

Title: Context Matters: Findings from a Qualitative Analysis of Social Care Referral Case Resolution Notes

Abstract

Background: In one statewide social care network leveraging referral platform technology, nearly one in five cases were closed as either resolved or unresolved with the outcomes status of “other.” This limits visibility into how an individual’s health related social need (HRSN) was or was not met.

Objective: (1) To conduct qualitative analysis of open text notes in order to increase contextual understanding of cases closed with outcome status “other” and (2) To develop and apply an updated outcome taxonomy to these cases for a more accurate understanding of client outcomes.

Methods: Analysis included historical statewide cases closed with the “other” status and an accompanying note from January 2019 - March 2024. A codebook was generated with a set of parent/child codes for each case resolution status (resolved and unresolved). Two analysts independently coded a randomized sample using NVivo software and inter-rater reliability (IRR) was calculated using Cohen’s kappa coefficient (0.82). Three analysts then coded the remaining dataset, assigning updated outcome statuses to all “other” cases.

Results: Of the 12,747 cases analyzed, 81% were coded as “resolved” (e.g. the individual was connected to a resource), while 19% were coded as “unresolved”. Of the unresolved cases, 12% were due to a community or network service gap (e.g “no resource available”, “program at capacity”), 32% were due to client-related reasons (e.g. “additional client documentation needed”, “client did not take action”), and the remaining 56% were undetermined (e.g. “lost to follow-up”, “waitlisted”).

Conclusion: Results suggest opportunity to further standardize closed loop referral resolution status outcomes. Input from service providers and clients is likely needed to ensure applicability and consensus across organizations and service types.