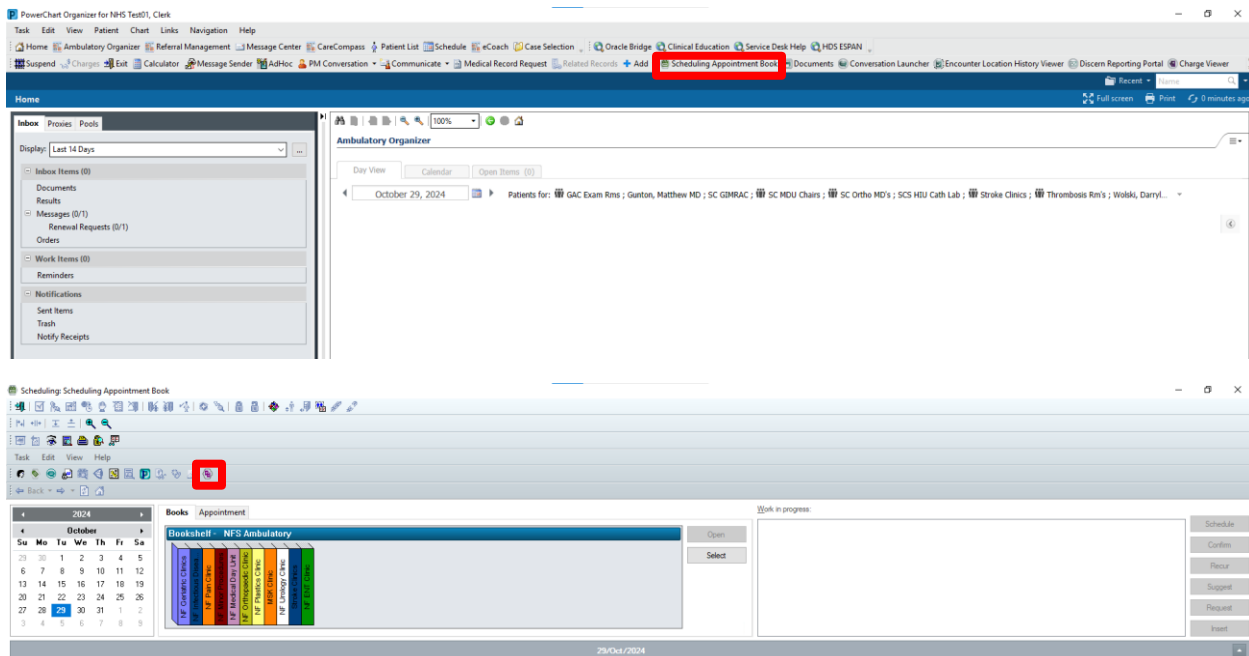


Clerical Staff:

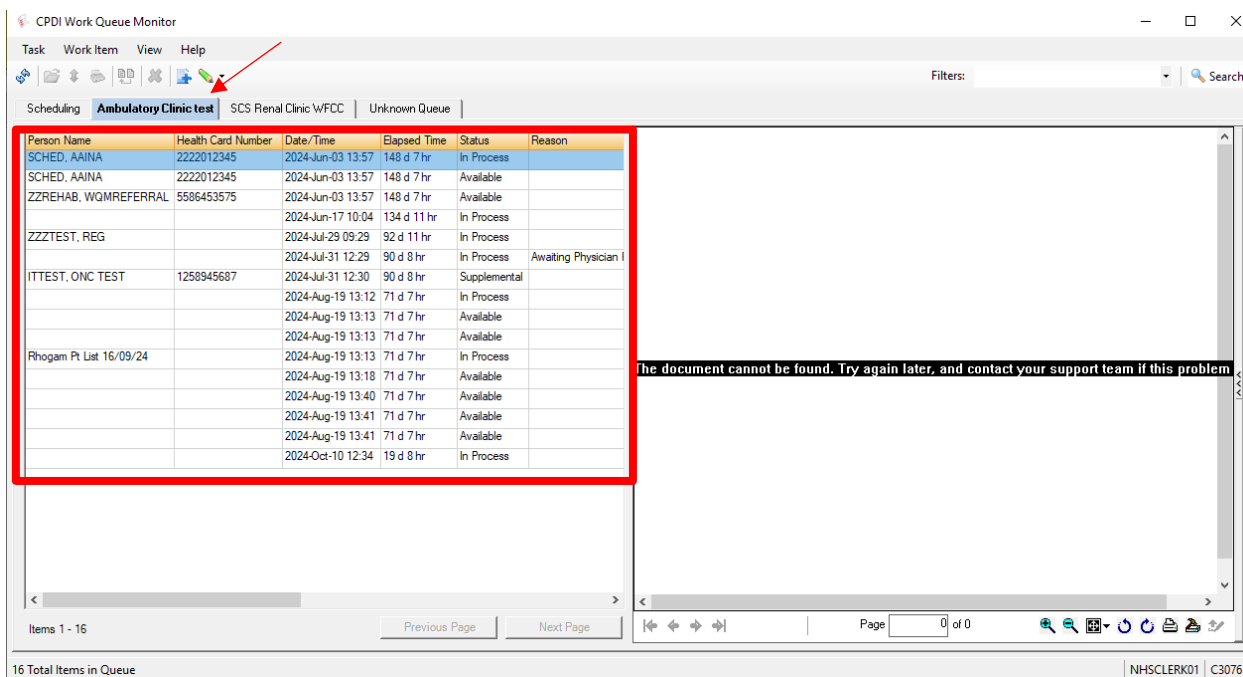
1. Navigate to **Work Queue Monitor**, this can be done two ways:
 - a. Through your **App Bar**, locate the purple icon with two pieces of paper.



- 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.



CPDI Work Queue Monitor

Task Work Item View Help

Scheduling **Ambulatory Clinic test** SCS Renal Clinic WFCC Unknown Queue

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	

Items 1 - 16

16 Total Items in Queue

NHSCLERK01 | C3076

- **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	MRN	Document Type	Owner
SCHED, AAINA	222212345	2024-Jun-03 13:57	56 d 20 hr	Available			88000043	Physician Order	NHS Test01, HUC
SCHED, AAINA	222212345	2024-Jun-03 13:57	56 d 20 hr	Available			88000043	Physician Order	NHS Test01, HUC
ZZREHAB, WOMREFERRAL	555645375	2024-Jun-03 13:57	56 d 20 hr	Available			88000143	Referral Letter	NHS Test01, HUC
ZZREHAB, WOMREFERRAL	555645375	2024-Jun-03 13:57	56 d 20 hr	In Process					NHS Test01, Oncology Rep
		2024-Ju-29 09:26	1 d 1 hr	Available					NHS Test01, HUC
		2024-Ju-29 09:27	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:27	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:28	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:28	1 d 1 hr	Available					NHS Test01, HUC
		2024-Ju-29 09:28	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:29	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:29	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:30	1 d 1 hr	Available					Little, Robert
		2024-Ju-29 09:31	1 d 1 hr	Available					Little, Robert

16 Total Items in Queue

NHS-HUC01 | P3076

Outpatient Nephrology Referral Form for Primary Care Providers

To our primary care provider colleagues:

Please find an Outpatient Nephrology Referral Form developed by the Ontario Renal Network (ORN). Recommended reasons for referral of patients with nephrological problems are outlined, and these closely mirror the ORN's KidneyWise Clinical Algorithm and Evidence Summary. While patients (and their primary care providers) often want to arrange a timely appointment so that their clinical concerns can be addressed and/or alleviated quickly, most nephrologists will triage referred patients based on level of need. Those patients who are at high risk of progressing to end-stage renal disease and/or who may require a renal biopsy for diagnosis are usually seen more urgently.

Typical indications include:

- Very low renal function (eGFR < 20 ml/min/1.73m²), confirmed on repeat testing)
- Rapidly declining renal function (eGFR decline ≥ 10 ml/min/1.73m² within 2 to 4 weeks, confirmed on repeat testing)
- Nephrotic syndrome (edema with severe proteinuria – i.e. urine ACR > 150 mg/mmol or 24-hour urine protein > 3.5 g/day and serum albumin < 25 g/L)
- Suspected glomerulonephritis or renal vasculitis (hematuria with > 20 RBC/hpf or RBC casts associated with proteinuria, declining renal function and/or positive immune markers)

Please note that the use of NSAIDs should be discontinued prior to confirming very low or rapidly declining renal function, as this is a common reversible cause of a decline in eGFR. Also, note that initiating the use of an ACEi or ARB may cause a reversible decline in eGFR (up to 30%) that does not necessarily warrant referral.

If you feel that circumstances warrant referral of a patient with CKD who does not meet the recommended referral criteria on the Outpatient Nephrology Referral Form, particularly in younger patients, contact your local nephrology group for further advice. If you feel your patient needs to be seen within 24 hours, contact the nephrologist on call in your region for further discussion.

Dr. Allan Gill, MD, CCPC, MPH
Provincial Primary Care Lead, ORN

Dr. Scott Bramble, MD, MSc, FRCPC
Provincial Lead, Early Detection and Prevention of Progression, ORN

The KidneyWise Clinical Toolkit helps primary care providers identify, detect, and manage chronic kidney disease (CKD).

The KidneyWise Clinical Toolkit helps to:

- Determine which patients are at high risk of developing CKD
- Provide recommendations on how to properly diagnose and best manage the disease to reduce risk for further progression
- Guide clinicians on which patients might benefit from referral to nephrology

www.kidneywise.ca

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

ZZREHAB, WOMREFERRAL

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

Location: JIFS

Document type: Referral Letter

Subject: Referral Letter

Priority: Routine

Scheduling Request List:

modality: AMB Pacemaker

Last Contact:

Referring physician:

Status: Available

Reason:

Comment: pod

Date of service: GMT-05:0

Post as authenticated

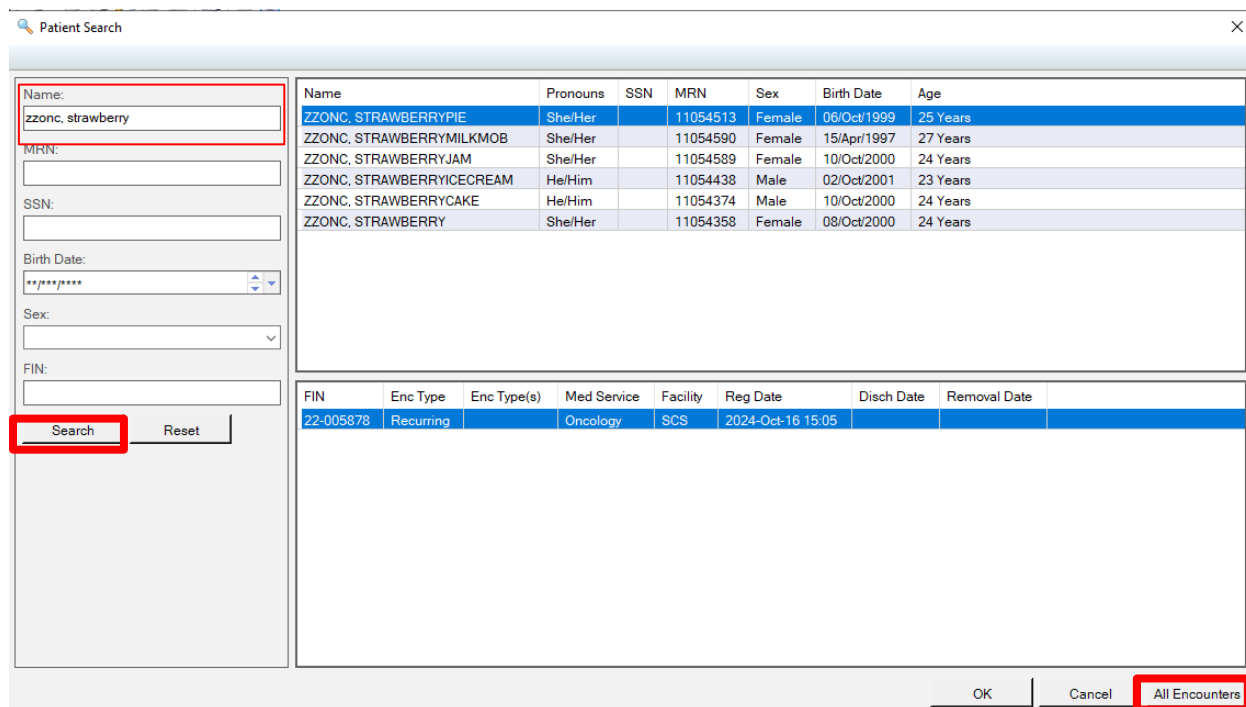
Sign date:

Page 0 of 0

Route 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

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		

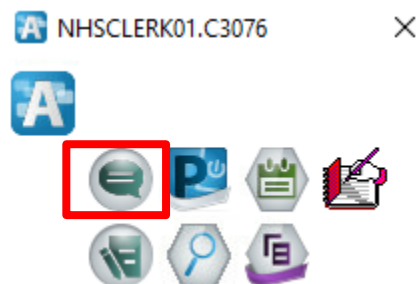
Search Reset

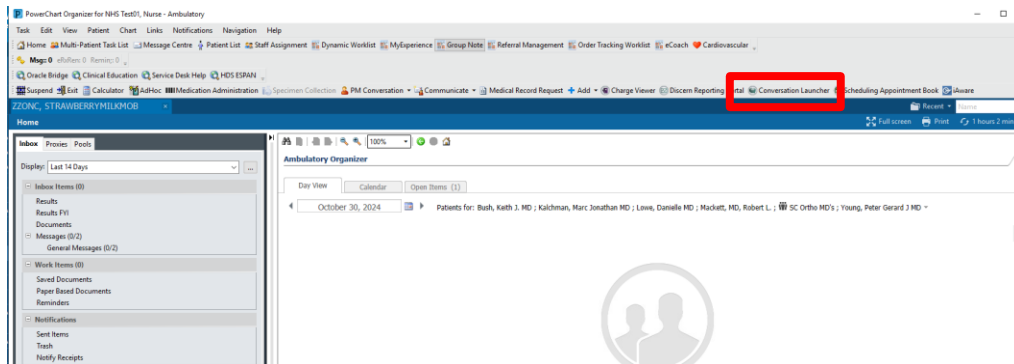
OK Cancel All Encounters

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.

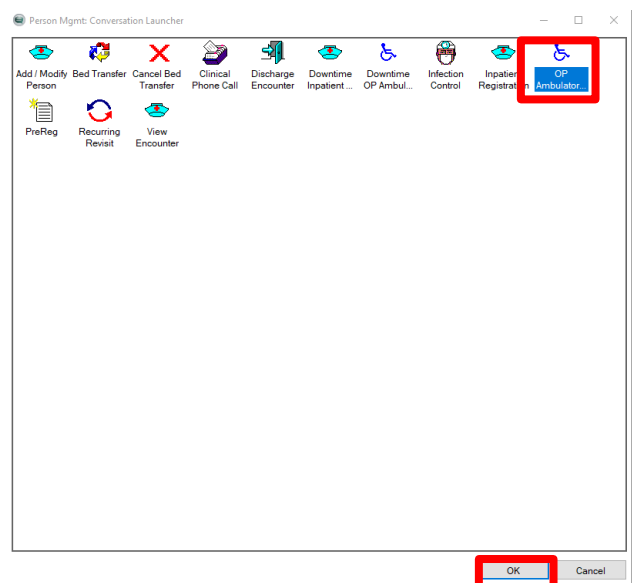
*****IF THE PATIENT IS NOT BUILT INTO THE SYSTEM*****

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

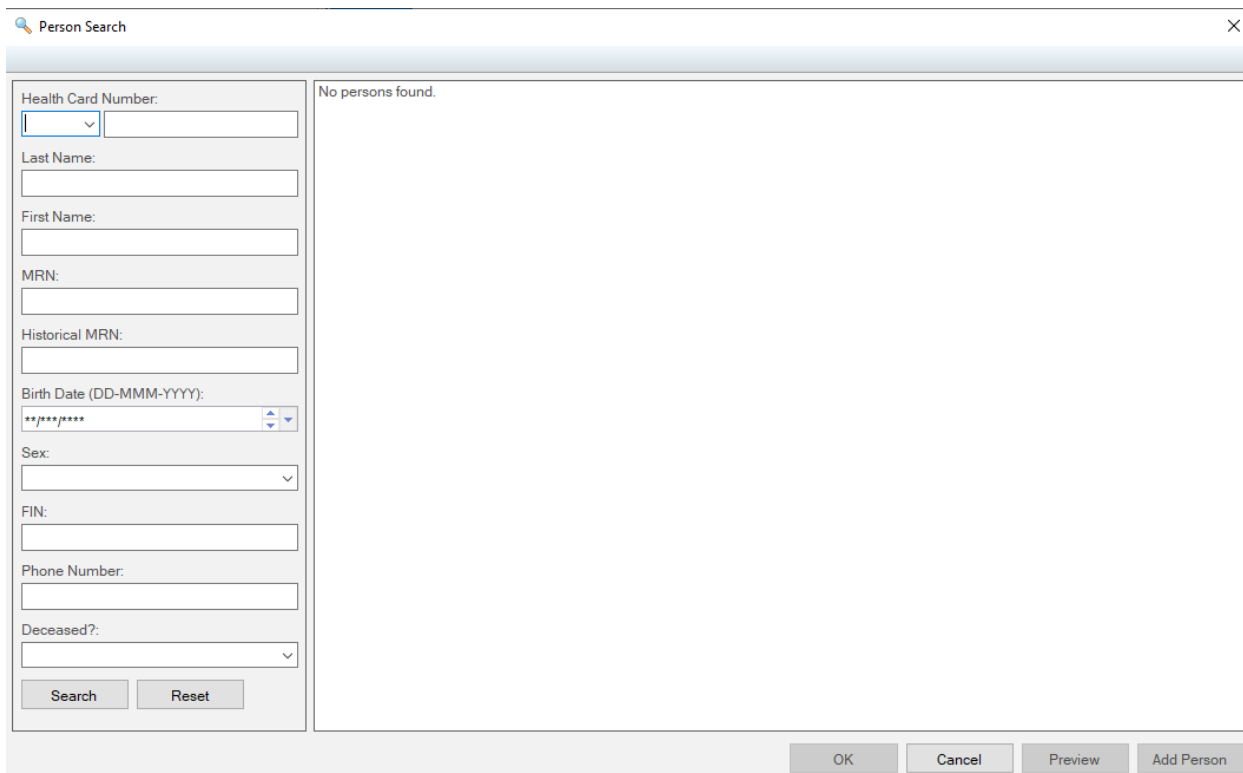




- Then select **OP Ambulatory Registration** and select **OK**.



- 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:

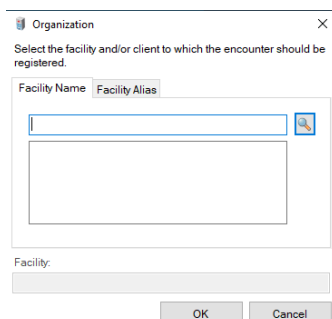
FIN:

Phone Number:

Deceased?:

No persons found.

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



Organization

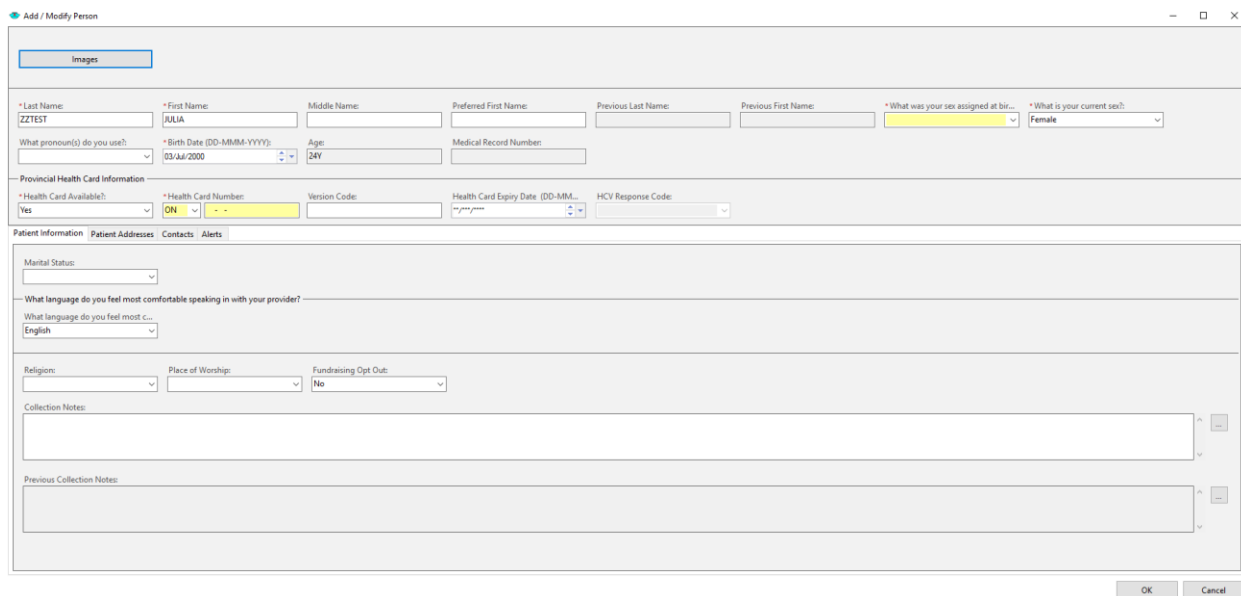
Select the facility and/or client to which the encounter should be registered.

Facility Name

Facility Alias

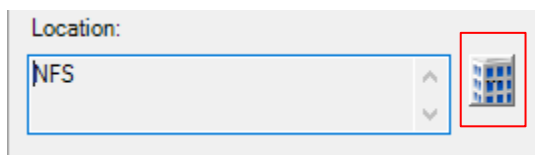
Facility:

- 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.

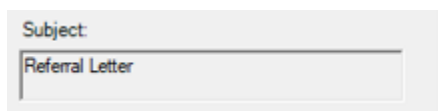


6. You can now modify the details on the left-hand side of the window that are applicable.

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



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



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

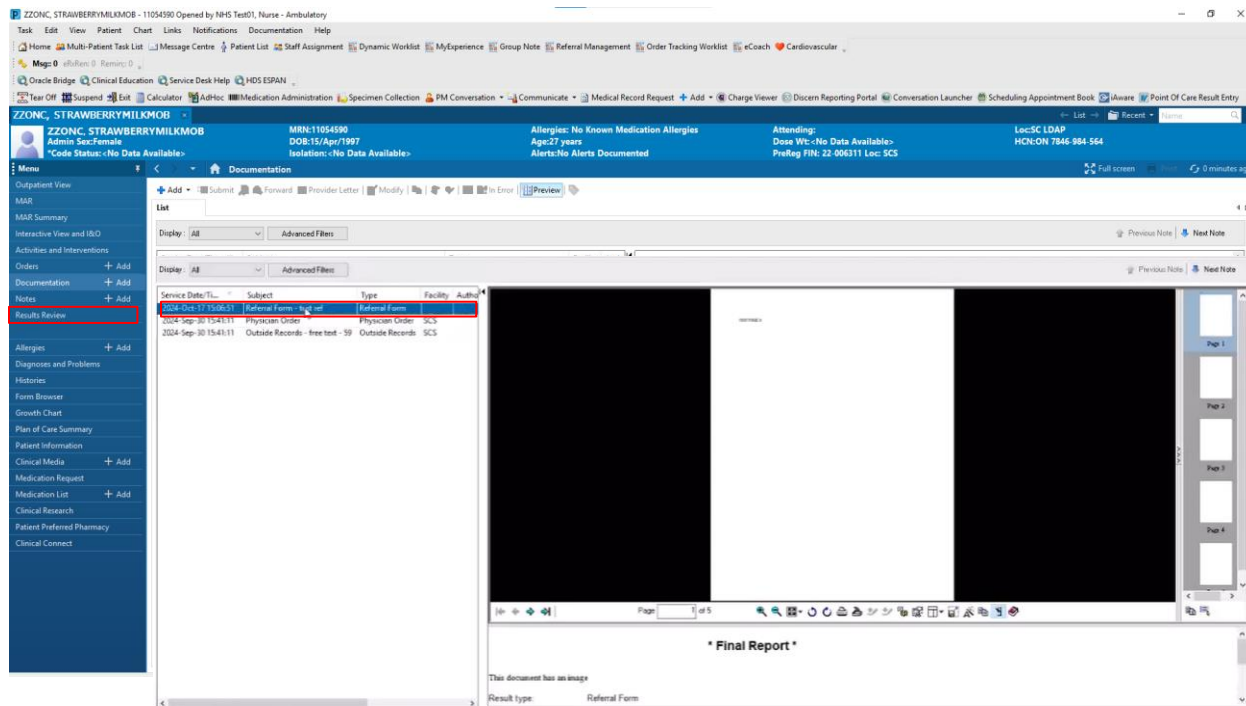
Complete

Supplemental

Comment:

Edit the "Date of Service" if desired.

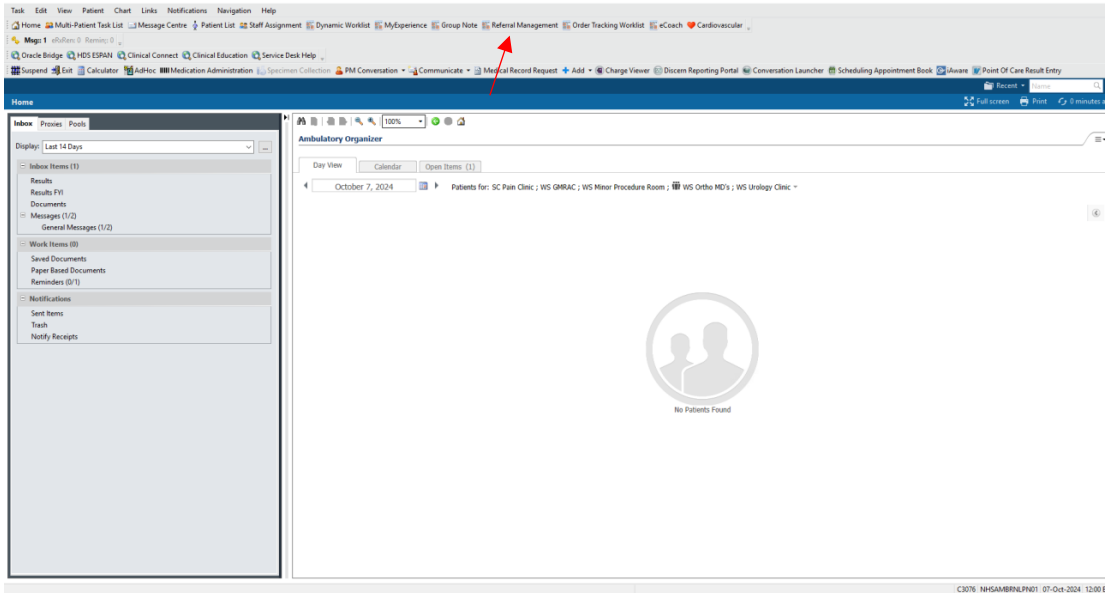
7. When documentation is complete, select **OK**.
8. Now when navigating back to Powerchart and opening the patient chart, this form will be visible under **Documentation**.



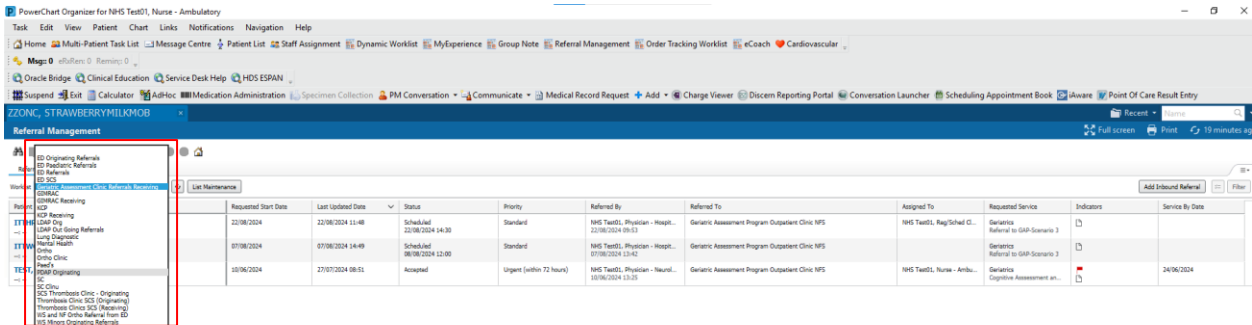
The screenshot shows the Powerchart interface for patient ZZONC, STRAWBERRYMILKMOB. The top banner displays patient information including MRN 11054390, age 27, and allergies. The left sidebar shows the 'Documentation' menu with 'Results Review' highlighted. The main window displays a list of documents, with a 'Referral Form' document selected. The document content is a 'Final Report' with the result type 'Referral Form'.

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**.



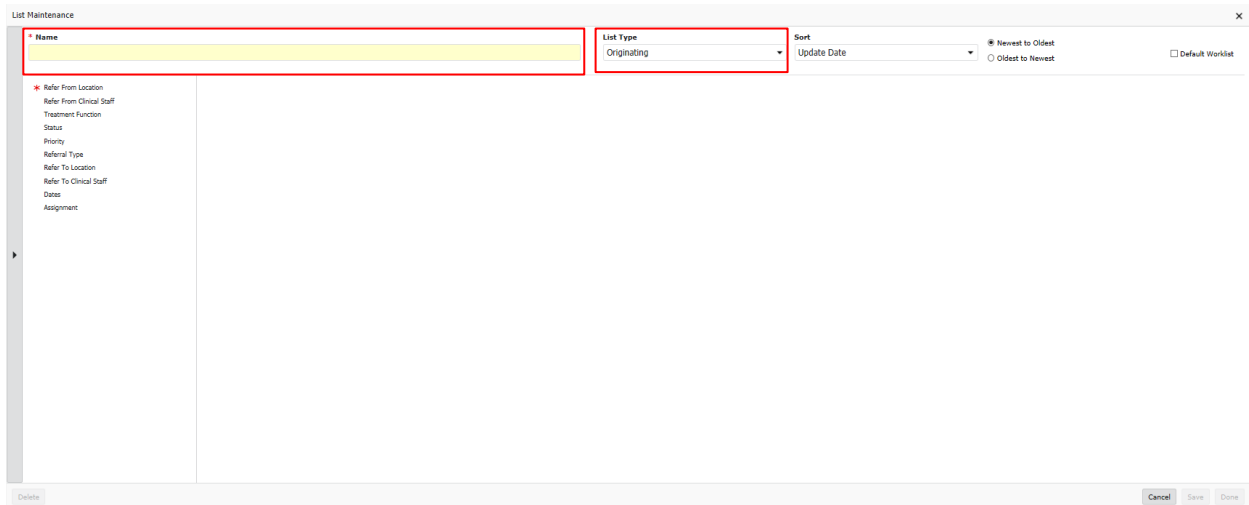
11. If you do not have the correct worklist to add a worklist select **List Maintenance**.

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		
ZZAMBALATORY, 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	HM 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		
*ZYZES, 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 Tung 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 test		
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...		
*ZYZES, 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 arm		

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 (Outbak)
 - 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 HJ Out Referrals from ED
 - WS Home Originating Referrals
- Buttons:** Cancel, Save, Close



List Maintenance

* Name

List Type: Originating

Sort: Update Date

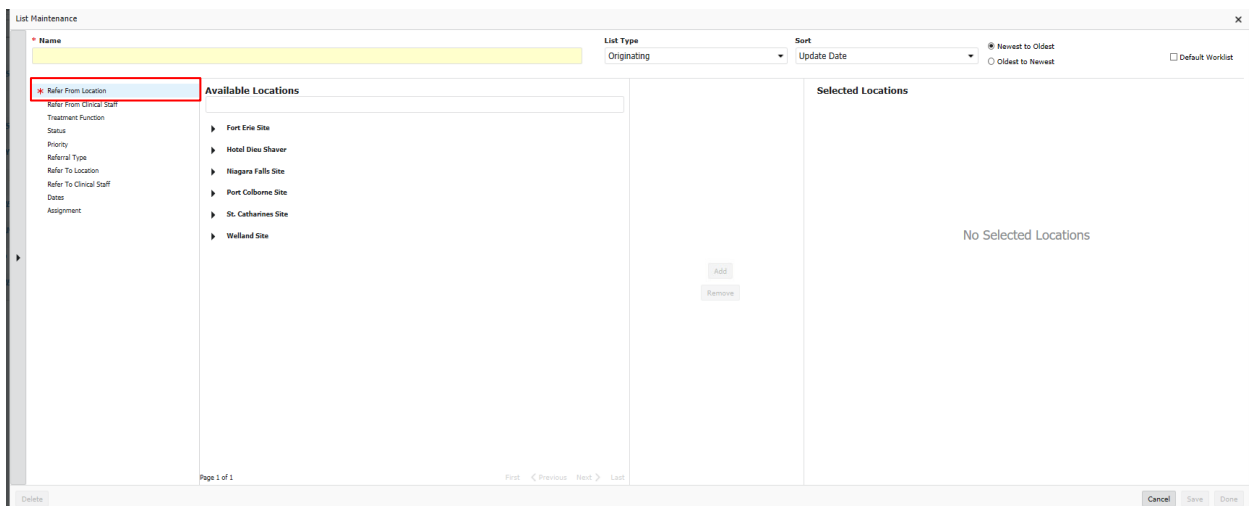
Newest to Oldest
 Oldest to Newest

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

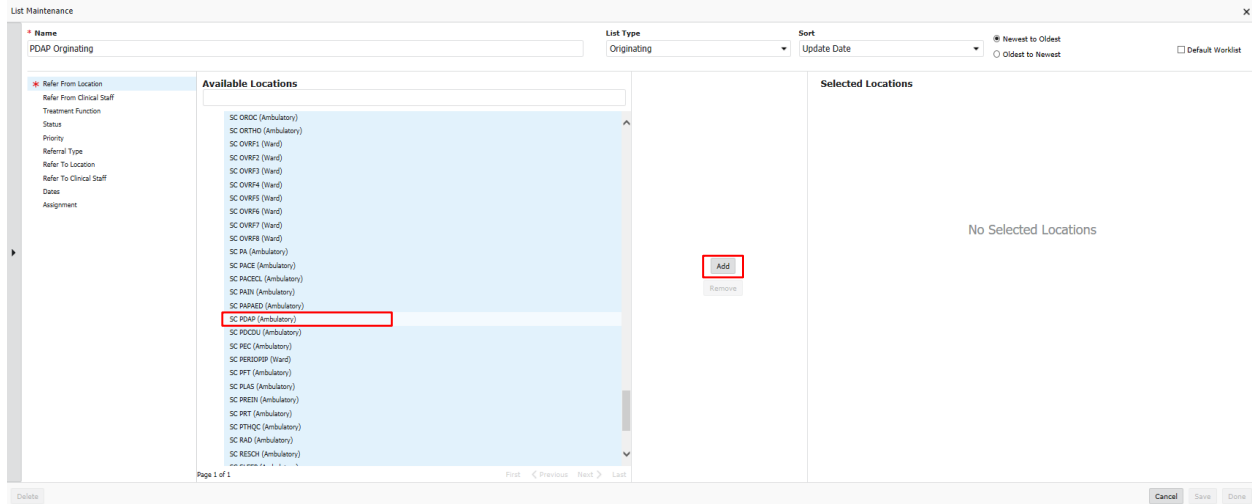
Selected Locations

No Selected Locations

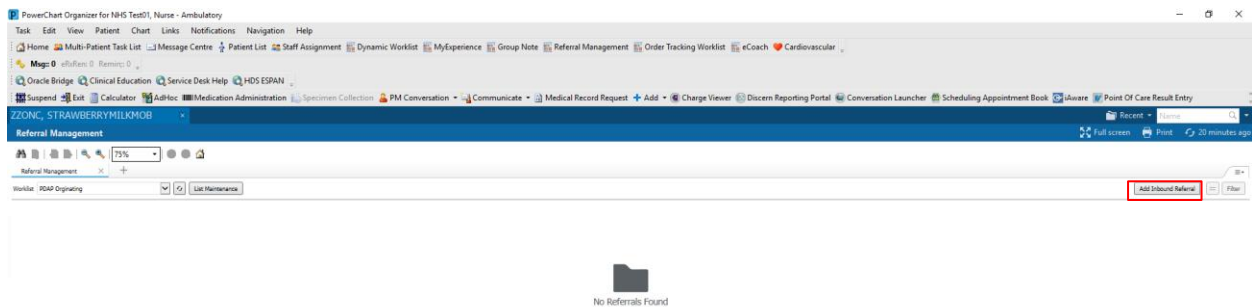
ADD REMOVE

Page 1 of 1 First Previous Next Last

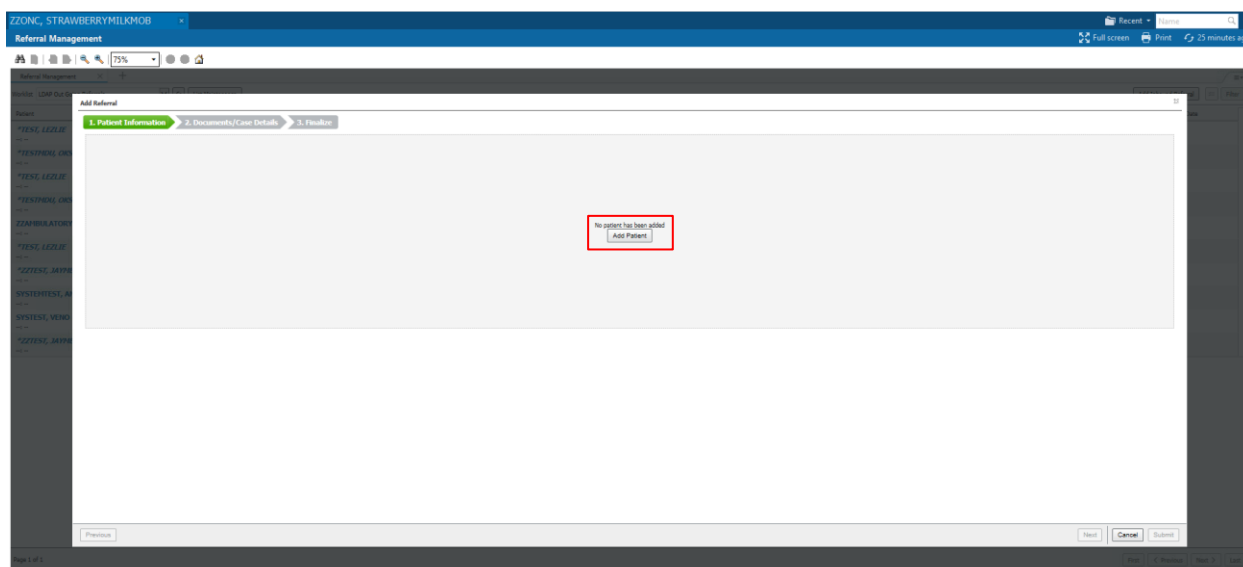
Delete Cancel Save Done



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

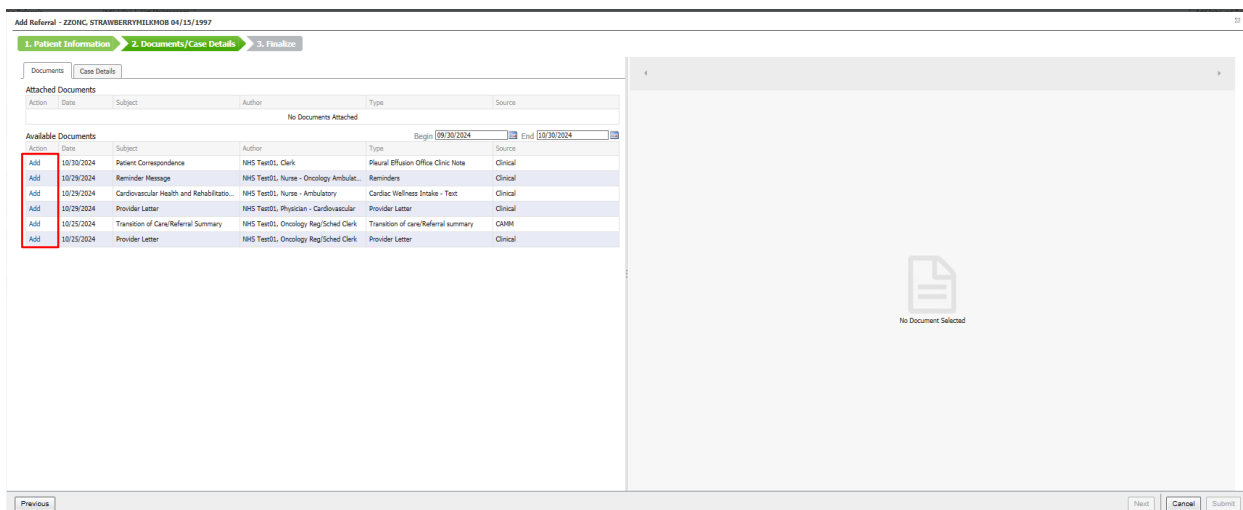


15. Now you will add the patient using the **Add Patient** button.



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

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

Documents Case Details

*Medical Service

*Referral Reason

Codified Reason
Q

Treatment to Date

Referral Type

Refer from Provider

Refer from Location
--

*Referral Written Date
MM/DD/YYYY

Requested Start Date
MM/DD/YYYY

Service By Date
MM/DD/YYYY

*Refer to Provider
Not Specified

*Refer to Location
--

*Priority

Instructions to Staff

Comments

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**.

Search by:

Provider

Practice



TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

Provider Search

Search: prostate

Qualifiers: +

Search by: Practice

Prostate Diag Assessment Prog SCS

Urology
Within Health System
& Providers Available

Accept Cancel

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

Add Referral - ZZONC, STRAWBERRYHEALTH 04/15/1997

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

Status: Pending Acceptance Unassigned Assign to me Assign

Accept Referral Reject Referral

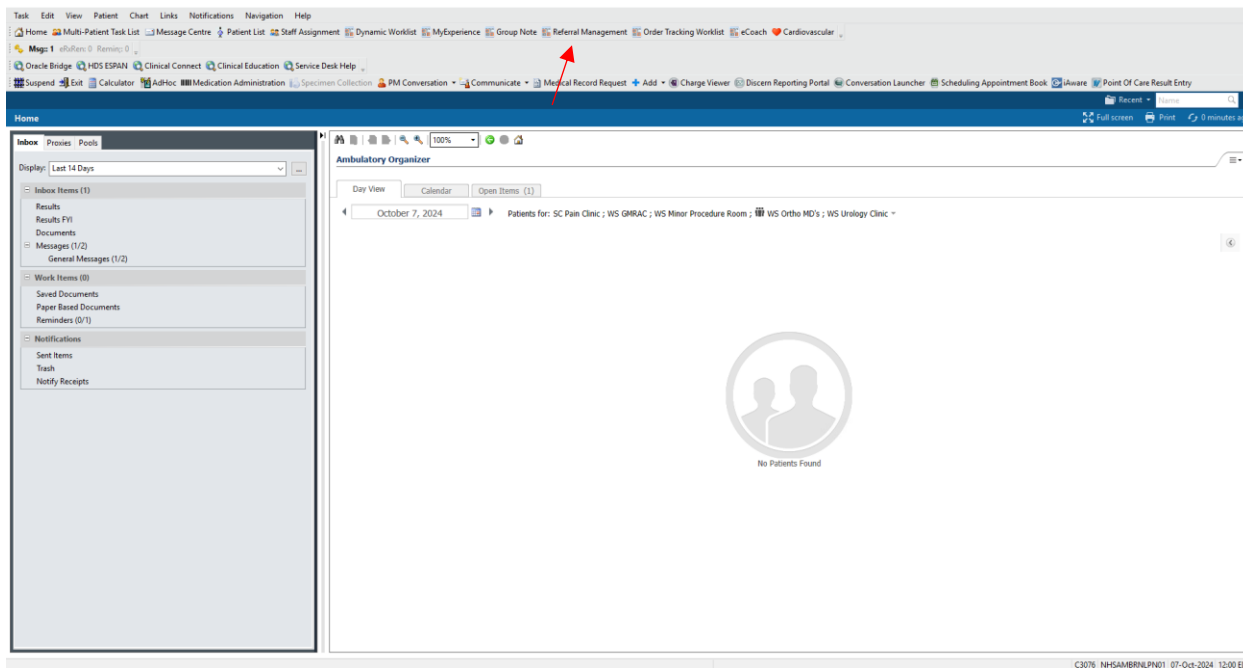
Medical Service	Referral Reason	Clinical Reason	Treatment to Date	Referral Type
Ambulatory	test			
Referral from Provider	Referral Location	Referral Written Date	Requested Start Date	Service By Date
		10/31/2024		
Referral to Provider	Referral Location	Specialty	Instructions to Staff	Comment
	Prostate Diag Assessment Prog SCS	Standard (next available)		

Date	Subject	Author	Type	Source

Previous Next Cancel **Submit**

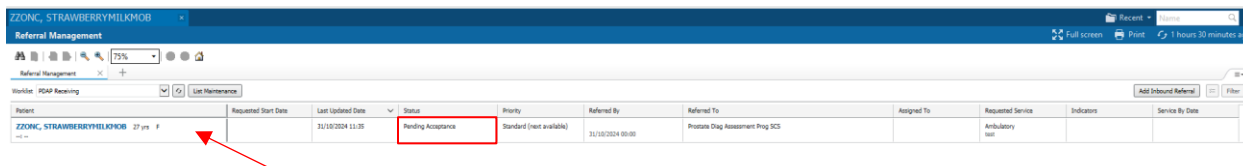
Nursing Staff:

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

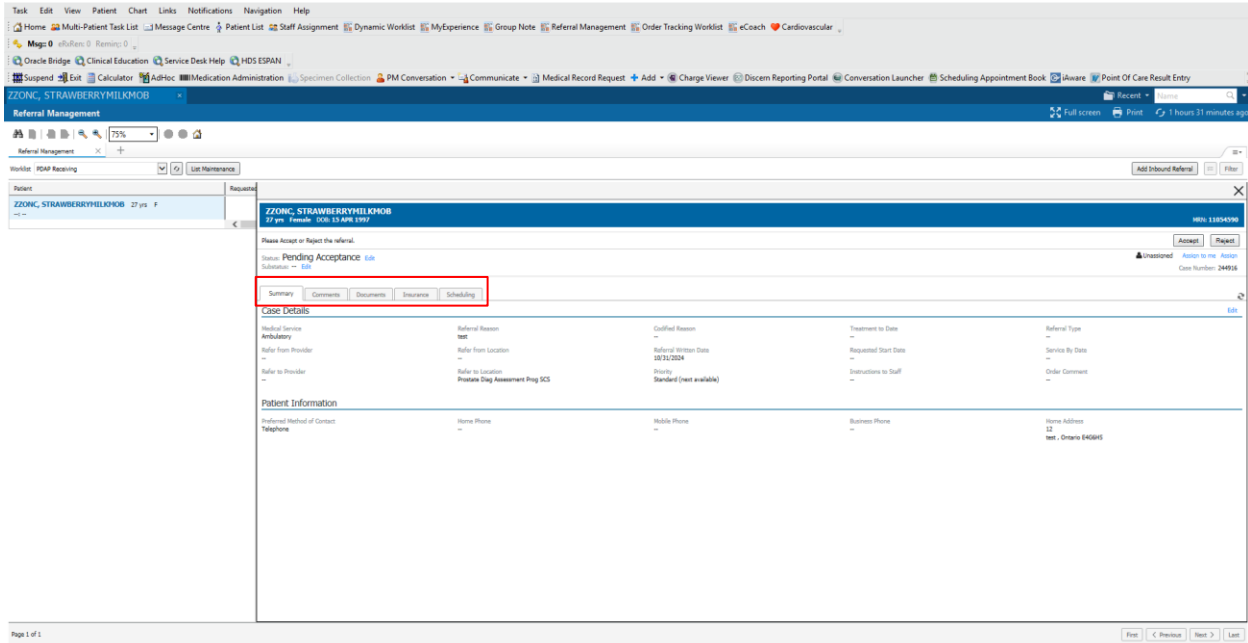


2. Ensure the correct worklist is selected, you will select the clinic's **Receiving** list.

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

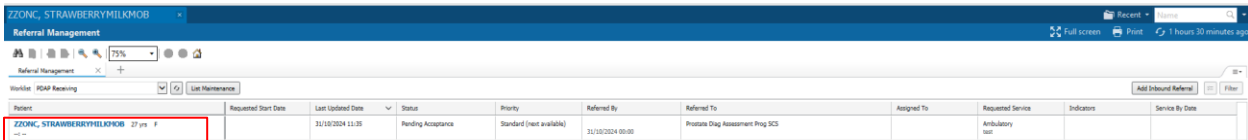


3. Clicking the white space beside the patient name you can open the referral and review its details, any attached documents, and add in any applicable comments.



The screenshot shows the 'Referral Management' interface. The patient name 'ZONG, STRAWBERRYMILKMOB' is visible in the top left. The main area displays 'Please Accept or Reject the referral.' with a status of 'Pending Acceptance'. Below this, there are tabs for 'Summary', 'Comments', 'Documents', 'Insurance', and 'Scheduling'. The 'Summary' tab is highlighted with a red box. Underneath, there are sections for 'Case Details' and 'Patient Information' with various fields and values.

- 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 a table of referrals. The first row is highlighted with a red box. The table has columns for 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
ZONG, STRAWBERRYMILKMOB 27 yrs F		31/10/2024 11:35	Pending Acceptance	Standard (next available)	31/10/2024 09:00	Prostate Diag Assessment Prog SCS		Ambulatory test		

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

Accepting

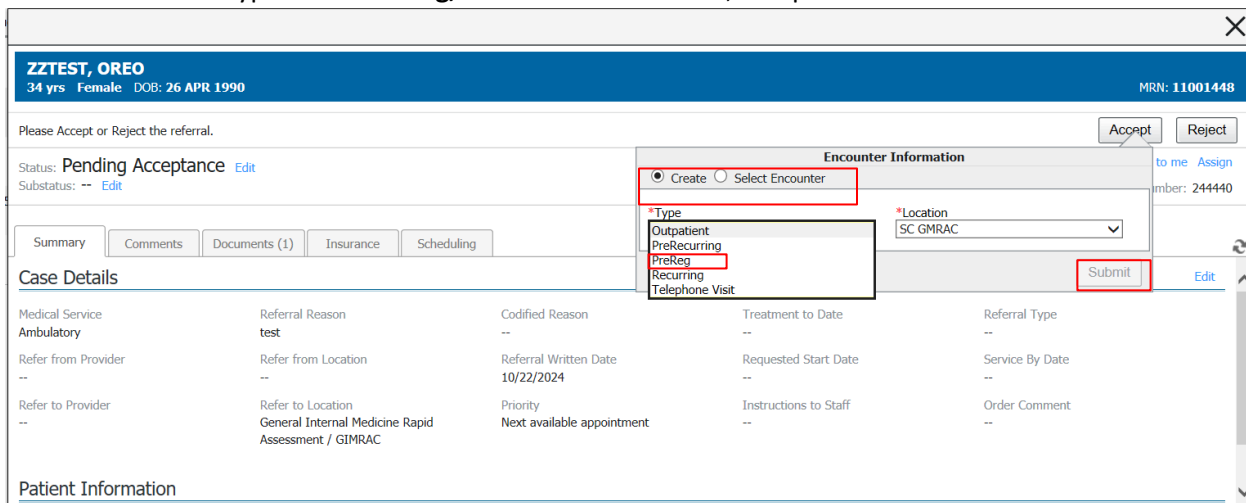
- Select **Accept** to accept the internal referral.



The screenshot shows the 'Patient, Test' header with details: 5 yrs Female DOB: OCT 26, 2013 MRN: 10000655 FIN: 20000670. Below the header, there is a 'Please Accept or Reject the referral.' prompt. The 'Accept' button is highlighted with a red box. Other buttons like 'Reject' and 'Assign to me' are also visible.

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.

- 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. Accept Reject

Status: Pending Acceptance Edit
Substatus: -- Edit

Encounter Information

Create Select Encounter

*Type: **PreReg**
Outpatient
PreRecurring
Recurring
Telephone Visit

*Location: SC GMRAC

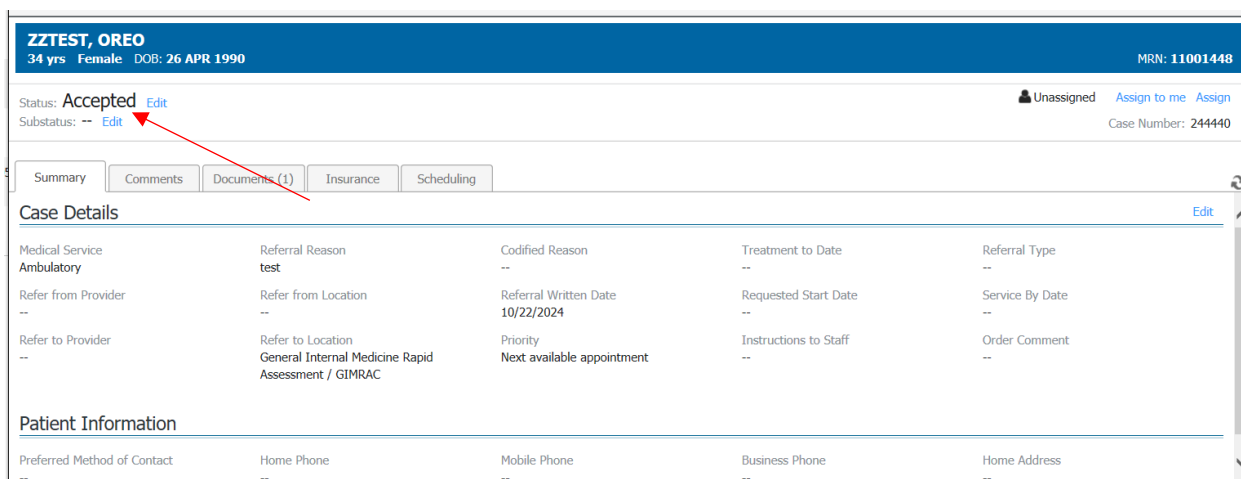
Submit Edit

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 --

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

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

- 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. Accept **Reject**

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.

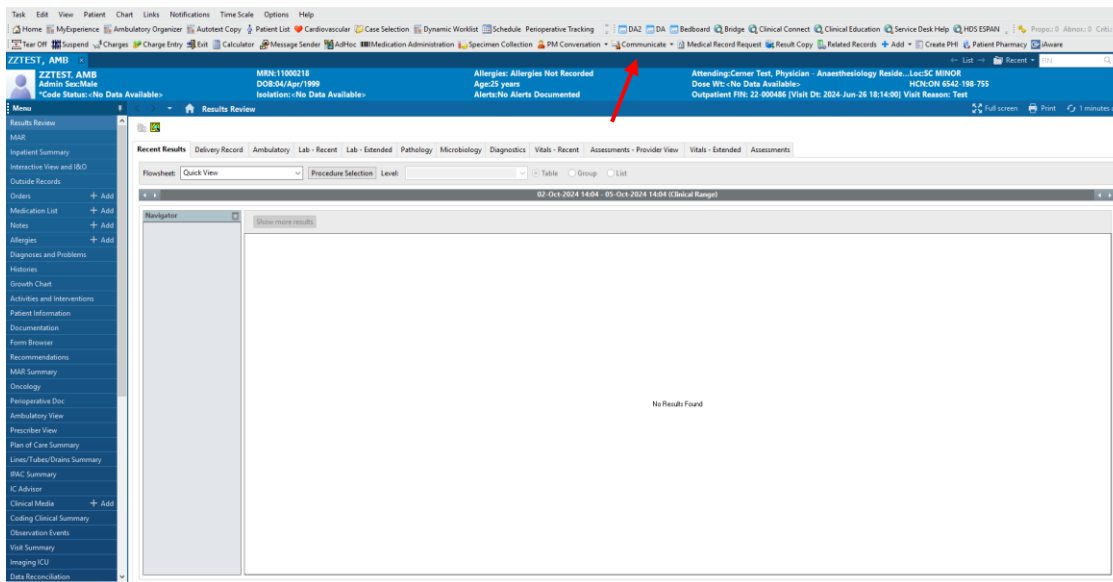
Reject Reason

*Reason

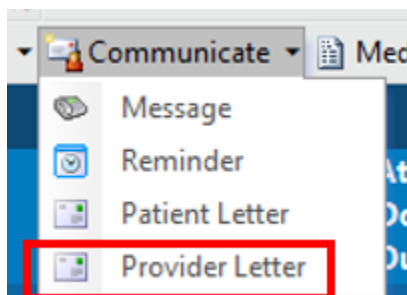
Comment

The referral status is updated to Rejected.

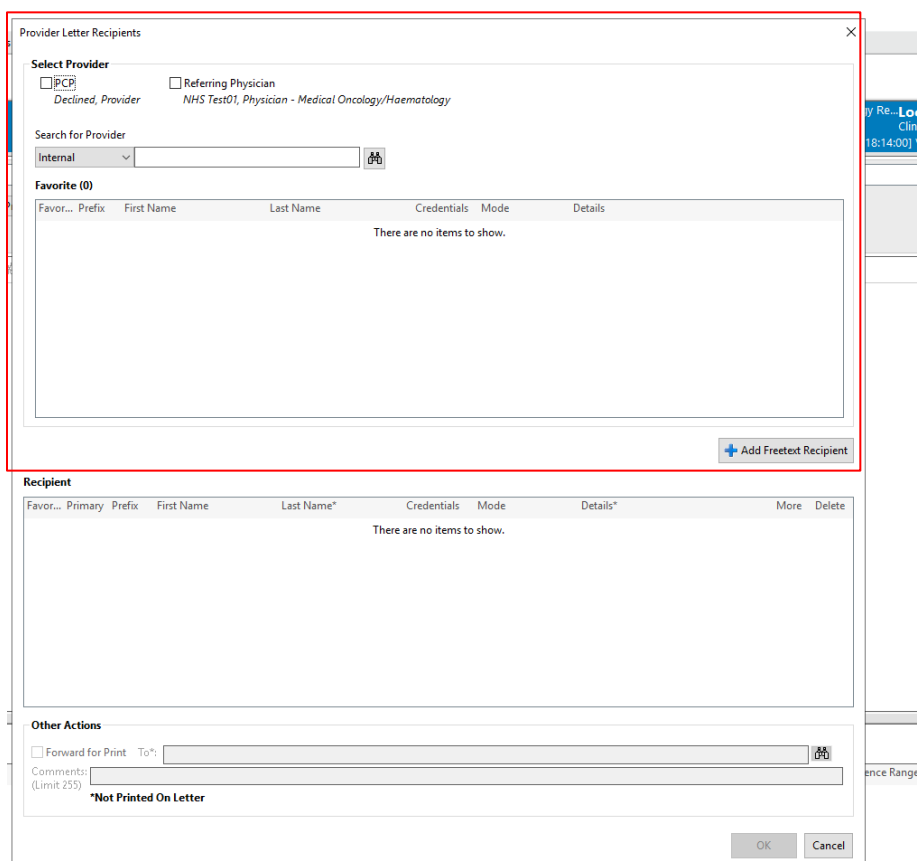
3. Now you inform the provider of the rejection reason, a provider letter would be used. Click on the black dropdown next to **Communicate** and select **Provider Letter**.



The screenshot shows the HIS interface for patient ZZEEST, AMB. The top navigation bar includes 'Communicate' with a dropdown arrow. A red arrow points to this dropdown menu. The main content area shows 'Recent Results' with a 'No Results Found' message.



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 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
There are no items to show.									

Other Actions

Forward for Print To*:

Comments: (Limit 255)

*Not Printed On Letter

OK Cancel

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			✕

Other Actions

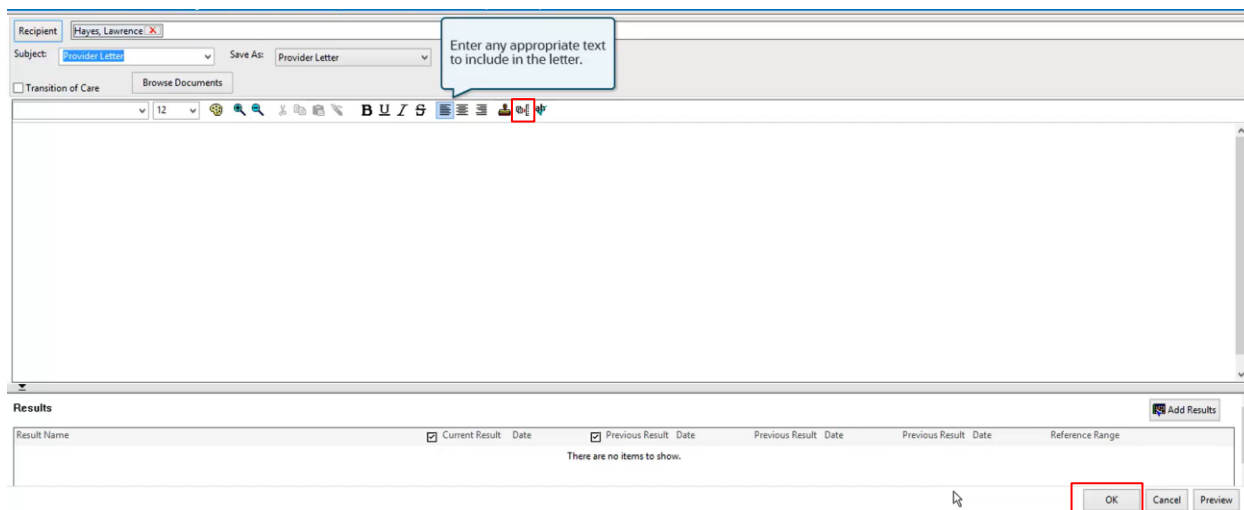
Forward for Print To*: 

Comments:
(Limit 255)

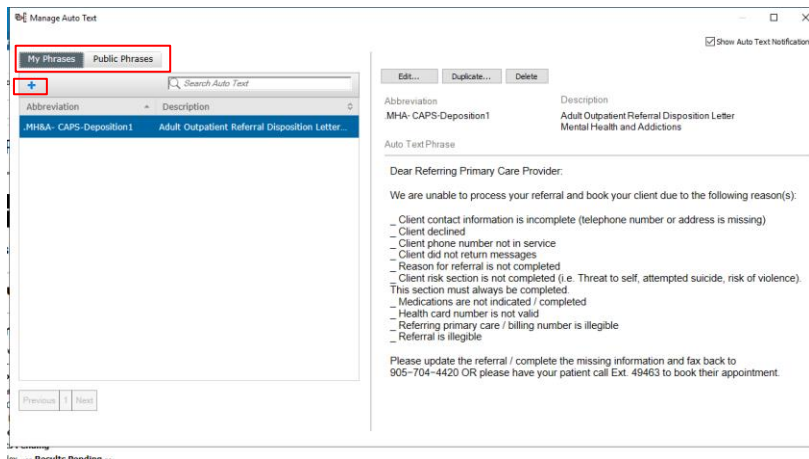
***Not Printed On Letter**

[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.

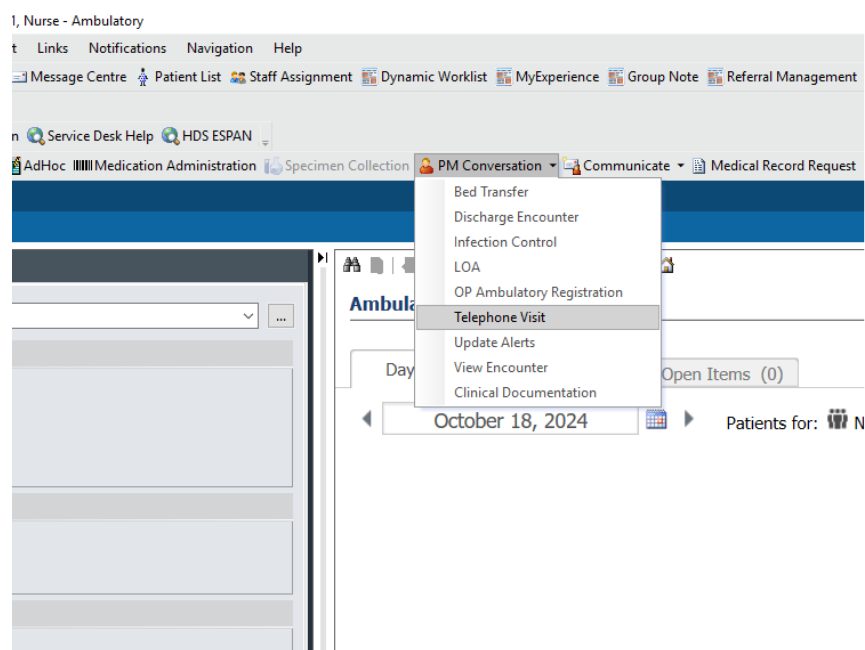
The following are currently built out as PDAP Autotexts.

Charting For PDAP

*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

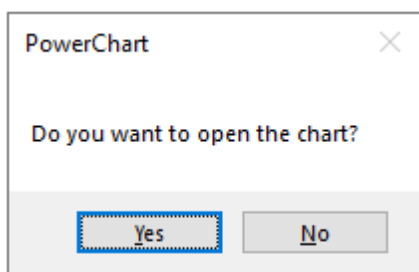
*Service: Respirology

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

Complete Cancel

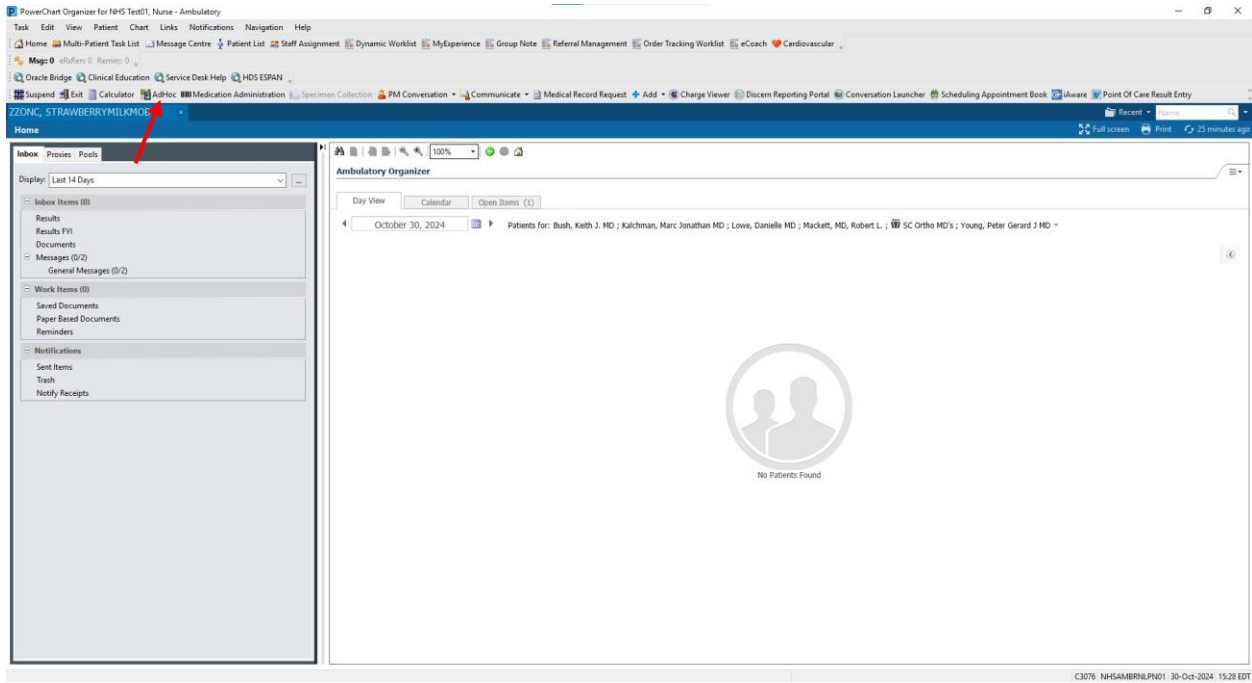
Ready NHSAMBRNL 101-13075-110 Oct/2024 21:32

- 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”.

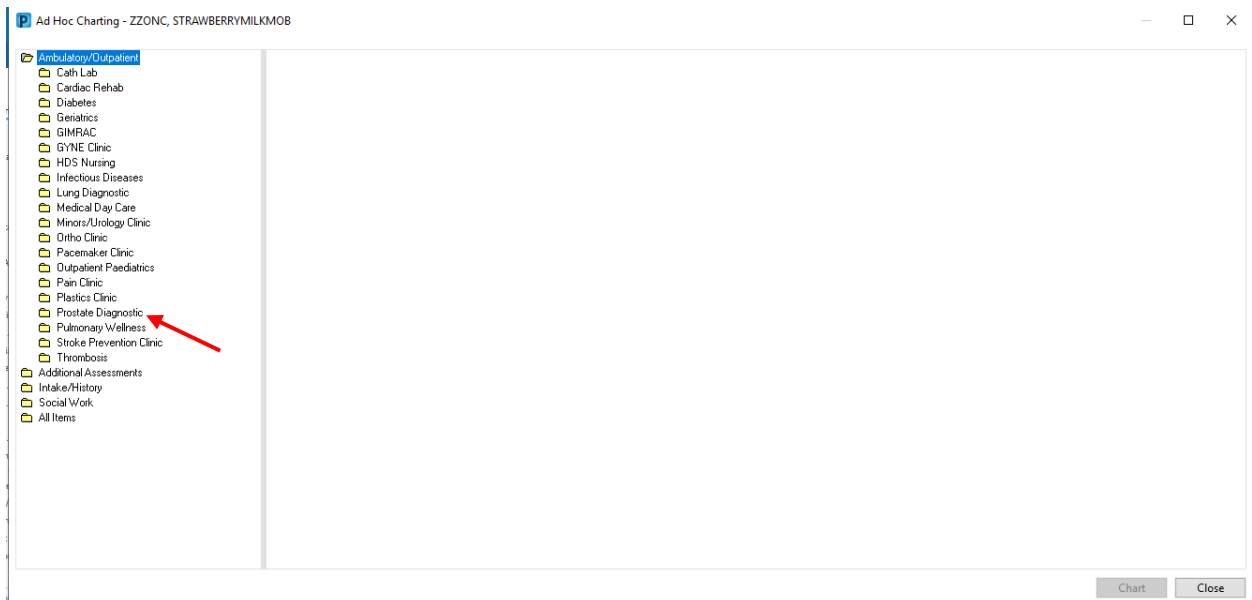


- Launch into the patient chart and locate the powerform you would like to complete. This can be done either through adhoc charting or through the vital sign drop down “carrot”.

Adhoc Charting



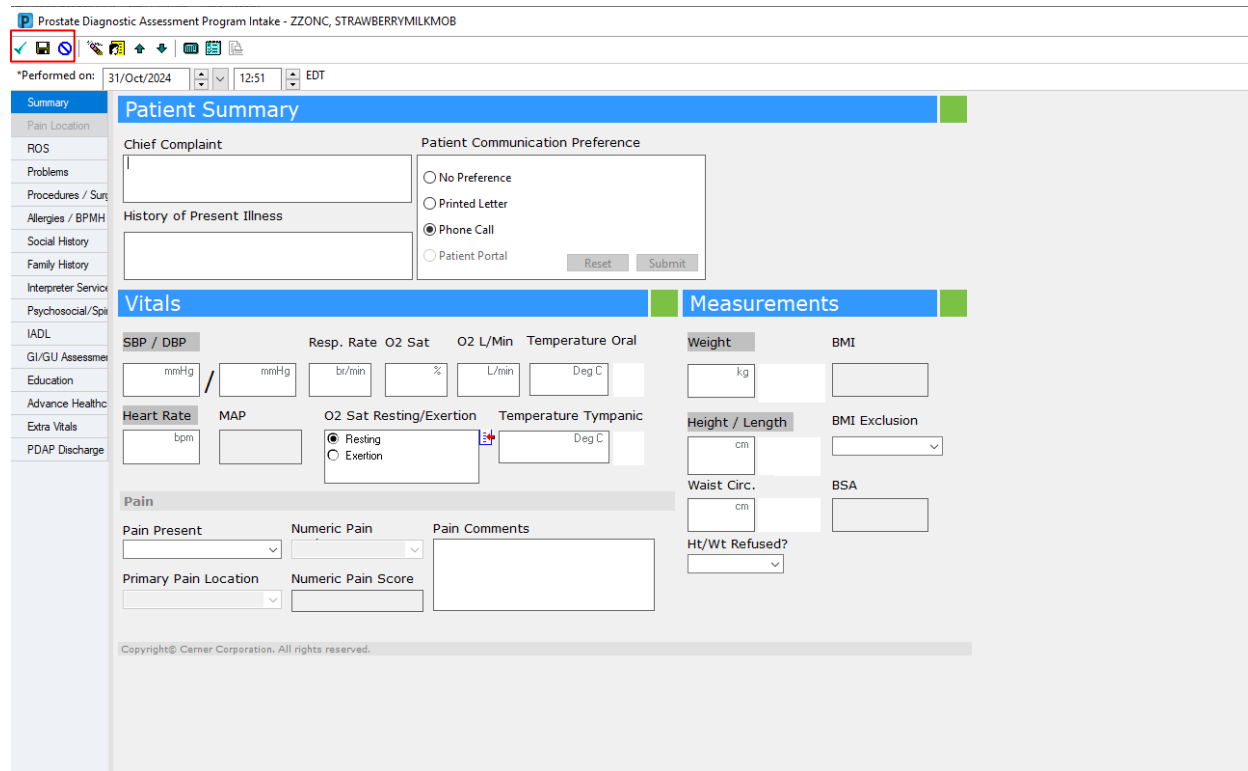
8. The ambulatory folders will show, navigate to your clinics appropriate folder.



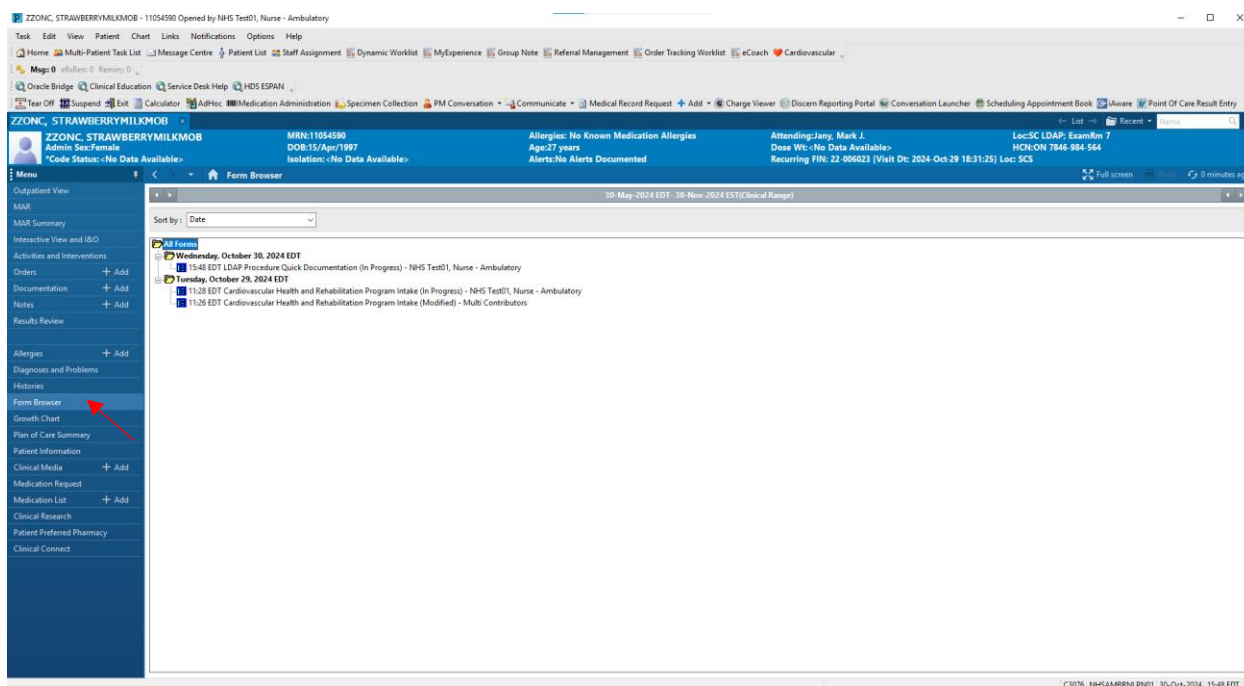
9. Now you can pick your clinic form or the generic telephone visit form.



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

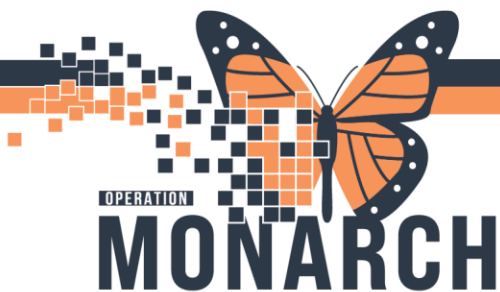


- ✓ - Submit
- 📄 - Save but **NOT** Submit, when you use this you can reopen your forms in **Form Browser**. Double click the forms to reopen and continue charting.



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' for patient ZZTEST, AMB. The 'Vital Signs' section is active, displaying a table of vital signs over time. A red arrow points to the 'Vital Signs' tab in the left-hand navigation menu.

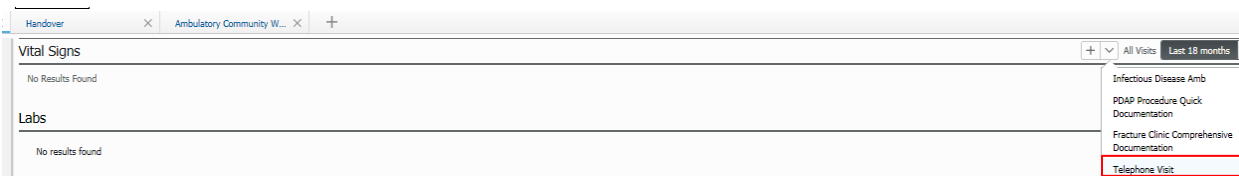
	10 OCT 2024	30 JUL 2024	30 APR 2024
BP	mmHg	16/16	118/60
HR	beats	60	60
Temp	deg C	37	37
Respiratory Rate	breaths	16	16
SaO2	%	98	98
Weight Strong	kg	121.000	121.000
Weight Measured	kg	121	121



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

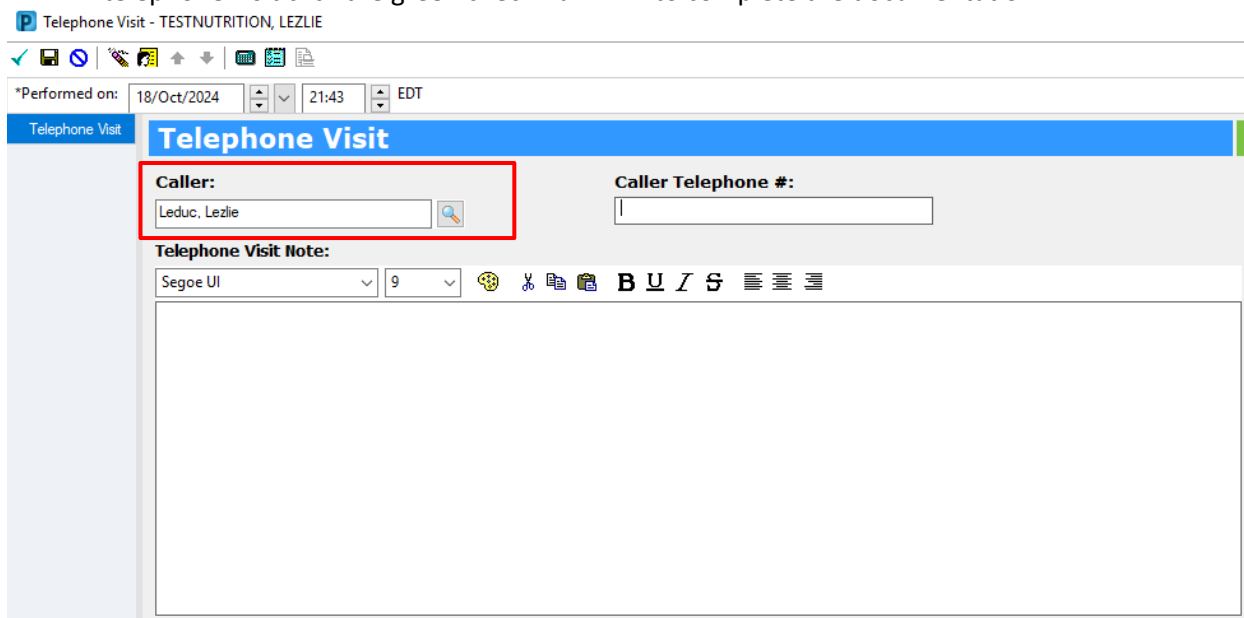


This screenshot is similar to the first one but highlights the 'Vital Signs' section. A red arrow points to the 'Vital Signs' tab in the left-hand navigation menu, and another red arrow points to the 'Vital Signs' section header in the main content area.

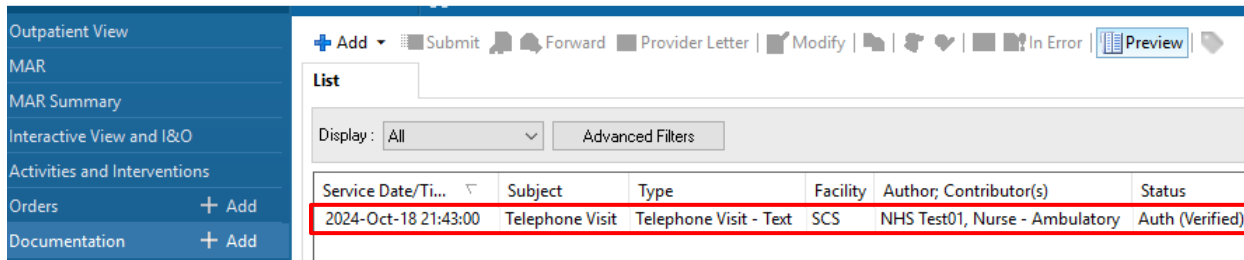
3. From the drop-down list, select **Telephone Visit**.



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.