

# Stakeholder Questions

for 12/11/09 meeting

## 1. Referral Process

- a. Before searching for duplicate child records in the effort to enter a new referral, should the SPOE have verified that they have the required information for a referral including Source Type and Source Name (see BR-003)? BR-003: A referral must contain the following demographic and referral information, at a minimum: First name, last name, DOB, FIPS Code, Gender, Referral Date, Source Type, and Source Name.
- b. Should we require information on the referral beyond what is listed above? How would this benefit your local system?
- c. Should the search provide the options to match the last name by the entire criteria, by “starts with”, and by “like”? Currently the system only searches by exact text.
  - i. Starts with “A” will return any child whose last name begins with the letter “A”.
  - ii. Like “ohns” will return any child whose last name contains the characters “ohns”. For example, “Johns”, “Johnson”, and “Johnston”.
  - iii. Exactly “Johnson” will only return those children whose last name is “Johnson” and no other values.
- d. Currently, DOB and Gender are locked on the Child Referral screen. What are the disadvantages of continuing to lock the DOB and Gender to the local user and allow them to be opened by a supervisor?

## 2. Activity Log

- a. Do scheduled calls, appointments, etc. need to appear on a calendar or will a queue be sufficient?
- b. Should we create a “dashboard” where queues would be displayed for things like scheduled calls, appointments, upcoming deadlines, etc.? This could also display graphs and/or statuses.

## 3. Intake Process

- a. How do you want to capture information about legal rights/status of a contact? It’s enveloped in the relationship field now.
- b. We would like to standardize the intake process. Please provide your intake forms/data elements.
- c. Should Medical Home be called Primary Care Physician instead?
- d. Should we collect other medical information such as allergies, medicines, etc.?