

Referral processing and Intake are two of the most important steps in the agency/client relationship. It's the point where you learn the most about the clients you serve. Data gathered during this stage is the basis for many critical decisions made throughout the agency's relationship with each client, including important diagnoses and payment processing.

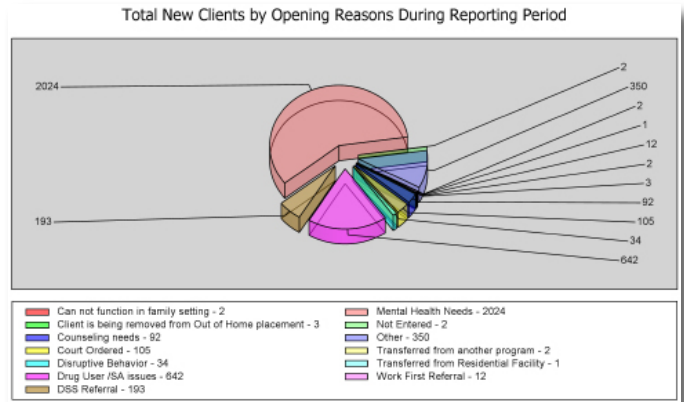
Evolv-CS helps agencies collect valuable client data and aids in data deployment throughout the organization - easily, effectively and in real-time.

## Process-Based Referral & Admission

- Handles referral and admission data collection in either a centralized environment or at the program level.

## Extensive Pre-Screening & Diagnostics Support

- Documents client pre-tests and diagnoses upon referral, which fully supports the determination of the type(s) of services needed.
- Offers the ability to add in multiple pre-screening items.



## Presenting Problems & Needs Data

- Extensive problems/needs recording can be used in determining the necessary course of treatment and developing a treatment plan.
- Links presenting problems/needs records to each referral and also offers the ability to add new presenting problems/needs with each referral.

Referral Status	Referral link to Problems/Needs Identified	Supporting Test/Assessments	Additional Information	Participating Staff/Notes
Current Problems on File				
Category	Problem	Statement	Date Identified	End Date
Behavioral	Disrespects Authority	Client disrespects authority.	1/1/2009	
Medical/Physical	Smoker	Client is a smoker.	1/1/2009	
Substance Use/Abuse	Alcohol Abuse	Client abuses alcohol.	1/1/2009	

## Presenting Problems Needs Information

## Multiple Program Recommendations & Enrollments

- Handles multiple referrals per individual.
- Maintains a history of past referrals and program recommendations.
- Links people/clients with prior referrals and/or admissions into a single "chart."

Program Recommendations			How Referral heard of Agency			External Referral	Tasks/Schedules	
Program Recommendations Made								
Program	Facility	Unit	Reason for Referral	Initial Status	Current Status	Priority	Modality	Remarks
Counseling Services (Outpatient)	Outpatient Clinic			Pending	Accepted	Place on Waiting List if Necessary	Individual Psychotherapy	Client should be assessed as soon as possible for other mental health service needs.
Foster Care (In-Patient)	Ingram (John) Family	1st Floor Bedroom		Pending	Pending	Urgent Placement Needed		Client should be placed in a foster home immediately.

## Program Recommendation Screen



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## Internal & External Referral Management

- Documents referrals to an external source, complete with a corresponding reason(s) for the outside referral.
- Documents problems related to outside referrals

## Referral Status Tracking & Management

- Tracks referrals with “pending” status.
- Easily stores and manages wait lists.
- Offers the ability to track and manage each referral status separately.
- Records referral status reasons to allow for analysis of acceptance or rejection rates.

Referral Status				
Referral Status	Referral link to Problems/Needs Identified	Supporting Test/Assessments	Additional Information	Participating Staff/Notes
<b>Status of the Referral</b>				
Status	Effective Date-Time		Reason for Status	
Pending	01/01/2009	Time 01:46pm	Pending: Assessing Needs	
Accepted	01/05/2009	Time 02:00pm	Enrolled	

Referral Status Tracking

## Referral Source

- Maintains referral source listings, complete with the ability to record unlimited contact names per referral source.
- Links referral source to individual agency programs.
- Flags referral sources as internal or external.

## Supporting Documentation

- Records and tracks key client variables at the point of initial contact such as diagnoses, presenting problems, strengths, treatment history, benefit assignment, employment and school information.
- Captures important demographic information at the beginning of each process.
- Records family members and collateral contacts for referred clients.
- Applies authorizations and benefits, including co-pays, upon referral.
- Tracks current and historical medical history.
- Classifies referral priorities (i.e. urgent, emergency or routine).