Worksheet: Defining your Referral Process

This worksheet will help you start to plan how MOTECH Suite-enabled referrals will work in your system. You will eventually produce a complete specification in an Excel file such as this example for maternal and child health (TBD). You can skip this worksheet but answering the questions below may be an easier way to start. It may be helpful to watch our demo video (TBD). And looking at your program’s paper forms or training materials may help as well.

* 1. Who refers patients to other facilities?

*Example: Community Health Nurses*

* 1. What technology does this person have?

*Example: Paper-based forms, CommCare handset, mobile phone, and/or computer*

* 1. What does the referrer give the patient when making the referral?

*Example: Referral form, directions*

1. Who are the patients referred to?

*Example: Regional Clinic Nurse, Lab Facility Worker, etc.*

1. What technology does that person have?

*Example: Paper-based forms, CommCare handset, mobile phone, and/or computer*

1. What does this person give the patient when the referral is completed?

*Example: Counter-referral form*

1. How are patients identified in your system?

*Example: Unique ID, name, etc.*

1. How are referrals marked as complete in your system?

*Example: CHN confirms that the patient completed the referral, referred provider confirms that the patient completed the referral, etc.*

1. Who should receive messages reminding them of the referral? Please add one row to the table below for each recipient. The table below contains a few *example data points.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Message Recipient** | **Message Type (CommCare, IVR, SMS, email, other)** | **Frequency & Rules** | **Content** |
| *Referring CHN* | *CommCare* | *Every day until referral is completed* | *Reminder to follow up with patient* |
| *Referred provider* | *SMS* | *Once when referral is made* | *Notification that patient will be coming to clinic* |
| *Patient* | *IVR* | *Every 2 days until referral is made* | *Reminder to go to clinic* |
| *…* |  |  |  |

**Note that the above information will not completely describe your application. The goal is just to initially specify some key elements of the referral process.**