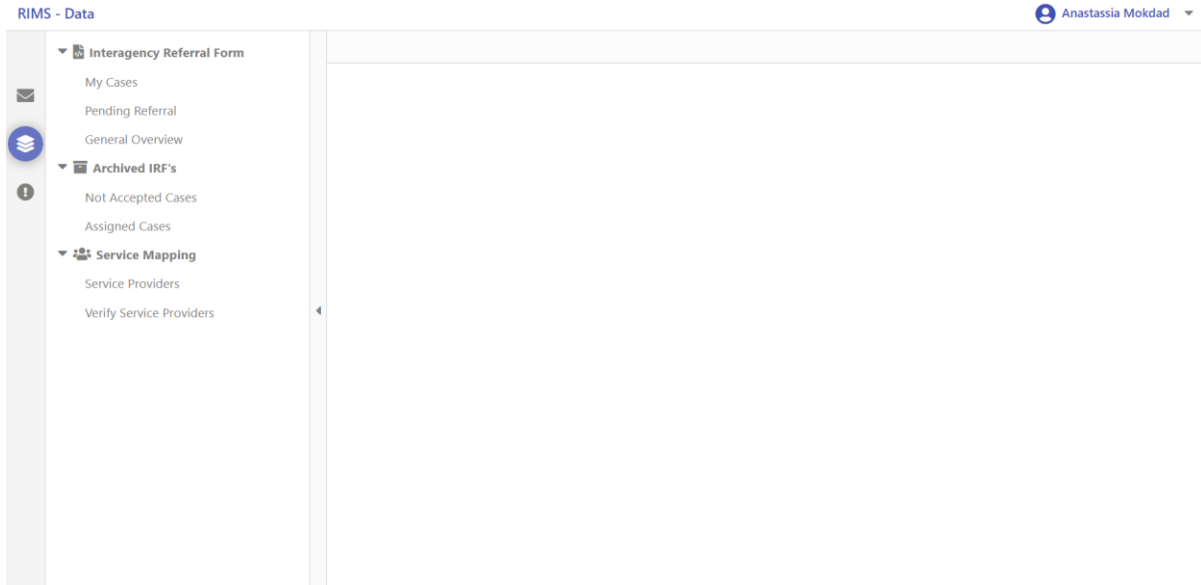
RIMS

Username

Password

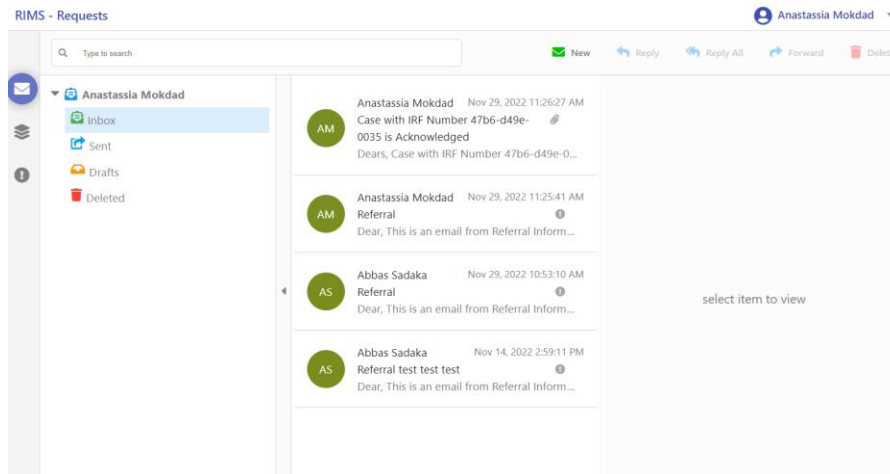
login

- 3- Click on login once you enter the username and password and a new page will open as shown in the fig below:



On this page you can find:

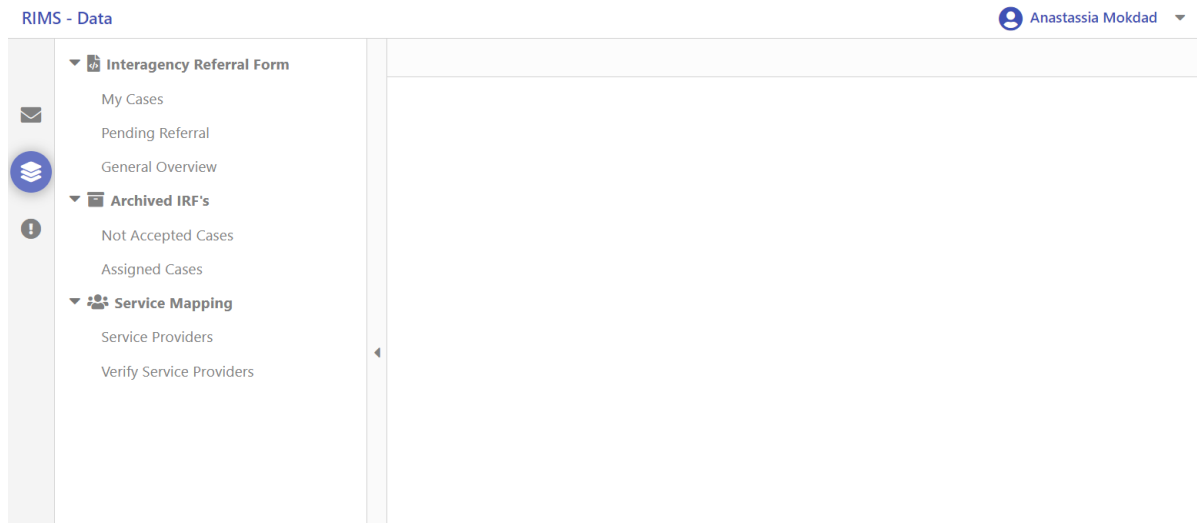
a) The Mailbox as demonstrated below:



The Mailbox includes:

- i. **Inbox:** Where all received cases are held
- ii. **Sent:** Where all sent cases are held
- iii. **Drafts:** Where draft cases are held
- iv. **Deleted:** Where deleted cases are held (Whether sent or received).

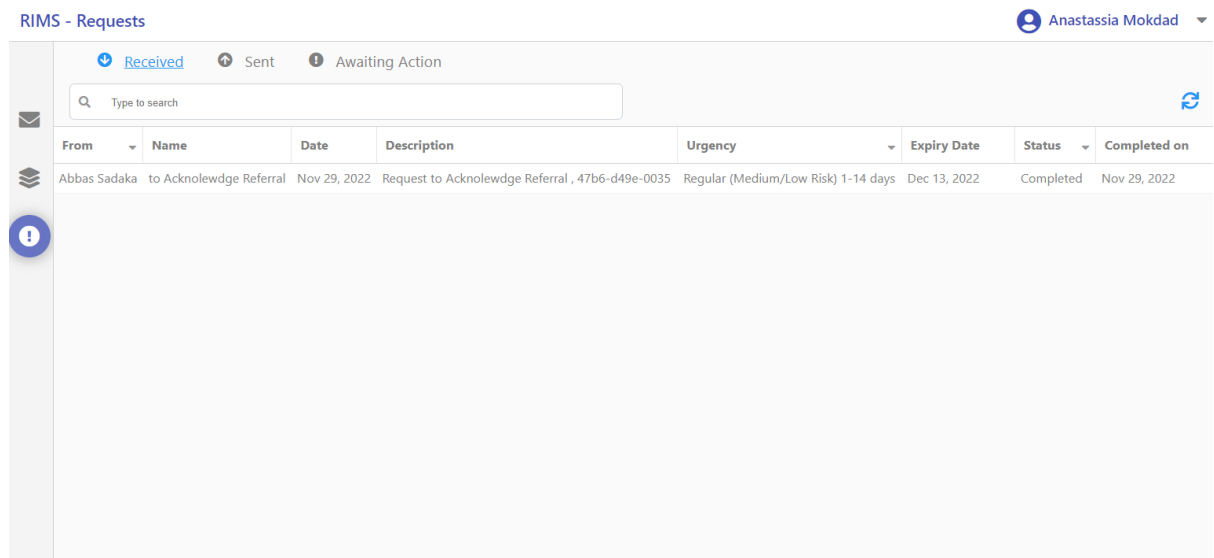
b) The Referral dimensions as demonstrated below:



Dimensions include:

- i. Referrals: Where referrals are sent, received and monitored
- ii. Archived referrals: Where all referrals that were not accepted by the receiver or assigned to other focal points for their action are stored
- iii. Service mapping: Where users can find focal point information, request verification and verify their own information.

c) RIMS Requests as demonstrated below:



This section, is where users can find their requests to acknowledge, accept or not accept the cases received.

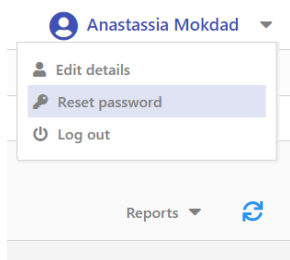
After login in, users will need to reset their password and verify their information.

Step1:

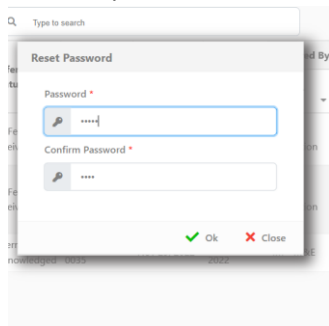
Reset password:

To reset the password:

- 1) Click on the top right side of the screen as demonstrated in the below figure



- 2) Click reset password



PS: The password should be at least 6 Characters, containing 1 non alphanumeric character and 1 capital letter

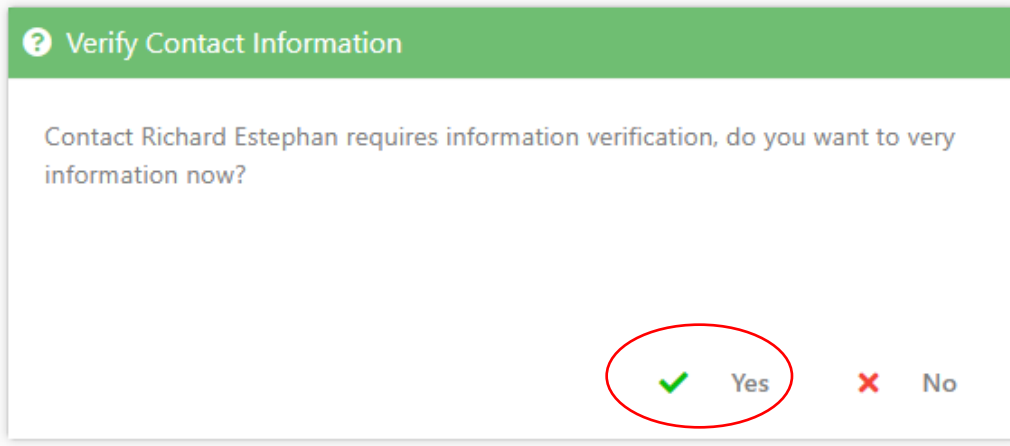
Step 2:

Verification of the user information:

To be able to work on the platform, the user will need to verify his/her/their own information

A verification request will pop up as demonstrated below:

- 1- Click on Yes to proceed with the verification process



2- Start filling the bio information on the first page as demonstrated below

A screenshot of a web application interface titled "My Services". The "Focal Point Information" section is highlighted with a red circle. Below this section, there are several input fields: "Organization" (with "Danish Refugee Council (DRC)" selected), "Full Name" (with "Anastassia Mokdad"), "Dutybase" (with "Beirut"), "Email" (with "anastasia.mokdad@drc.ngo"), and "CC". There are also radio buttons for "Can Send and Receive" (selected "External and Internal Referrals") and a "Phone Number" field with a blue tooltip that says "Phone number should be in this format 70 123 456". At the bottom, there are buttons for "New Service", "Verify Contact", "Save", and "Close".

Bio Information:

Organization: Name of the Organization the user is working at

Full Name: First and last name

Duty base: (Where is the user's work office located)

Email: (Work email / not the personal email)

CC: Email of the users' supervisor/manager

Can Send and Receive: Specify if user can send referrals only internally, meaning inside his/her/their own organization, or if they can send the referral to other organizations as well

External and Internal Referrals: user can send referrals to all organization – and other organization are able to see that he/she/they are a service provider

Internal Referrals Only:

Phone Number: The users work number

Hotline: The organizations hotline number

Backup focal Point Name: The person who replaces the user in case they on leave etc.

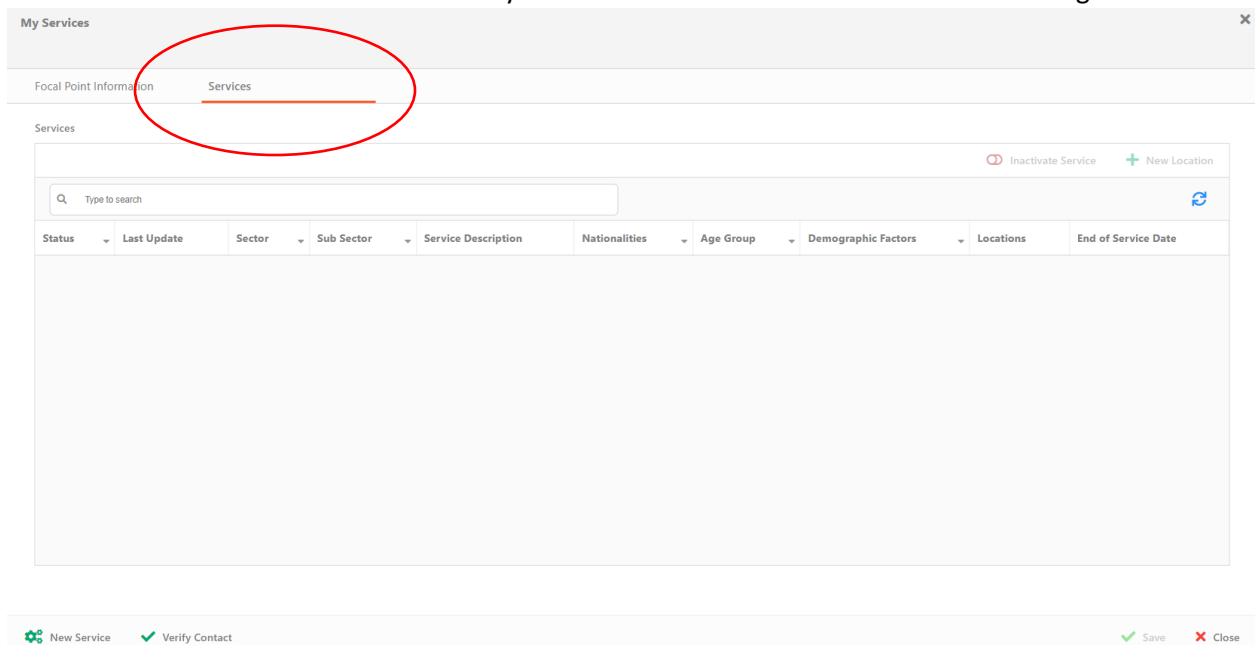
Backup Phone Number: The work number of the person who replaces the user in case they go on leave etc.

Do You Want To Share Back Up Focal Point Phone Number With The Beneficiaries?: specify if the phone number can be shared with persons of concern.

Once the user finalizes entering the Bio data they need to verify the service data

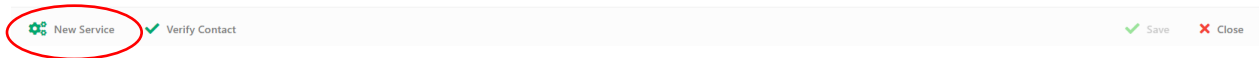
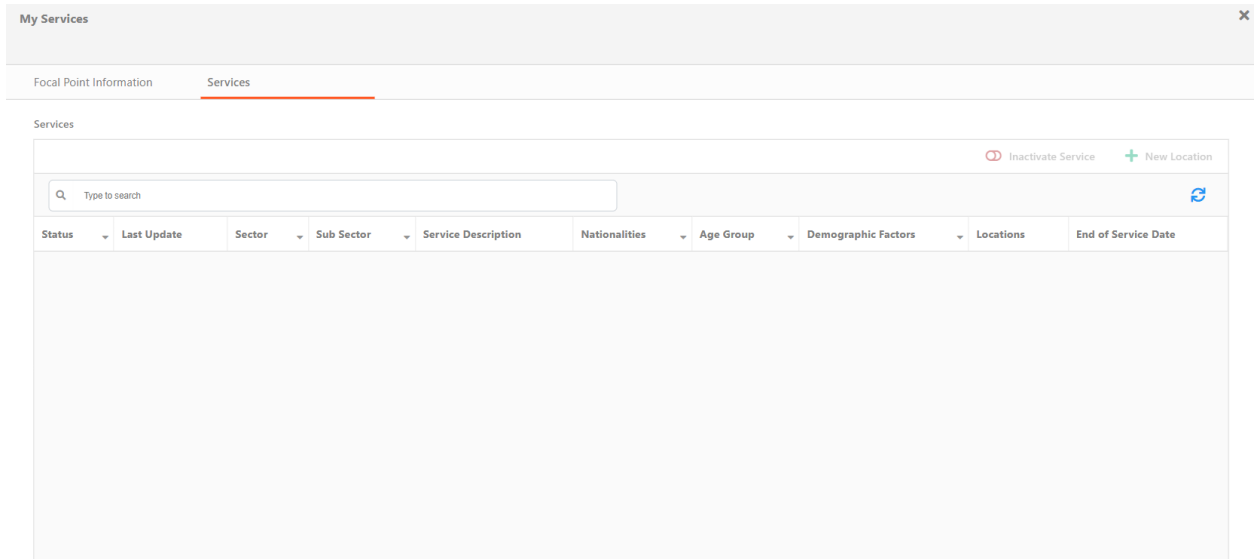
To verify services' data the user needs to:

- 1- Click on Services and check if there are any services listed as demonstrated in the below figure

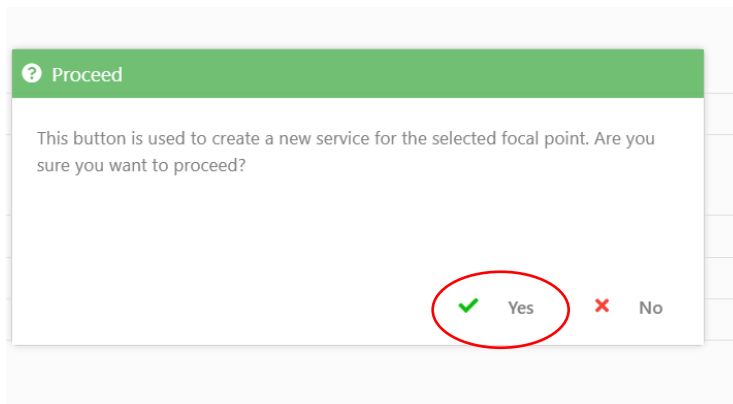


- 2- Open the service (if any) by double clicking on the service row
- 3- View and verify information

PS: If there aren't any services, user will have to click on new service as demonstrated below:



- Another pop up will appear as demonstrated below:



- **Click yes and enter the service information:**

Sector: Select the sector that the service belongs to

Sub sector: Select the relevant sub-sector to the service

Service Description: Describe the provided service

Nationalities: Select the nationalities that can benefit from the service

Age Group: Select the age groups that can benefit from the service

Demographic Factors: Select the demographic factors that can benefit from the service

End of Service Date: Select the date of when the service provision ends - List the date for the longest period you will be able to cover the service

- Click on Continue
- Specify in which governorate and districts the service will be provided (Multiple districts can be selected to specify that the service is provided in all of these areas)

Locations ✕

Q Type to search ↻

English		Arabic	
Governorate	District	Governorate	District
<input type="checkbox"/>	Akkar	عكار	عكار
<input type="checkbox"/>	Mount Lebanon	جبل لبنان	عاليه
<input type="checkbox"/>	Mount Lebanon	جبل لبنان	بعيدا
<input type="checkbox"/>	Baalbek-EI Hermel	بعلبك - الهرمل	بعلبك
<input type="checkbox"/>	North	الشمال	بشري
<input type="checkbox"/>	Beirut	بيروت	بيروت
<input type="checkbox"/>	El Nabatieh	الندبئية	بنت جبيل
<input type="checkbox"/>	Mount Lebanon	جبل لبنان	الشوف
<input type="checkbox"/>	North	الشمال	البترون
<input type="checkbox"/>	Baalbek-EI Hermel	بعلبك - الهرمل	الهرمل
<input type="checkbox"/>	North	الشمال	الكورة
<input type="checkbox"/>	Mount Lebanon	جبل لبنان	المتن
<input type="checkbox"/>	North	الشمال	المتنية الضنية
<input type="checkbox"/>	El Nabatieh	الندبئية	الندبئية
<input type="checkbox"/>	El Nabatieh	Hasbaya	حاصبيا
<input type="checkbox"/>	Mount Lebanon	جبل لبنان	جبيل

✔ Select ✕ Cancel

- Select the area of implementation as demonstrated below
- Click on Select

Locations ✕

Q beirut ✕ ↻

English		Arabic	
Governorate	District	Governorate	District
<input checked="" type="checkbox"/>	Beirut	بيروت	بيروت

✔ Select ✕ Cancel

Another page will open where you can add – and duplicate the service

To duplicate the service but in a different location:

1- click on new Location as demonstrated below:

Focal Point Services - IM - M&E - IM

Inactivate Service

Service Provided

Sector * IM - M&E Sub Sector * IM

Service Description * RIMS specialist

Locations

Locations

Inactivate Location

Type to search

Status	Governorate	District	Address
Active	Mount Lebanon	Aley	
Active	Beirut	Beirut	

+ New Location Save Close

2- Select the new desired location

Locations

Type to search

English	Arabic
Governorate	Governorate
District	District
<input type="checkbox"/> Akkar	<input type="checkbox"/> عكار
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> جبل لبنان
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> عاليه
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> بعبدا
<input type="checkbox"/> Baalbek-EI Hermel	<input type="checkbox"/> بعلبك - الهرمل
<input type="checkbox"/> North	<input type="checkbox"/> الشمال
<input type="checkbox"/> Beirut	<input type="checkbox"/> بيروت
<input type="checkbox"/> El Nabatieh	<input type="checkbox"/> النبطية
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> جبل لبنان
<input type="checkbox"/> North	<input type="checkbox"/> الشمال
<input type="checkbox"/> Baalbek-EI Hermel	<input type="checkbox"/> بعلبك - الهرمل
<input type="checkbox"/> North	<input type="checkbox"/> الشمال
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> جبل لبنان
<input type="checkbox"/> North	<input type="checkbox"/> الشمال
<input type="checkbox"/> El Nabatieh	<input type="checkbox"/> النبطية
<input type="checkbox"/> El Nabatieh	<input type="checkbox"/> حاصبيا
<input type="checkbox"/> Mount Lebanon	<input type="checkbox"/> جبل لبنان

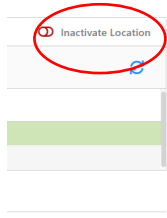
Select Cancel

3- Select the location and press select only (no need to save)

PS. If user needs to remove the service – They will need to set it as inactive.

To set the service as INACTIVE:

- Select the service line that needs to be inactivated
- Then Click on inactive, as demonstrated below



- the service will be inactivated as demonstrated below

Locations

Inactivate Location

Type to search

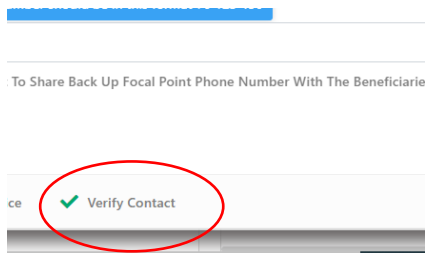
Status	Governorate	District	Address
In-Active	Mount Lebanon	Aley	
Active	Beirut	Beirut	

Group Targeted

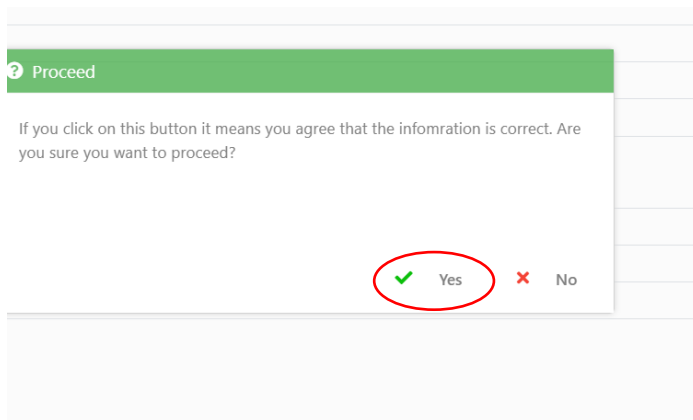
PS the user will appear multiple times – if he/she/they are providing the service in different areas

PS Users can edit their own and their colleagues working in the same organization information only

Once the user finalized entering the data they need to click on Verify button in the service mapping to verify that the information they listed is accurate.



- click on verify
- Then click on yes



Step 3:

Start using the platform

Send/Receive referrals:

To send, action or follow up with referrals you need to click on **My cases** button as demonstrated below:

Once you click on the RIMS option a new page will open as demonstrated below:

RIMS - Data Anastassia Mokdad

My Cases

Duplicate Download IRF New IRF

All Cases Created & Sent Received

Type to search Reports Refresh

Referral Status	IRF Number	Referral Date	Last Action Date	Referred By					
				Sector	Sub-Sector	Focal Point	Organization	Location	
No Feedback Received	65ea-c3ba-0037	Nov 29, 2022	Nov 29, 2022	Child Protection	Child Protection Prevention				
No Feedback Received	65ea-1ec8-0036	Nov 29, 2022	Nov 29, 2022	Child Protection	Child Protection Case Management				
Referral Acknowledged	47b6-d49e-0035	Nov 29, 2022	Nov 29, 2022	IM - M&E	M&E	Abbas Sadaka	Danish Refugee Council (DRC)	Beirut	7

This page contains:

- All cases
- Created & sent
- Received
- Duplicate
- Download IRF
- New IRF
- Type to search
- Reports
- Refresh

To create a new referral:

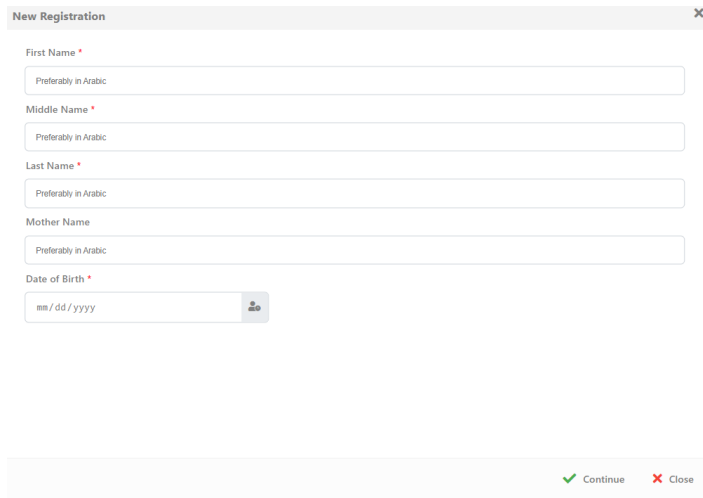
- 1) Click on New IRF and the click yes on the popup message as demonstrated below

Proceed

This button will create a new referral. Are you sure you want to proceed?

Yes No

Once you click yes, another registration page will open that contains the beneficiary details as demonstrated below:



2) Start filling the beneficiary information

First Name – Middle Name – Last Name (Mandatory data) In these fields you need to type the name of the beneficiary in Arabic as demonstrated below:

First Name: The persons of concern name

Middle Name: The persons of concern father's name

Last Name: The persons of concern family name

Mother Name: The persons of concern mother's name - This field is not mandatory; however, it is recommended to add the mother's name in order to avoid confusion between similar beneficiary names.

Date of Birth: The persons of concern date of birth / or the closest if it's not available

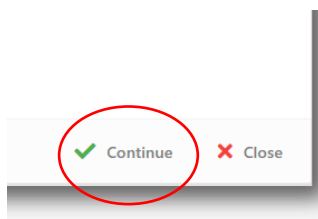
N.B. When filling the birthdate make sure:

a) To put the right birthdate,

b) That the Birthdate is not after the referral date/identification date as this is physically impossible,

c) That the birthdate is the beneficiary's and not his caregiver's.

3) Click Continue as demonstrated below



PS If the person of concern exists – the system will suggest a list that users can select from in order not to duplicate the person of concern information – if not then click on Continue

4) Continue filling the rest of the beneficiary details fields

Identification date: Is the date when the person of concern was first identified/ In this section you can either select the date of identification or type it

Sex: the gender of the person of concern

Marital status: marital status is presented for three groups: **married; divorced, separated, or widowed; and single.**

N.B. If the selected choice is Married you can fill extra data about the companion (First Name – Middle Name – Last Name).

If the selected choice is Other you can add extra details about the beneficiary's marital status

Relationship to Head of Household (Relationship to the Bread Winner): What relationship the person of concern holds with the head of household.

Location: select the location of where the person of concern resides

Address: add any details to the person of concern' address

Reference point/Name of contact person: the name of the person the user can contact to reach the person of concern

Current Lebanese Phone Number: the phone number of the person of concern

Other phone number: any other number you can reach the person of concern with

Nationality: select the nationality of the person of concern

Available ID: what available ID the person of concern holds as means of verification

Once all the above mandatory information is filled click on continue:

Another page will open – which is the digitalized inter agency form:

Start filling the form

Inter-Agency Referral Form - - Draft

Person of Concern IRF Not Accepted Reasons Waiting List Referrals History

Incident Date *

Date when the incident occurred

mm / dd / yyyy

Identified by *

Describes through which channel the person of concern was identified

- Community Focal Point / Community Based Network
- Education Centers
- Governmental Authority
- Home visit
- Hotline Call
- Phone Call
- Schools
- Self-Referral (Feedback and Complaints Hotline)
- Self-Referral (Personal Visit to the Organization Office)
- Self-Referral (Person of concern visited the organization)
- Self-Referral (Programmatic Hotline)

Identified Date *

Date when identifier had identified the person of concern for the first time

Save Close

- **Incident date:** mandatory. Sometimes there is no Incident so we can fill the identification date.

- **Identified by:** through which identification channel was the person of concern identified

Identified by *

i Describes through which channel the person of concern was identified

- Community Focal Point / Community Based Network
- Education Centers
- Governmental Authority
- Home visit
- Hotline Call
- Phone Call
- Schools
- Self-Referral (Feedback and Complaints Hotline)
- Self-Referral (Personal Visit to the Organization Office)
- Self-Referral (Person of concern visited the organization)
- Self-Referral (Programmatic Hotline)

- Identified Date *
- **Identifier date:** date of when the case was identified – this date might differ from the person of concerns’ identification date, since they might be identified earlier.
 - **Identifier name:** the name of the person who identified this case
 - **Priority:** if this is an urgent case (within 24 hours it needs to be responded to),select fast track referral

If this is it a normal case (1 to 14 days) select Regular.

Priority *

i Indicate the priority of the case so the receiving agency knows the timeframe to respond. Consider if there are indications of immediate risk to personal safety as expressed by the person being referred.

- Fast-track (high risk) - serious imminent risk to personal safety (life-threatening situation) requiring immediate intervention within 1-48 hours
- Regular (Medium/Low Risk) - likelihood of serious risk to personal safety requiring speedy intervention within 1-14 days

- ▼ Referred By
- **Referred by:** Indicated from which sector and sub-sector the case was referred
 - **Donor:** Select under which donor this case is referred
 - **Project:** Select under which project this case is referred

▼ Referred By

<p>Sector *</p> <p>i Which sector is sending the referral</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Sub-Sector *</p> <p>i Which sub-sector is sending the referral</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Donor</p> <p>i Under which Donor you consider this referral (If Any)</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Project Code</p> <p>i Under which Project you consider this referral (If Any)</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

- **Client minor:** a minor client is the person of concern that did not reach the legal age yet – in Lebanon it is 18 years old.

PS if the client is a minor, another set of questions will open, with one of them being mandatory

Minor Client

Is Client Minor? *

Yes
 No

A minor is a person who is under the age of legal responsibility (In Lebanon it means anyone under 18 years old)

Name of Caregiver

Preferably in Arabic

Relationship to Child/Adult

Caregiver Address

Caregiver Phone

✓ Save ✗ Close

Is Client Minor: if the person of concern is under 18 years old the click yes

Name of Caregiver: name of the person who has the legal responsibility to take care of the child. Caregivers may be health professionals, family members, friends, social workers, or members of the clergy

Relationship to child: what is the relationship of the caregiver to the child

Relationship to Child/Adult

Caregiver address: the address of the caregiver

Caregiver phone: the phone number of the caregiver

Caregiver informed of the referral?: indicate if the caregiver is aware of the referral made

Children Individual Case Number (when registered): UNICEF partners (only)

Is the person of concern out of school?: Specify if the person of concern goes to school or not

Does the person of concern have any disability?: Specify if the person of concern has any disabilities

Is the person of concern working?: Specify if the person of concern is involved in any labor

Continue filling the IRF:

Needs for Specific Services and Assistance: Specify what type of service the person of concern is in need of

Case Narrative: Describe the service that is needed, with some background information without going into many details, or naming the person of concern.

Referred To: Select to which sector and sub-sector the referral needs to be sent, based on the requested service by the person of concern

Sector: Select to which sector the referral needs to be sent, based on the requested service by the person of concern

Sub-sector: Select to which sub-sector the referral needs to be sent, based on the requested service by the person of concern

Donor: Select the donor that the referral was made under

Project Code: Select the donor that the referral was made under

Referral Checklist:

▼ Referral Checklist

Individual is informed of available service options and consents to go ahead with the referral *

i Case worker should explain the referral process and inform the person of concern that he/she/they will be referred

- Yes
 No

Individual has signed consent to release information *

- Yes
 No

Any contact preferences

i Important Information such as home visit time, specific restrictions, etc ...

- Yes
 No

Any risks or immediate safety concerns observed/expressed

- Yes
 No

The case worker needs to make sure that the person of concern is aware of the referral process and had given consent to be referred.

- Individual is informed of available service options and consents to go ahead with the referral
- Individual has signed consent to release information

PS if the person of concern is not aware or did not give consent the field officer/case worker need to explain why they did not obtain consent or did not inform the person of concern

- Any contact preferences
- Any risks or immediate safety concerns observed/expressed

Once user fills all mandatory fields, they need to click on save and
Either assign the case
Or refer the case as demonstrated below

PS: Users need to specify their roles to the Information management team at DRC, to ensure that they have the possibility to assign or refer a case.

Inter-Agency Referral Form - Draft

Duplicate Download IRF

Person of Concern IRF Not Accepted Reasons Waiting List Referrals History

Donor Project Code

Referral Checklist

Individual is informed of available service options and consents to go ahead with the referral *

Case-worker should explain the referral process and inform the person of concern that he/she/they will be referred

Yes
 No

Individual has signed consent to release information *

Yes
 No

Any contact preferences

Important Information such as home visit time, specific restrictions, etc ...

Yes
 No

Any risks or immediate safety concerns observed/expressed

Yes
 No

Assign Refer Save Close

- Assign: Is when the user is only an internal data entry and cannot send the referral but internally
If the user clicks on assign the below popup message will appear:

Proceed

This button will assign the case to your internal focal point. Are you sure you want to proceed?

Yes No

Click yes and select the internal focal point

- Refer: Is when the user can send internally and externally the cases
If the user clicks refer the below popup message will appear

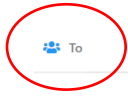
Proceed

This button will send the case to the selected service provider. Are you sure you want to proceed?

Yes No

Click yes and select the service provider as demonstrated below by clicking on To:

Referral



Cc

Subject Referral

to Acknowledge Referral Edit X

Dear,

This is an email from Referral Information Management System "RIMS". Please login to RIMS using your credentials at [Rims](#) and set the required action.

Regards,
RIMS Team



Once user clicks on to, the service mapping page will open as demonstrated below:

The screenshot shows the 'Service Providers' interface. At the top, there are two tabs: 'All Contacts' and 'Recommended', both highlighted with red circles. Below the tabs is a search bar with the placeholder text 'Type to search'. The main area contains a table with the following columns: Full Name, Organization, RIMS Partnership Status, Send & Receive, Provide PWSN Services, Dutybase, Email, Phone Number, Hotline, Sector, Sub Sector, and Service Description. The table lists three service providers from the Danish Refugee Council (DRC) and one from the Norwegian Refugee Council (NRC). At the bottom right, there are 'Select' and 'Cancel' buttons.

<input type="checkbox"/>	Full Name	Organization	RIMS Partnership Status	Send & Receive	Provide PWSN Services	Dutybase	Email	Phone Number	Hotline	Sector	Sub Sector	Service Description
<input type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AA Akram Al-Hadi	Norwegian Refugee Council (NRC)	RIMS Partner	External and Internal Referrals	No	Sour	akram.elhadi@nrc.no	70 054 177	70 005 216	Protection	Legal Aid	Information Provision, Legal Counselling and Legal Assistance on Civil documentation: Birth - Marriage - Death - Divorce, Legal status, Housing, land and property rights in Lebanon - Organize written lease agreements with landlords, Housing, land and property rights in Syria, Employment rights and labor law, Protecting documentation, CDR: Collaborative dispute resolution between refugees

The user can select the service provider from the first page or can choose from the recommended list on the second page

Service Providers

All Contacts Recommended

Type to search

<input type="checkbox"/>	Full Name	Organization	RIMS Partnership Status	Send & Receive	Provide PWSN Services	Dutybase	Email	Phone Number	Hotline	Sector	Sub Sector	Service Description
<input checked="" type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AS Abbas Sadaka	Danish Refugee Council (DRC)	RIMS Partner	External and Internal Referrals	No	Beirut	abbas.sadaka@drc.ngo	70 123 123		Basic Assistance	Cash Assistance	jhfkjgk
<input type="checkbox"/>	AA Akram Al-Hadi	Nonwegian Refugee Council (NRC)	RIMS Partner	External and Internal Referrals	No	Sour	akram.elhadi@nrc.no	70 054 177	70 005 216	Protection	Legal Aid	Information Provision, Legal Counselling and Legal Assistance on Civil documentation: Birth - Marriage - Death - Divorce. Legal status. Housing, land and property rights in Lebanon - Organize written lease agreements with landlords. Housing, land and property rights in Syria. Employment rights and labc law. Protecting documentation. CDR: Collaborative dispute resolution between refugees.

Select Cancel

Once selected the user needs to click on Select and the click on Send as demonstrated below

Inter-Agency Referral Form - - Draft

Duplicate Download IRE

Person of Contact Donor

Referral C

Individual is in Case work

Individual has

Any contact pr

Important

Any risks or im

Referral

To: Abbas Sadaka ✓ ✕

Cc:

Subject: Referral !

Acknowledge Referral Edit ✕

Dear,

This is an email from Referral Information Management System "RIMS". Please login to RIMS using your credentials at [Rims](#) and set the required action.

Regards,
RIMS Team

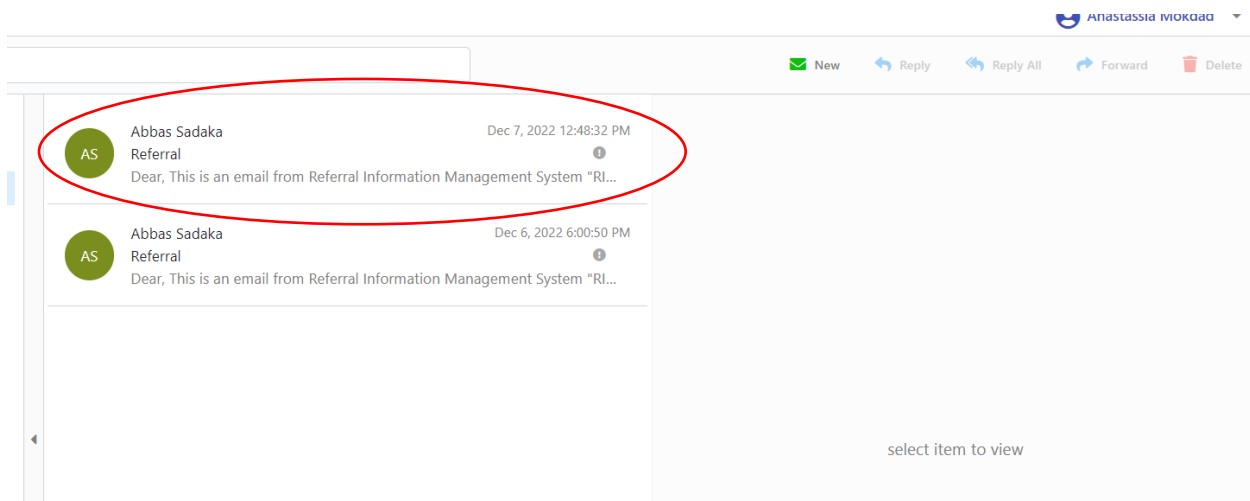
Assign Refer Save Close

PS: Users need to specify their roles to the Information management team at DRC, to ensure that they have the possibility to assign or refer a case.

The referral sent, will appear under the users My cases section as demonstrated below– with a status of No Feedback received, until the receiver acknowledges the referral

Referral Status	IRF Number	Referral Date	Last Action Date	Referred By							Referred To			
				Sector	Sub-Sector	Focal Point	Organization	Location	Phone Number	Email	Sector	Sub-Sector	Focal Point	
No Feedback Received	3a5d-8c05-0044	Dec 7, 2022	Dec 7, 2022	Basic Assistance	Core Relief Items (CRII/NI)							Education	Education	
No Feedback Received	017f-4a9b-0038	Dec 6, 2022	Dec 6, 2022	GBV/SGBV	GBV Case Management							Shelter	Shelter	

It will also appear in the users mailbox, in the emails sent section as demonstrated below

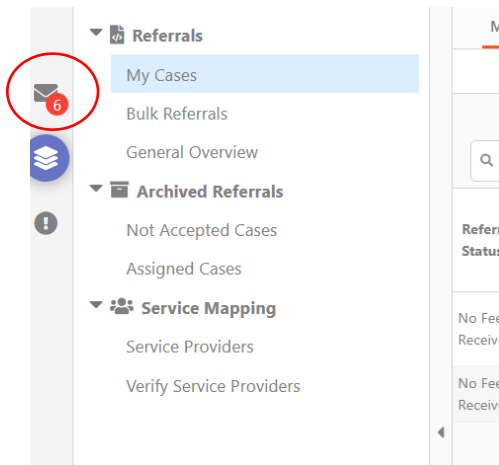


To acknowledge a referral:

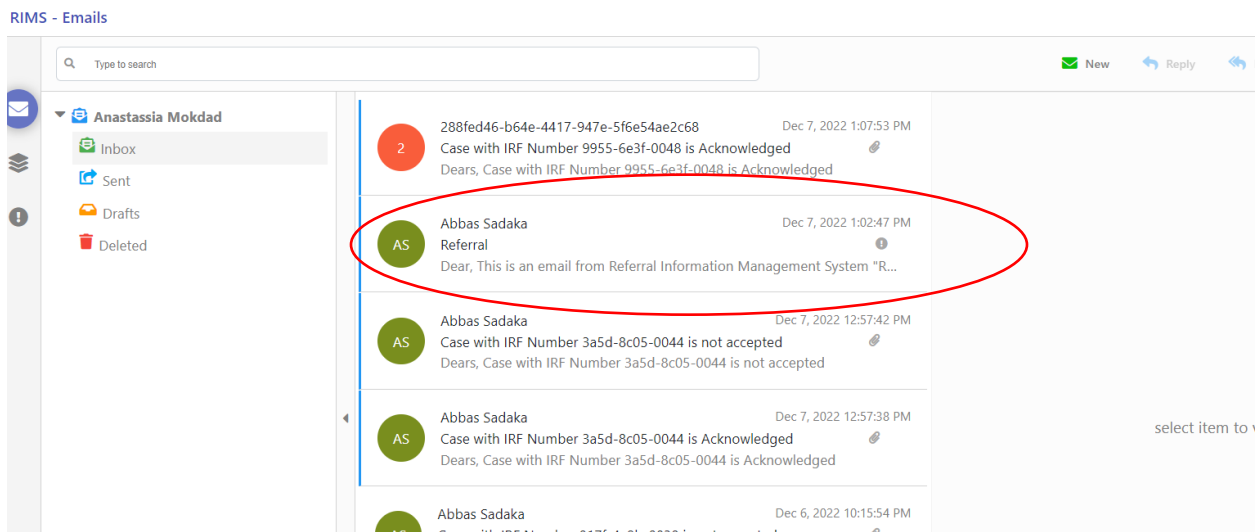
User can either:

Log in to RIMS and acknowledge the request

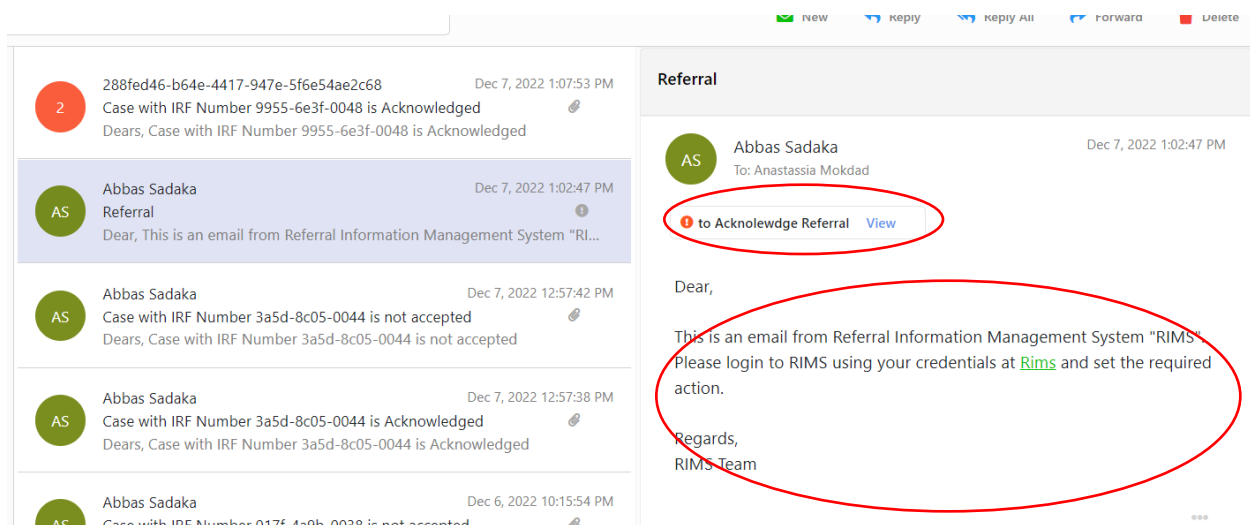
- 1- Login to RIMS
- 2- You will find a notification in the inbox



Click on Inbox to check the notification



The request to acknowledge will be titled as referral.



To acknowledge the referral from inside the email click on view and select the referral row and click on acknowledge referral

PS: If user does not acknowledge referral from the INBOX, the referral will not appear under my cases

The screenshot displays a web application interface for managing referrals. On the left, a sidebar contains the following information:

- From:** Abbas Sadaka
- To:** Anastassia Mokdad
- Date:** Dec 7, 2022
- Description:** Request to Acknowledge Referral , 9955-6e3f-0048
- Urgency:** Regular (Medium/Low Risk) 1-14 days
- Expiry Date:** Dec 21, 2022
- Status:** Completed
- Completed on:** Dec 7, 2022

The main area features a table with the following columns: Referral Status, IRF Number, Referral Date, Last Action Date, Referred by (Sector, Sub-Sector, Focal Point), Organization, Location, Phone Number, Email, and Referral Sector. A red circle highlights the first row of the table:

Referral Status	IRF Number	Referral Date	Last Action Date	Sector	Sub-Sector	Focal Point	Organization	Location	Phone Number	Email	Referral Sector
Referral Acknowledged	9955-6e3f-0048	Dec 7, 2022	Dec 7, 2022	Livelihoods	Livelihoods	Abbas Sadaka	Danish Refugee Council (DRC)	Beirut	70 123 123	abbas.sadaka@drc.ngo	Health

At the bottom right of the interface, there is a "Close" button with a red 'X' icon.

To acknowledge the referral from outlook the user will need to:

- 3- Click on the link in the email as demonstrated below
- 4- Enter the access code that is in the email



LBN Referral Information Management System

To: Anastasia Mokdad

Cc: Abbas Sadaka



Wed 12/7/2022 1:02 PM

RIMS | Referral Information Management System

Request to Acknowledge Referral

Dear Anastassia Mokdad,

A request is sent from
Abbas Sadaka
 Request to Acknowledge Referral

[Click here to view/manage request](#)

Use the below access code to view request:
AGVATPXKVUXO



LBN Referral Information Management System

To: Anastasia Mokdad

Cc: Abbas Sadaka



Wed 12/7/2022 1:02 PM

RIMS | Referral Information Management System

Request to Acknowledge Referral

Dear Anastassia Mokdad,

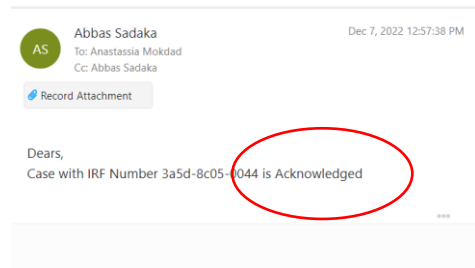
A request is sent from
Abbas Sadaka
 Request to Acknowledge Referral

[Click here to view/manage request](#)

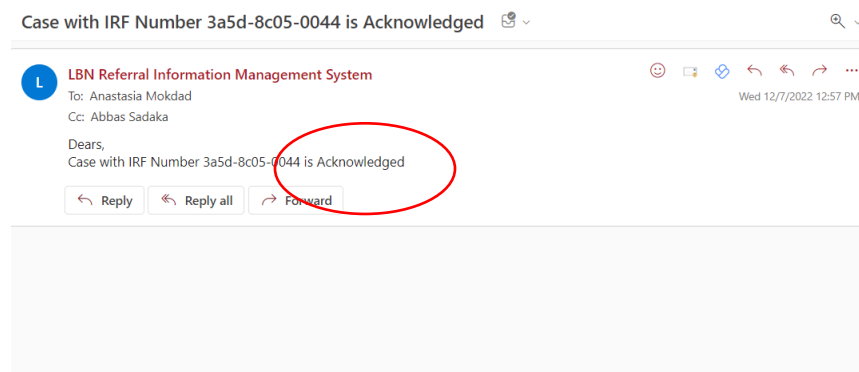
Use the below access code to view request:
AGVATPXKVUXO

When the referral is acknowledged an automatic email is sent to

RIMS:



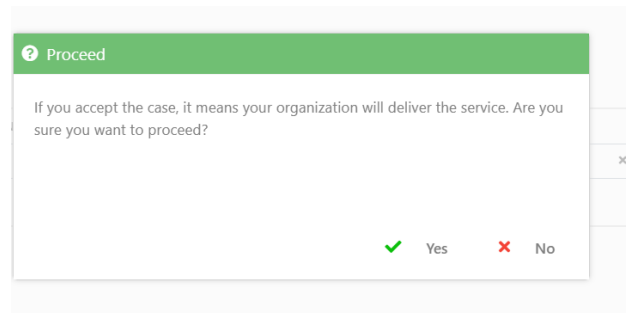
And to outlook



Step 5:

To accept or Not accept the case the same process as above applies:

If the user clicks on accept the below popup message will appear:



Click yes to proceed.

- When the user clicks yes the below page will open

Referral Accepted

Is there any UNICEF fund contribution (staff, activities, etc) when accepting the case *

Yes

No

Click on whether the UNICEF contributes or not and then on Continue

The service can be:

- Successfully closed: Meaning the service was successfully delivered to the PoC
- Waiting list: The person will receive the service but after a certain period of time
- No service delivered: Although the person is accepted to receive the service, they did not receive the service.

Marital Status *

Single

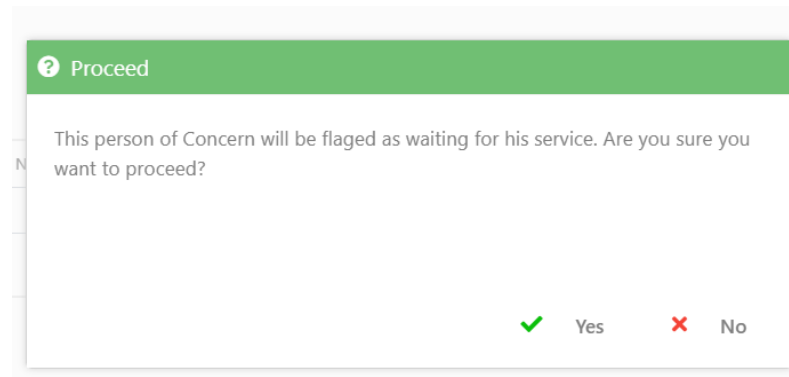
If the user selects that the service has been successfully closed, then the below popup message will appear.

Click yes and the case will be closed.

Proceed

This button means that you delivered the service to the person of concern. Are you sure you want to proceed?

If the user selects that the person of concern is on a waiting list, then the below popup message will appear.



- **Click yes**

And select the waiting duration and then on continue as demonstrated below



If the user selects that the person of concern did not receive the service, then the below popup message will appear.

? Proceed

You will mark the referral as no service delivered and it will be removed from your cases and sent back to the initial sender. Are you sure you want to proceed?

Yes No

Click yes and select the reason why the service is not delivered and then continue as demonstrated below

No Service Delivered ✕

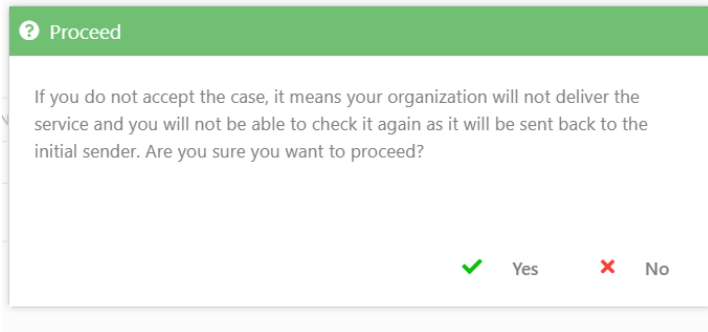
Reason *

- Age
- Gender
- Insufficient Funds
- Location
- Nationality
- Service Provided
- Other

Description *

Continue Close

If the user clicks not accepted the below popup message will appear:



Click yes and the referral will be removed from the users cases but will remain in the orgial sender IRF archive




Bulk Referrals:



To send bulk referrals you need to duplicate either the case or the PoC as demonstrated below:


The user should click on “my cases” and select the case that they want to duplicate.

- You can duplicate the case when you want to refer more than one PoC who have the same case.
- You can duplicate the PoC when you want to refer the same PoC to more than one sector.

My Cases

 Duplicate  Download IRF  New IRF

All Cases  Created & Sent  Received

🔍 Type to search Reports 

Referral Status	IRF Number	Referral Date	Last Action Date	Referred By					
				Sector	Sub-Sector	Focal Point	Organization	Location	Phone Number
No Feedback Received	2d0c-0694-0111	Dec 12, 2022	Dec 12, 2022	Protection	PSS				
No Feedback Received	65ea-6bbf-0115	Dec 12, 2022	Dec 12, 2022	Child Protection	Child Protection PSS				
No Feedback Received	65ea-c3ba-0109	Dec 12, 2022	Dec 12, 2022	Child Protection	Child Protection Prevention				

For example, we want to duplicate the PoC to send them to more than one service. When we select duplicate PoC, a pop-up message will appear. Click on yes.

Proceed

This button will duplicate the IRF for the Same Person of Concern but users can edit the requested service. If you proceed the IRF will be created even if you close it. Are you sure you want to proceed?

Yes
 No

After clicking yes, the system will proceed in asking questions about the new services you want to refer the PoC to and if you had their consent.

After you finish adding the service you want to refer to, you close the page and it will be saved as a not referred draft.

Then you click on bulk referrals and select whether the added cases were fast track cases or regular track cases. The drafts will appear in the bulk referrals page as below.

My Cases **Bulk Referrals**

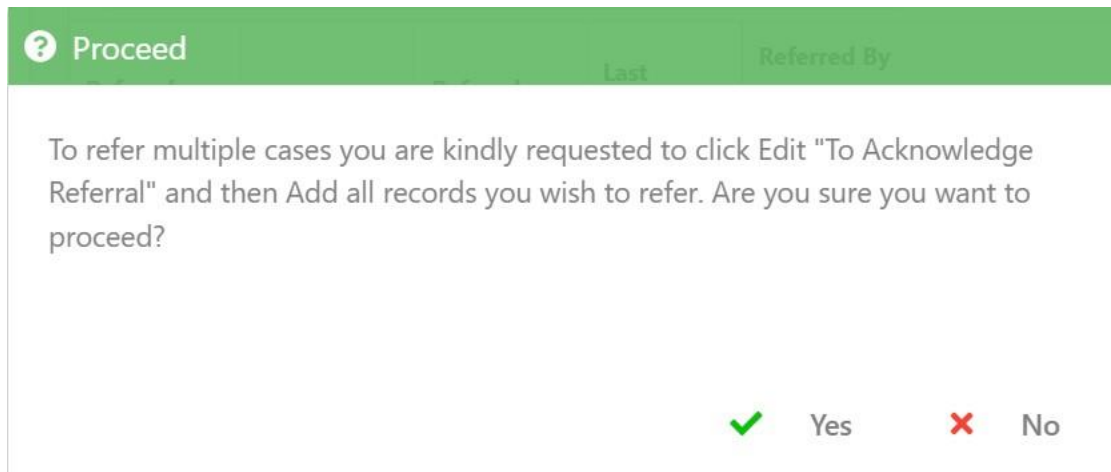
Download IRF **Refer**

Fast Track **Regular**

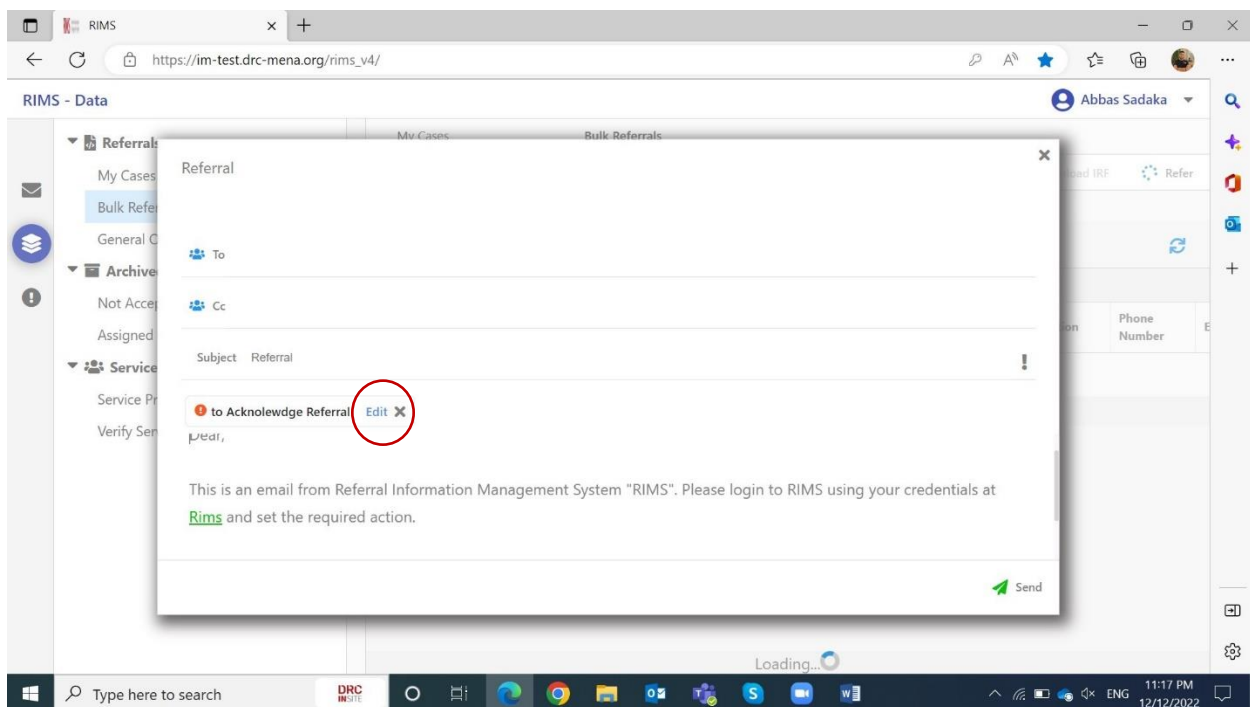
Type to search

Referral Status	IRF Number	Referral Date	Last Action Date	Referred By					
				Sector	Sub-Sector	Focal Point	Organization	Location	Phone Number
Draft				Protection	PSS				
Draft				Protection	PSS				

You click on refer then a pop-up message will appear as below.



This pop up message asks you to click edit in order to add records you want to refer. You click on yes, and then edit as below.



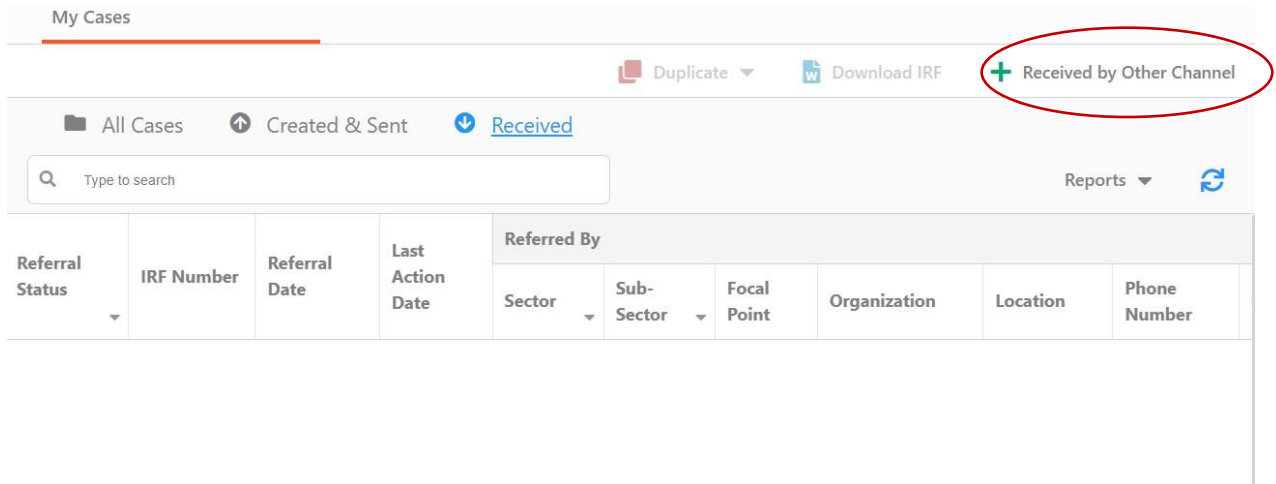
After pressing edit, a new page will pop up. You are requested to press on add records then select the cases you want to refer then save. After that you send the referral to the recommended service provider.

P.S. the receiving agent should treat each case alone. i.e. they should acknowledge each received case alone even if they are bulk referrals.

Received from Outside RIMS:

To add a referral received from a non-RIMS organization:

- Go to my cases, received cases, and press on (received by other channel) as below.



The screenshot shows the 'My Cases' interface. At the top, there are buttons for 'Duplicate', 'Download IRF', and a red-circled '+ Received by Other Channel' button. Below these are filters for 'All Cases', 'Created & Sent', and 'Received'. A search bar is present with the placeholder 'Type to search'. On the right, there are 'Reports' and a refresh icon. The main table has columns for 'Referral Status', 'IRF Number', 'Referral Date', 'Last Action Date', and a 'Referred By' section with sub-columns for 'Sector', 'Sub-Sector', 'Focal Point', 'Organization', 'Location', and 'Phone Number'.

A pop up message will appear indicating that you are adding a new record which was received from outside RIMS. You click on yes.



A green confirmation dialog box with a question mark icon and the text 'Proceed'.

This button will create an IRF that was received from outside of RIMS. Are you sure you want to proceed?

✓ Yes ✗ No

Then you proceed in filling in the referral data as per received as if you're filling a new referral. After finishing you save the referral and then click on acknowledge referral as below.

Inter-Agency Referral Form - - Draft

Duplicate Download IRF

Person of Concern IRF Not Accepted Reasons Waiting List Referrals History

i Case worker should explain the referral process and inform the person of concern that he/she/they will be referred

Yes
 No

Individual has signed consent to release information *

Yes
 No

Any contact preferences

i Important Information such as home visit time, specific restrictions, etc ...

Yes
 No

Any risks or immediate safety concerns observed/expressed

Yes
 No

Acknowledge Referral Save Close

Then after acknowledging the referral, the system will ask you to add the receiving agent. You select yourself from the service providers.

Moving forward you can take the needed actions whether you'll accept the case or not.