

General Questions:

Sending Referrals

1. What currently happens when your agency sends a referral? (i.e. Who sends it? How? Is there a formal approval process?)

Receiving Referrals

1. How does your agency receive referrals? (i.e. Is there one person responsible for receiving all referrals? Does each program have a designated individual to receive referrals?)

What kind of challenges, if any, has the current process resulted in?

Specific Questions:

1. How many programs would you like to be able to receive referrals for?
2. Are there any programs that users will only send referrals for?
3. Do any of your programs require a specific form?
 - a. Is the form completed before adding a client to a program (used to determine eligibility)?
 - b. Is this form completed after adding a client to a program (to gain additional information)?
 - c. If yes to any of the above questions request a copy
4. Does your organization serve any special populations, if so, whom?
 - a. Are there any existing precautions your organization takes for these users separate from the general workflow described above?
 - b. Are these clients typically in a particular program?
5. Are there any restrictions to client information for individuals within your organization/agency?
6. Does your agency have multiple locations?
 - a. Are the same programs offered at all locations?
 - b. Do all staff members work at each location?