



Digital Front Door - Patient Engagement Portal

G-Cloud 15

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Digital services for
health and social care



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1 About RIVIAM Digital Care

RIVIAM provides a secure care co-ordination platform and services connecting health and social care – so people receive the right care, at the right time, using the right information.

Our platform seamlessly integrates with existing patient and care record systems so information can flow, and health and care organisations can work together around a single record.

In 2025, RIVIAM managed:

1. 2.2 million eConsents for our immunisations customers
2. 2.3 million auto lookups of patient's NHS numbers
3. 50K referrals for NHS Community and Local Authority customers.

For more information, please visit www.riviam.com

1.1 RIVIAM's suite of services

We deliver a suite of services including:

1. Referral Management service
2. Multi-agency Referral Hub service
3. Multi-disciplinary Team (MDT) service
4. Referrer's Hub
5. Immunisations eConsent service
6. Hospital to Home service
7. Digital Front Door – Patient Engagement Portal
8. Digital Front Door – Citizen Engagement Portal
9. Neurodiversity Referral Management service
10. EPR Interfacing Adaptor
11. Service Directory

1.2 NHS integration

A commitment to interoperability is central to our capabilities and vision to enable co-ordinated care. We invest in NHS integrations and provide our own APIs to strengthen connectivity.

RIVIAM interfaces with NHS services (MESH, Personal Demographics Service) and clinical systems (TPP SystemOne™, EMIS Web, Access Rio and EPRs such as Cerner Millennium™).

We are currently undergoing NHS APP integration for our Patient Engagement Portal (the portal is integrated with the NHS APP via the NHS Wayfinder interface), developing eReferral API, CIS2 and BaRS integrations. In 2025 we introduced our Sadie AI services including a Clutter Classifier app.

In line with NHS requirements, all sensitive data in RIVIAM is encrypted. We provide reporting and data analysis for operational and public health needs.

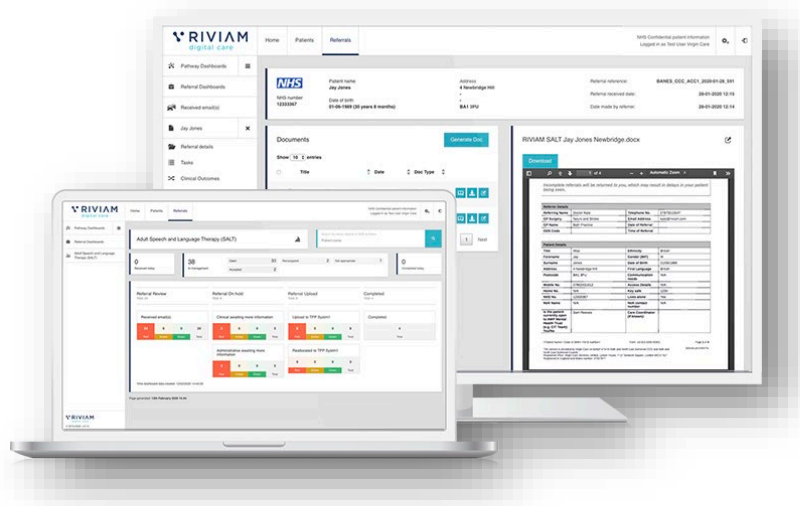


Figure 1 RIVIAM's Referral Management service.

1.3 Health and social care experience

Today, we partner with over 20+ NHS Trusts, Local Authorities and independent organisations delivering NHS and care services across England.

Our team has many years of experience helping NHS and independent providers deliver services to improve healthcare outcomes.

2 Digital Front Door – Patient Engagement Portal

2.1 Overview

Healthcare providers can reduce waitlists and Did Not Attends, boost patient satisfaction by empowering patients to book, amend, cancel appointments with RIVIAM's Patient Engagement Portal.

The service includes:

1. Web or downloadable app (available on iOS or Android). Mobile first, the portal is designed for optimum accessibility and sustainability.
2. Secure login (with optional NHS Login or NHS APP). People who have a care record on RIVIAM are sent a notification via email or SMS to visit the portal and, if registered, they can securely login to interact with care teams. There are multiple ways they can login. Registered people can login with their email and password, with a second factor authentication. They can also use NHS Login or NHS APP (if this functionality is enabled) or Google, Microsoft and Apple accounts for quick login.
3. Appointment booking and clinic management. In real time, people can effortlessly book, amend or cancel appointments. The service enables people who have multiple referrals to book adjacent appointments, and the ability to support more complex use cases.
To make it as easy as possible, there is no need to register to book.
4. Document management. A person can see and download documents shared with them by care providers, such as outcome letters or advice sheets. This can include video and audio files.
5. A content management service that enables our customers to configure their own waiting well information, resources and links. for patients
6. Dashboard and ability for patients to view messages and quickly see their appointment bookings.

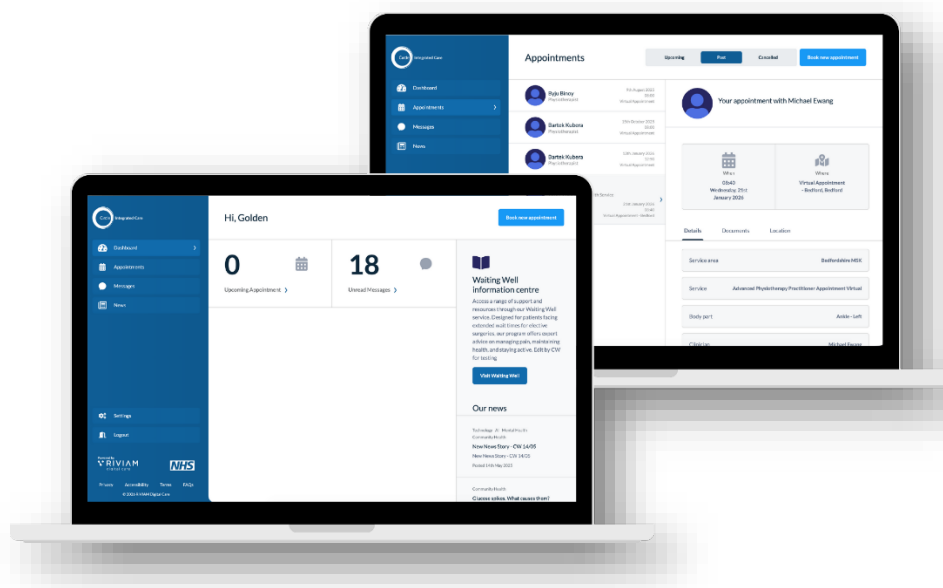


Figure 2 RIVIAM's Patient Engagement Portal.

2.2 Functionality

Key functionality included in this service is:

1. Web app or downloadable app, accessibility and sustainability enabled
2. Multiple login/register options including NHS Login and NHS App
3. Customisable with content management system for sharing waiting well resources
4. Dashboard for patient to quickly see appointment status, read messages
5. Providers can share documents, forms and outcome letters
6. Patients can book, amend, cancel own appointments, receive notifications/messages
7. Questionnaires to capture patient outcomes, enable patient assessment feedback (Optional)
8. Waitlist management to manage waiting lists, book patient appointments (Optional)
9. Interfaces with TPP SystemOne™/compatible EPRs, real-time appointment booking/diary sync (Optional)
10. Friends and family login and access, questionnaires, real-time messaging (Optional).

2.3 Benefits

The benefits are significant. The service offers:

1. Supports delivery of complex community healthcare services
2. Reduces Did Not Attends by empowering patients to manage appointments
3. Increases healthcare provider's clinic and appointment slot and clinic utilisation
4. Boosts patient satisfaction giving them access to their care delivery
5. Enables patients to see waiting well resources, documents, links
6. Reduces costs for provider via digital outcome correspondence and documents
7. Easier for providers and patients to share questionnaires and documents
8. Reduces clinical time filtering questionnaires for review, none are mislaid
9. Waitlist management increases provider productivity by reducing appointment administration
10. Interfacing service streamlines operations through real-time clinical system/EPR integration.

2.4 Optional services

The following services can be procured with this service, they include:

2.4.1 Waitlist management

Waitlist management is an option for RIVIAM's Patient Engagement Portal.

The service is designed to help our customers efficiently track, manage and act on patient waitlists, improving service delivery and patient satisfaction.

It offers a clear and organised view / dashboards of patient waitlists by appointment status, service area, priority (Routine or Urgency), pathway and appointment type (slot type, for example, initial or follow-up appointment).

Additionally, waitlist management enables RIVIAM users to book and cancel appointments on behalf of patients as well as release appointments so patients can use the portal to book appointments themselves.

The benefits of RIVIAM's waitlist management are as follows:

- Optimised waitlist management: RIVIAM effectively handles waitlists, including last-minute cancellations, minimising delays and improving service delivery
- Enhanced patient satisfaction: The application allows staff to manage appointments for patients who cannot use the Patient Engagement Portal, improving the overall patient experience
- Improved decision-making: With access to comprehensive patient and referral information, you can make informed decisions.

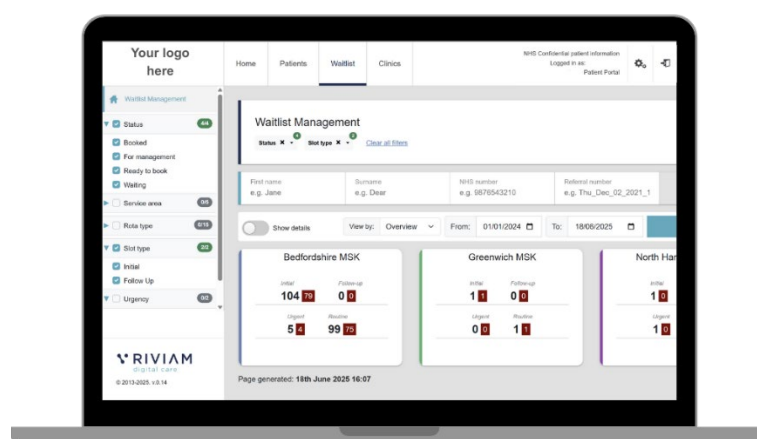


Figure 3 RIVIAM's Waitlist Management.

2.4.2 EPR Interfacing Adaptor

RIVIAM's EPR interfacing adaptor connects RIVIAM's services with third party health and social care systems.

RIVIAM works with TPP SystmOne, EMIS, The Access Group Rio and other compatible EPRs.

The service provides the ability to search for patients, access records, upload and download documents. Levels of service vary across interfaces. It includes interfacing with HL7 FHIR and ADT interfaces. For more information about RIVIAM's commitment to interfacing and our services, please visit <https://www.riviam.com/nhs-integration>

For customers of the Patient Engagement Portal or Citizen Engagement Portal, RIVIAM's real time integrations enable one virtual appointment diary bringing together data. This creates efficiencies, saves costs and people using the portal can book multiple appointments for the same care service in one instance.

For customers of the Hospital to Home service, RIVIAM's integration with a hospital's EPR (for example Cerner's Millennium) provides RIVIAM users with the patient's latest ward and Estimated Discharge Date, aiding decision-making for timely service delivery and supporting improved patient discharge.

2.4.3 Friends and family login

RIVIAM can enable a service to allow friends, family and authorised contacts to access and login with their existing credentials, view and manage care on behalf of the patient.

2.4.4 Questionnaires

RIVIAM's patient and stakeholder questionnaires provide an accessible, interactive and engaging experience which encourages questionnaire completion.

Questionnaires make it easy for providers using RIVIAM to obtain assessment feedback. This can be key for gaining additional information for the delivery of certain services and pathways.

Questionnaires can be made available via RIVIAM's Digital Front Door services – the Patient Engagement Portal, Citizen Engagement Portal or Referrer's Hub – or they can be made available as a secure web service.

Users completing a questionnaire are sent a link/notification via email/SMS message. Reminders can be configured to prompt recipients who haven't responded on a predetermined basis.

The returned questionnaire data is securely stored in RIVIAM against the patient record. The returned questionnaire can be accessed securely by RIVIAM users either by viewing the patient and referral record or using a dashboard to see aggregated data.

Questionnaires can be automatically triggered when the referral is progressed to a particular step in the RIVIAM workflow pathway or based on an agreed timeframe, specific event or task.

Questionnaires provide a flexible tool to ask patients and different stakeholders questions and receive their responses.

RIVIAM also provides the option to present the questionnaire using the Government Digital Service (GDS) style to provide consistency with UK Government websites.

2.4.5 Real-time messaging

Real-time messaging enabled on RIVIAM enables synchronous communication between referrers and providers using RIVIAM's services.

This means referrers (patients, stakeholders or professionals) using RIVIAM's Digital Front Door services – the Patient Engagement Portal, Citizen Engagement Portal or Referrer's Hub – can more easily engage and share messages and information in real-time with organisations using RIVIAM to manage services and pathways.

The benefits of this are improved satisfaction for referrers as it's easier and quicker for them to share inputs, and more efficient care co-ordination for organisations delivering care.

When a person sends in a message RIVIAM automatically creates a task and assigns it to a workflow. This means that a message is never lost or not actioned, as every message is managed, reducing clinical risk of a missed communication.

It speeds up care delivery and helps reduce backlogs.

2.4.6 Video service

RIVIAM's end-to-end encrypted video service provides high quality video and audio for use within RIVIAM applications. It enables secure video and audio calls between clinicians or administrators using RIVIAM and patients or citizens.

The service can be added to RIVIAM's Digital Front Door services – the Patient Engagement Portal, Citizen Engagement Portal or Referrer's Hub – as well as our

Referral Management, Multi-agency Referral Hub and Multi-disciplinary Team services.

Ad hoc or scheduled conversations can be set up, and it's easy and secure for patients and citizens to launch a consultation for an appointment or to provide assessment feedback for example.

3 Onboarding

Customer success is central to RIVIAM and with each customer our goal is to think about what's key to achieving the customer's desired outcomes.

RIVIAM's default project management approach is to follow Agile development methodologies supported by clear project management control of risks and issues. We implement an Agile delivery approach with the following stages:

1. Discovery
2. Solution Model
3. Planning and Delivery
4. Testing and Go-Live

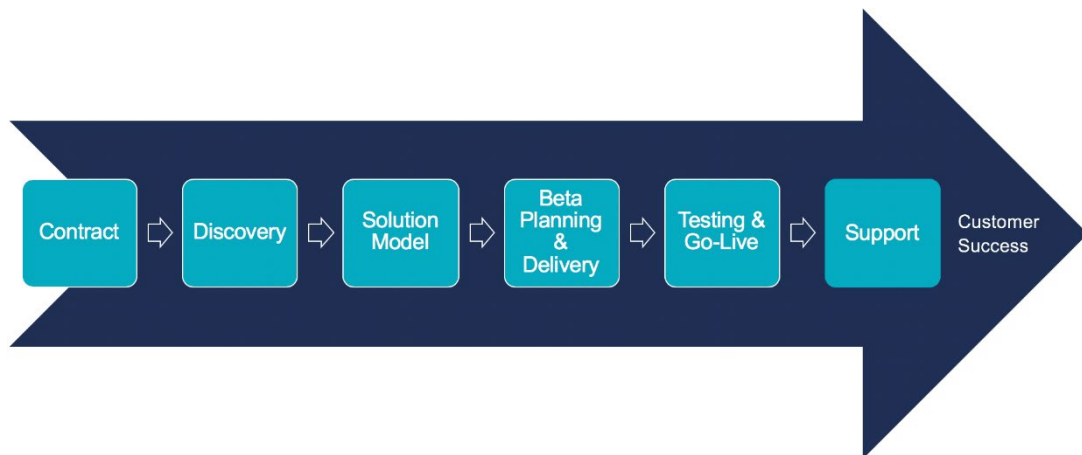


Figure 4 RIVIAM's delivery approach

3.1 Discovery

Our discovery phase will typically last 1 to 2 weeks. During this time, we will:

- Explore the customer's challenges and user needs.
- Agree the desired outcomes for RIVIAM via structured engagement with key stakeholders in workshops and meetings. RIVIAM uses a service design model to view digital transformation through the lenses of different beneficiaries: citizens and referrers; operational teams; and clinical services.
- Identify any technical or architectural challenges to reduce delivery risks.

- Demo the service to ensure key stakeholders understand the functionality and benefits.

3.2 Solution model

The Solution Model typically takes between 2 and 3 months but can be faster depending on the level of definition the customer has already achieved. At the end of the discovery phase, we produce a detailed Solution Model. The objective of the Solution Model is to:

- State the outcomes for the solution and outline how RIVIAM will achieve these.
- Provide a detailed overview of the RIVIAM solution and any interfacing and infrastructure requirements.
- Gain agreement as to what's required both from a design and technical point of view.
- Agree a high-level roll-out and delivery plan.
- Confirm governance.
- Confirm dependencies, assumptions, risks and issues.
- Identify any gaps in functionality or changes required to meet your needs.

3.3 Planning and delivery

We will create a series of development and configuration cycles for the Beta Planning and Delivery phase. At the end of each cycle, we review the solution and can flex the plan. We have found this to be a very effective way of working with customers.

Customers are initially deployed into a test environment and then, on successful acceptance, the software is deployed to a production environment. Based on a customer's production requirements, we will perform an impact analysis on our infrastructure to ensure our customer's needs are delivered.

3.3.1 Data Privacy Impact Assessments

We support our customers (the data controllers) with their Data Privacy Impact Assessments (DPIAs). We will also agree how we will respond to Freedom of Information and Subject Access Requests.

3.3.2 Reporting

RIVIAM delivers dashboards that provide detailed information about the number and flow of referrals and outcomes.

Self-service pre-defined reporting is provided for customers. We can also agree with the customer to provide bespoke reporting. We will agree a customer's requirements during the discovery phase.

Optionally, a data extract to a SQL database is possible via a customisation project. This allows the customer to build customised reporting around RIVIAM's dataset in a decrypted form.

3.3.3 Testing and go-live

Prior to the services going live, we conduct rigorous testing before a customer's own acceptance testing. Customers are expected to acceptance test the service before go-live. RIVIAM can optionally provide the customer with a test environment.

3.3.4 Accessibility

RIVIAM's services are designed to WCAG2.1 AA standards. We are committed to ensuring inclusivity and that as many people as possible can use our services easily and independently.

3.3.5 Clinical safety

As part of Discovery and at key milestones, we undergo a Clinical Risk Safety Review updating RIVIAM's Hazard Log and providing a DCB0129 Clinical Safety Case Report. This log and report are then released to our customer.

3.3.6 Training

A 'train-the-trainer' approach is used for all our product training. RIVIAM provides an extensive library of training material and videos available online at <https://support.riviam.com>.

RIVIAM can also support you with bespoke training if required, for example running online or face to face group training sessions.

4 Minimum requirements

4.1 Summary

RIVIAM is offered as a fully hosted Software-as-a-Service solution which means users just need a modern browser which is HTML 5 compliant and access to the internet or the health and social care network (HSCN).

RIVIAM is based upon a service-orientated architecture which means that we can update our services at different times, ensuring we can maintain 99.5% service availability to our customers.

4.2 Minimum requirements for service

Customers need to be aware that RIVIAM's network endpoints are whitelisted to avoid issues with customer's intrusion detection systems.

Adequate network bandwidth is required when users are working at home using ADSL connectivity, especially when connecting with a VPN solution.

5 Software support

5.1 Support

Every customer has a dedicated Account Manager as well as access to our support desk.

RIVIAM's Support Desk is managed by an experienced team who are quick to solve any issues and provide advice based on years of experience working with different customers.

Support is provided 9.00am to 5.30pm, Monday to Friday. Weekend and out of hours support is available and can be agreed with RIVIAM.

Support emails should be sent to support@riviam.com.

5.1.1 Help Centre

Customers can also use RIVIAM's Help Centre. User guides for services are available here along with useful 'how to' guides and videos with helper tips. The guides provide step by step advice on how best to navigate and use the system. RIVIAM's support team also issue regular user newsletters and online drop-in sessions.

5.1.2 Response times

On receipt of support requests, the request will be classified as follows.

#	Severity	Impact	Description	Action	Response time
1	Critical	A significant impact on the operations of the customer's business caused by failure of RIVIAM's service.	100% of RIVIAM Cloud has stopped working and is non-responsive.	RIVIAM will prioritise resolution and will respond to the Customer with a summary of what has happened and an outline plan of recovery.	2 hours
2	Major	Operations of the customer's business are impeded caused by a failure of a component of RIVIAM's service.	Components of RIVIAM Cloud have stopped or are intermittently working.	RIVIAM will manage the issue as soon as possible and will respond to the Customer with a summary of what has happened and an	4 hours

				outline plan of recovery.	
3	Minor	Issues that have a minimal impact on the operations of the customer's business but which the customer thinks could improve the delivery of benefits.	There are one or more issues with the functionality of RIVIAM Cloud that the Customer/Access Centre staff believe should be improved.	We will discuss the issue with you and your request will be included with a list of enhancements and prioritised by RIVIAM.	

The Support team log all requests and the case is kept open until the issues is resolved. All information is kept for future reference.

5.2 Service levels

RIVIAM's services are available 24 hours a day, 7 days a week, with 99.95% uptime (excluding maintenance updates).

RIVIAM's services are hosted on Amazon Web Services (AWS) cloud services in the London Region making use of their three Availability Zones within this region. AWS is a global cloud leader and is ISO27001, ISO27017 and ISO27018 accredited.

5.3 Customer upgrades

RIVIAM is continuously working on a development programme and customers will receive releases of RIVIAM services at no extra cost during the term of the agreement. These will include new functionality bringing additional benefits.

6 Security

Our secure platform and services are run from secure, resilient AWS data centres in England using AWS best practice 'Well Architected Framework'¹. All information on RIVIAM is always encrypted using the AES256 algorithm. RIVIAM is also connected to the HSCN to provide further security for customers.

RIVIAM deploys an array of security tools to protect sensitive data including web application firewalls and host intrusion detection systems for active monitoring. On a regular basis, RIVIAM performs vulnerability scans for its internet-facing applications.

¹ For more information on the AWS Well Architected Framework, see <https://aws.amazon.com/architecture/well-architected/?wa-lens-whitepapers.sort-by=item.additionalFields.sortDate&wa-lens-whitepapers.sort-order=desc>

7 Business Continuity and data backup

RIVIAM operates on a highly available secure platform hosted by AWS.

Our platform consists of multiple services providing different aspects of the platform and services. This means that services can be flexed and given more resources when required.

All database services are operated on clustered technology means that the data is written to more than one database instance in real-time.

Each instance is backed up daily and we have rigorous data back up plans in place. Please contact RIVIAM if you require more information on this.

8 Pricing and ordering

RIVIAM operates a flexible Software-as-a-Service licensing model which means customers do not pay for any support and maintenance, hosting or training.

With this model, customers also benefit from the ongoing updates of RIVIAM and our ongoing programme of innovation with NHS systems.

8.1 Pricing

Please download RIVIAM's pricing schedule.

8.2 Invoicing

On commencement of the contract, 80% of the setup costs are due with the remaining 10% on delivery of acceptance testing and the final 10% on go-live.

The annual costs of running the service are invoiced monthly in advance. The monthly charges will commence when the live environment is set up and ready for acceptance testing.

Payment terms of 14 days are requested, and pricing is exclusive of VAT.

For changes or bespoke work, RIVIAM charges a day rate of £750 +VAT for development and £750 for consulting and strategic engagement.

8.3 Termination

RIVIAM requires three months notice to terminate a contract.

Retention or destruction of the customer's data on expiry of the contract will be agreed with the customer. There is a fee for this as outlined in our pricing document.

9 Definitions

The following definitions are used to drive RIVIAM's pricing and provide the criteria used in the pricing for G-Cloud 15.

Term	Definition
RIVIAM Instance	A RIVIAM instance describes the services required to deliver the SaaS service for the customer. It relates to a single database that is hosted on RIVIAM's infrastructure. Typically, a customer may require different RIVIAM's instances to match their contract obligation as a data controller.
Care Record	Refers to the core capability of having a record about a person. This record is searchable and can be added to a linked to other data indexes, such as the NHS number.
Referral Management	The ability to manage referrals about a person who is managed within the RIVIAM Care Record.
Case Management	The ability to manage multiple referrals about a person and manage them through RIVIAM's dashboards.
Core Solution	Is a RIVIAM instance, with the care record, referral management and case management services. It includes a single RIVIAM pathway and RIVIAM referral form. It includes the ability to have any number of users created with the application.
Pathway Dashboard	A list of pathways shown as matrix with the Red Amber Green (RAG) summary counts.
Pathway	A pathway is the way RIVIAM organises its workflow. It can represent a team (North West Team), a service (like

	Frailty, or ADHD). It's a logical container where referrals are routed to and managed within. A pathway can have one or more steps defined, up to a maximum of 25. A pathway can have Red Amber Green (RAG) time based on the number of minutes a referral has been in the pathway. A pathway can be assigned to one or more multi-agency organisations. When a new pathway is set up, RIVIAM provides a single requirements workshop, during which we will agree the required pathway design and implementation requirements including the routing rules.
Step	A container of referrals within a pathway that helps a customer manage workflow through the pathway. A step can have Red Amber Green (RAG) time based on the number of minutes a referral has been in a step.
Referral Form	A referral form is used to collect information from a public or private website from a patient / citizen, member of the public or a health and social care professional. A referral form has a maximum of 100 fields. If more fields are required, a second form will be required.
Routing Rule	A routing rule inspects the data provided in a referral form and makes a logic decision on which pathway and step the referral should be placed in.
Internet Access	By default, RIVIAM provides access to its RIVIAM Web application over the internet. Customers may prefer to upgrade to access over the NHS HSCN network or Public Sector networks.

	It's also possible to provide access via a dedicated VPN IP address.
VPN Access	Where a customer has a VPN service that offers one or more static IP address, RIVIAM can whitelist these IP addresses to limit access to the RIVIAM Web application over the internet.
RIVIAM Web	Is the management portal for RIVIAM that allows users to access RIVIAM services. It is a container for all services and is part of the core offering.
Multi-agency Organisation	When customers take the Multi-agency Referral Hub service, RIVIAM allows an organisation to be defined. This is often used to model partner organisations or sub-contractors that are part of service delivery but which the customer wants to control the access they have to pathways and referrals. An organisation can be assigned to one or more pathways.
Service Directory	The service directory is designed for health and social care professionals and members of the public to search for health and social care services. A simple management interface allows customers to add services, provide a service description, eligibility criteria, location information. The service directory can then be used on a public website or with RIVIAM's applications.
Test Instance	An instance of RIVIAM with the customer's configuration that is used to support testing of a new service or updates to an existing service. This can be purchased on a monthly basis.

Updates to referral forms and pathways	If a referral form or pathway needs to be updated, then RIVIAM will assess the extent of complexity and time required and fit it into a small, medium or large change.
Patient Engagement Portal	A public website that allows a patient for health services to gain secure access to their information and services managed by RIVIAM.
Referrer's Hub	Service that enables referrers to securely login to make and see referrals, track referral status, share messages with healthcare providers, complete online questionnaires.
NHS Login	The NHS Login service for patients that confirms the identity and NHS number of the patient for RIVIAM's services to use.
Appointment Management	RIVIAM's appointment management module allows a service to create a diary and manage clinics allowing patients to book into the service via the Patient Portal, or RIVIAM Web users to book appointments for patients on their behalf.
Integration to Appointment Management Customer service	Working with the customer, RIVIAM agrees and integrates an adaptor to the customer's booking / appointment system. Assumed to be 5 day's work and the customer has a way for delivering real-time appointment booking via their own system APIs.
Waitlist Management	A waitlist is the ability to manage patients waiting for appointments. Users can move patients onto waitlists and book appointments.

2-way messaging	The ability for a stakeholder using RIVIAM's services to message into a service and receive a response. Received messages are converted into actions for a RIVIAM Web user to respond to. A message is always about a person and can be linked to a referral, pathway or step.
Task Management	The task management module allows users to create tasks that are based on a defined template. These tasks are always associated with a person receiving care, and can be linked to a pathway, step or list. A customer and/or multi-agency organisation can see all the tasks that their organisation is managing. It is also possible to see all the tasks for a pathway, step or referral. This module provides a powerful way to manage cross-organisational tasking.
List Management	The ability to create a list of patients and/or referrals. Lists can be created to manage work or track caseloads. They provide a flexible tool for services with full audit and traceability.
Multi Disciplinary Team (MDT)	The MDT service allows RIVIAM users to manage MDT diaries, allocate patients to a MDT and track actions over time.
Risk Management	Risk management allows risks to be managed across pathways, lists and tasks. It provides a single view of risks being managed across a RIVIAM instance for a customer. It includes the basic risk model of a risk being assessed against probability and likelihood with a combined score.

	Tasks are used to track the mitigations of a risk. Tasks created are then managed as part of the task management module.
NHS APP Wayfinder integration	RIVIAM's Patient Engagement Portal is integrated with the NHS APP via the Wayfinder interface. This service allows patients to access RIVIAM hosted services via the NHS APP.
Secure Video Call	End-to-end hosted encrypted video service that provides high quality video service within the RIVIAM applications, for example to support appointments and MDTs.
NHS eReferrals – Referral Management	RIVIAM's integration with the NHS eReferral API service allows customers to manage referrals and advice and guidance within RIVIAM. RIVIAM automatically checks for new referrals in the waitlist, downloads the referral and associated documents, placing the referral in a pathway ready for review.
NHS eReferrals – Advice and Guidance	Integrates with the NHS eReferral Advice and Guidance service. Allows a user to respond to an advice requests and manage the workflow. Provides access to the conversation flow and allows a clinician to pick from recommended responses.
Sadie AI – Document Summary and Analysis	Using RIVIAM's AI Large Language Model integration. Securely loads a patient's records into Sadie. Allows a customer to ask questions about the patient / referral.

	Allows pre-building summary templates to summarise documents. This service is subject to class 1 MHRA regulatory approval.
Questionnaires	Questionnaire module provides the ability for a customer to create a questionnaire that can be configured to be sent to a patient or stakeholder when a referral is placed in a step. The questionnaire reminder service sends the patient or stakeholder a reminder notification message if the questionnaire hasn't been responded to. Questionnaire management service allows RIVIAM Web users to manage incoming responses. These can also be managed via the referral navigator.
Questionnaire setup	The questionnaire setup is the configuration of a new questionnaire and its routing within RIVIAM. A questionnaire follows the same rules as a RIVIAM referral form.
24/7 Email Processing service	Automatically connects to a Microsoft SMTP email account and checks for email every 10 seconds. Processes the email and creates a new referral. Referral documents based on RIVIAM known format can be used to automatically place in a referral step within a pathway.