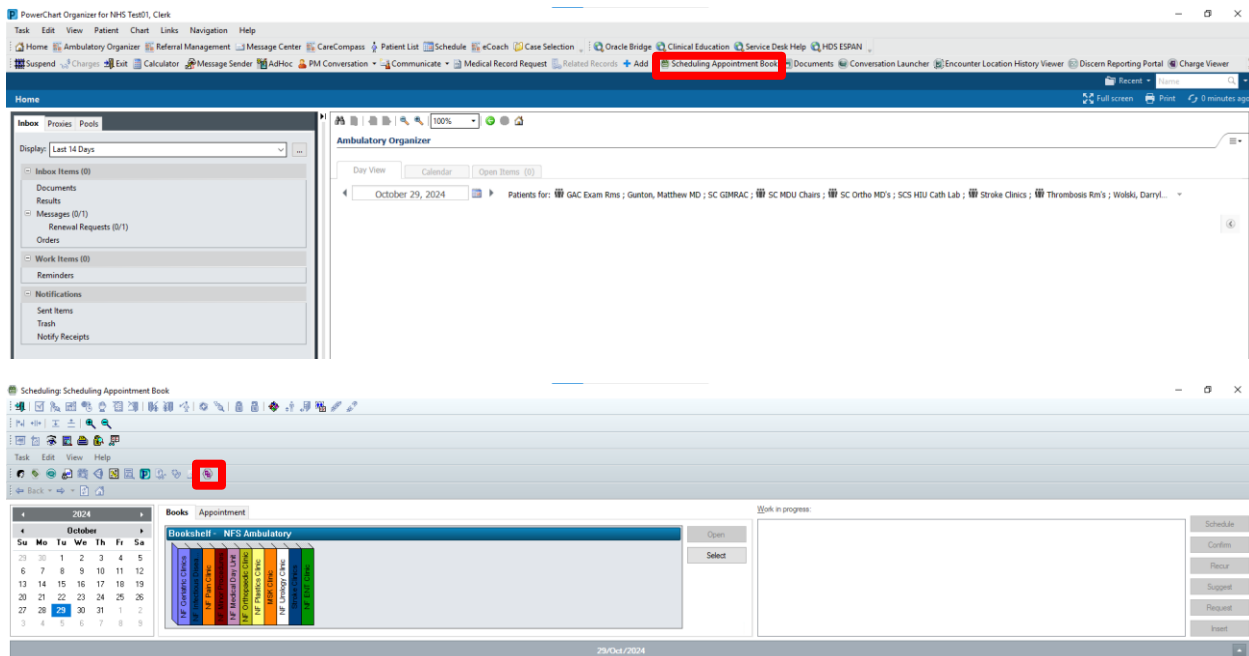


Clerical Staff:

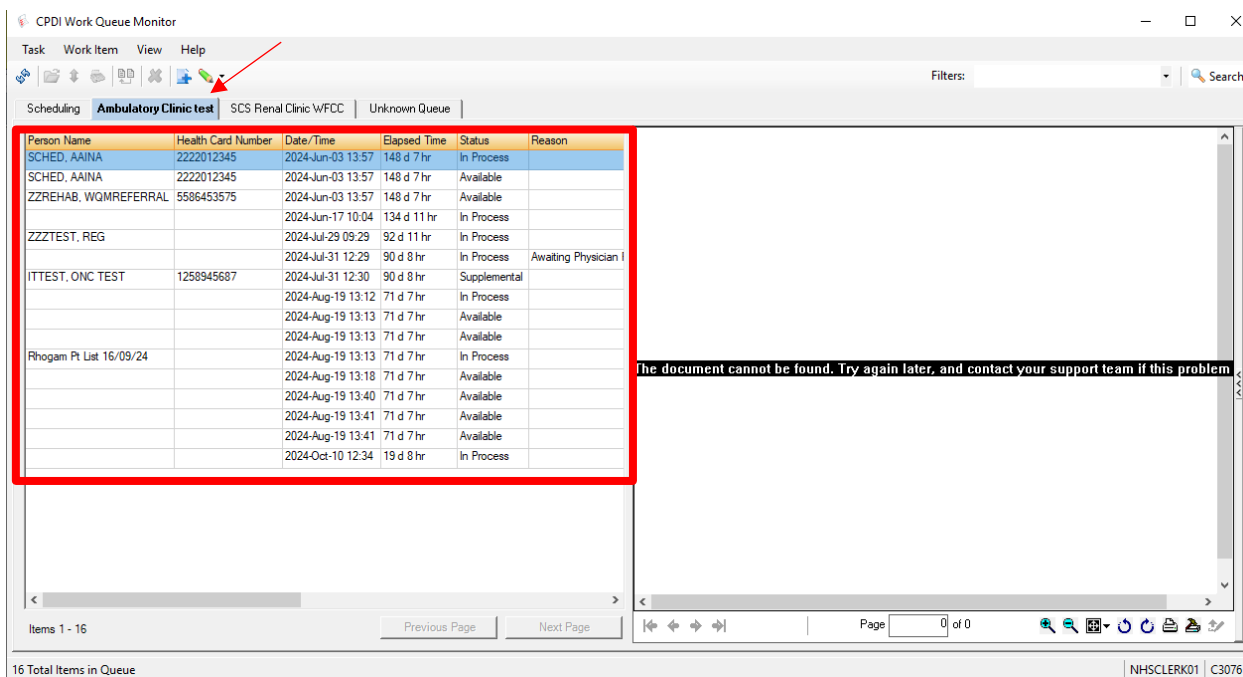
1. Navigate to **Work Queue Monitor**, this can be done two ways:
 - a. Through your **App Bar**, locate the purple icon with two pieces of paper.



- b. Through Powerchart you can open your **Scheduling Appointment Book**, within the appointment book locate the purple icon in the top banner bar.



2. When in Work Queue Monitor, select the tab corresponding to your department's queue (e.g., Ambulatory Clinic). You are now able to see all of your incoming faxes on the left window pane, they present in chronological order.



Person Name	Health Card Number	Date/Time	Elapsed Time	Status	Reason
SCHED, AAINA	2222012345	2024-Jun-03 13:57	148 d 7 hr	In Process	
SCHED, AAINA	2222012345	2024-Jun-03 13:57	148 d 7 hr	Available	
ZZREHAB, WOMREFERRAL	5586453575	2024-Jun-03 13:57	148 d 7 hr	Available	
		2024-Jun-17 10:04	134 d 11 hr	In Process	
ZZZTEST, REG		2024-Jul-29 09:29	92 d 11 hr	In Process	
		2024-Jul-31 12:29	90 d 8 hr	In Process	Awaiting Physician I
ITTEST, ONC TEST	1258945687	2024-Jul-31 12:30	90 d 8 hr	Supplemental	
		2024-Aug-19 13:12	71 d 7 hr	In Process	
		2024-Aug-19 13:13	71 d 7 hr	Available	
		2024-Aug-19 13:13	71 d 7 hr	Available	
Rhogam Pt List 16/09/24		2024-Aug-19 13:13	71 d 7 hr	In Process	
		2024-Aug-19 13:18	71 d 7 hr	Available	
		2024-Aug-19 13:40	71 d 7 hr	Available	
		2024-Aug-19 13:41	71 d 7 hr	Available	
		2024-Aug-19 13:41	71 d 7 hr	Available	
		2024-Oct-10 12:34	19 d 8 hr	In Process	

- **Single Click** on each work item for a quick view.
 - **Double Click** on the thumbnail to the right of the preview pane to preview a page, **or use the blue arrows at the bottom** of the preview pane.
3. Now select the item you will associate your referral with, to do so click the work item you want to work on. **Double click** the highlighted work item.

CPDI Work Queue Monitor

Task Work Item View Help

Filters: Search

Person Name	Health Card Number	Date/Time	Elapsed Time	Status	Reason	Encounter Number	IRTN	Document Type	Owner
SCHED, AAINA	2222012345	2024-Jun-03 13:57	56 d 20 hr	Available			88000043	Physician Order	NHS Test01_HUC
SCHED, AAINA	2222012345	2024-Jun-03 13:57	56 d 20 hr	Available			88000043	Physician Order	NHS Test01_HUC
ZZREHAB, WOMREFERRAL	5586453575	2024-Jun-03 13:57	56 d 20 hr	Available			88000143	Referral Letter	NHS Test01_HUC
		2024-Jun-03 13:57	56 d 20 hr	In Process					NHS Test01_Oncology Reg
		2024-Jul-29 09:26	1 d 1 hr	Available					NHS Test01_HUC
		2024-Jul-29 09:27	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:27	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:28	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:28	1 d 1 hr	Available					NHS Test01_HUC
		2024-Jul-29 09:28	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:29	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:29	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:30	1 d 1 hr	Available					Little, Robert
		2024-Jul-29 09:31	1 d 1 hr	Available					Little, Robert

16 Total Items in Queue

NHS-HUC01 | P3076

4. The **Add/Modify Work Item** window will now open. Within this window you will search the patient using the patient and magnifying glass icon in the top left-hand corner.

Add/Modify Work Item

Task View Work Item Help

Patient Name: ZZREHAB, WOMREFERRAL DOB: 01/Mar/1960
MTRN Age: 64 years Encounter Type: FN

Location: JWS

Document type: Referral Letter

Subject: Referral Letter

Priority: Routine

Scheduling Request List:

modality: AMB Facemaker

Last Contact:

Referring physician:

Status: Available

Reason:

Comment: post

Date of service: GMT-05:0

Post as authorized

Sign date:

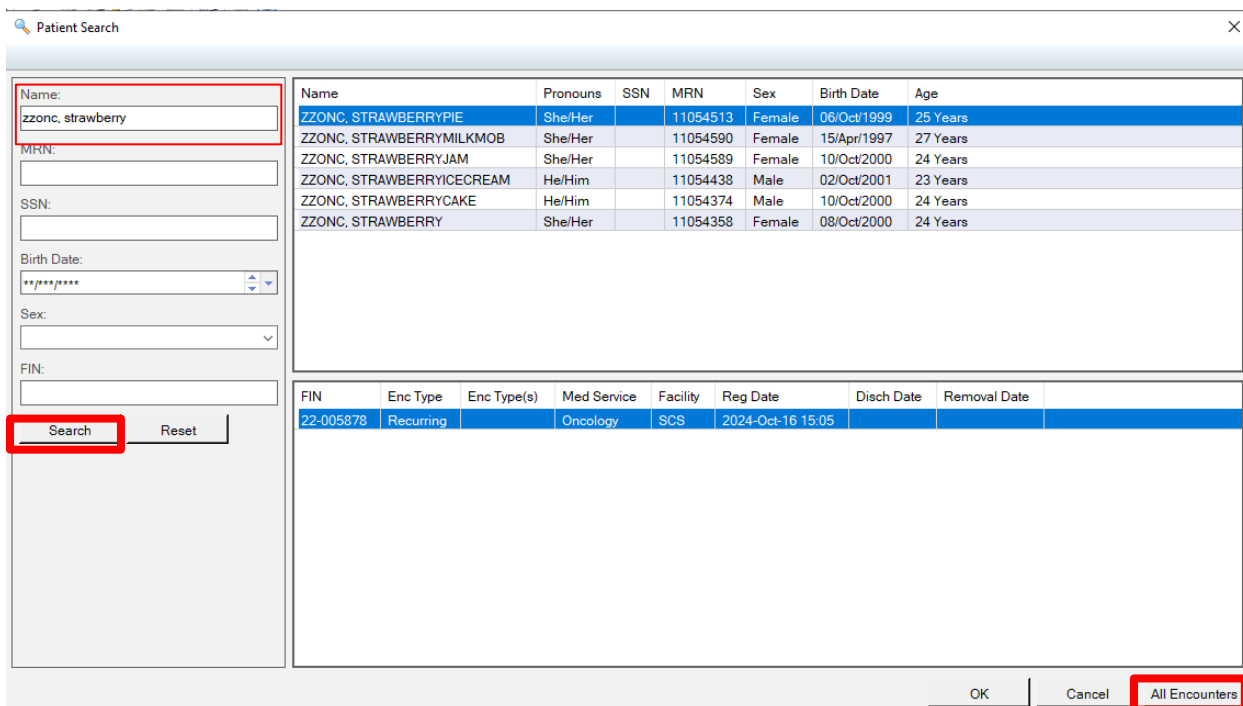
TEST PAGE 3

Page 0 of 0

File OK Cancel

5. Search for the patient by entering the patient's details (last name, first name). Click search.
Note: The more information you enter, the more accurate your results.

*When you find the correct patient be sure to select **ALL ENCOUNTERS**. *



Patient Search

Name: zzonc, strawberry

MRN:

SSN:

Birth Date:

Sex:

FIN:

Search Reset

Name	Pronouns	SSN	MRN	Sex	Birth Date	Age
ZZONC, STRAWBERRYPIE	She/Her		11054513	Female	06/Oct/1999	25 Years
ZZONC, STRAWBERRYMILKMOB	She/Her		11054590	Female	15/Apr/1997	27 Years
ZZONC, STRAWBERRYJAM	She/Her		11054589	Female	10/Oct/2000	24 Years
ZZONC, STRAWBERRYICECREAM	He/Him		11054438	Male	02/Oct/2001	23 Years
ZZONC, STRAWBERRYCAKE	He/Him		11054374	Male	10/Oct/2000	24 Years
ZZONC, STRAWBERRY	She/Her		11054358	Female	08/Oct/2000	24 Years

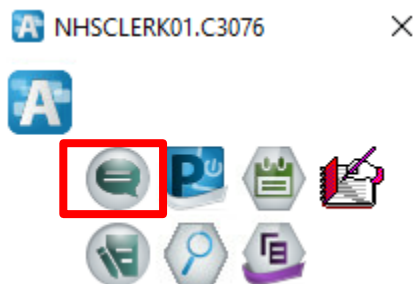
FIN	Enc Type	Enc Type(s)	Med Service	Facility	Reg Date	Disch Date	Removal Date
22-005878	Recurring		Oncology	SCS	2024-Oct-16 15:05		

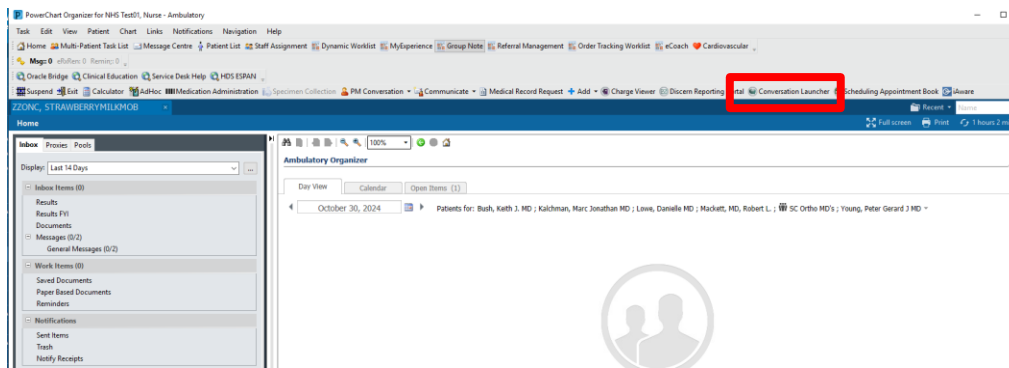
OK Cancel All Encounters

You will notice no MRN or FIN number will populate, this is intentional as we do not want to associate this referral with an encounter yet until it is accepted, this is just the initial intake.

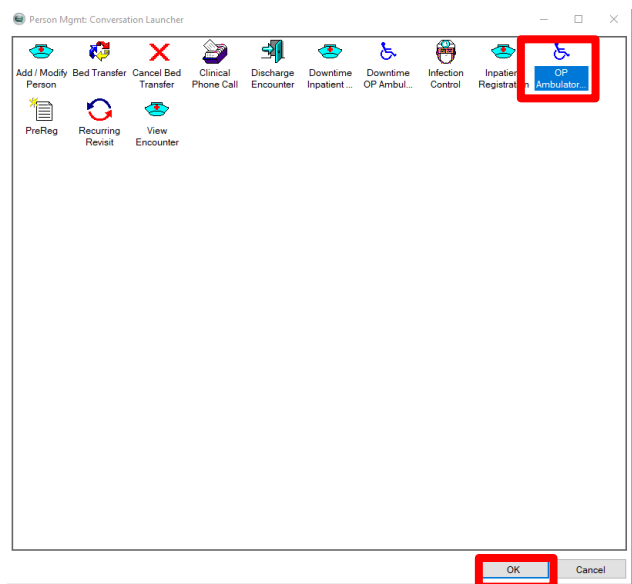
*****IF THE PATIENT IS NOT BUILT INTO THE SYSTEM*****

- Navigate to **Conversation Launcher** in your App Bar or in PowerChart

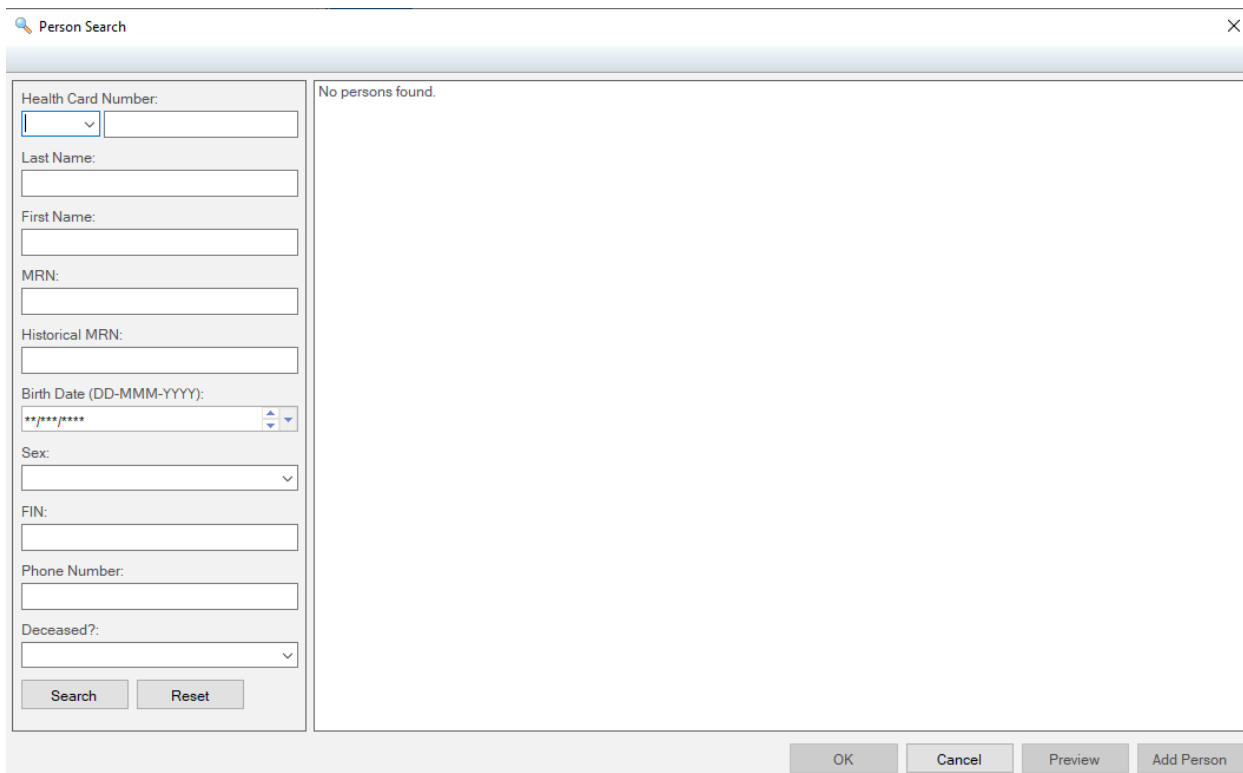




- Then select **OP Ambulatory Registration** and select **OK**.



- Now you will input all of their information and select **Search** then select **Add Person**.



Person Search

Health Card Number:

Last Name:

First Name:

MRN:

Historical MRN:

Birth Date (DD-MMM-YYYY):

Sex:

FIN:

Phone Number:

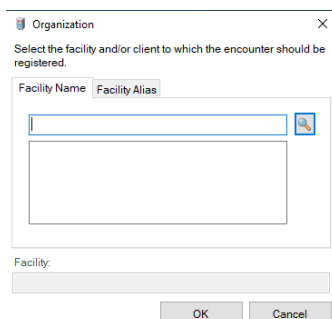
Deceased?:

No persons found.

Search Reset

OK Cancel Preview Add Person

- Now the organization window populates. For **Facility Name**, it cannot use abbreviations, **Facility Alias** can ie. SCS. Select **OK**.



Organization

Select the facility and/or client to which the encounter should be registered.

Facility Name Facility Alias

Facility:

OK Cancel

- The registration page will pop off after requiring more extensive info, complete this and select **OK**. You can now complete the previous steps which involved searching for the patient.

◆ Add / Modify Person

Images

* Last Name: ZZTEST * First Name: JULIA Middle Name: Preferred First Name: Previous Last Name: Previous First Name: * What was your sex assigned at bir... Female * What is your current sex? Female

What pronoun(s) do you use? Birth Date (DD-MM-YYYY): 03/01/2000 Age: 34Y Medical Record Number:

Provincial Health Card Information

* Health Card Available: Yes * Health Card Number: ON * Version Code: Health Card Expiry Date (DD-MM-YYYY): HCV Response Code:

Patient Information Patient Addresses Contacts Alerts

Marital Status:

What language do you feel most comfortable speaking in with your provider?

What language do you feel most c... English

Religion: Place of Worship: Fundraising Opt Out: No

Collection Notes:

Previous Collection Notes:


OK Cancel

6. You can now modify the details on the left-hand side of the window that are applicable.

Location: Can be modified using the building icon beside the box.

Location:

NFS



Subject: Since many forms will be called “Referral Form” it is highly recommended to rename the subject line to be clinic specific.

Subject

Referral Letter

Selecting Document Type: Click “Document Type” drop down arrow. Scroll the list, find the **Referral Form** Type, and click on it to populate the field.

Click Status Drop-down Arrow: Scroll down further to the “Status” drop-down and select “Complete” for the status.

Status:

Complete

Available

Canceled

Clarify

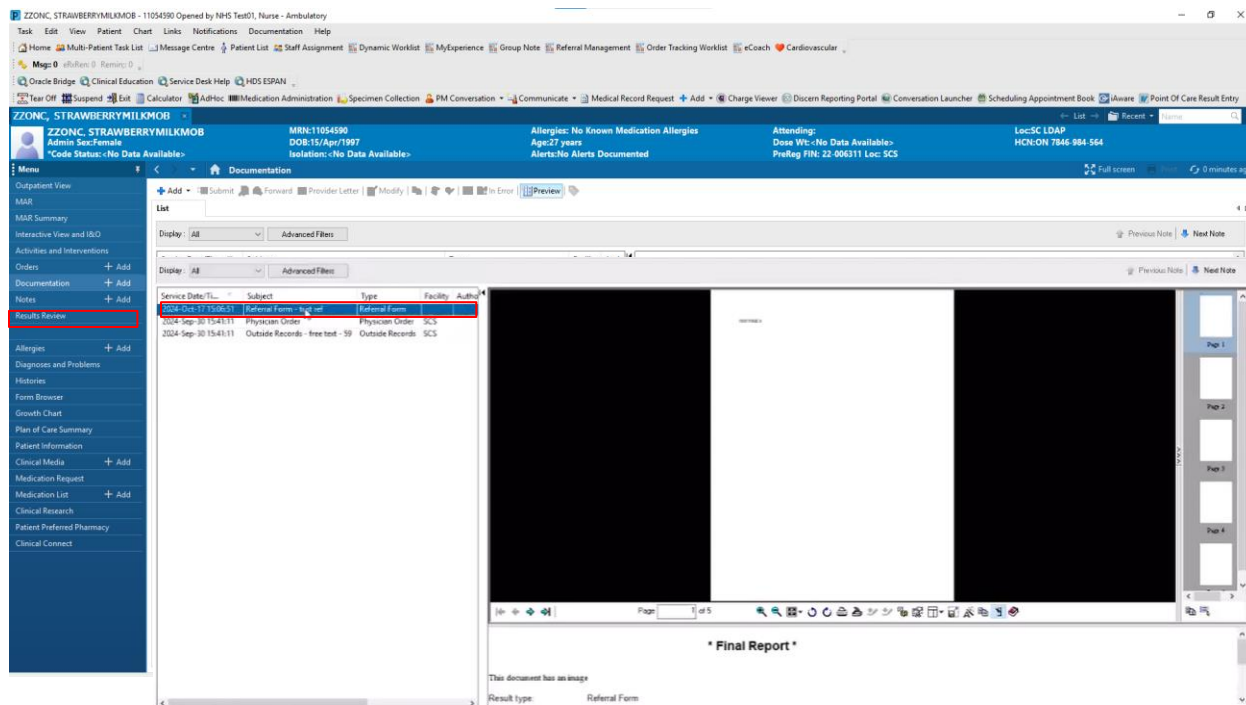
Complete

Supplemental

Comment:

Edit the “Date of Service” if desired.

7. When documentation is complete, select **OK**.
8. Now when navigating back to Powerchart and opening the patient chart, this form will be visible under **Documentation**.



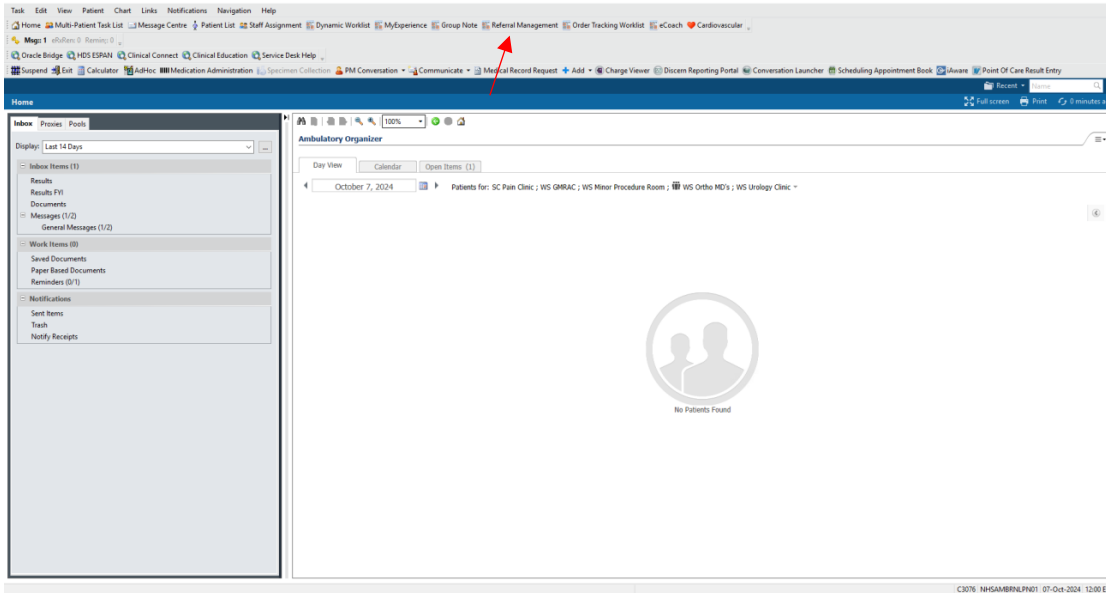
The screenshot shows the Powerchart interface for patient ZZOZC, STRAWBERRYMILKMOB. The patient's MRN is 11054590, DOB is 15/Apr/1997, and age is 27 years. The patient is currently in the 'Documentation' tab. A table of documents is displayed, with the following entries:

Service Date/Time	Subject	Type	Facility	Auth
2024-Sep-30 15:43:11	Referral Form	Referral Form	SCS	
2024-Sep-30 15:43:11	Physician Order	Physician Order	SCS	
2024-Sep-30 15:43:11	Outside Records - free text	Outside Records	SCS	

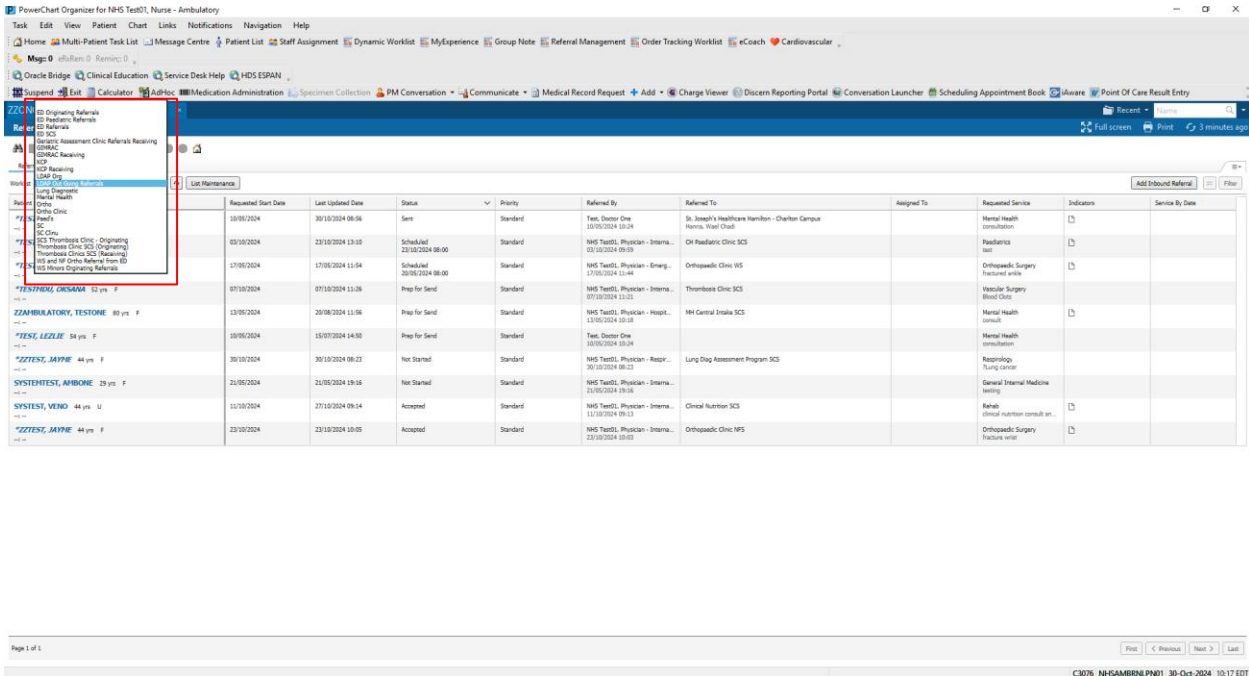
The 'Referral Form' document is highlighted in red. The interface also shows a 'Final Report' section at the bottom, which is currently blank.

Now that the documentation has been added to the patient chart. We can create an inbound referral to add it to the clinic’s referral list.

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



10. Ensure the correct worklist is selected, each clinic should have an **Originating** and **Receiving** list. For this you can select either list as we will be creating an **Inbound Referral**.



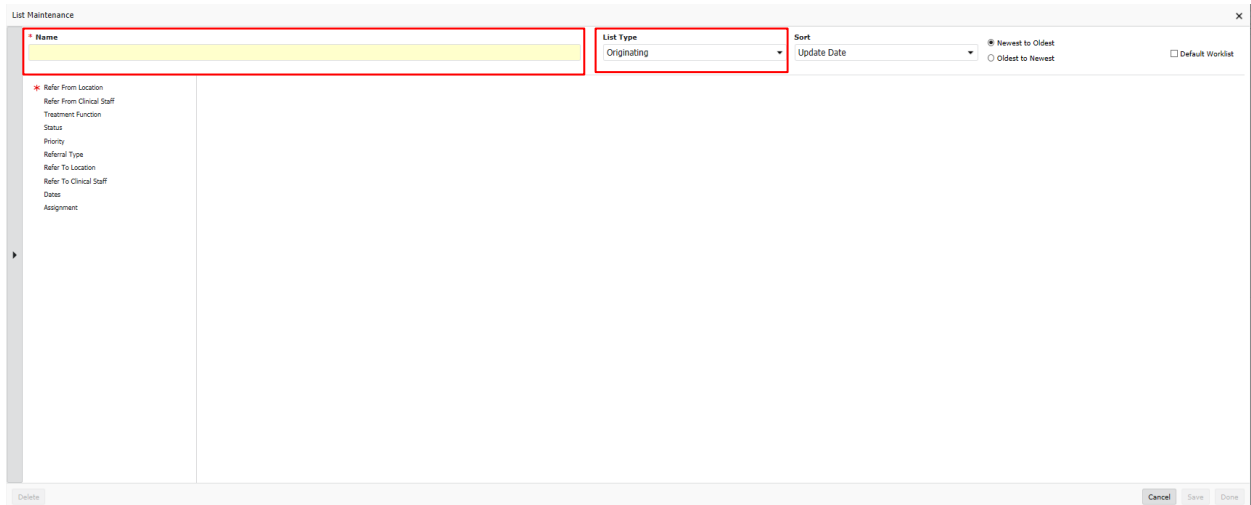
11. If you do not have the correct worklist to add a worklist select **List Maintenance**.

Patient	Requested Start Date	Last Updated Date	Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Service By Date
*TEST, LEZLIE 54 yrs F	10/01/2024	30/10/2024 08:56	Sent	Standard	Tec, Doctor One 10/01/2024 10:24	St. Joseph's Healthcare Hamilton - Charlton Campus Hanna, Wael Chad		Mental Health consultation		
*TESTING, OKSANA 52 yrs F	03/10/2024	23/10/2024 13:10	Scheduled	Standard	NHS TestS1, Physician - Intern... 23/10/2024 08:00	OH Pediatric Clinic SCS		Pediatrics test		
*TEST, LEZLIE 54 yrs F	17/05/2024	17/05/2024 11:04	Scheduled	Standard	NHS TestS1, Physician - Emerg... 20/05/2024 08:00	Orthopaedic Clinic WS		Orthopaedic Surgery Fractured ankle		
*TESTING, OKSANA 52 yrs F	07/10/2024	07/10/2024 11:26	Prep for Send	Standard	NHS TestS1, Physician - Intern... 07/10/2024 11:21	Thrombosis Clinic SCS		Vascular Surgery Blood Clot		
ZAMBALATORY, TESTONE 80 yrs F	13/02/2024	20/08/2024 11:06	Prep for Send	Standard	NHS TestS1, Physician - Hospit... 13/02/2024 10:18	NH Central Intake SCS		Mental Health consult		
*TEST, LEZLIE 54 yrs F	10/05/2024	15/07/2024 14:20	Prep for Send	Standard	Tec, Doctor One 10/05/2024 11:21			Mental Health consultation		
*ZTETS, MAYNE 44 yrs F	30/10/2024	30/10/2024 08:23	Not Started	Standard	NHS TestS1, Physician - Respir... 30/10/2024 08:23	Lung Diag Assessment Program SCS		Respiriology Pulm cancer		
SYSTEMEST, ARBONE 29 yrs F	21/05/2024	21/05/2024 19:16	Not Started	Standard	NHS TestS1, Physician - Intern... 21/05/2024 09:33			General Internal Medicine Interns		
SYSTEM, VINO 44 yrs U	11/10/2024	27/10/2024 09:14	Accepted	Standard	NHS TestS1, Physician - Intern... 11/10/2024 09:33	Clinical Nutrition SCS		Ashab Clinical nutrition consult an...		
*ZTETS, MAYNE 44 yrs F	23/10/2024	23/10/2024 10:05	Accepted	Standard	NHS TestS1, Physician - Intern... 23/10/2024 10:03	Orthopaedic Clinic NHS		Orthopaedic Surgery Fracture repair		

12. Then select **+Add**, here you will input a name of the clinic, then select **Originating** or **Receiving** for the List Type.

The screenshot shows the 'List Maintenance' dialog box with the following content:

- Worklists:**
 - ED Originating Referrals
 - ED Pediatric Referrals
 - ED Referrals
 - ED SCS
 - Emergency Assessment Clinic Referrals Receiving (Outbk)
 - OB/GYN
 - OB/GYN Receiving
 - KCP
 - KCP Receiving
 - LOP Dry
 - LOP Out Going Referrals
 - Lung Diagnostic
 - Mental Health
 - Other
 - Ortho Clinic
 - Paed's
 - SC
 - SC Clinic
 - SCS Thrombosis Clinic - Originating
 - Thrombosis Clinic SCS (Originating)
 - Thrombosis Clinic SCS (Receiving)
 - WS and Hb O2 Referrals from ED
 - WS Home Originating Referrals
- Buttons:** Cancel, Save, Close



List Maintenance

* Name

List Type: Originating

Sort: Update Date

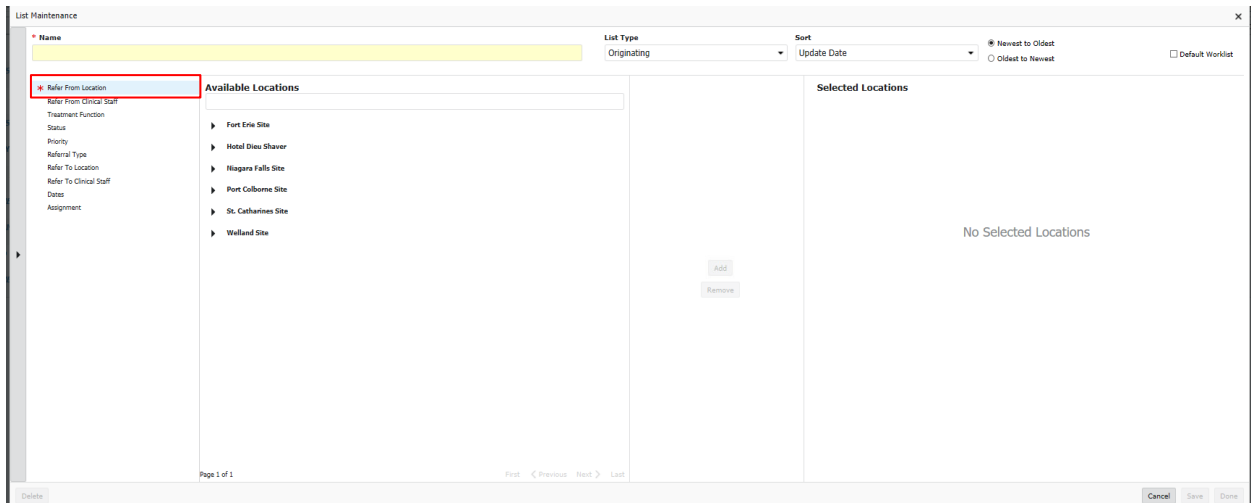
Newest to Oldest
 Oldest to Newest

Default Worklist

- * Refer From Location
- Refer From Clinical Staff
- Treatment Function
- Status
- Priority
- Referral Type
- Refer To Location
- Refer To Clinical Staff
- Dates
- Assignment

Delete Cancel Save Done

13. Then select **Refer from Location**, and input your clinic, click the name of the clinic then click **Add**. Then press **Save**.



List Maintenance

* Name

List Type: Originating

Sort: Update Date

Newest to Oldest
 Oldest to Newest

Default Worklist

- * Refer From Location
- Refer From Clinical Staff
- Treatment Function
- Status
- Priority
- Referral Type
- Refer To Location
- Refer To Clinical Staff
- Dates
- Assignment

Available Locations

- ▶ Fort Erie Site
- ▶ Hotel Dieu Shaver
- ▶ Niagara Falls Site
- ▶ Port Colborne Site
- ▶ St. Catharines Site
- ▶ Welland Site

Selected Locations

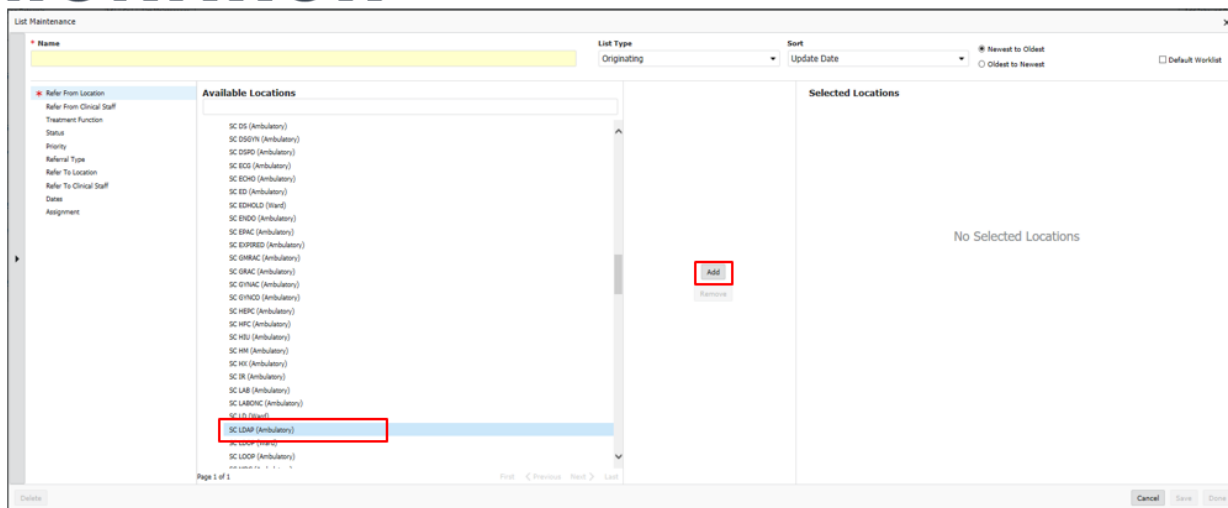
No Selected Locations

Add Remove

Page 1 of 1

First Previous Next Last

Delete Cancel Save Done

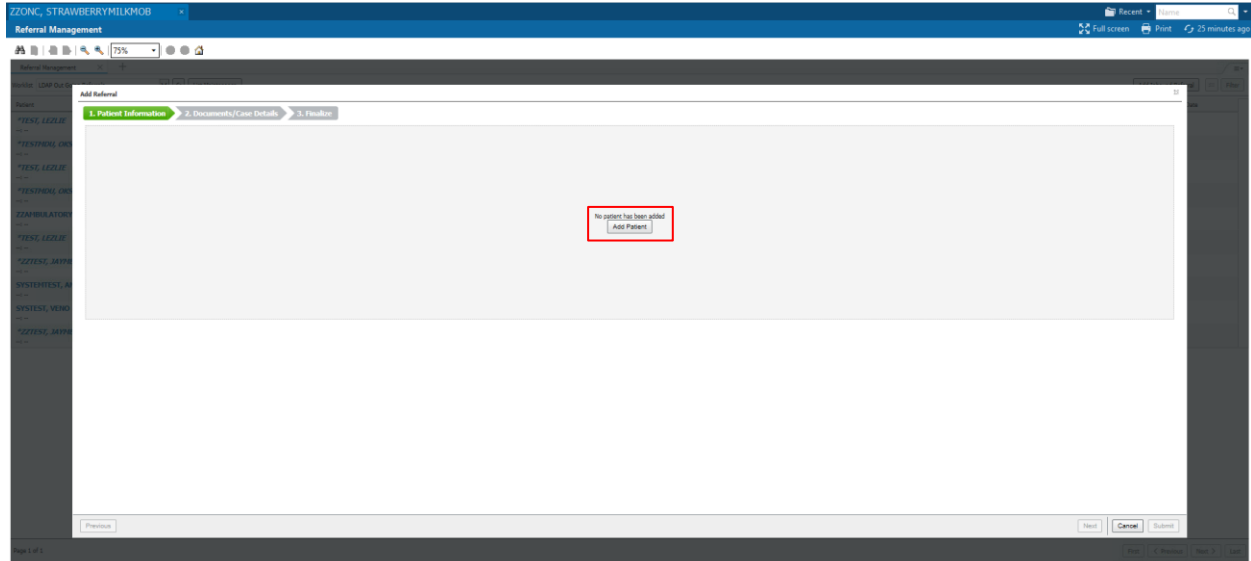


14. Now when in your correct worklist, select **Add Inbound Referral**.

Worklist: LDM Out Going Referrals Add Inbound Referral

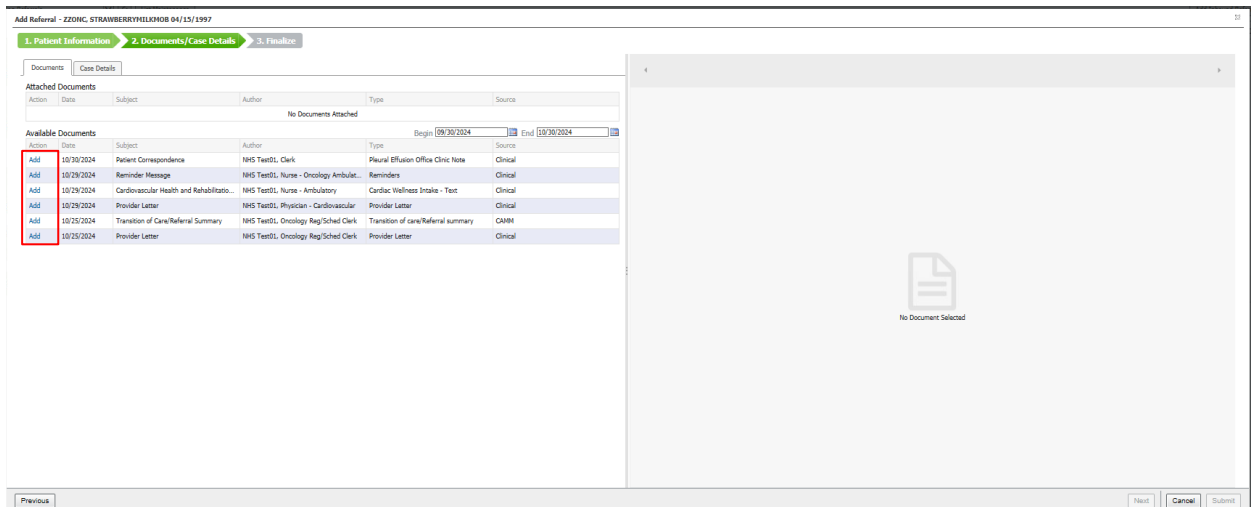
Patient	Requested Start Date	Last Updated Date	Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Service By Date
*TEST, LEZLIE 54 yrs F	10/05/2024	30/10/2024 06:56	Sent	Standard	Test, Doctor One	St. Joseph's Healthcare Hamilton - Charlton Campus Hanna, Wlad Chlod		Mental Health consultation		
*TESTHONG, OKSANA 52 yrs F	01/10/2024	29/10/2024 13:10	Scheduled 23/10/2024 08:00	Standard	NHS Tawt01, Physician - Intern...	OH Paediatric Clinic SCS		Paediatric test		
*TEST, LEZLIE 54 yrs F	17/05/2024	17/05/2024 11:54	Scheduled 20/05/2024 08:00	Standard	NHS Tawt01, Physician - Emerg...	Orthopaedic Clinic W/S		Orthopaedic Surgery Fractured ankle		
*TESTHONG, OKSANA 52 yrs F	07/10/2024	07/10/2024 11:26	Prep for Send	Standard	NHS Tawt01, Physician - Intern...	Thrombotic Clinic SCS		Vascular Surgery Blood Clot		
ZZAMBURATORY, TESTONE 80 yrs F	11/05/2024	20/08/2024 11:56	Prep for Send	Standard	NHS Tawt01, Physician - Hosp...	WH Central Intake SCS		Mental Health consult		
*TEST, LEZLIE 54 yrs F	10/05/2024	10/07/2024 14:50	Prep for Send	Standard	Test, Doctor One	Lung Diag Assessment Program SCS		Mental Health consultation		
*ZZTEST, MAYHE 44 yrs F	30/10/2024	30/10/2024 06:23	Not Started	Standard	NHS Tawt01, Physician - Respi...			Respirology Tung consult		
SYSTEMTEST, ARBIONE 29 yrs F	21/05/2024	21/05/2024 19:16	Not Started	Standard	NHS Tawt01, Physician - Intern...			General Internal Medicine testing		
SYSTEMTEST, VENO 44 yrs U	11/10/2024	27/10/2024 09:14	Accepted	Standard	NHS Tawt01, Physician - Intern...	Clinical Nutrition SCS		Rahab Clinical nutrition consult pr...		
*ZZTEST, MAYHE 44 yrs F	23/10/2024	23/10/2024 10:05	Assessed	Standard	NHS Tawt01, Physician - Intern...	Orthopaedic Clinic W/S		Orthopaedic Surgery Fracture wrist		

15. Now you will add the patient using the **Add Patient** button.



16. Now you can input the **Documents/Case Details**.

- a. To add a document, select the **Add** button to the left of the patient documents.



- b. Now in the **Case Details** tab, input all yellow fields and anything else applicable.

Medical Service: Ambulatory



Add Referral - ZZONC, STRAWBERRYMILKMOB 04/15/1997

TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

1. Patient Information 2. Documents/Case Details 3. Finalize

Documents Case Details

*Medical Service
[Dropdown menu]

*Referral Reason
[Text area]

Codified Reason
[Text input]

Treatment to Date
[Text input]

Referral Type
[Dropdown menu]

Refer from Provider
[Text input]

Refer from Location
[Text input]

*Referral Written Date
MM/DD/YYYY [Text input]

Requested Start Date
MM/DD/YYYY [Text input]

Service By Date
MM/DD/YYYY [Text input]

*Refer to Provider
[Dropdown menu]

*Refer to Location
[Text input]

*Priority
[Dropdown menu]

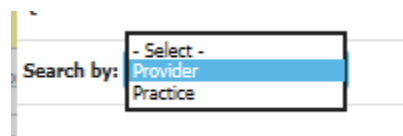
Instructions to Staff
[Text area]

Comments
[Text area]

Previous

*For **Refer to Provider**, since we are just adding this to the clinic and there is not a specific provider yet since we have not accepted/rejected we will refer to a location. Complete the following:

- Select the magnifying glass to open the **Provider Search**
- Then select the drop down beside **Search by:** here you will click **Practice**.





TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

Provider Search 22

Search: lung

Qualifiers +

Search by: Practice Search Clear

Lung Diag Assessment Program SCS Cardiovascular & Thoracic Surgery, Critical Care, General Surgery, Hematology, Internal Medicine, Pulmonology, Respiratory, Thoracic Surgery
Widow Health System
13 Providers Available

Accept Cancel

- Click the clinic and Select **Accept**
- 17. Now review the details and select **Submit**.

Add Referral - ZZDHC STRAWBERGYPHELKHOR 04/15/1997 37

1. Patient Information 2. Documents/Case Details 3. Finalize

Status: Pending Acceptance Unassigned Assign to me Assign

Accept Referral Reject Referral

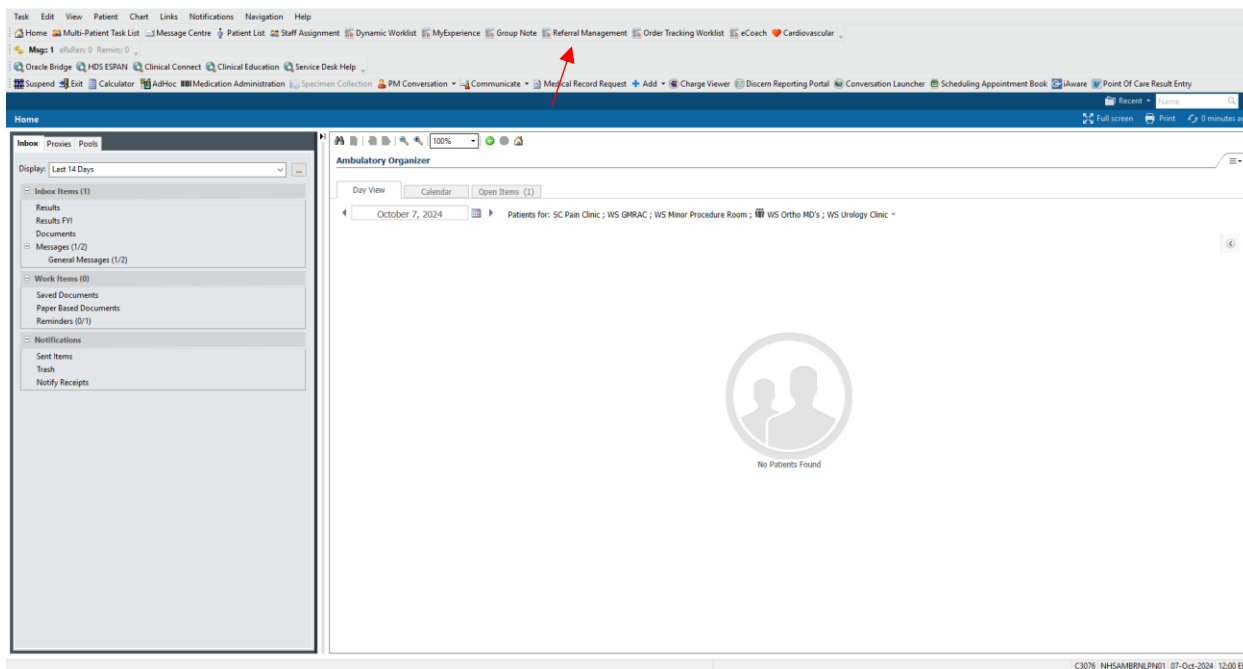
Case Details				
Medical Service	Referral Reason	Codified Reason	Treatment to Date	Referral Type
Ambulatory	IME	--	--	--
Referral from Provider	Referral from Location	Referral Written Date	Requested Start Date	Service By Date
--	--	10/30/2024	--	--
Referral to Provider	Referral to Location	Priority	Instructions to Staff	Comment
--	Lung Diag Assessment Program SCS	Standard	--	--

Attached Documents				
Date	Subject	Author	Type	Source
--	--	--	--	--

Previous Next Cancel Submit

Nursing Staff:

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

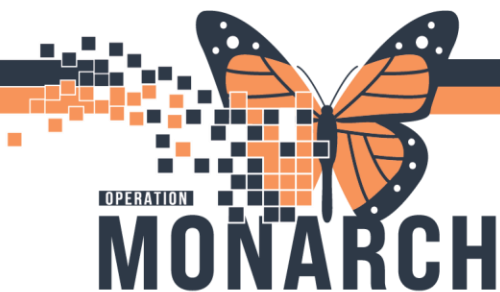


2. Ensure the correct worklist is selected, you will select the clinic's **Receiving** list.

Here you will see the referral sent by the clerical staff, it will be shown in a **Pending Acceptance** status.

The screenshot shows the 'Referral Management' window with a table of referrals. A red arrow points to a row with 'Pending Acceptance' status. The table columns include Patient, Requested Start Date, Last Updated Date, Status, Priority, Referred By, Referred To, Assigned To, Requested Service, Indicators, and Service By Date.

Patient	Requested Start Date	Last Updated Date	Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Service By Date
*ZZONG, STRAWBERRYMILKMOB 27 yrs F	30/10/2024 11:38	30/10/2024 11:38	Pending Acceptance	Standard	30/10/2024 09:00	Lung Diag Assessment Program SCS		Ambulatory test		
*ZZONG, STRAWBERRYMILKMOB 27 yrs F	30/10/2024 09:36	Scheduled 30/10/2024 09:30	Scheduled	Standard (next available)	29/10/2024 09:00	Lung Diag Assessment Program SCS		Ambulatory test		
*ZZONG, STRAWBERRYMILKMOB 27 yrs F	30/10/2024 08:36	30/10/2024 08:36	Pending Acceptance	Standard	30/10/2024 09:00	Lung Diag Assessment Program SCS		Ambulatory Test		
TESTISTRATION, LEZLIE 44 yrs F	29/10/2024 08:11	29/10/2024 08:11	Pending Acceptance	Standard	29/10/2024 09:00	Lung Diag Assessment Program SCS		Respirology Lung cancer		
*ZZONG, VALENTINO 25 yrs M	16/10/2024 09:36	16/10/2024 09:36	Pending Acceptance	Emergency (within 24 hours)	16/10/2024 09:00	Lung Diag Assessment Program SCS		Medical Oncology test		
*SYSTEMSIST, AMBRYTHO 69 yrs F	16/10/2024 09:36	16/10/2024 09:36	Accepted	Urgent (within 72 hours)	16/10/2024 09:00	Lung Diag Assessment Program SCS		Ambulatory test		
*ZZAMBULATORY, TESTONE 80 yrs F	09/09/2024	14/06/2024 09:58	Scheduled	Urgent (within 72 hours)	09/09/2024 11:16	Lung Diag Assessment Program SCS	Carne Test, Physician - P...	Respirology Test		14/06/2024
*ZZONG, RAY 33 yrs M	03/06/2024	03/06/2024 14:46	Accepted	Urgent (within 24 hours)	03/06/2024 09:00	Lung Diag Assessment Program SCS	Hauser, Kameron	General Internal Medicine test		
ZZEYET, BRIAN 23 yrs M	03/06/2024	03/06/2024 14:43	Scheduled	Next available appointment	03/06/2024 09:00	Lung Diag Assessment Program SCS		Respirology Test		
*SYSTEMSIST, AMBRYTHO 74 yrs F	22/05/2024	22/05/2024 12:58	Accepted	Standard	01/05/2024 09:00	Lung Diag Assessment Program SCS	NHS Test(S), Physician - R...	Respirology testing receiving workflow		
TEST, LEZLIE 34 yrs F	16/05/2024	16/05/2024 23:31	Accepted	Standard	16/05/2024 23:30	Lung Diag Assessment Program SCS		Respirology consult		
*ZZAMBULATORY, TESTONE 80 yrs F	09/05/2024	09/05/2024 09:49	Accepted	Standard	09/05/2024 09:43	Lung Diag Assessment Program SCS	Carne Test, Physician - P...	Cardiology test		
*ZZAMBULATORY, TESTONE 80 yrs F	17/04/2024	17/04/2024 20:40	Accepted	Urgent (within 24 hours)	17/04/2024 12:53	Lung Diag Assessment Program SCS	NHS Test(S), Nurse - Amb...	Respirology consult		18/04/2024
*ZZAMBULATORY, TESTONE 80 yrs F	11/04/2024	11/04/2024 12:55	Scheduled	Urgent (within 72 hours)	11/04/2024 11:17	Lung Diag Assessment Program SCS	Carne Test, Physician - P...	Respirology Testing for Lung cancer		16/04/2024



TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

3. Clicking the white space beside the patient name you can open the referral and review its details, any attached documents, and add in any applicable comments.

The screenshot shows the 'Referral Management' window for patient ZZONG, STRAWBERRYMLKMOB. The window is titled 'ZZONG, STRAWBERRYMLKMOB' and includes a 'Referral Management' header. Below the header, there is a 'Patient' list on the left and a 'Requested' list on the right. The main area displays the details of a referral, including 'Medical Service: Ambulatory', 'Referral Reason: test', and 'Referral Status: Pending Acceptance'. A red box highlights the 'Case Details' section, which contains tabs for 'Summary', 'Comments', 'Documents', 'Insurance', and 'Scheduling'.

4. You can also review the patient's chart by selecting their name in the referral management table, their name acts as a hyper link.

The screenshot shows the 'Referral Management' window with a table of referrals. The table has the following columns: Patient, Requested Start Date, Last Updated Date, Status, Priority, Referred By, Referred To, Assigned To, Requested Service, Indicators, and Service By Date. A red box highlights the first row of the table, which corresponds to patient ZZONG, STRAWBERRYMLKMOB.

Patient	Requested Start Date	Last Updated Date	Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Service By Date
ZZONG, STRAWBERRYMLKMOB 27 yrs F		30/10/2024 11:38	Pending Acceptance	Standard	30/10/2024 00:00	Lung Day Assessment Program SCS		Ambulatory Test		
ZZONG, STRAWBERRYMLKMOB 27 yrs F		30/10/2024 09:06	Scheduled	Standard (next available)	30/10/2024 09:30	Lung Day Assessment Program SCS		Ambulatory Test		
ZZONG, STRAWBERRYMLKMOB 27 yrs F		30/10/2024 08:36	Pending Acceptance	Standard	29/10/2024 00:00	Lung Day Assessment Program SCS		Ambulatory Test		
TESTMURKIN, LEZLIE 44 yrs F		29/10/2024 08:11	Pending Acceptance	Standard	30/10/2024 00:00	Lung Day Assessment Program SCS		Respiology, Lung consult		
ZZONG, VALENTINO 25 yrs M		16/10/2024 09:36	Pending Acceptance	Emergent (within 24 hours)	16/10/2024 00:00	Lung Day Assessment Program SCS		Medical Oncology Test		
SYSTEMSISTE, AMBIFTYHO 69 yrs F		16/10/2024 09:36	Accepted	Urgent (within 72 hours)	16/10/2024 00:00	Lung Day Assessment Program SCS		Ambulatory Test		
ZZAMBULATORY, TESTONE 80 yrs F	09/05/2024	14/06/2024 09:58	Scheduled	Urgent (within 72 hours)	Genet Test, Physician - Prim... 09/05/2024 11:56	Lung Day Assessment Program SCS	Genet Test, Physician - P...	Respiology Test		14/06/2024
ZZONG, RAY 33 yrs M		03/06/2024 14:46	Accepted	Urgent (within 24 hours)	03/06/2024 00:00	Lung Day Assessment Program SCS	Nurse: Kamron	General Internal Medicine HST		
ZZETEST, BRIAN 22 yrs M		03/06/2024 14:43	Scheduled	Next available appointment	03/06/2024 00:00	Lung Day Assessment Program SCS		Respiology Test		
SYSTEMSISTE, AMBIFTYHO 74 yrs F		22/05/2024	22/05/2024 12:38	Accepted	Standard	NHS Test1, Physician - Urology 22/05/2024 12:40	NHS Test1, Physician - R...	Respiology, testing working workflow		
TEST, LEZLIE 54 yrs F		16/05/2024	16/05/2024 23:31	Accepted	Standard	NHS Test1, Physician - Ortho... 16/05/2024 23:25		Respiology consult		
ZZAMBULATORY, TESTONE 80 yrs F	09/05/2024	09/05/2024 09:49	Accepted	Standard	Genet Test, Physician - Prim... 09/05/2024 09:43	Lung Day Assessment Program SCS		Cardiology Test		
ZZAMBULATORY, TESTONE 80 yrs F	17/04/2024	17/04/2024 20:40	Accepted	Urgent (within 24 hours)	Test, Doctor One 17/04/2024 12:22	Lung Day Assessment Program SCS	NHS Test1, Nurse - Amb...	Respiology consult		18/04/2024
ZZAMBULATORY, TESTONE 80 yrs F	11/04/2024	11/04/2024 12:00	Scheduled	Urgent (within 72 hours)	Genet Test, Physician - Prim... 11/04/2024 11:37	Lung Day Assessment Program SCS	Genet Test, Physician - P...	Respiology, Testing for lung cancer		18/04/2024

5. You can now **Accept** or **Reject** the referral.

6. 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.

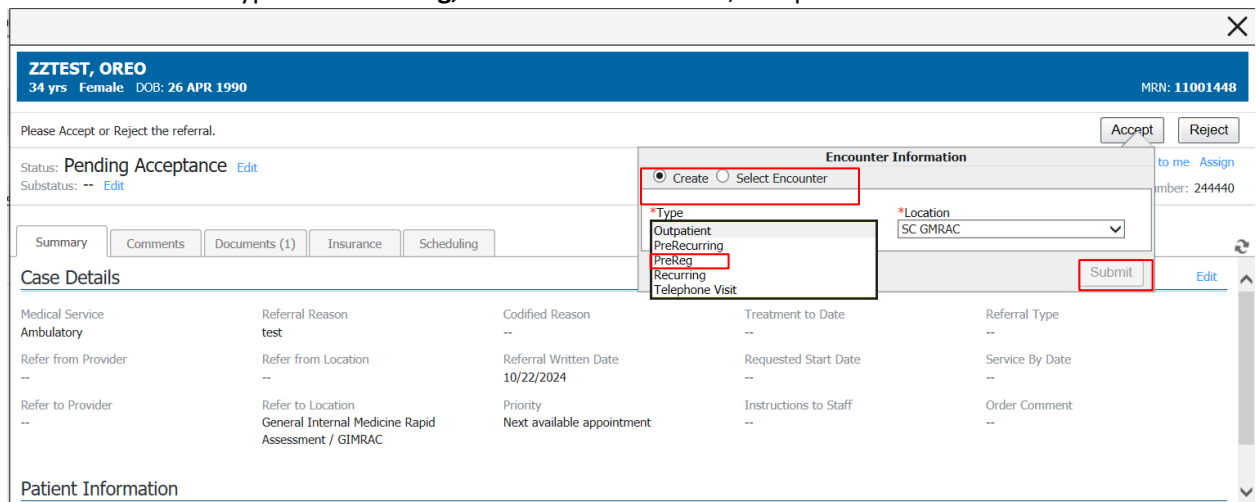
Status: **Pending** [Edit](#)
Substatus: Pending Review [Edit](#) [Clear](#)

[Accept](#) [Reject](#)

Unassigned [Assign to me](#) [Assign](#)
Case Number: 12062

In PowerChart (PowerChart.exe), the system prompts you to create an encounter or select an existing one. For your clinics, you will mostly create a new encounter.

7. 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, OREO
34 yrs Female DOB: 26 APR 1990 MRN: 11001448

Please Accept or Reject the referral.

Status: **Pending Acceptance** [Edit](#)
Substatus: -- [Edit](#)

[Summary](#) [Comments](#) [Documents \(1\)](#) [Insurance](#) [Scheduling](#)

Case Details

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 --

Encounter Information

Create Select Encounter

*Type
Outpatient
PreRecurring
PreReg
Recurring
Telephone Visit

*Location
SC GMRAC

[Submit](#) [Edit](#)

[to me](#) [Assign](#)
Number: 244440

Patient Information

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

ZZTEST, OREO
 34 yrs Female DOB: 26 APR 1990 MRN: 11001448

Status: **Accepted** [Edit](#) Unassigned [Assign to me](#) [Assign](#)
 Substatus: -- [Edit](#) Case Number: 244440

Summary Comments Documents (1) Insurance Scheduling

Case Details [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 --
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Rejecting

1. Select **Reject** to reject the referral or indicate that a referral sent was rejected.

Patient, Test
 5 yrs Female DOB: OCT 26, 2013 MRN: 10000655 FIN: 20000670

Please Accept or Reject the referral.

Status: **Pending** [Edit](#) Unassigned [Assign to me](#) [Assign](#)
 Substatus: Pending Review [Edit](#) [Clear](#) Case Number: 12062

2. Enter a codified rejection reason, and, optionally, a free-text rejection reason. The system updates the status of the referral to Rejected.

Reject Reason

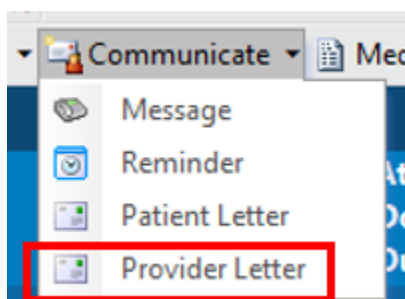
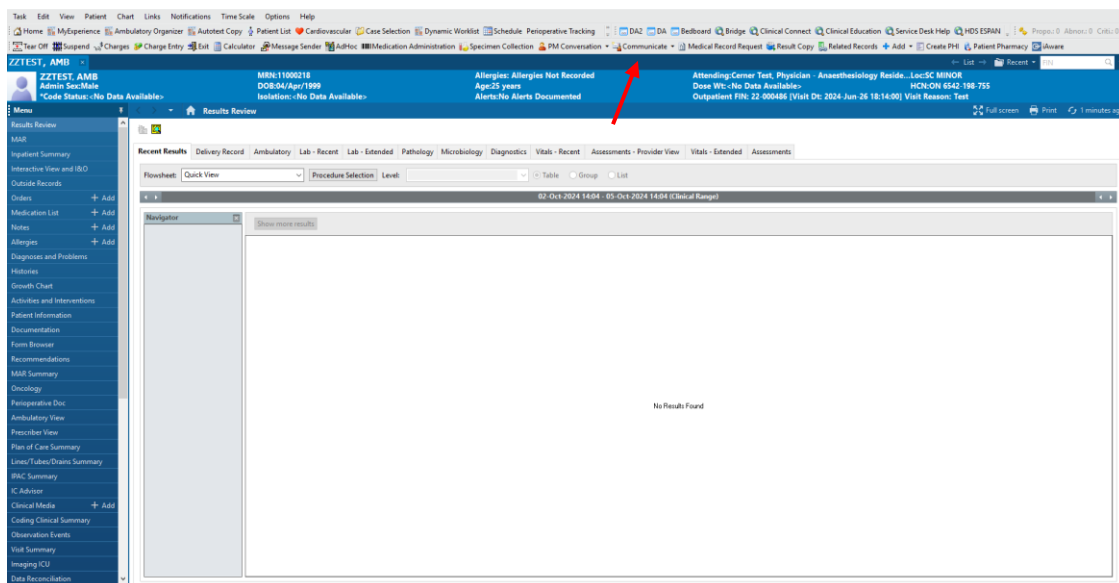
*Reason

▼

Comment

The referral status is updated to Rejected.

3. Now you inform the provider of the rejection reason, a provider letter would be used. Click on the black dropdown next to **Communicate** and select **Provider Letter**.



4. Search for and select a provider from the Search for Provider list, or select a provider from the Favorite or Recent Recipient tab. If you need to manually enter a recipient's click **Add Freetext Recipient**. The provider is added to the Recipient list.

Provider Letter Recipients

Select Provider

PCP Referring Physician
Declined, Provider NHS Test01, Physician - Medical Oncology/Haematology

Search for Provider

Favorite (0)

Favor...	Prefix	First Name	Last Name	Credentials	Mode	Details
There are no items to show.						

Recipient

Favor...	Primary	Prefix	First Name	Last Name*	Credentials	Mode	Details*	More	Delete
There are no items to show.									

Other Actions

Forward for Print To*:

Comments:
(Limit 255)

***Not Printed On Letter**

5. Select a cell from the Recipient list and update the provider's information as needed.


Provider Letter Recipients ✕

Select Provider

PCP
Declined, Provider

Referring Physician
NHS Test01, Physician - Medical Oncology/Haematology

Search for Provider

Internal 

Favorite (0)


Favor...	Prefix	First Name	Last Name	Credentials	Mode	Details
There are no items to show.						

[+ Add Freetext Recipient](#)

Recipient

Favor...	Primary	Prefix	First Name	Last Name*	Credentials	Mode	Details*	More	Delete
★	<input checked="" type="checkbox"/>		Physician - Medical On...	NHS Test01		Fax	[Redacted]		✕

Other Actions

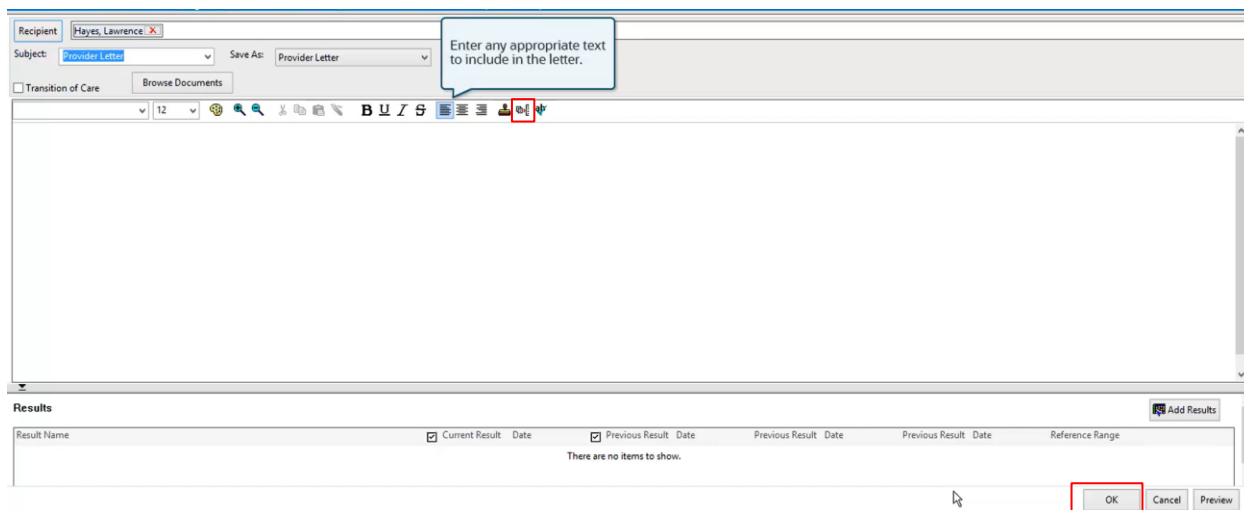
Forward for Print To*: 

Comments:
(Limit 255)

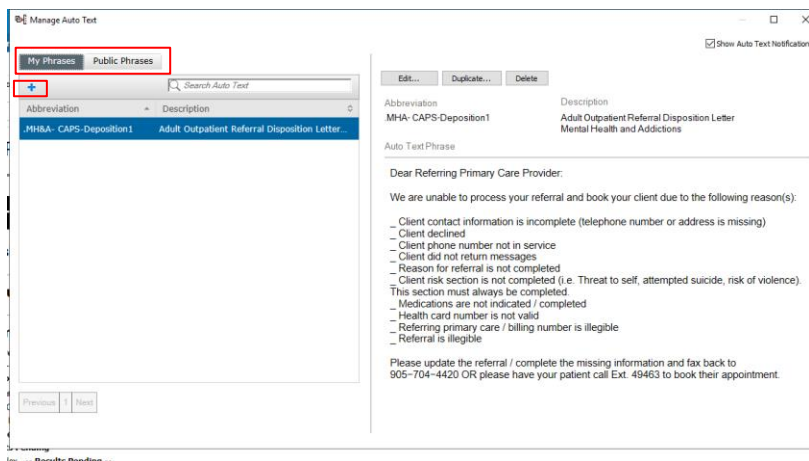
***Not Printed On Letter**

OK Cancel

- Click **OK**. The Create Letter dialog box is displayed and you can input why the referral was rejected. When complete select **OK** to send the provider letter.

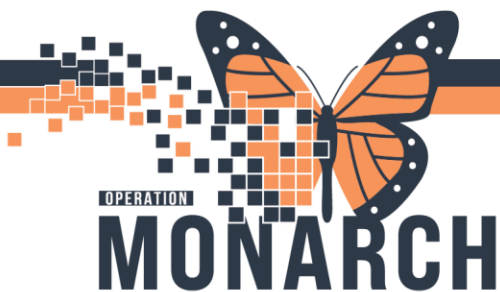


7. Within the provider letter there is an autotext icon.
8. Within the auto text “library”, there are three functions.



- a. “My Phrases”-contains the auto texts you have created.
- b. “Public Phrases”-contains all model auto text that are built in Cerner.
- c. The “Add/+” button -allows the user to create a custom auto text.

The following are currently built out as LDAP Autotexts.



OPERATION

MONARCH

LDAP Autotext Dictionary

TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

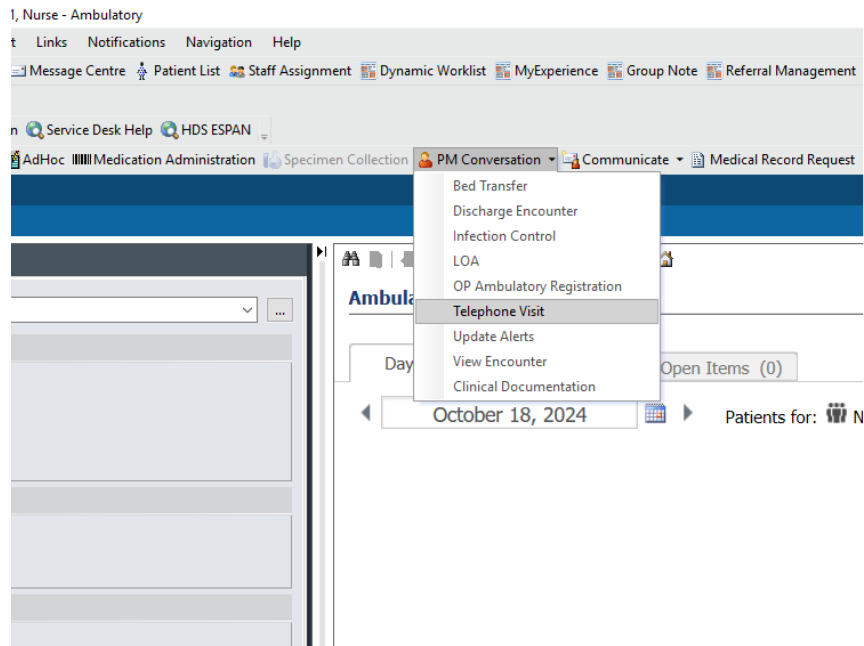
The Abbreviation	The Description
This is what the end user types to bring up the auto text term. <i>*This is sensitive to capitals and ensure you include the "." at the beginning. *</i>	This will display when the end user hovers the cursor over the auto text term prior to selecting it. This can help clarify what will be selected.
.LDAP-Ref-Receipt	LDAP-Referral-Receipt
.LDAP-EBUSComForm	EBUS Communication Form
.LDAP-LetterheadDoc	Letterhead Document
.LDAP-LetterheadReq	Letterhead Request for Information
.LDAP-ConsultRequest	Consult Request
.LDAP-NotAppropriate	Not Appropriate

Charting For LDAP

*Initial Intake, since most of the intake pertaining to your clinic occurs on the phone, you would utilize **PM Conversation**.*

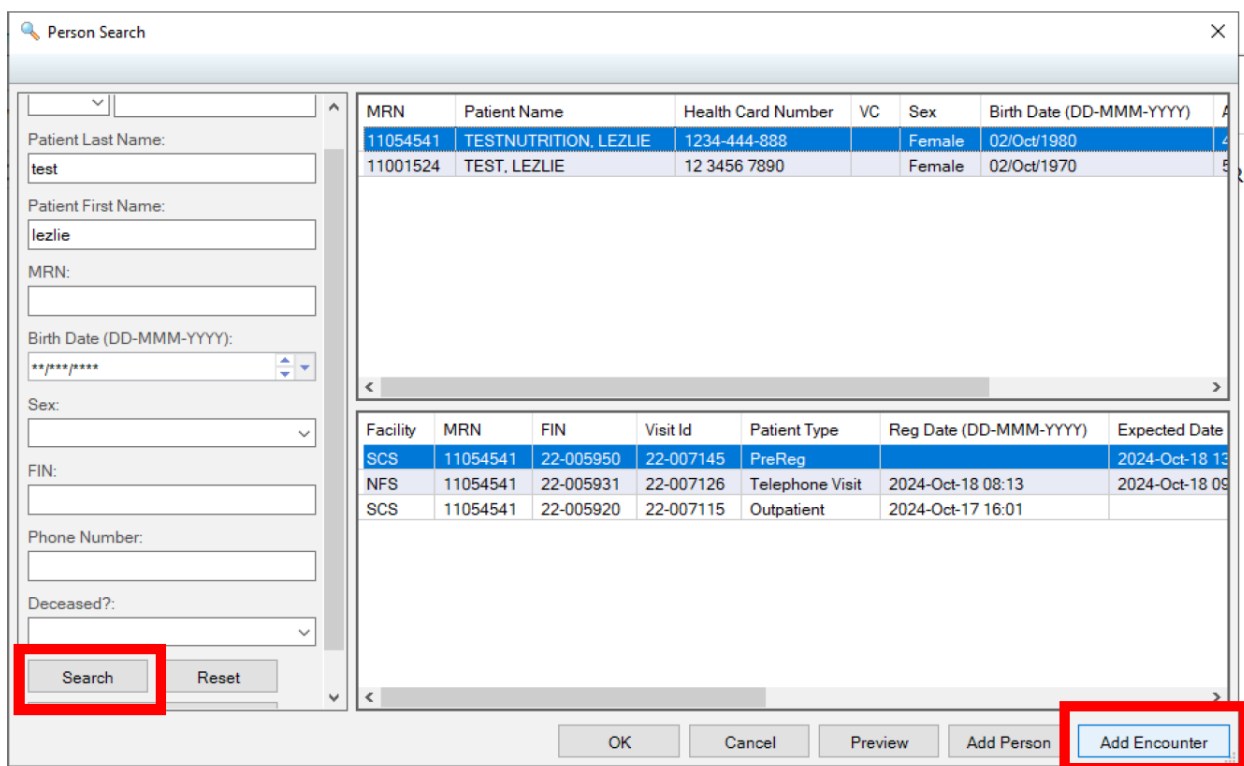
The use of PM Conversations: Telephone Visits is for patient interactions that are not booked appointments, but need to be logged as visits for the purpose of keeping statics on the amount of time staff are spending with patients. This feature is to be used for any patient telephone interaction over 5mins in length that is not a pre-booked telephone visit.

1. From the home page on the screen choose PM Conversation and Telephone Visit.



2. Type patient name in the search field and click the search button.
3. Once you find the patient click **Add Encounter** to make a telephone visit encounter.

NOTE: if you do not find the patient, connect with your Ward Clerk to ensure patient information has been entered in the system.



Person Search

Patient Last Name: test

Patient First Name: lezlie

MRN:

Birth Date (DD-MMM-YYYY): **/**/****

Sex:

FIN:

Phone Number:

Deceased?:

Search Reset

MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)
11054541	TESTNUTRITION, LEZLIE	1234-444-888		Female	02/Oct/1980
11001524	TEST, LEZLIE	12 3456 7890		Female	02/Oct/1970

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date
SCS	11054541	22-005950	22-007145	PreReg		2024-Oct-18 13
NFS	11054541	22-005931	22-007126	Telephone Visit	2024-Oct-18 08:13	2024-Oct-18 09
SCS	11054541	22-005920	22-007115	Outpatient	2024-Oct-17 16:01	

OK Cancel Preview Add Person Add Encounter

4. Select the facility to which the encounter should be registered

Facility Name: Is the Name (ie: St Catharines)

Facility Alias: Is the Short Form (ie: SCS, NF, WS, FE, PC, HDS)

Organization

Select the facility and/or client to which the encounter should be registered.

Facility Name Facility Alias

St.

St. Catharines Site

Facility:

St. Catharines Site

OK Cancel

Organization

Select the facility and/or client to which the encounter should be registered.

Facility Name Facility Alias

scs

St. Catharines Site

Facility:

St. Catharines Site

OK Cancel

- Complete the required fields marked in "yellow" and with an "*" to register the telephone visit to the appropriate clinic location. Can click complete when done.

Clinical Phone Call

Images

Last Name: TESTNUTRITION First Name: LEZLIE Middle Name: Preferred First Name:

Previous Last Name: Previous First Name: What was your sex assigned at bir...: Female What is your current sex?: Female What pronoun(s) do you use?: She/Her

Birth Date (DD-MMM-YYYY): 02/Oct/1980 Age: 44Y Medical Record Number: 11054541 FIN: -

Phone Number: Alternate Phone Number:

Provincial Health Card Information

Health Card Available?: Yes *Health Card Number: ON 1234-444-888 Version Code: Health Card Expiry Date: **/**/****

Facility: SCS *Building: SCS *Inpatient/Ambulatory Unit: SC LDAP Previous Encounter Type: Telephone Visit Encounter Type: Telephone Visit

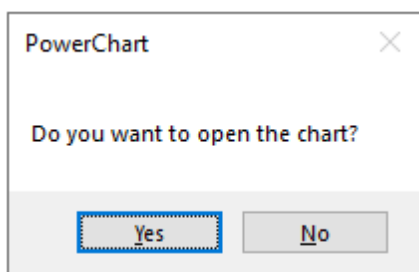
*Service: Respirology

*Registration Date: 18/Oct/2024 *Registration Time: 21:31

Complete Cancel

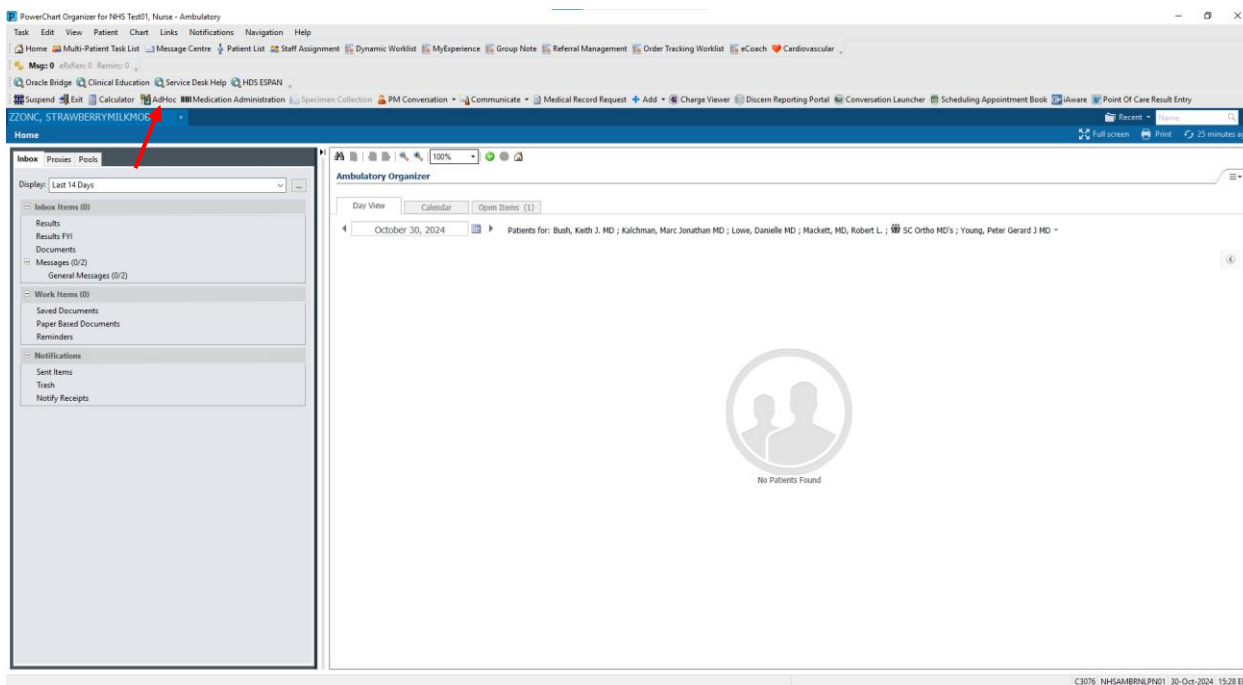
Ready NHSAMBRNLP 101 100376 110 Oct/2024 21:32

- You will receive the following message and click “OK”. You will get the following message asking if you would like to open the chart. Click “Yes”.

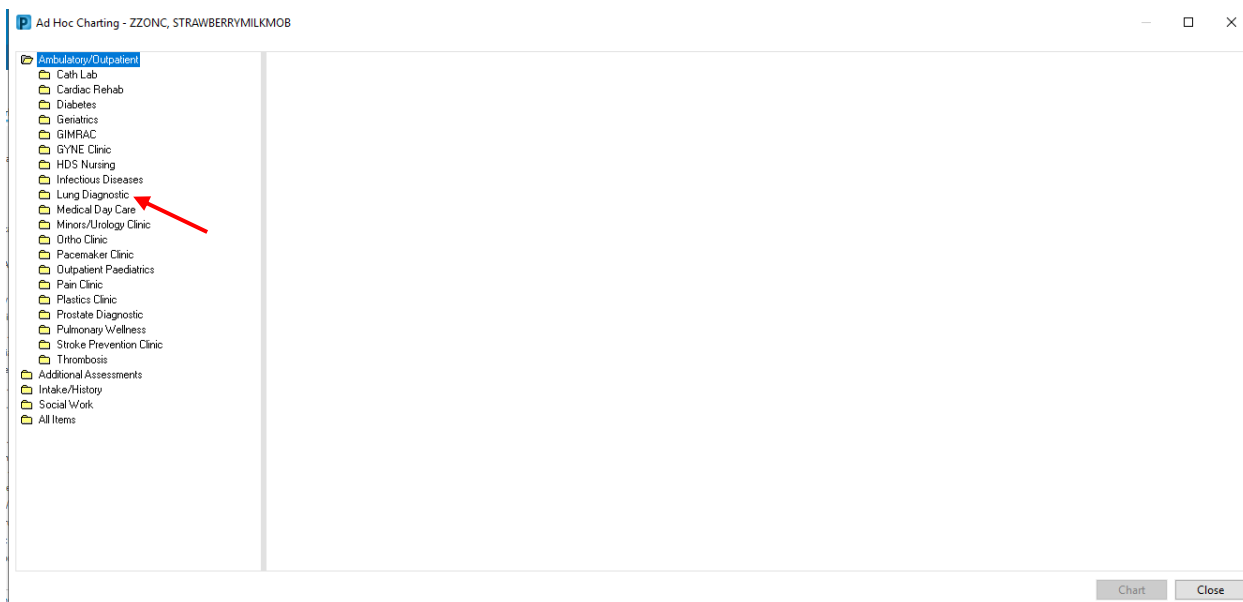


- Launch into the patient chart and locate the powerform you would like to complete. This can be done either through adhoc charting or through the vital sign drop down “carrot”.

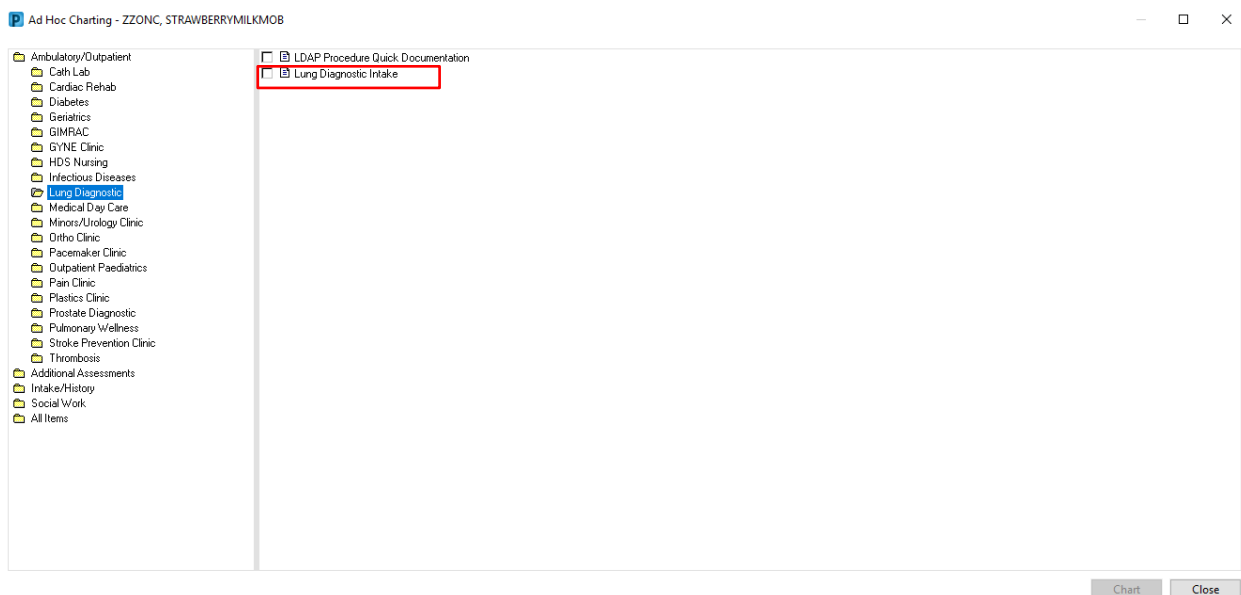
Adhoc Charting



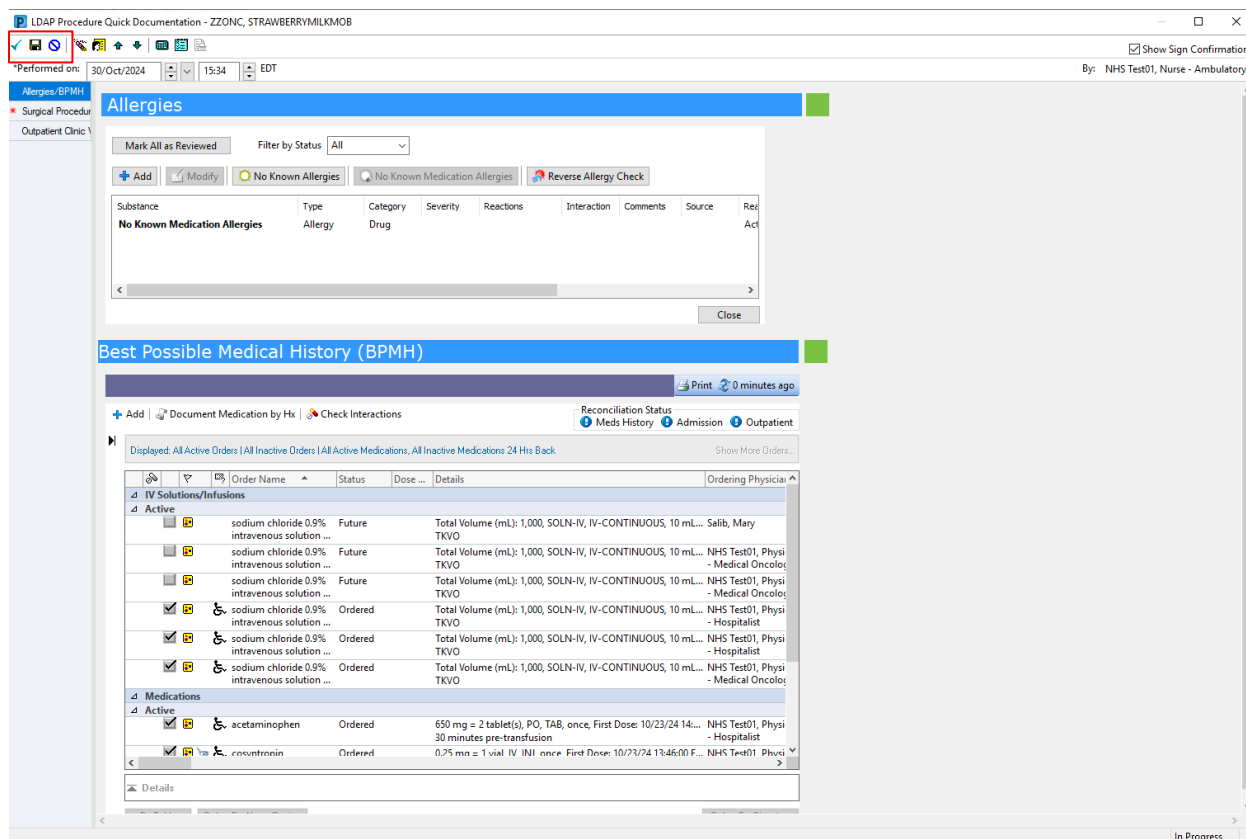
8. The ambulatory folders will show, navigate to your clinics appropriate folder.



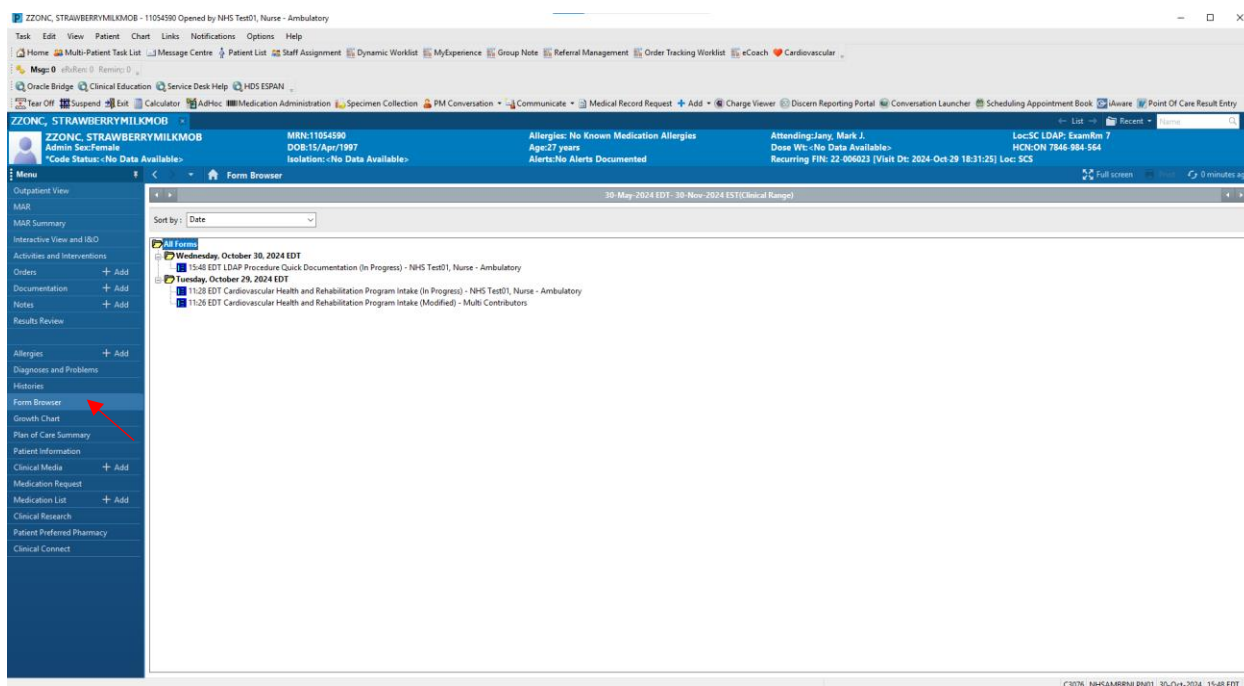
9. Now you can pick your clinic form or the generic telephone visit form.



Within the forms the buttons on the top are for the following:

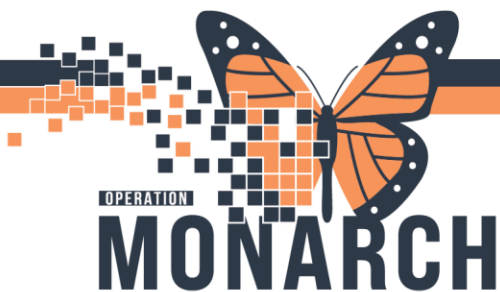


- ✓ - Submit
- 📄 - Save but **NOT** Submit, when you use this you can reopen your forms in **Form Browser**. Double click the forms to reopen and continue charting.



Vital Sign Drop Down Carrot:

1. When in your patient chart, select **Outpatient View** if not already open.



TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

The screenshot shows the 'Outpatient View' interface for patient ZZTEST, AMB. The 'Vital Signs' section is active, displaying a table of vital signs over time. A red arrow points to the 'Carrot' icon (a small upward-pointing triangle) in the top right corner of the Vital Signs table, which is used to expand or collapse the section.

	10 OCT 2024	30 JUL 2024	30 APR 2024
BP	108/62	16/16	118/60
HR	60	60	60
Temp	37	37	37
Respiratory Rate	16	16	16
SpO2	98	98	98
Weight	121.000	121.000	121.000
Weight Measured	121	121	121

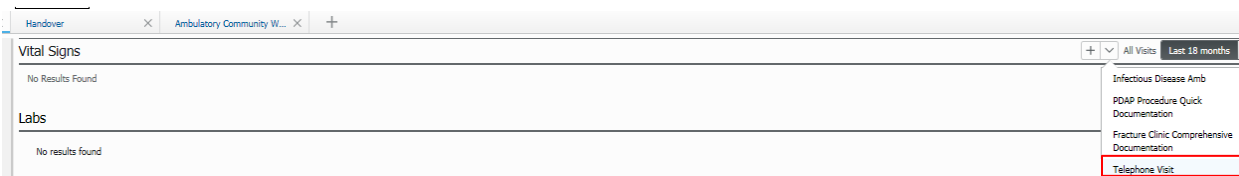
2. Now navigate to the **Vital Signs** section, here you will locate the “carrot” icon





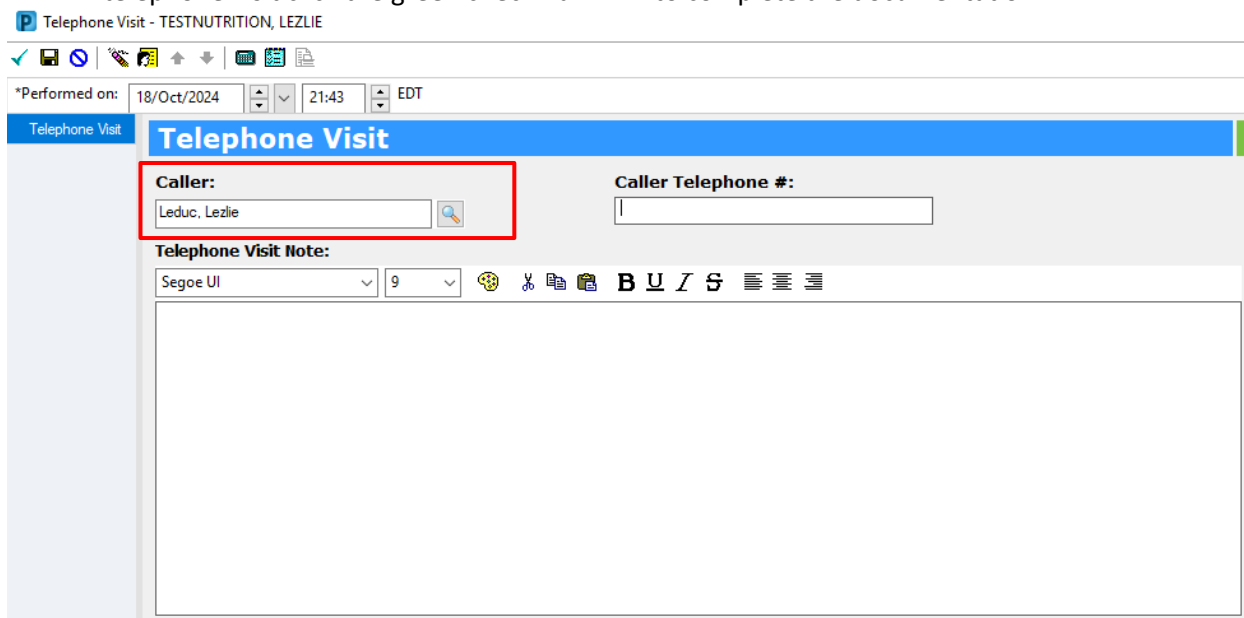
This screenshot shows the same 'Outpatient View' interface, but with the 'Vital Signs' section expanded. A red arrow points to the 'Carrot' icon in the top right corner of the Vital Signs table, which is now expanded to show more data. Another red arrow points to the 'All Vital Signs' dropdown menu in the top right corner of the Vital Signs table.

	10 OCT 2024	30 JUL 2024	30 APR 2024
BP	108/62	16/16	118/60
HR	60	60	60
Temp	37	37	37
Respiratory Rate	16	16	16
SpO2	98	98	98
Weight	121.000	121.000	121.000
Weight Measured	121	121	121

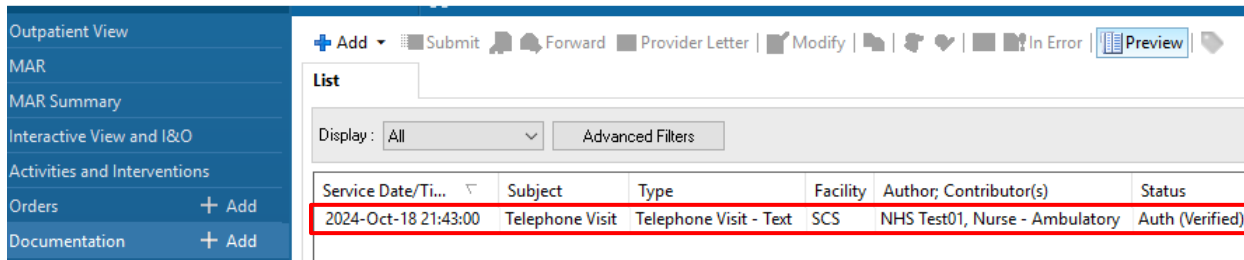
3. From the drop-down list, select **Telephone Visit**.



4. Document your patient encounter. On the telephone visit form you can add the caller name and number by searching with the  and finding the clinician's name. Once you complete the telephone visit click the green checkmark  to complete the documentation



5. This will document the power form in the chart and register a telephone visit as an encounter.





TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

Allergies: Allergies Not Recorded		Attending:		Loc: SC LDAP		
Age: 44 years		Dose Wt: <No Data Available>		HCN: ON 1234-444-888		
Alerts: No Alerts Documented		Telephone Visit FIN: 22-006014 [Visit Dt: 2024-Oct-18 21:31:26] Visit Reason: <No - Reason for visit>				
P Custom Information: TESTNUTRITION, LEZLIE						
Visit Type	Location	Admit Date	Discharge Date	FIN	Service	Visit Reason
Telephone Visit	NF GAC	18/Oct/2024 08:13:27		22-005931	Ambulatory	
Outpatient	SC CLINU	17/Oct/2024 16:01:49		22-005920	Ambulatory	consult
PREREG	SC CLINU			22-005990		
Telephone Visit	SC LDAP	18/Oct/2024 21:31:26		22-006014	Respirology	

- Decision support and clinical managers will be able to pull reports on the number of registered telephone visit encounter for a Clinic area from this data.