

Referral Management

How to place Referral order?

- Log into Powerchart
- Open the patient chart and single left click on +Add sign besides Orders tab from left side blue menu
- Search for Referral Order in the search window



- Single left click on the Done on the bottom right of the screen
- Referral order window opens

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• In the Service field choose 'Mental Health' for mental health and 'Mental Health Addictions' for OP addictions

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■ Details for Referral Or	der	
📸 Details 🔠 Order Comm	ents 🕼 Diagnoses	
🕂 🖀 lh. 🔍 🎽		
*Requested Start Date/Time:	16/Oct/2024 T1325 EDT	
*Service:	Mental Health	
*Reason for Referral:	Mental Health	
	Mental Health Addictions	111
	Nephrology/Dialysis	11
	Neurology	11
Treatment To Date:	Obstetrics	11
	Ophthalmology	11
	Oral Surgery	111
Referral Type:	Orthopaedic Surgery	
	Otolaryngology Head/Neck Sx	
1 Missing Required Details Dx T	Paediatrics Iders For Nurse Review Sign	

• In the Refer to: option, single left click on the binoculars on the right side of the box

🔊 😨 🖳 🕅 Order Name	Status	Start	Details	
SC 1MA; SC1M01; A Fin:22-0011	01 Admit: 2024-F	eb-22 15:53		
Interprofessional Consults				
🔲 ⊱ Ӿ Referral Order	Order	2024-Oct-15 14:14	15/Oct/2024 14:14 EDT, Medical Service Mental Health	
Details for Referral Orde	r			
🔀 Details 📗 Order Comments	i Diagnoses			
Treatment To Date:				^
inclution to bate.				
Referral Type:		~		
Refer to:				
nerer tor		ara		
Service by Date: **/	···/····	~		
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Litaaan U				
Missing Required Details Dx Table	e Orders For C	osignature Orders	For Nurse Review	Sjgn

Referral Provider Lookup Window Opens

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Choose the Provider/Practice depending on where you want to send referral and search for it



d.





ommunicate 👻 🗎 Medical Record Request 📫 Add 🔻 📨 Discern Reporting Portal 🛛 Scheduling Appointment Book 🔑 Emergency Access 🍦

Referral Provider Lookup	
Search: wellness	
Qualifiers:	+
Search by: Practice Include external practices	Search Clear
Accelerated Health & Wellness	Family Practice
Unit A3-130 Hwy 20 East, Fonthill, Ontario LOS 1E6	Within Health System
	Accept

- Once you select the Clinic/Provider, Accept button becomes available
- Single left click on Accept button

Creating Incoming/Outgoing Referral Lists

2. Go to List Maintenance

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4. You need to create an originating and a receiving list. Name your list to indicate which one it is.

Referral Management Referral Management Referral Management Referral Management Referral Management * Name List Type Sort Name UNIT M Originating * Refer From Location Refer From Clinical Staff * Stratus site * Stratus site * Fort Erie Site * Fort Erie Site * Stratus site	SYSTEMTEST,	MHANINETYFIVE ×					🛅 Recent 🔹 Name	Q -
	Referral Manag	gement					🔀 Full screen 🛛 🖶 Print	・ 0 minutes ago
Referral Management X Worktst List Maintenance Ratert List Type System Ist Type VINIT M Originating Originating VINIT M Originating Originating V Refer From Location Available Locations Refer From Clinical Staff Treatment Function Status Fort Erie Site		🔍 🔍 🛛 100% 🔹 🔿 🗶						
Vertext List Maintenance X X Patent List Type Sort In Newest to Oldest Default Worklist *SYS7274 Virginating Originating Update Date Oldest to Newest Default Worklist *SYS7274 * Refer From Location Available Locations Selected Locations * st. Catharines Site *SYS7274 * Fort Erie Site * St. Dias Sc. Link (Ward) Sc. Link (Ward)	Referral Manag	ement X +						
Patient List Type Sort Newest to Oldest #SYSTER UNIT M Originating Originating Originating Oldest to Newest Default Worklist *SYSTER * Refer From Location Available Locations Selected Locations • st. catharines Site *SYSTER Treatment Function • Fort Erie Site • Sc Lith (Ward)	Worklist UNI Lis	ist Maintenance					2	× =] Filter
VINIT M Originating UNIT M Originating Originating Update Date Oldest to Newest O	Patient	* Name		List Type	Sort	Newest to Oldest		8
System Available Locations Selected Locations *System Refer From Clinical Staff *System Treatment Function *Status Fort Erie Site Sc 1MA (Ward) 	*SYSTEM	UNIT M Originating		Originating •	Update Date	 Oldest to Newest 	Default Worklist	
SYSTER ✓ Refer From Location Available Locations Selected Locations SySTER Refer From Clinical Staff ✓ st. Catharines Site Treatment Function ✓ fort Erie Site Sc LMA (Ward)								
Refer From Clinical Staff SYSTEP Treatment Function Status Fort Erie Site St. Catharines Site St. Catharines Site St. Catharines Site	*SYSTEM	✓ Refer From Location	Available Locations			Selected Locations		
Treatment Function	*CVCTEN	Refer From Clinical Staff				 St. Catharines Site 		
Status Scatus Status	-:	Treatment Function	Fort Frie Site					
ROADSH Printy		Priority	, Torcene bite			SC IMA (Ward)		
Referal Type Add		Referral Type	Hotel Dieu Shaver		Add			
Refer To Location Niagara Falls Site		Refer To Location	Niagara Falls Site		Demove			
Refer To Clinical Staff		Refer To Clinical Staff	Port Colhorne Site					
Dates		Dates						
Assignment St. Catharines Site		Assignment	St. Catharines Site					
Welland Site First < Page 1 of 1 > Last			Welland Site First 《 Page 1 of 1 》	> Last				
Delete Save Done		Delete					Cancel Save Done	
Page 1 of 1	Page 1 of 1						HISE I C Previous II I	ext > Last

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.

ailable Locations			Selected Locations
			✓ St. Catharines Site
St. Catharines Site	~		SC 1MA (Ward)
SC 1AA (Ward)			
SC 1BA (Ward)		Add	
SC 1BB (Ward)		Remove	
SC 2AA (Ward)			
SC 2AASU (Ward)			
SC 2AB (Ward)			
SC 2AC (Ward)	~		
First < Page 1 of 1 👌 Last			
			Cancel Save D

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6. Similarly you can create receiving list as shown below.

* Name		List Type		Sort		Newest to Oldest	
WRICC Receiving		Receiving	•	Update Date	•	Oldest to Newest	Default Worklist
✓ Refer To Location	Available Locations				Selected	Locations	
Refer To Clinical Staff					Derected	Proceeding 100	
Treatment Function					MH Weilin	SS Recovery SCS	
Status	Bilirubin Clinic SCS	^					
Priority	Cancer Rehab Program HDS						
Referral Type	Cardiac Rehab Offsite SCS						
Refer From Clinical Staff	Cardiac Rehab SCS						
Dates	Cardiology Assessment Clinic SCS			Remove			
Assignment	Cardiology Follow Up SCS						
Problem Code	Cardioversion NFS						
	Cardioversion SCS						
	CH Paediatric Clinic SCS	~					
	Chemotherany SCS First 🛛 🗸 Page 1 of 8 🖒	Last					

7. 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

8. When you are done creating your list, select Done and close out of list maintenance

Sending an Internal Referral

1. Find the patient and click on the row to expand the case details

				X
SYSTEMTEST, MHANI 71 yrs Female DOB: 12 DE	NETYFIVE c 1952			MRN: 11001537 FIN: 22-001667
This referral has not yet been star	ted. Click the 'Start Referral' button to prepare	for sending.		Start Referral
Status: Not Started Edit Substatus: Edit				Lunassigned Assign to me Assign Case Number: 190408
Summary Comments	Documents Insurance Schedulin	g		e
Case Details				Edit
Medical Service Mental Health	Referral Reason test	Codified Reason	Treatment to Date	Referral Type
Refer from Provider NHS Test01, Psychiatrist	Refer from Location St. Catharines Site/SC 1MA	Referral Written Date 10/17/2024	Requested Start Date 10/17/2024	Service By Date
Refer to Provider	Refer to Location MH Wellness Recovery SCS	Priority Standard	Instructions to Staff	Order Comment
				First Previous Next > Last

2. Single left click on Start Referral button.







OPERATION	TIP SHEET
MONARCH	HOSPITAL INFORMATION SYSTEM (HIS)
	=-
Add Inbound Re	ferral = Filter
	×
MRN: 110002	12 FIN: 22-001314
	Generate
🚨 Unassigned	Assign to me Assign
	Case Number: 58062

- 3. In the upper right-hand corner click "Generate"
- 4. If the provider didn't specify where to send the referral or more information is needed, on the Summary tab click "Edit" and fill in any of the missing information

Case Details					Edit	^
Medical Service Mental Health	Referral Reason test	Codified Reason	Treatment to Date	Referral Type		
Refer from Provider NHS Test01, Psychiatrist	Refer from Location St. Catharines Site/SC 1MA	Referral Written Date 10/17/2024	Requested Start Date 10/17/2024	Service By Date		
Refer to Provider	Refer to Location MH Wellness Recovery SCS	Priority Standard	Instructions to Staff	Order Comment		

5. If there is a document that needs to be attached to the referral, find the appropriate document on the documents tab and select "Add". That will attach the document to this case, so the receiving office knows it is relevant.

Summary	Comments	Documents	(1) Insura	nce Sche	eduling (1)	
Attached	Documents					Create Letter
Action	Date	Subject	Author	Туре	Source	Category
Remove	10/17/2024	Transition	NHS Test0	Transition	CAMM	
Available	Documents	Transition of C	Care/Referral Su	mmary	End 10/18/2	024
Action	Date	Subject	Author	Туре		Source
		No	Documents Ava	ilable		

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TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

6. If you need to obtain an authorization for the referral, go to the Insurance tab and highlight the patient's health plan and click "Associate". Once the health plan is associated to the case the Edit button above the Authorization section becomes available. Click "Edit".

Summ	ary	Comments Docume	ents (1) Insurance	Scheduling (1)						æ
Insura	nce Ir	nformation								^
Asso	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin	End	1
	1	MINISTRY OF HEALT	MINISTRY OF HEALT	Ontario Health Insur	SYSTEMTEST, MHAN	4523256897		04/30/2024		
You can a	associate	a health plan to the refer	ral by highlighting a healtl	h plan in the table and cli	cking the 'Associate' butto	n.			Associate	
Autho	rizatio	n								
Authoriza	tion Num	ber	Authorization Type	Autho	orization Status	Number Aut	horized	Begin Date		1
					-+ Phase					~

- 7. Input the authorization information for this case and save
- 8. Once you have all necessary information, click "Generate" in the upper right-hand corner



9. Review the case details and click "Send". The case is now in the receiving office's queue

4/03/2020	Continuity of Care Document	Kalkhorst Cerner - Solution	Continuity of Care Documen	CAPER	
14.5050	Continuity of Care Document	Kalkherd Center - Solution	Continuity of Care Document.	CAPER	

10. The referral will be in a "Pending" status until the receiving office accepts or rejects it

Receiving an Internal Referral

1. Create custom list for Receiving location (Explained in detail in previous steps)

Name		List Type		Sort		Newest to Oldest		
WRICC Receiving		Receiving •		Update Date •		Oldest to Newest	Default Worklis	
✓ Refer To Location	Available Locations				Selected	Locations		
Refer To Clinical Staff					MH Weln	ess Recovery SCS		
Treatment Function								
Status	Bilirubin Clinic SCS		•					
Priority	Cancer Rehab Program HDS							
Referral Type	Cardiac Rehab Offsite SCS							
Refer From Clinical Staff	Cardiac Rehab SCS							
Dates	Cardiology Assessment Clinic SCS		i 1	Remove				
Assignment	Cardiology Follow Up SCS							
Problem Code	Cardioversion NFS							
	Cardioversion SCS							
	CH Paediatric Clinic SCS							
	Chemotherany SCS							
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- 2. Find the patient and click on the row to expand the case details
- 3. In the upper right-hand corner click either "Accept" or "Reject"
- 4. If you reject a case, the referring office will see a status of "Rejected" and take the appropriate actions on it
- 5. If you accept the case, you will start working the referral



Case Details					Edit	^
Medical Service Mental Health	Referral Reason test	Codified Reason	Treatment to Date	Referral Type		
Refer from Provider NHS Test01, Psychiatrist	Refer from Location St. Catharines Site/SC 1MA	Referral Written Date 10/17/2024	Requested Start Date 10/17/2024	Service By Date		
Refer to Provider	Refer to Location MH Wellness Recovery SCS	Priority Standard	Instructions to Staff	Order Comment		~

- 6. In the summary tab, review the information from the referring office. If they didn't specify a specific provider and you would like to assign one, edit the case
- 7. Next, review the Comments, Documents and Insurance tabs
- 8. On the Insurance Tab, you will see a message that says the authorization has been copied to the person or encounter level and cannot be modified. If you need to update the authorization information, you will navigate to the person's registration view and make the update there.

Authorization				
Authorization Number 1234567	Authorization Type Authorization	Authorization Status Approved	Number Authorized 3	Begin Date
End Date	Contact Name	Contact Phone		
-				
Authorization cannot be modified	d from the referral after it has been copie	ed to the person or encounter. The authoriz	zation information on the referral may not	be the most up to date version.

9. Once you have the information you need, navigate to the Schedule Tab and click "New Appointment"

Summary Comments Documents Insurance	Scheduling	e
Associated Appointment		
No Appointment Associated		
		New Appointment

- 10. That will take you to your schedule view where you will schedule the appointment like normal
- 11. Once you have confirmed the appointment, go back to your Referral Management View

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12. Within the schedule tab, click the refresh button and you will see the scheduled appointment associated to the case

SYSTEMTEST, MHAI 71 yrs Female DOB: 12	NINETYFIVE DEC 1952				MRN:	11001537 FI	(N: 22-00595 8
Status: Scheduled Edit Substatus: Edit					🛔 Unas	signed Assign Case No	n to me Assign umber: 190408
Summary Comments Associated Appointm	Documents (1) Insuran	ce Scheduling (1)					
Date/Time	Appointment Type	Location	Resource	Duration	Status	Access Chart	
10/22/2024, 08:30 AM	MHA Assessment/Triage Fa	SC MHWRICC	Sirianni, Vince RN	30 minutes	Confirmed	Open	
You can remove the appointme Confirmed Appointm The patient's appointment is as	ent associated to the referral by h ents ssociated to the referral.	ghlighting it in the table and cli	cking the 'Disassociate' button.				Disassociate

- 13. If you had already scheduled an appointment for this patient, it will show in the Confirmed Appointments section. Instead of clicking "New Appointment", you can select the existing appointment from the list and associate it to the case.
- 14. After an appointment is attached to the case, the status will show as "Scheduled" with the date and time of the appointment. If the patient no shows or cancels the appointment, the status will update to "Pending Reschedule".
- 15. When the patient arrives for the appointment and is checked in, the status of the referral will update to "Patient Seen".
- 16. Attach necessary documentation to the case and update the status of the case to "Complete"

Para, Otaz ran	630/4/63
	Complete
Lunassigned Assig	n to me Assign

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17. The referring office will review the documentation and update the status to "Closed"

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