

Version 2: Updated March 10, 2025

Training Materials – Referrals Processing

The intended purpose for this module is to allow users in HIFIS to easily track the referrals performed internally or between each agency through the Case Management > Case Sessions module. This module will assist user in understanding the “Referral” (Referred From & Referred To) fields in HIFIS.

Through a vast majority of modules in HIFIS, users will notice when entering information in a group activity, admissions, conflicts, goods & services, case management etc. have fields regarding “Referred From”, “Referred To” and “Agency Involved/Referral”. These fields are there to help track client service connections. In the following pages, you will see an easy step-by-step guide to effectively enter and track client service connections performed by agencies and how it will be tracked through the Case Management module.

Think of the “**Referred From**”, “**Referred To**” and “**Agency Involved/Referral**” fields as a journey for the client:

- **Referred From** = Where the client commenced their journey (this will be your agency, as you will be completing the work required for subsequent stages in the process; referral source information TO you will be recorded in the Initiation Survey in HIFIS).
- **Referred To** = Where the client is going next for additional support (where (agency) are they going to get the services they require).
- **Agency Involved/Referral** = Who (agency) is helping the client along the way and/or the agency actively working with the client during the Case Session. They are not necessarily the starting or ending referral points but are involved in the case.

Example Scenario of entering the **Referred From**, **Referred To** and **Agency Involved/Referral**:

- A Hospital (Chinook Regional Hospital) refers a client to the shelter (**Referred From = Hospital**)
- User (i.e. Case Manager) refers client to a housing agency for long-term housing (**Referred To = Housing Agency**)

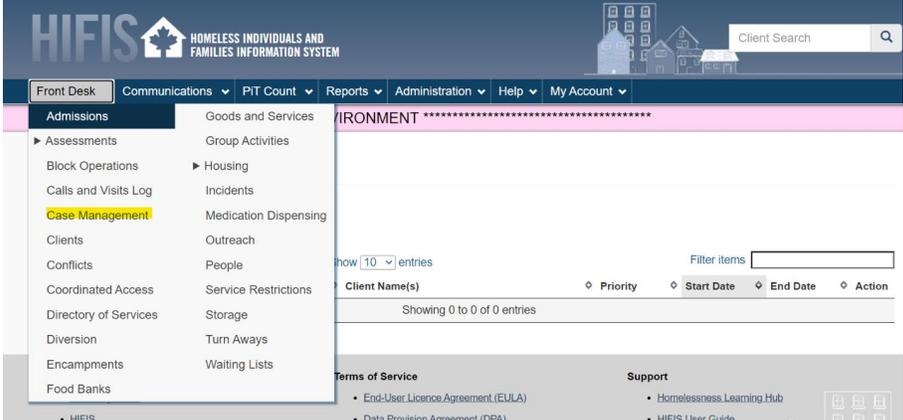
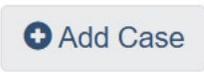
- A mental health organization provides support/counselling to client while they are at shelter (**Agency Involved/Referral = Mental Health Organization**)

This tracking ultimately helps ensure that clients receive the right support at the right time.

Test Modules	Action
1. Case Management – Case Sessions	<ul style="list-style-type: none"> • After a Case Session has been recorded for the Client – Case Management List: Client Management > Case Management

1. Referrals Processing for Case Management Module

Prerequisite	<ul style="list-style-type: none"> • Client Profile/Record has been created in HIFIS.
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Action	
<p>1. From the HIFIS main page, navigate over to the Front Desk drop down menu and select “Case Management”</p> <ul style="list-style-type: none"> • 	
<p>2. From the Case Management List page, select the “+ Add Case” button.</p>	

3. From the Client – Add Case Management page, fill in the required fields marked with a red star until you reach the “Referred From” and “Referred To” fields.

Client - Add Case Management

Client Name Sparrow, Jack (1975-0... ★

Caseworker Manager, Case x ★

Goal Employment x ★

Status Open x ★

Start Date 2025-02-19 11:53 AM ★

Target Date

Program x OSSI-Funded + - ★

4. For the “Referred From” and “Referred To” fields, you will notice a “filter” icon next to each field, click the filters and it will prompt open the “Referral Filter”.

Referred from Select an option [filter icon]

Referred to Select an option [filter icon]

Referral Filter

Geographic Region Select an option

City Select an option

[Filter] [Close]

5. In the “Referral Filter” click on the drop down for the “Geographic Region” field and select “Lethbridge”.

Geographic Region Lethbridge x ▲

City

Lethbridge

6. Once “Lethbridge” has been selected, click on the Filter button.

[Filter]

7. User will then be re-directed back to the Client – Case Management List page and will see that the “Referred From” field has expanded with numerous selections to choose from.

Status

Start Date

Target Date

Program

Referred from

- Correctional Facility - Lethbridge Correctional Centre
- Hospital - Chinook Regional Hospital
- Housing Services - Elsie's House
- Housing Services - Canadian Mental Health Association
- Housing Services - Lethbridge Housing Authority
- Housing Services - Family Ties Association**
- Select an option

8. For the “Referred To” field, perform the same steps as listed above.

Referred from Hospital - Chinook Regional Hospital

Referred to Disability Services - Ability Employment

9. Once user has selected the appropriate options for “Referred From” and “Referred To”, click Save.

Save

10. Once clicking Save, user will then be re-directed to the “Display Case Management” page for client and will see all entered information of their Case Goal.

Display Case Management

Details Sessions Documents Case Comments Custom Tables

Goal Employment

Family Members

Caseworker Manager, Case

Service Provider City of Lethbridge

Status Open

Contributing Factors

Program

Referred from Hospital - Chinook Regional Hospital

Referred to Disability Services - Ability Employment

Start Date 2025-02-19 11:56 AM

11. For a full view/summary of the Case Management list for the specific client, navigate over to the Client Management drop down list and select Case Management.

Client Information Client Management Programs

Admissions
Appointments
Bulletins
Calls and Visits Log
Case Management
Chores
Conflicts
Coordinated Access
Diversion
Food Banks
Goods and Services
Group Activities
Housing Loss Prevention
Housing Placements
Incidents
Medication Dispensing
Programs
Service Restrictions
SPDAT
Storage

Client - Edit Case Management

Details Sessions Documents Case Comments Custom Tables

Goal Employment

Family Members Select an option

Caseworker Manager, Case

Program OSSI-Funded

Referred from Select an option

Referred to Select an option

Status Open

Contributing Factors Select an option

Start Date 2025-02-19 11:56 AM

Target Date

12. This will re-direct you to the Client-Case Management list where it will provide a full summary of all documented cases entered for client

Client - Case Management List

Open Closed All

Show 10 entries Filter items

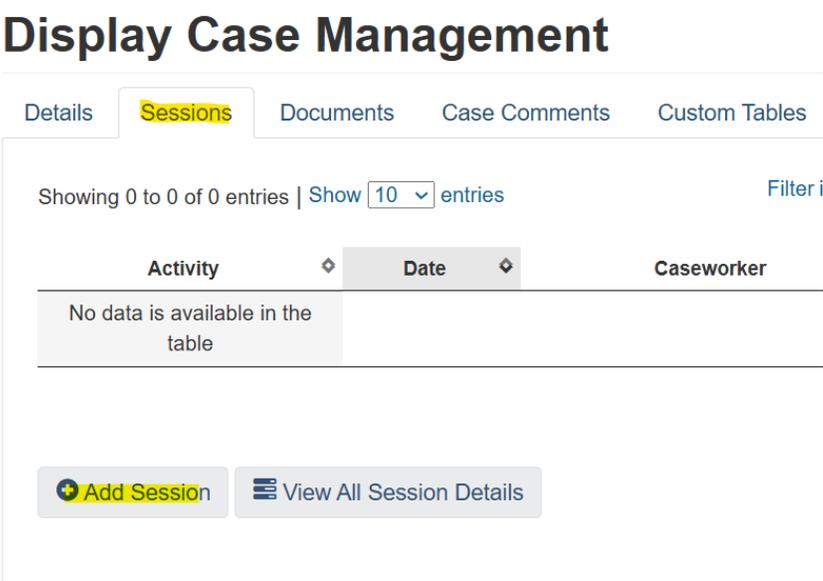
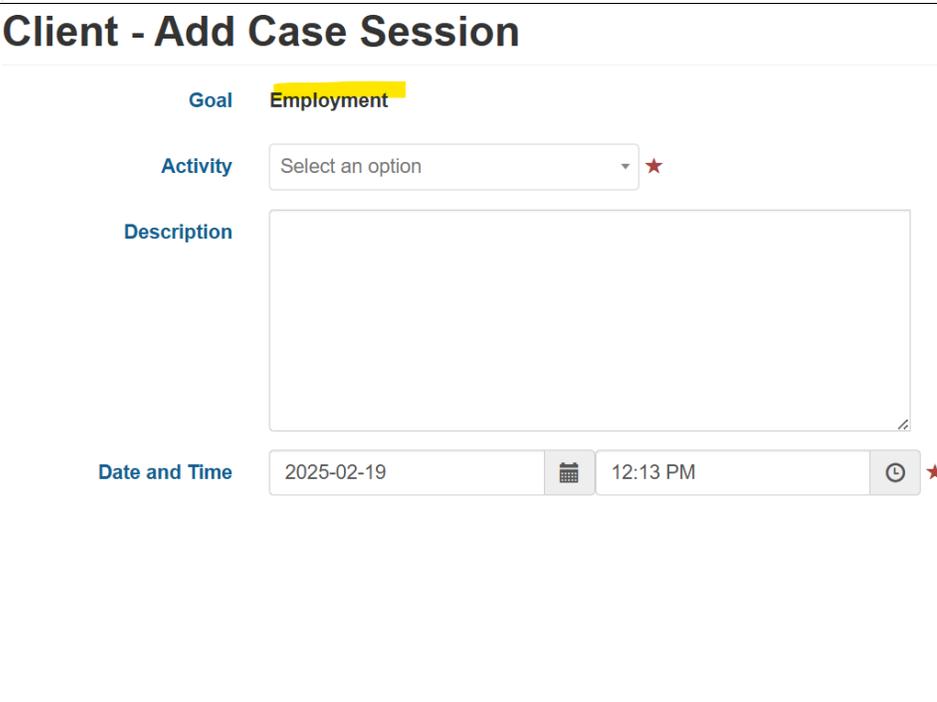
Caseworker	Service Provider	Goal	Status	Action
Manager, Case	City of Lethbridge	Employment	Open	Target Date: N/A

1

Add Case Client - Multiple Goal Session

(Open, Closed and All - Cases) tabs.	
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2. Creating Case Sessions for Client for Referral Processing

Action	
<p>1. From the Display Case Management page, select the “Sessions” tab and click the “+ Add Session”</p>	
<p>2. From the Client – Add Case Session page, you will notice that the Case Goal selected when creating a case management has populated over as this is the overarching goal for the client while the “case sessions” are efforts tracked for client to fulfill this goal.</p>	

3. From the Client – Display Case Session page, fill in all required fields marked with a red star until you reach the “Agency Involved/Referral” field.

Client - Add Case Session

Goal Employment

Activity *

Description

Date and Time *

Expended Time

Hours

Minutes

Caseworker *

Responsibility

Agency Involved / Referral

Client Present No

Family Present No

4. From the “Agency Involved/Referral” field, this is where you will select the type of services that is supporting the client while trying to meet their Case Goal.

Agency Involved / Referral

Client Present

Family Present

Disability Services x ▲

Addictions

Child Protection Services

Client / Self

Community

Correctional Facility

Disability Services

5. Once user has selected the appropriate service, click the Save button.

6. User will be re-directed back to the Client – Edit Case Management page and will see the Case Session recorded.

Client - Edit Case Management

Programs ★ ? ⓘ

Details Sessions Documents Case Comments Custom Tables

Showing 1 to 1 of 1 entries | Show 10 entries

Filter items

Activity	Date	Caseworker	Action
Apply for SIN Card	2025-02-19 12:13 PM	Case Manager	  

1

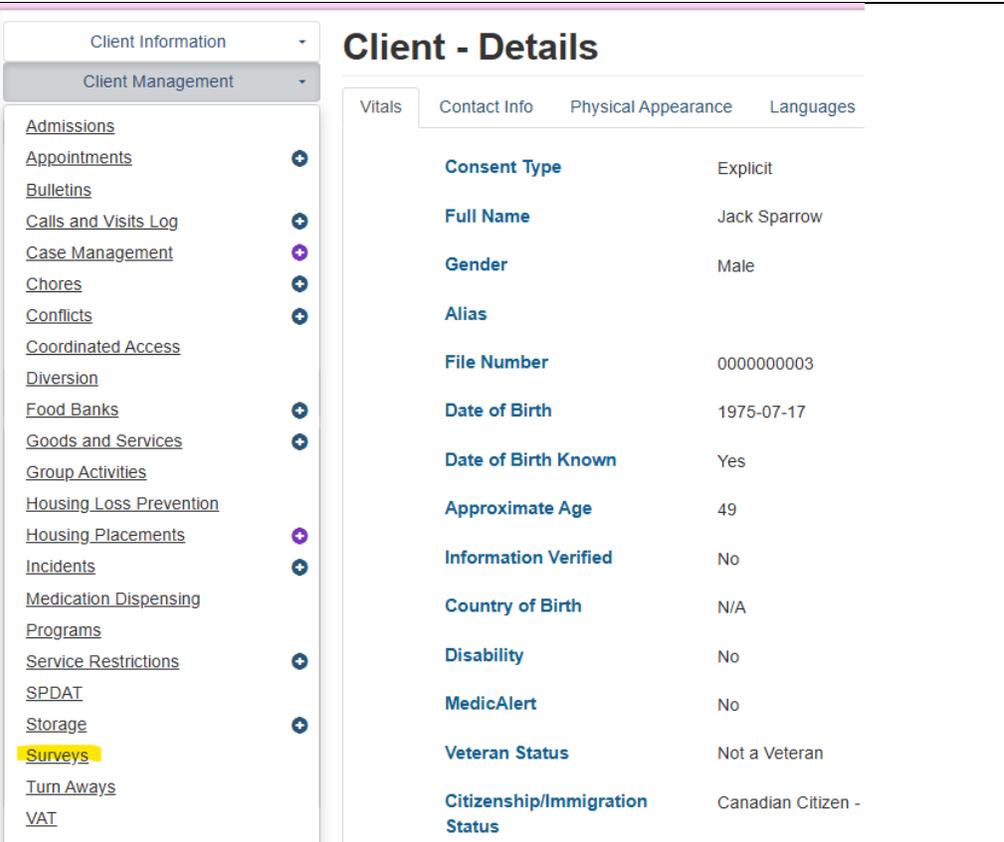
[Add Session](#) [View All Session Details](#)

3. Procedure to Administering a Survey: Initiation and Exit

The Surveys module in HIFIS will be utilized when you receive a client (Initiation survey) and when you refer a client out / close their case (Exit survey). We have demonstrated the process below with Exit, but the steps are the same for both.

***Please Note** – Ensure you stay in the Client’s Profile/Vitals page to begin proceeding the step for administering a survey as you will need to access the Survey through Client Management.

***Please Note** – When performing the “Warm Transfer – Program Change” survey, when referring out to a housing support, this is another step in closing a case file.

Action	
<p>1. From the Client – Details page, navigate over to the Client Management drop down menu and select the “Surveys” option.</p>	

2. From the Client – Survey page, click on the drop down arrow next to the “Complete New Survey” tab.

The screenshot shows the 'Client - Survey' interface. At the top, there is a tab labeled 'Complete New Survey' which is highlighted in yellow. Below the tab, there is a 'Show 10 entries' dropdown and a 'Filter items' search box. A table header is visible with columns: Survey, Service Provider, Date Taken, and Action. The table content area is empty, displaying the message 'No data is available in the table'.

3. In the “Survey” field, click in the text box “Select an Option” and select your option and then click “+ Begin Survey”.

This screenshot shows the 'Client - Survey' page with the 'Survey' dropdown menu open. The dropdown menu contains several options: 'Select an option', 'Follow-Up Interview', 'Initiate Services- Suitability Response', and 'Program Completion - Warm Transfer- Exit'. The last two options are highlighted in yellow. Below the dropdown, the table header and 'No data is available in the table' message are visible.

4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.

The screenshot displays the 'Take Survey' page for the survey titled 'Program Completion - Warm Transfer- Exit'. The 'Date Taken' field is set to '2025-03-10'. Below this, there is a table with the following questions and response fields:

#	Question	Response
1	What agency do you represent?	<input type="text"/>
2	What is this survey for?	Select a...
3	What is the participant's last date of service with your agency?	<input type="text"/>
4	What supports/services were provided to this individual by your agency?	Select a...

5. Once you have filled in all the fields of the survey, click Save.

The screenshot shows a single button labeled 'Save' with a floppy disk icon, indicating the final step of the survey process.

6. Once clicking Save, you will be redirected back to the Client-Survey page showing that the survey has been completed. All surveys will now stay with the client in Client – Survey.

Client - Survey



[Complete New Survey](#)

Show entries

Filter items

Survey	Service Provider	Date Taken	Action
Initiate Services- Suitability Response	City of Lethbridge	2025-02-25	

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