Training Materials – Referrals Processing

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)**

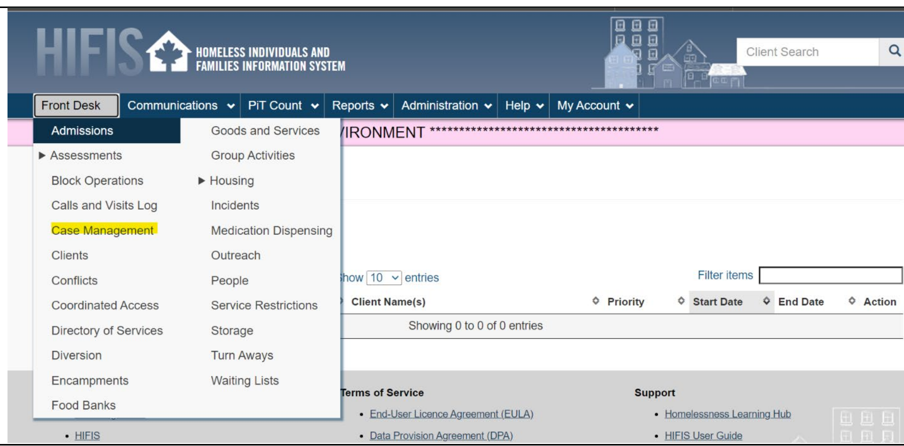
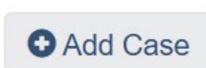
- A mental health organization provides support/counselling to client while they are at shelter **(Agency Involved/Referral = Mental Health Organization)**

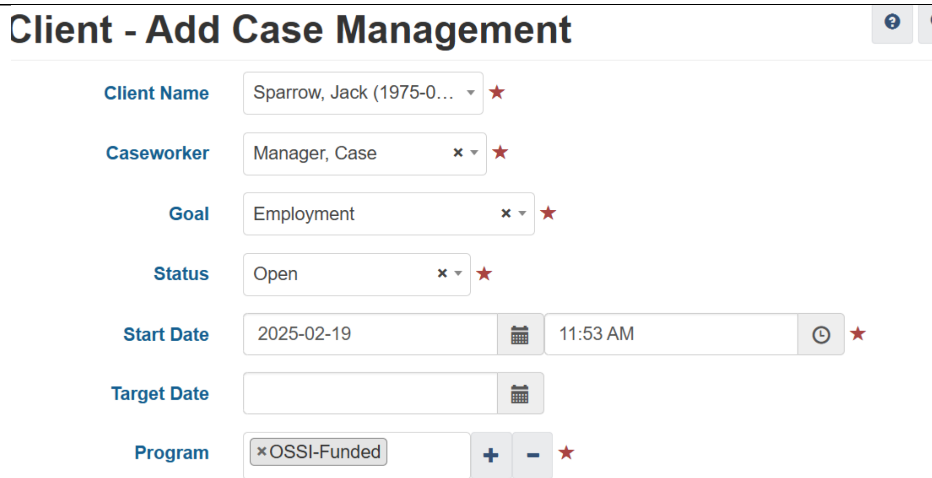
This tracking ultimately helps ensure that clients receive the right support at the right time.

Test Modules	Action
1. Case Management – Case Sessions	• 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	• Client Profile/Record has been created in HIFIS.

Action	
1. From the HIFIS main page, navigate over to the Front Desk drop down menu and select “Case Management”.	
2. From the Case Management List page, select the “+ Add Case” button.	

<table>
<tr>
<td>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.</td>
<td>
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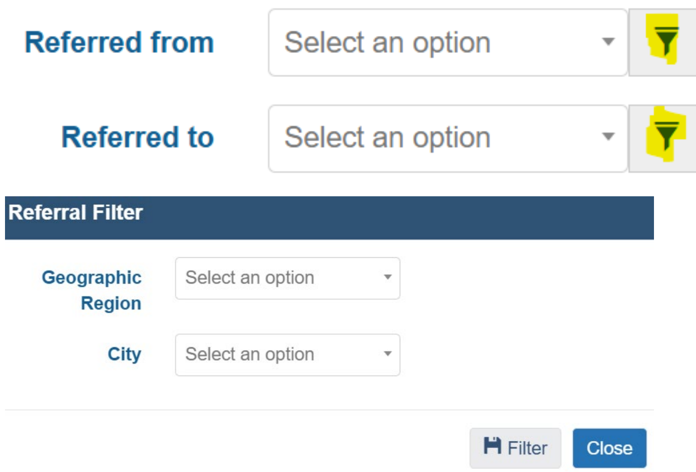
<tr>
<td>4. For the “Referred From” and Referred To” fields, you will notice a “filter” icon next to each field, click the filters and it will prompt open the “Referral Filter”.</td>
<td>
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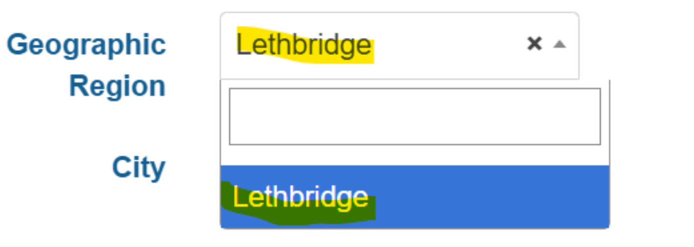
<td>5. In the “Referral Filter” click on the drop down for the “Geographic Region” field and select “Lethbridge”.</td>
<td>
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<tr>
<td>6. Once “Lethbridge” has been selected, click on the Filter button.</td>
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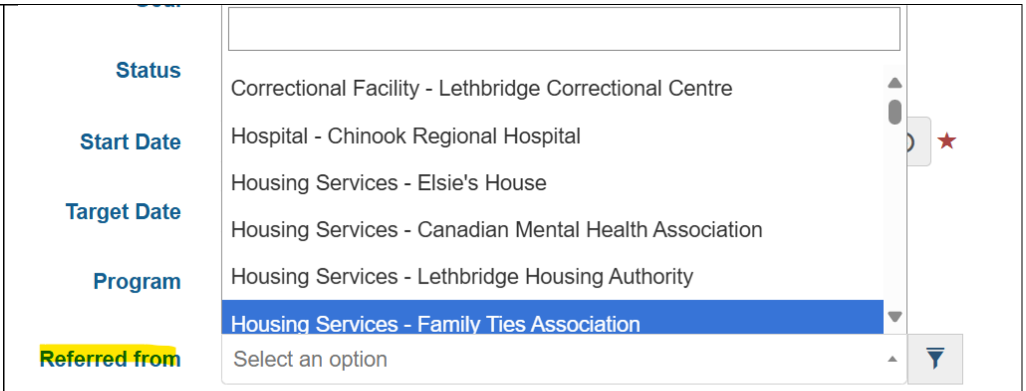
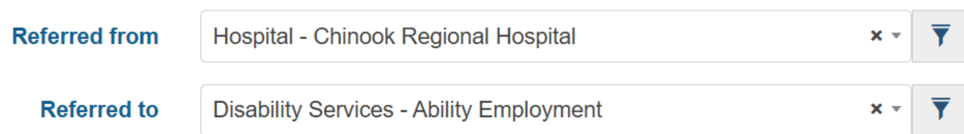
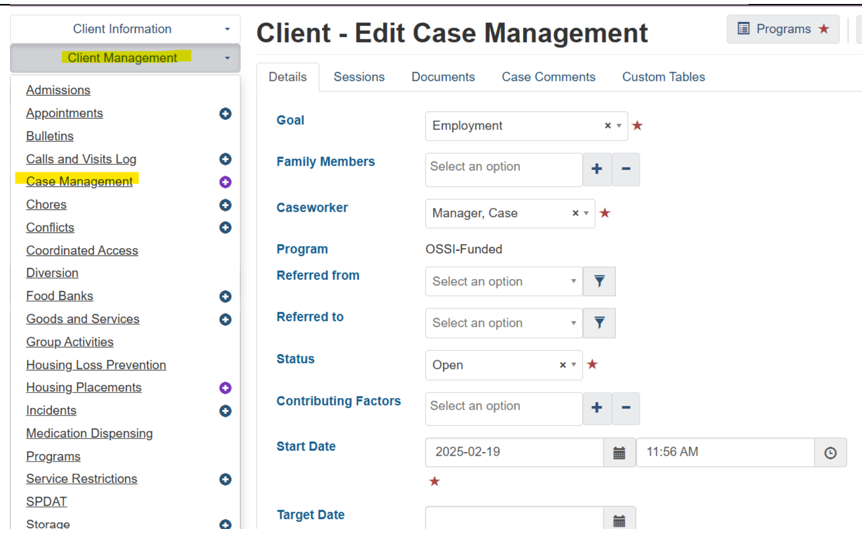
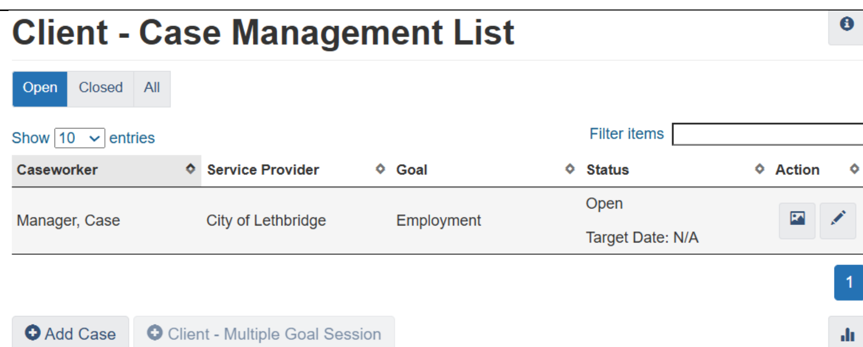
7. User will then be re-directed back to the Client – Case Management List page and will see that the “Referred From” filed has expanded with numerous selections to choose from.	
8. For the “Referred To” field, perform the same steps as listed above.	
9. Once user has selected the appropriate options for “Referred From” and “Referred To”, click 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.

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.

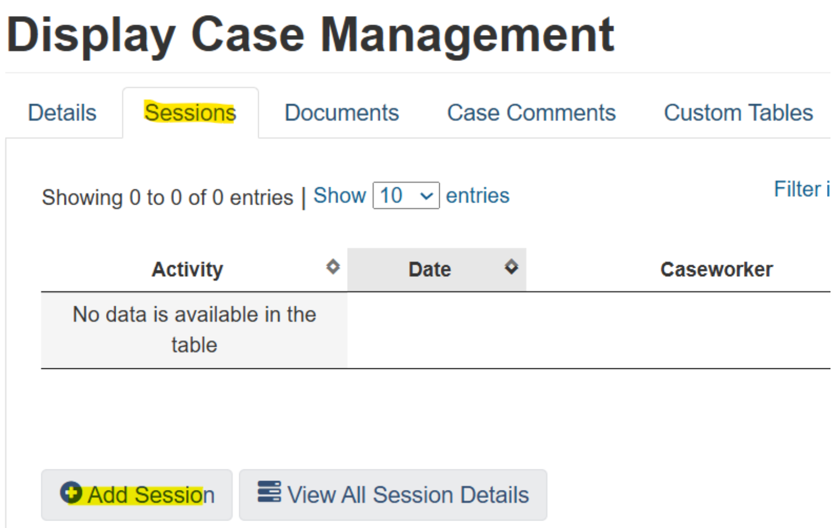
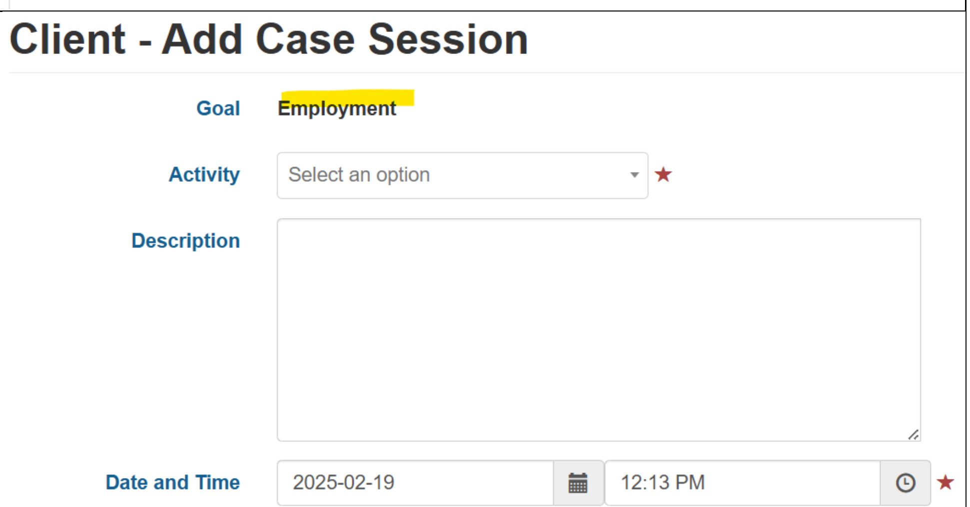


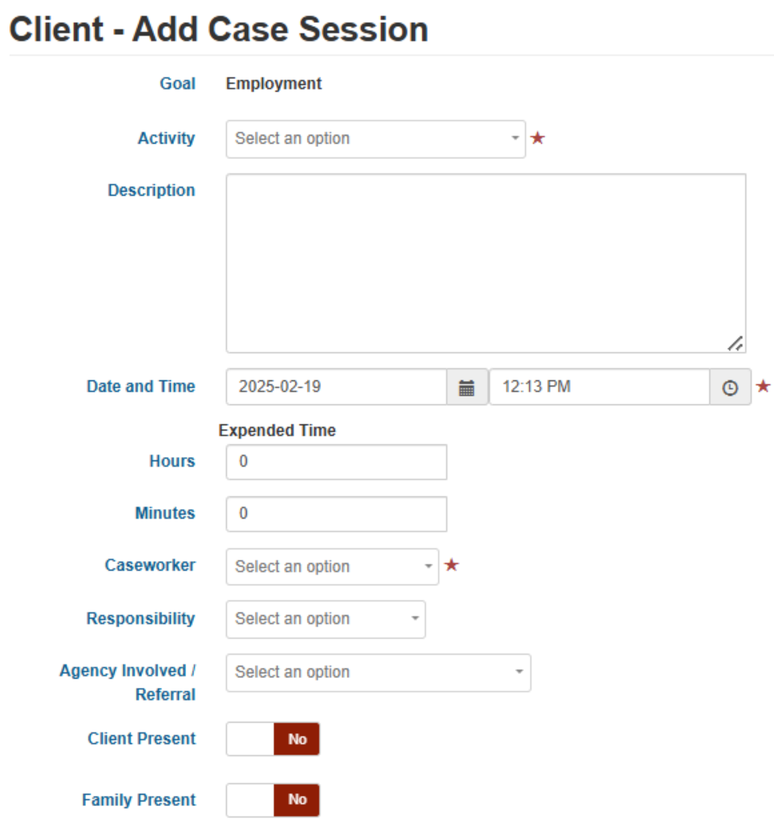
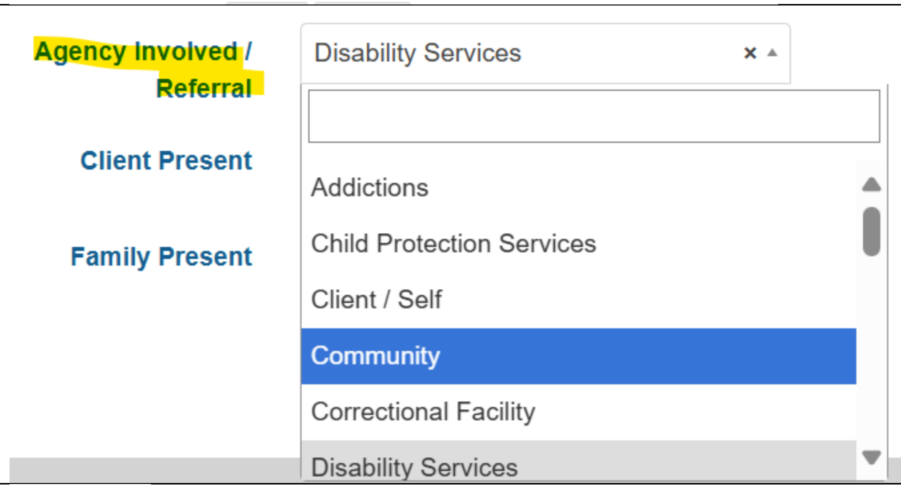
12. This will re-direct you to the Client-Case Management list where it will provide a full summary of all documented cases entered for client



(Open, Closed and All - Cases) tabs.	

2. Creating Case Sessions for Client for Referral Processing

Action	
1. From the Display Case Management page, select the “Sessions” tab and click the “+ Add Session”	
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.	

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

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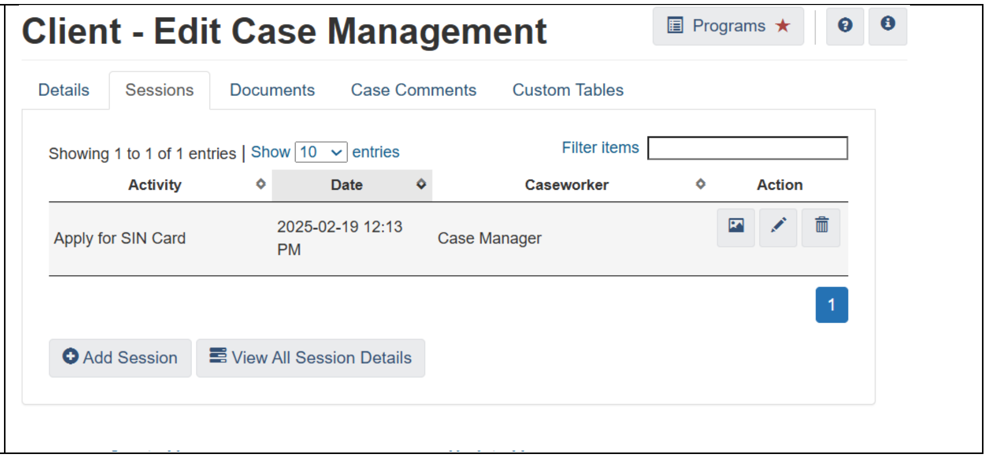
<tr>
<td>6. User will be re-directed back to the Client – Edit Case Management page and will see the Case Session recorded.</td>
<td>
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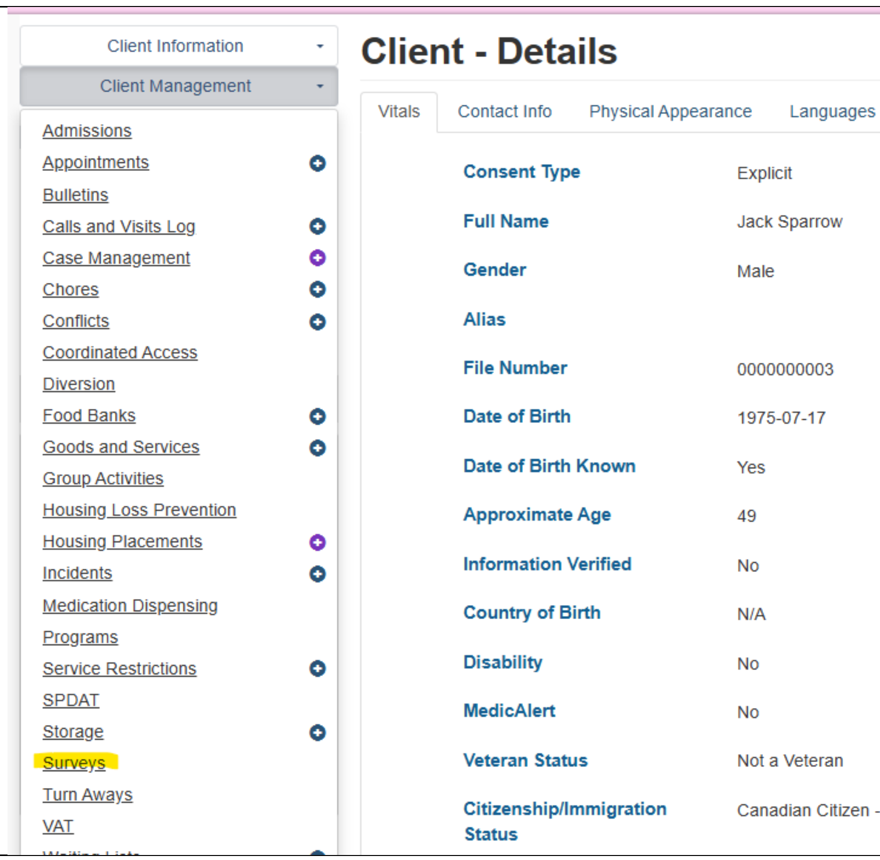
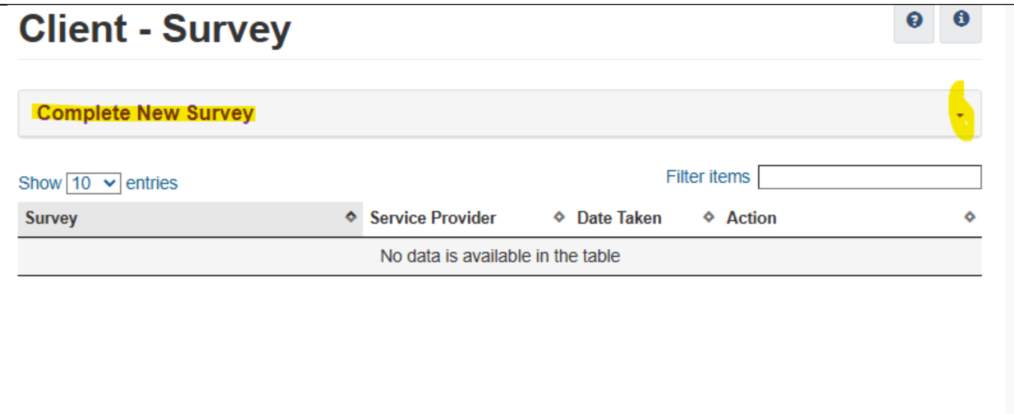
3. Procedure to Administering a Survey: Initiation and Exit

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

<table>
<tr><td>2. From the Client – Survey page, click on the drop down arrow next to the “Complete New Survey” tab.</td><td>
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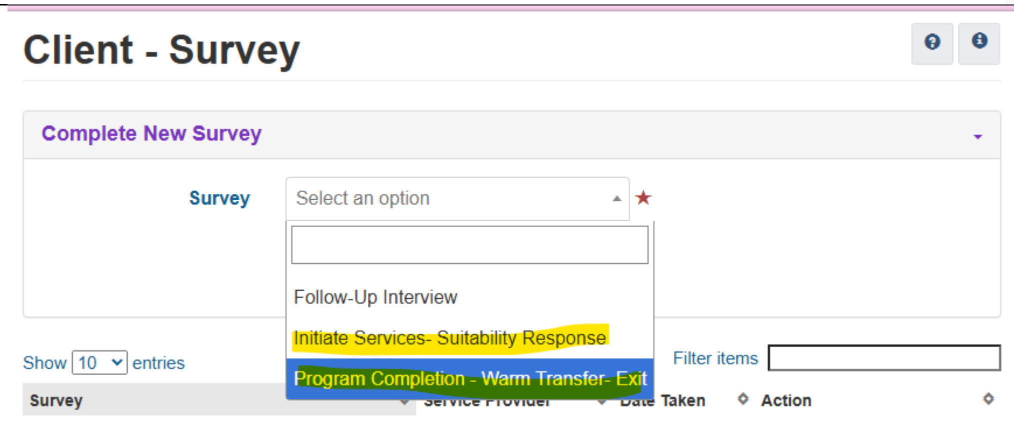
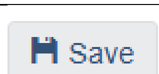
<tr><td>3. In the “Survey” field, click in the text box “Select an Option” and select your option and then click “+ Begin Survey”.</td><td>
</td></tr>
<tr><td>4. After selecting this option, the survey will prompt open and can begin filling in all the fields available.</td><td>
</td></tr>
<tr><td>5. Once you have filled in all the fields of the survey, click Save.</td><td>
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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.