

Making a Referral

An online referral not only passes essential transfer information between providers, it also transfers control of the entire E2E Passport.

Follow these simple steps ...

STEP 1 : Open Passport

- open a web browser such as Internet Explorer
- go to www.e2epassport.com
- enter your Adviser login and password
- click the Login button

Adviser Login & Password : *xx.advisername* : you will have been given this name when you were first trained in how to use E2E Passport. The *xx* part is an area code and must not be omitted. Examples of area code include *nt*. (Notts), *tw*. (Tyne & Wear) and *cd*. (Durham)

STEP 2 : Use Referrals Option

- select **Referral** from the menu
 - find and click the **Add** button next to the name of the learner in your **Primary Caseload** list you want to refer to another organisation
- A form headed **Referral** will appear.



Referrals : the *Referral* form lets you add transfer details and send provisional drafts and completed referrals to another organisation.

Young Person	Add	View
Ian Reid		
Bertram Bassett		

STEP 3 : Complete Referral Form

- click in a field to select it
- type to add data

Be aware that a **time-out** operates. This will close your connection after an hour if a Save is not detected. Use **SAVE DRAFT** every 20 minutes to avoid this happening

Referral Form : the *Referral* form is the same form used in the paper-based E2E Passport and agreed by LSC and Connexions nationally.

STEP 4 : Save Draft

Save Draft

- select **Save Draft** at the foot of the form
- A form headed **Referral draft saved** will appear.
- select **Email this Referral** only if you want to email a copy to prospective providers
 - select **providers** you want to receive referral details from the list
 - click **Okay** to email the draft referral

Draft Referrals : the *Referral* form can be saved as a **DRAFT**. This means it can be edited over a number of sessions and emailed to multiple prospective E2E providers.

Once a provider accepts a referral, **SAVE** will transfer the Passport to that provider's in-box - under *Incoming Referrals*.

STEP 5 : Adviser Assignment / Save

- click the drop-down list next to **New Provider**
 - select the organisation the learner's Passport will be transferred to
 - select your own name from the Secondary Adviser list
- Finally click **SAVE** to complete the transfer.

Adviser Assignment : this part of the *Referral* form allows an Adviser to finally select the organisation the learner's E2E Passport will be transferred to. The transfer is made to the providers Incoming Referrals in-box. The E2E Passport manager program is then used to allocate the learner to an Adviser caseload.