

Referrals in HIFIS 4

What's Missing?

- There is a limited ability in HIFIS 4 right now to facilitate a transfer of a client.
- Let's imagine the client comes to Shelter X. Shelter X is full, they record a Turnaway. In the Turnaway, they record that they referred the client to Shelter Y. **How does Shelter X communicate this information to Shelter Y, in HIFIS?** Short answer: they don't.
 - They could send a Message, but that's to a specific staff, and they probably don't know who's working today.
 - They could maybe create a Broadcast, but that goes out to everyone.
 - They could create a Client Comment, but Shelter Y may not read it.
- Same thing goes for: a client is referred from a drop-in centre to a shelter. A client is referred from a shelter to transitional housing. A client is referred from a Housing First team to a supportive housing provider.

What's Possible?

- A new module called Referrals. It is different and new because it's specifically intended to share information between 2 Service Providers.
- A Referral is added by a User at a SP. They select the other SP they want to send the client to. This creates a Referral Record. This is going to be somewhat similar to a Message, with a from and a to. Except that instead of Users, it's Service Provider to Service Provider.
- Each Service Provider will have a list of Incoming and Outgoing Referrals. When there are new Incoming Referrals, all staff at that agency will be alerted, much like when they have an unread Message.
- Each Incoming Referral has a Status field that includes values like New, Accepted, No-Show, Rejected, Cancelled.

Referral Fields – Add New

Add New Referral

- Client*
- Requested By* (user with the Staff Role)
- Referred To* (other Service Providers in Cluster)
- Start Date and Time*
- Module(s)* (what type of service is this client being referred for – note, this could be instead replaced by a “Referral Type” field)
- Comments (this is important, to provide some context about why the referral is happening, and share info between providers as desired. Rich Text Editor please)

Referral Fields - Incoming

- Staff would be able to review the information the first Service Provider added and then deal with it.
- When they “receive” a Referral, they would be able to change the status and add some notes of their own. When they change the status that would add an End Date field.

Referral List - Incoming

Client Name	From (Service Provider)	Start Date and Time	Module / Reason	Status
Bob Smith	Shelter X	December 16 2018 8:15pm	Admission	Accepted
Jane Dough	Drop-In Centre	December 17 2018 3:20pm	Goods & Services	New

Referral List - Outgoing

Client Name	To (Service Provider)	Start Date and Time	Module / Reason	Status
Bob Smith	Shelter Y	December 16 2018 8:15pm	Admission	Accepted
Steve Jones	Shelter Z	December 17 2018 6:40pm	Admission	No Show
Mike Brown	Shelter Z	December 17 2018 7:30pm	Admission	New
Mike Brown	Food Bank	December 17 2018 7:30pm	Food Bank	New

Notes

- Providing a Referral to a Client is a Service. However, it's a special kind of service.
- The service was provided by the outgoing Service Provider.
- The receiving Service Provider also needs the ability to interact with the Referral that they themselves did not create AND they don't need to have User Rights at the outgoing Service Provider to be able to do so.
 - There would probably be a Right like "Receive Referrals" which might operate sort of like a Book Out, how some of the fields are not editable while other ones are.