

How to accept a referral in a **Pending Acceptance** status.

1. Navigate to **Referral Management** from the top banner bar.

| Task Edit View Patient Chart Links Notifications Navigation Help (] Home @Multi-Ameri Task Lin ::Message Centre & Patient List 35 Sulf Ausg () Mugt : discussion Demmo 0 () Oncek Bindge @ HOS ESPAN @ Cinical Convect @ Cinical Education @ Service @Sospend @ Esp Calculator @AcHoc IIII Medication Administration, Spor Home | meet 🖟 Dynamic Worklist 🖉 MySperience 🖺 Group Note 📓 Referal Management 📓 Order Tracking Worklist 📓 «Casch 🖤 Cardiovascular) Deak Help] mee Collection 🎍 PM Conversation - 🔩 Communicate + 🔄 Marcel Request + Add + 📽 Charge Viewer 🛞 Discern Reporting Portal 🛞 Conversation Luncher 🖱 Scheduling Appointment Book 🖾 (Aware 🐙 Point Of Care Result Entry met Collection 🎍 PM Conversation - 🍕 Communicate + 🔄 Marcel Request + Add + 🏶 Charge Viewer 🛞 Discern Reporting Portal 🛞 Conversation Luncher 🖱 Scheduling Appointment Book 💆 (Aware 🐙 Point Of Care Result Entry Marcel - Point - Optimiser - Point - Optimiser - Point - Optimiser | ago |
|--|--|-----|
| Index Pools Pools Doplay Last Libys Index Items (1) Reuts Reuts Fri | M M | · |
| Decements Message (1/2) General Messages (1/2) Work Items (0) Sared Documents Paper Based Documents Reminders (0/1) Notifications Sect Tems Tabh | 6 | |
| Netify Receipts | No Patients Found | |
| | | |

2. Select the correct referral with a **Pending Acceptance** status. Ensure the **Worklist** is correct.

| Task Edit View Datient Chart Links Matilication | as Maximation Male | | | | | | | | | |
|--|-------------------------|----------------------|--------------------------|------------------------|---|--|-----------------------|---------------------------------|---------------------|-----------------------|
| A Home A Multi-Patient Task List Message Centre | Patient List Staff Ass | ionment 👫 Dynamic Wi | orklist 🖪 Myfanerience 🎫 | Group Note S Referral | Management 📧 Order Trac | iina Worklist 📰 eCoach 🤎 Cardinvascular | | | | |
| Mare 1 aBaBarr 0 Remine 0 | | dannen II olumne u | and a mycholence a | orospitote santona | management me | and the second the construction a | | | | |
| Oracle Bridge C HDS ESPAN C Linical Connect C CE | inical Education 🔊 Serv | ice Desk Helo | | | | | | | | |
| Suspend + Dit Calculator MAdHoc III Medicatio | n Administration | ecimen Collection | Conversation + 🖓 Comm | unicate 👻 🗟 Medical Re | cord Request 💠 Add 💌 🚳 | Charge Viewer C Discern Reporting Portal | Launcher @ Schedulin: | Appointment Book 🖂 | Aware Point Of Care | Result Entry |
| The subless of the Internet Street of the sector | | | | | tern radaen 1 Mas . | ende unter Concernational constants | cannote (g soldating | | Recent | Nama Q - |
| Referral Management | | | | | | | | | 5C Full screen | Print 🧿 O minutes ago |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Referral Management × + | | | | | | | | | | / =- |
| Worklst Thrombosis Clinics SCS (Receiving) | List Maintenance | 2 | | | | | | | Add Inbound | Referral 😑 Filter |
| Patient | Requested Sta | Last Updated | Status | Priority | Referred By | Referred To | Assigned To | Requested Ser ^ | Indicators | Service By Date |
| ZZREHAB, WQMREFERRAL 64 yrs M | | 28/09/2024 14:32 | Pending Acceptance | Urgent (within 24 | 20/08/2024 00:00 | Thrombosis Clinic SCS | Thiyagarajah, Kart | Ambulatory Testing demo for | D | |
| TESTTHROMBO, JEN 40 yrs F | | 28/09/2024 14:28 | Pending Acceptance | Standard | 28/09/2024 00:00 | Thrombosis Clinic SCS | NHS Test01, Nurs | Ambulatory Blood Clots | | |
| SYSTEMTEST, HIMTEN ZZZ 33 yrs M | 28/09/2024 | 28/09/2024 15:09 | Accepted | Urgent (within 72 | NHS Test01, Physician 28/09/2024 15:01 | Thrombosis Clinic SCS | NHS Test01, Clerk | Vascular Surgery blood clots | 5 | 02/10/2024 |
| TEST, LEZLIE 54 yrs F | 28/09/2024 | 28/09/2024 14:50 | Accepted | Standard | NHS Test01, Physician 28/09/2024 14:45 | Thrombosis Clinic SCS | | Vascular Surgery clots | D | |

niagarahealth

| Page 1 of 1 | First Freedows Next > Last |
|-------------|----------------------------|
| | |
| | |
| | |
| | |
| | The Hotel Dieu |
| | |

aver

1



TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

3. Select Accept to accept the internal referral.

| Patient, Test 5 yrs Female DOB: OCT 26, 2013 MRN: 10000655 FIN: 20000670 | | |
|---|---------------------------|-----------|
| Please Accept or Reject the referral. | Accept | Reject |
| Status: Pending Edit Substatus: Pending Review Edit Clear | ned Assign to Case Nur | me Assign |

In PowerChart (PowerChart.exe), the system prompts you to create an encounter or select an existing one.

4. To create a new encounter, select the **Create** option in the Encounter Information dialog box. For the encounter type select **PreReg**, then select a **Location**, and press **Submit**.

| | | | | | | | | | | | × |
|---------------------------------|----------------------|--------------------------------|--|------------|-------------------------------------|-------------------------------------|---------------------------|-----------------------|-----------------|--------|-------------------------------|
| ZZTEST, O 34 yrs Fema | REO le DOB: 26 AF | PR 1990 | | | | | | | | м | RN: 11001448 |
| Please Accept or | Reject the refer | ral. | | | | | | | | Accept | Reject |
| Status: Pendir Substatus: Ed | ng Accepta | NCE Edit | | | | • Create O | Encou Select Encounter | unter Information | | | to me Assign Imber: 244440 |
| Summary | Comments | Documents (1) | Insurance | Scheduling | | *Type Outpatient PreRecurring | | *Location SC GMRAC | | ~ | a |
| Case Detail | S | | | | | Recurring Telephone Visit | | | | Submit | Edit |
| Medical Service Ambulatory | | Referral test | Reason | | Codified Reason | | Treatment to Date | _ | Referral Type | | |
| Refer from Provid | ler | Refer fro | m Location | | Referral Written Date 10/22/2024 | | Requested Start Date | | Service By Date | | |
| Refer to Provider | | Refer to General Assessm | Location Internal Medicin ent / GIMRAC | e Rapid | Priority Next available appointm | ent | Instructions to Staff | | Order Comment | | |
| Patient Info | ormation | | | | | | | | | | |

An encounter is created and associated with the referral case, then the status of the referral case is updated to **Accepted**.







TIP SHEET HOSPITAL INFORMATION SYSTEM (HIS)

| ZZTEST, OREO 34 yrs Female DOB: 26 APR 19 | 90 | | | | MRN: 11001448 |
|--|---|--|---------------------------|-------------------|--|
| Status: Accepted Edit Substatus: Edit | | | | Luassigned | Assign to me Assign Case Number: 244440 |
| Summary Comments Dow | cuments (1) Insurance Schedulin | 9 | | | € Edit |
| Medical Service Ambulatory | Referral Reason test | Codified Reason | Treatment to Date | Referral Type | |
| Refer from Provider | Refer from Location | Referral Written Date 10/22/2024 | Requested Start Date | Service By Date | |
| Refer to Provider | Refer to Location General Internal Medicine Rapid Assessment / GIMRAC | Priority Next available appointment | Instructions to Staff | Order Comment | |
| Patient Information | | | | | |
| Preferred Method of Contact | Home Phone | Mobile Phone | Business Phone | Home Address | ~ |

5. To associate an existing encounter with the referral case, select the **Select Encounter** option in the Encounter Information dialog box.

Encounters that have a registration date in the last 30 days are displayed.

| | Encounter I | nformation | |
|----------------------|-------------|------------|-----------------|
| 🔿 Create 💿 Select En | counter | | |
| Registration Date | Туре | Location | FIN |
| 04/07/1921 12:00 AM | Inpatient | PWR_ORGA | ECNSLT1 |
| 04/01/1921 12:01 AM | Day Surgery | PWR_ORGA | DAYSURGERYFIN01 |
| 03/30/1921 12:02 AM | Emergency | PWR_ORGA | |

6. Select an existing encounter, and select **Submit**. The system associates the existing encounter with the referral case, then updates the status of the referral case to **Accepted**.

niagarahealth

