

### REFERRAL MANAGEMENT: CREATING REFERRAL LISTS

#### **Originating Referral List**

An originating referral list is the list to manage the location the referral is being sent to. "Generated From"

- 1. Navigate to Referral Management
- 2. Go to List Maintenance





- 4. You need to create an originating. Name your list to indicate which one it is.
  - Ie: SCS Thrombosis Clinic Originating
  - Ie: SCS PARC Clinic Originating
  - Ie: MCKC Clinic Originating

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List	t Maintenance		
	* Name	List Type	•
	Niagara Primary Care - Originating	Originating	•

5. After choosing the type of list and naming it, you need to select the locations to associate. Click the locations you want added and click "Add" to move them over to the selected locations box. You can add additional criteria to the list like specific providers, statuses, etc. by clicking each on each item in the left-hand column and selecting the check box.







List	Maintenance						×
	* Name Nianara Primary Care - Originating		List Type Originating	Sort Undate Date	•	Newest to Oldest	🖌 Default Worklist
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6. When you are done creating your list, select Done and close out of list maintenance

Lis	Maintenance							×
	* Name		List Type		Sort		Newest to Oldest	
	MDU		Originating	•	Update Date	•	<ul> <li>Oldest to Newest</li> </ul>	Default Worklist
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C	elete							Cancel Save Done







#### **Receiving Referral List**

A receiving referral list is the list to manage the location the referral is being sent to: the "Receiving Clinic".

- 1. Navigate to Referral Management
- 2. Go to List Maintenance



You need to create a receiving list. Name your list to indicate which one it is.
 Ie: SCS Thrombosis Clinic Receiving

Ie: SCS PCC Clinic Receiving

Ie: MCKC Clinic Receiving

Note Transmission      Note The Notion      Note The Note	Oldest to Newest
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- 5. After choosing the type of list and naming it, you need to select the locations to associate.
- 6. Click the locations you want added and click "Add" to move them over to the selected locations box. You can add additional criteria to the list like specific providers, statuses, etc. by clicking each on each item in the left-hand column and selecting the check box.
- 7. When you are done creating your list, select Done and close out of list maintenance







A centralized referral list allows the individual managing the referral list to see both the orginating referral and receiving referral in the same list. This enables the user to both generate referrals and to accept referrals. This is beneficial in places like the ED where the staff if Sending the Referral and Accepting the Referral for the purpose of booking the patients in.

- 1. Follow steps outlined above
- 2. Click on Centralized List and Referral List Maintenance Locations

faintenance		0			
Name ED Paediatric Referrals	List	type tralized •	Sort Update Date •	<ul> <li>Newest to Oldest</li> <li>Oldest to Newest</li> </ul>	Default Worklist
<ul> <li>referral-list-maintenance-location</li> </ul>	Refer From Location (1)			Refer To Location	
Refer From Clinical Staff Refer To Clinical Staff Treatment Function	able Locations		Selected Location:	8	
Status F Priority Referral Type F H	fort Erie Site fotel Dieu Shaver		SC ED (Ambulatory	)	
Assignment Problem Code P	viagara Falls Site	Add			
) S } V	R. Catharines Site Welland Site	Remove			
Page 1 of 1	1 First ∠ Previous Next				

- 3. Save the list once it is set up.
- 4. You may need to filter the list more since you are doing both. You can filter by the headings at the top and sort by Alphabetic Order or by Date.

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itient	Requested Sta	Last Updated	Status	Priority	Referred By	Referred To	Assigned To	Requested Ser	Indicators	Service By Date
ZZTESTGELLAR, SARAH MICHEL 34	21/08/2024	21/08/2024 10:26	Sent	Standard	NHS Test01, Physician 21/08/2024 10:20	Cardiology Associates of Niagara Kotrec, Marian, MD, FRCPC		Cardiology assessment	D	
ZZTESTGELLAR, SARAH MICHEL 34 F	21/08/2024	21/08/2024 10:16	Pending Acceptance	Standard	NH5 Test01, Physician 21/08/2024 10:12	Cardiology Assessment Clinic SCS Kotrec, Marian, MD, FRCPC		Cardiology assessment	0	
ZZTESTGELLAR, SARAH MICHEL 34	21/08/2024	21/08/2024 09:18	Not Started	Standard	NHS Test01, Physician 21/08/2024 09:18	Cardiology Associates of Niagara		Cardiology 2nd opion		
NI THREE, WSSEVEN 8 yrs F	03/10/2024	03/10/2024 10:23	Not Started	Standard	Dorah, Nicholas 03/10/2024 10:23			General Internal cough		
DAMS, TAYLOR 66 yrs F	11/10/2023	27/06/2024 10:49	Prep for Send	Standard	NH5 Test02, Physician 11/10/2023 14:54			Medical Oncology test	D	
ZZTEST, MIIATHREE 34 yrs F	24/01/2024	06/06/2024 13:23	Prep for Send	Standard	Cerner Test, Psychiatr 24/01/2024 13:28			Mental Health pt need to be see		26/01/2024
YSTTEMTEST, MHAONEHUNDRE 29 M	05/06/2024	05/06/2024 13:13	Not Started	Standard	NHS Test, Resident 05/06/2024 13:13	MH Geriatric Mental Health SCS		Mental Health Add Test		
ZZTESTGELLAR, SARAH MICHEL 34. F	21/08/2024	21/08/2024 10:46	Prep for Send	Standard	NH5 Test01, Physician 21/08/2024 10:46			Neurology assessment		
ZZTEST, DKA 58 yrs M	29/07/2024	06/06/2024 13:24	Prep for Send	Standard	NHS Test02, Physician 29/07/2024 09:50	Early Pregnancy Clinic SCS		Obstetrics bleeding		
TTTWO, EARLY PREGNANCY 29 yrs F	01/08/2024	02/08/2024 12:33	Scheduled 02/08/2024 08:00	Standard	NHS Test01, Physician 01/08/2024 12:44	Early Pregnancy Clinic SCS		Obstetrics Bleeding in early p	ß	

5. Confirm all details are correct and start the referral







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INI THREE, WSSEVEN 8 yrs Fenale DDE 01 JAN 2016				MRN 11000871 FIN: 22-005385
This referral has not yet been started. Olde	the 'Start Refercal' button to prepare for sending.			Start Referral
Satus: Not Started tor Substatus: Edit				Unassigned Assign to me Assign Case Number: 110408
Summary Comments Docum Case Details	verts Insurance Scheduling			ER
Medical Service General Internal Medicine	Referral Rasson cough	Codified Reason	Treatment to Data	Referal Type 
Refer from Provider Dorah, Nicholas	Refer from Location St. Catherines Sta/SC CH4MB	Refemal Written Date 10/03/2024	Requested Start Date 10/03/2024	Senice By Date
Rafer to Provider 	Refer to Location OH Paedlabric Clinic SCS	Priority Standard	Instructions to Staff	Order Comment. 
Patient Information				
Professed Hethod of Contact. No Profesence	Hame Phane —	Hobie Phone —	Dusiness Phone 	Hume Address 65 Titled St, Welland Ontarie , Ontario L38495
,	Conorato			110. 22 005005
6.	Generate	the referi		Generate

7. Accept or Reject the Referral and move on to scheduling the appointment. (following the scheduling tip sheets)

d Assign to me Assign

INI THREE, WSSEVEN 8 yrs Female DOE 01 JAN 2016	NT FHREE, WSSEVEN ym: Fenule: 000:01.003.0006 M69: 1300.0006 M69: 1300.0006 M71. FD: 22-005305									
Nase Accept or Reject the referal.										
Status: Pending Acceptance Edit labitatus: Edit	tans: Pending Acceptance Edit									
Summury Commerts (1) Insurance Scheduling										
Case Details				Edt						
Hedical Service Seneral Internal Medicine	Referral Reason cough	Codified Reason	Treatment to Date	Referal Type						
keler from Provider Jorah, Nicholas	Refer from Location St. Catharines Site/SC OH448	Referral Written Date 10/03/2824	Requested Start Cate 10/03/2024	Service By Date						
keler to Provider	Refer to Location OH Paeduatric Clinic SCS	Priority Standard	Instructions to Staff	Order Comment						
Patient Information										
Preferred Hethod of Contact No Preference	Home Phone	Hobie Phone 	Business Phone —	Home Address 65 Thed St, Welland Ontario , Ontario L384W6						

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6