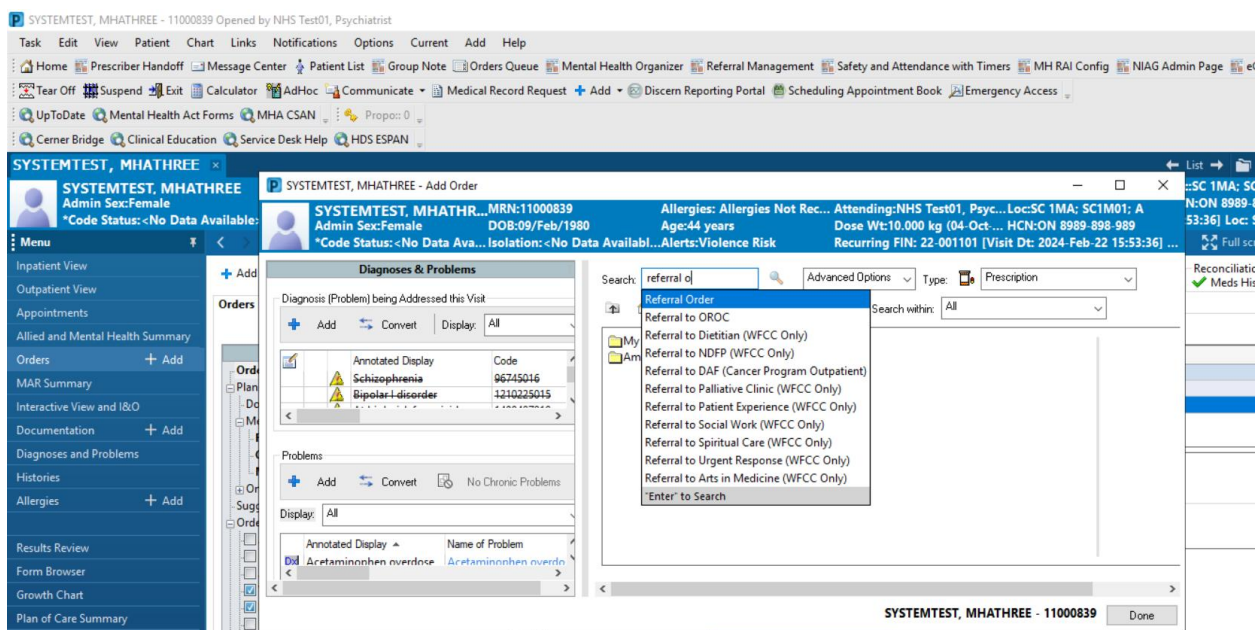


Referral Management

How to place Referral order?

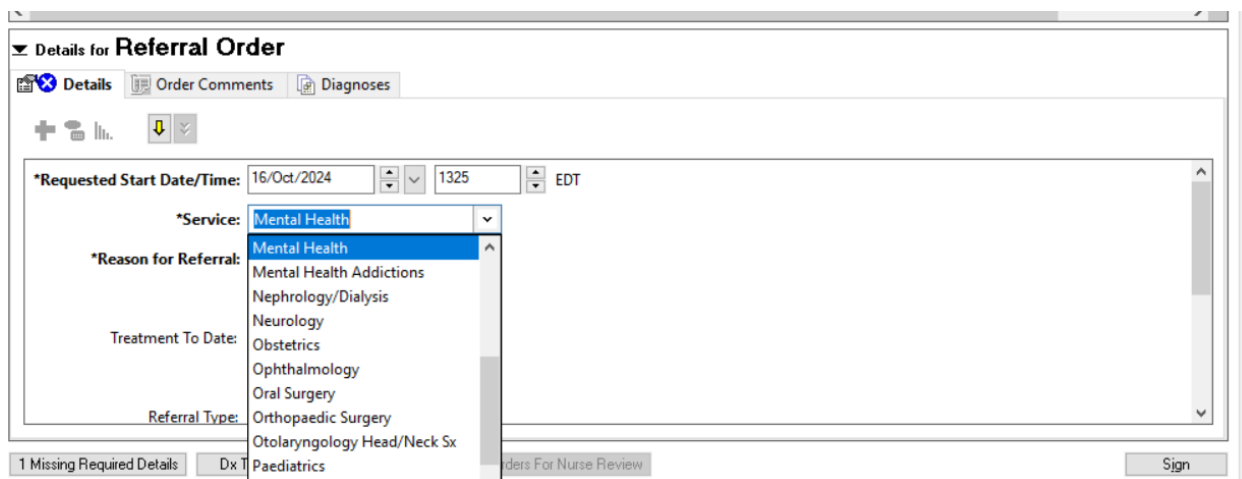
- Log into Powerchart
- Open the patient chart and single left click on +Add sign besides Orders tab from left side blue menu
- Search for Referral Order in the search window



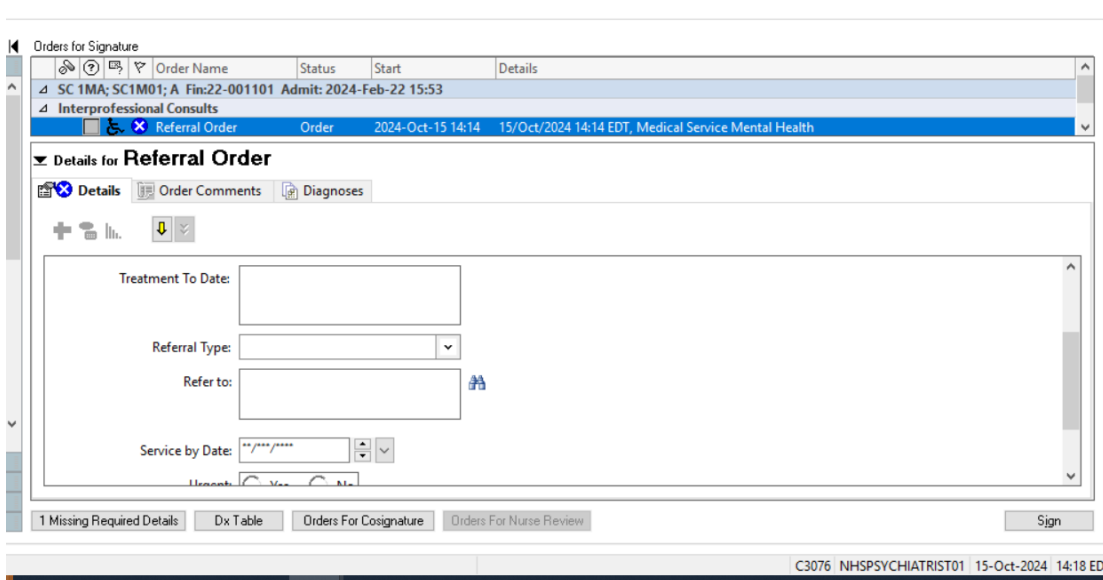
The screenshot shows the Powerchart interface for patient SYSTEMTEST, MHATHREE (MRN: 11000839). The 'Add Order' window is open, and the search function is used to find 'Referral Order'. The search results list several options, including 'Referral to OROC', 'Referral to Dietitian (WFCC Only)', 'Referral to NDPP (WFCC Only)', 'Referral to DAF (Cancer Program Outpatient)', 'Referral to Palliative Clinic (WFCC Only)', 'Referral to Patient Experience (WFCC Only)', 'Referral to Social Work (WFCC Only)', 'Referral to Spiritual Care (WFCC Only)', 'Referral to Urgent Response (WFCC Only)', and 'Referral to Arts in Medicine (WFCC Only)'. The 'Done' button is located at the bottom right of the screen.

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

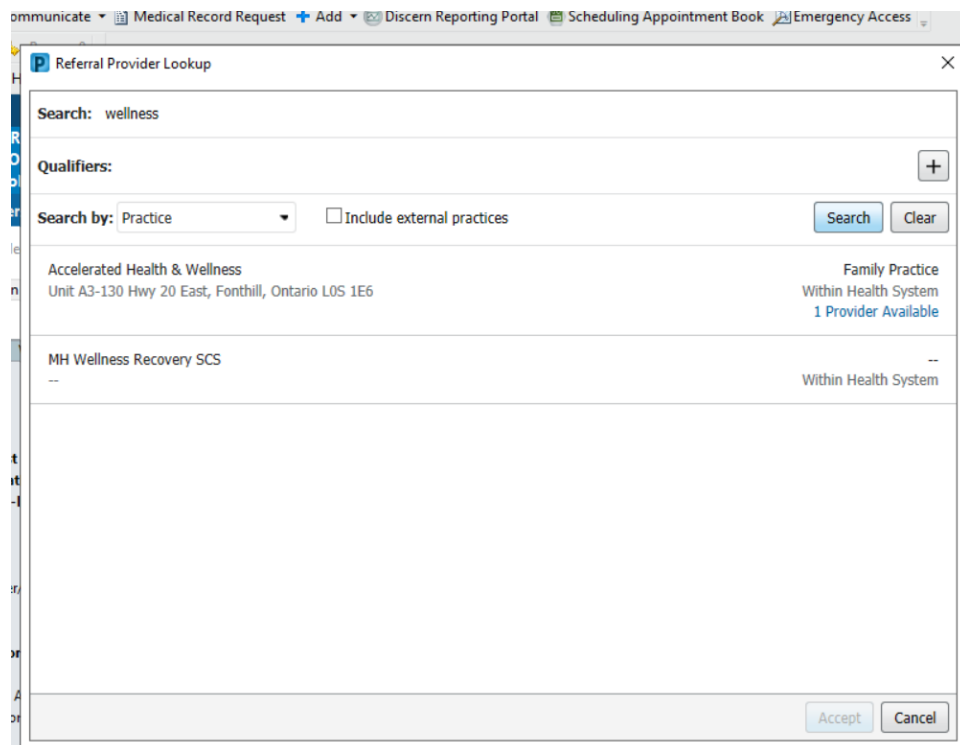
- In the Service field choose 'Mental Health' for mental health and 'Mental Health Addictions' for OP addictions



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



- Referral Provider Lookup Window Opens
- Choose the Provider/Practice depending on where you want to send referral and search for it



Referral Provider Lookup

Search: wellness

Qualifiers: +

Search by: Practice Include external practices

Search Clear

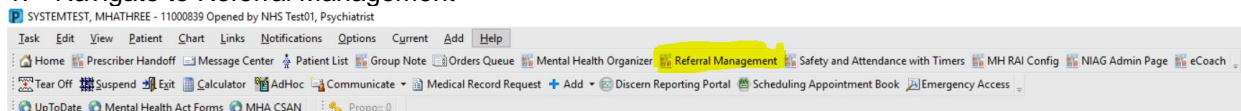
Accelerated Health & Wellness Unit A3-130 Hwy 20 East, Fonthill, Ontario L0S 1E6	Family Practice Within Health System 1 Provider Available
MH Wellness Recovery SCS --	-- Within Health System

Accept Cancel

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

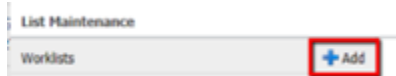
Creating Incoming/Outgoing Referral Lists

1. Navigate to Referral Management

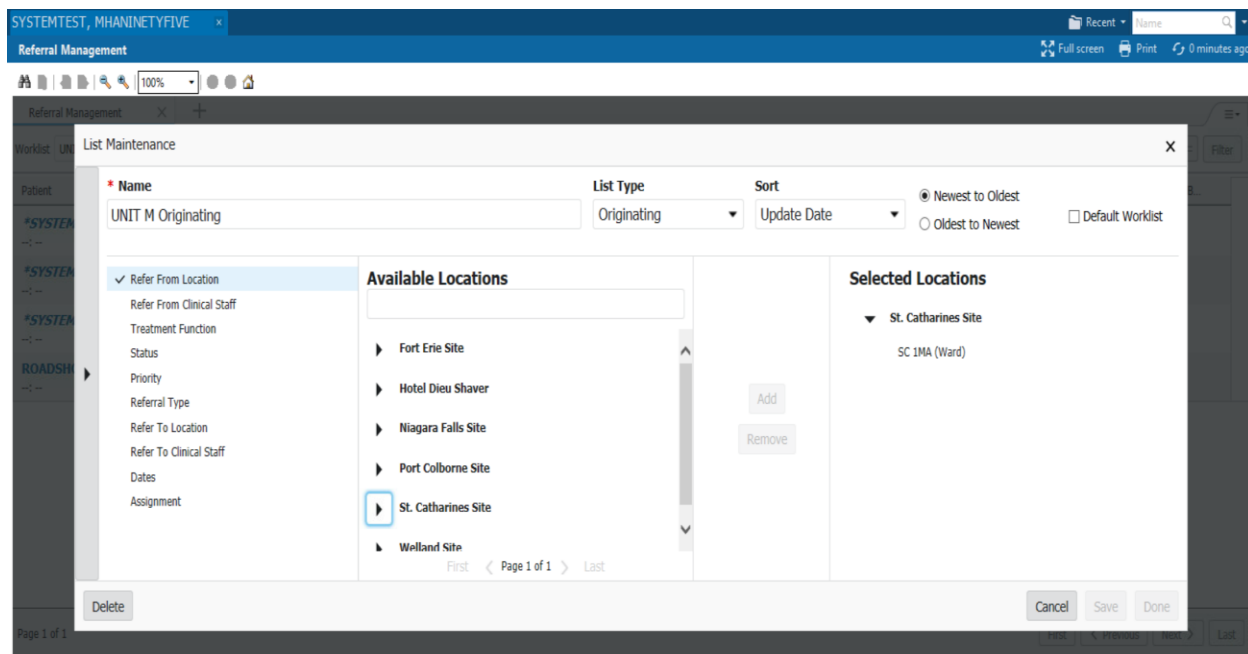


2. Go to List Maintenance

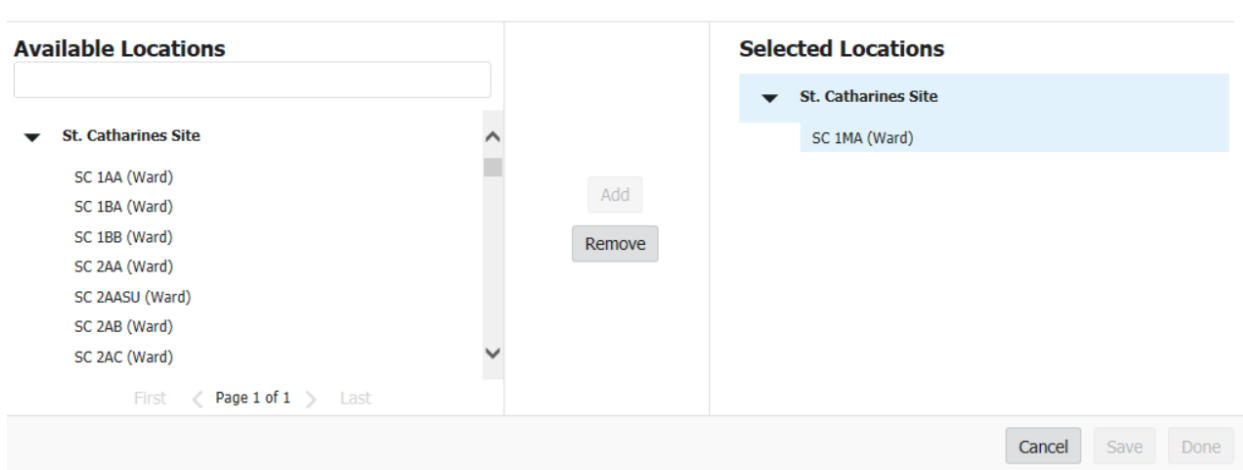
3. Click Add



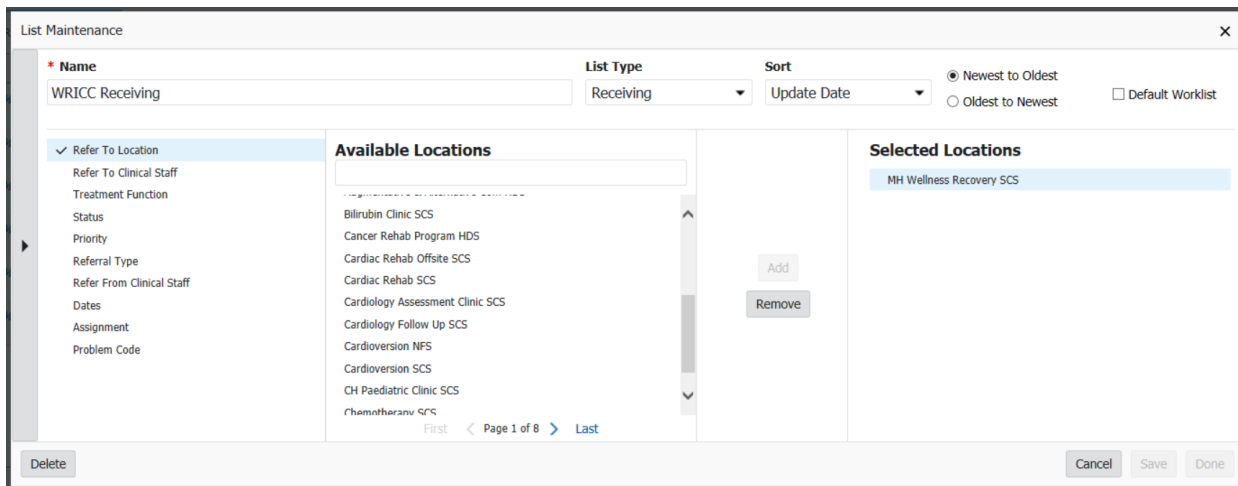
4. You need to create an originating and a receiving list. Name your list to indicate which one it is.



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.



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



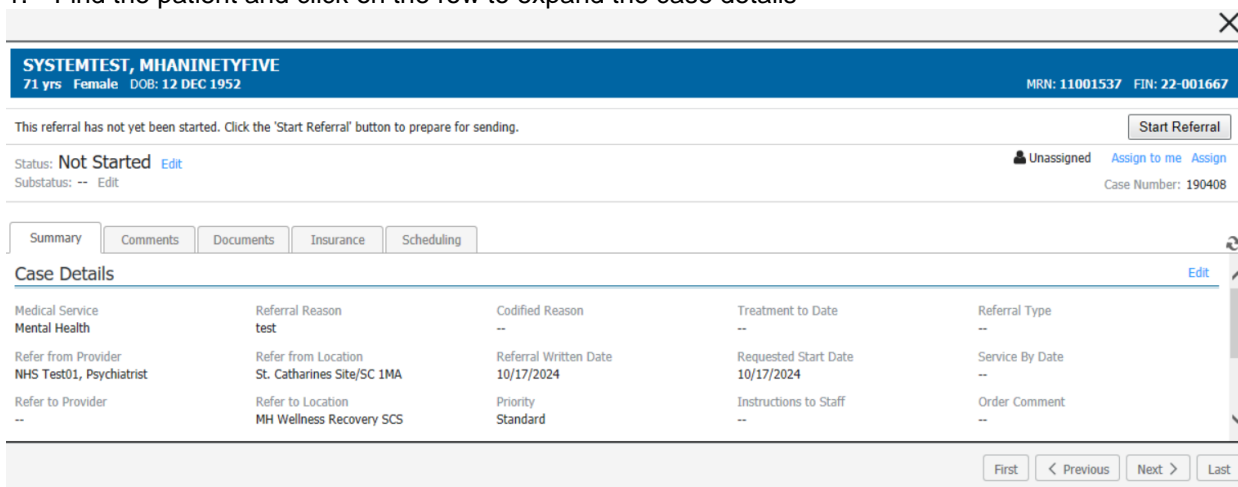
The screenshot shows the 'List Maintenance' window. At the top, there are fields for 'Name' (WRICC Receiving), 'List Type' (Receiving), and 'Sort' (Update Date). There are radio buttons for 'Newest to Oldest' (selected) and 'Oldest to Newest', and a checkbox for 'Default Worklist'. Below this, there are three main columns: a left-hand column with a list of criteria (e.g., 'Refer To Location', 'Refer To Clinical Staff'), a middle column titled 'Available Locations' with a scrollable list of locations (e.g., 'Bilirubin Clinic SCS', 'Cancer Rehab Program HDS'), and a right-hand column titled 'Selected Locations' which currently contains 'MH Wellness Recovery SCS'. There are 'Add' and 'Remove' buttons between the available and selected lists. At the bottom, there are 'Delete', 'Cancel', 'Save', and 'Done' buttons.

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

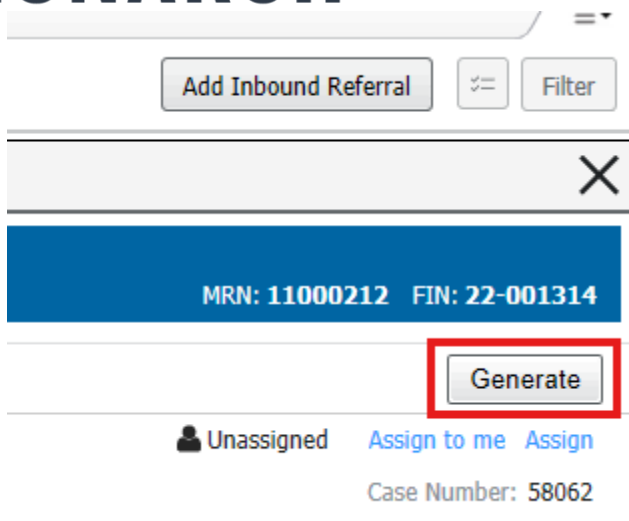


The screenshot shows the patient case details for 'SYSTEMEST, MHANINETYFIVE', a 71-year-old female born on 12 DEC 1952. The MRN is 11001537 and the FIN is 22-001667. The status is 'Not Started'. There is a 'Start Referral' button. Below this, there are tabs for 'Summary', 'Comments', 'Documents', 'Insurance', and 'Scheduling'. The 'Case Details' section is expanded, showing a table with the following information:

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

At the bottom of the case details, there are navigation buttons: 'First', '< Previous', 'Next >', and 'Last'.

2. Single left click on Start Referral button.



Add Inbound Referral Filter

MRN: 11000212 FIN: 22-001314

Generate

Unassigned Assign to me Assign

Case Number: 58062

- In the upper right-hand corner click "Generate"
- 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	Referral Reason	Codified Reason	Treatment to Date	Referral Type
Mental Health	test	--	--	--
Refer from Provider	Refer from Location	Referral Written Date	Requested Start Date	Service By Date
NHS Test01, Psychiatrist	St. Catharines Site/SC 1MA	10/17/2024	10/17/2024	--
Refer to Provider	Refer to Location	Priority	Instructions to Staff	Order Comment
--	MH Wellness Recovery SCS	Standard	--	--

- 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) Insurance Scheduling (1)

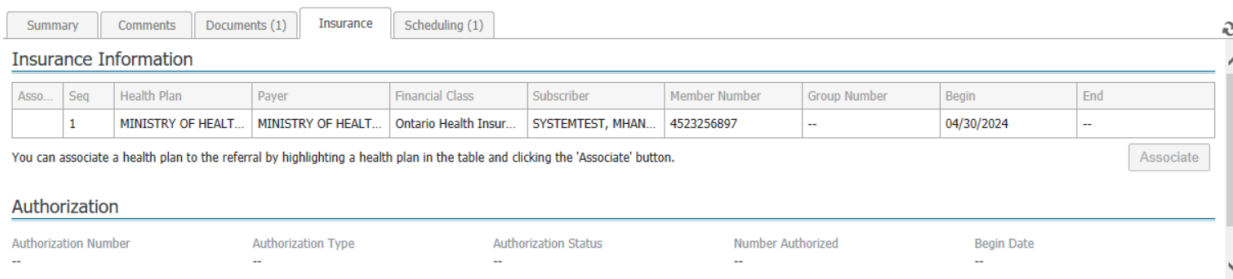
Attached Documents Create Letter

Action	Date	Subject	Author	Type	Source	Category
Remove	10/17/2024	Transition...	NHS Test0...	Transition...	CAMM	

Available Documents Transition of Care/Referral Summary End 10/18/2024

Action	Date	Subject	Author	Type	Source
No Documents Available					

- 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".



Summary Comments Documents (1) Insurance **Scheduling (1)**

Insurance Information

Asso...	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin	End
	1	MINISTRY OF HEALT...	MINISTRY OF HEALT...	Ontario Health Insur...	SYSTEMTEST, MHAN...	4523256897	--	04/30/2024	--

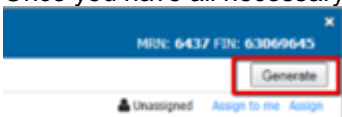
You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button.

Associate

Authorization

Authorization Number	Authorization Type	Authorization Status	Number Authorized	Begin Date
--	--	--	--	--

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

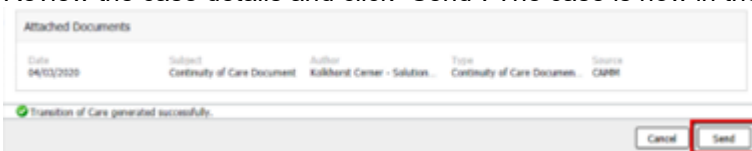


MRN: 6437 FIN: 63069645

Generate

Unassigned Assign to me Assign

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



Attached Documents

Date	Subject	Author	Title	Source
04/03/2020	Continuity of Care Document	Kulkarni Center - Solution	Continuity of Care Document	CAPRI

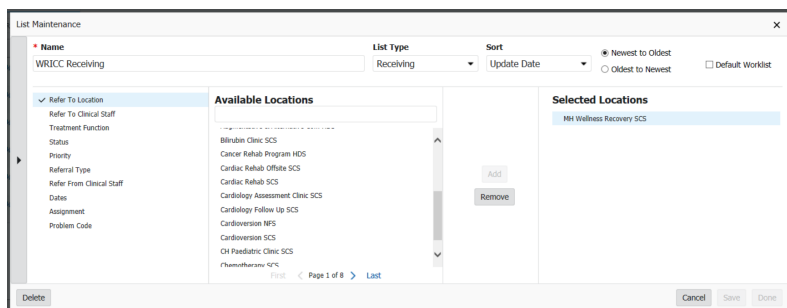
Transition of Care generated successfully.

Cancel Send

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

Receiving an Internal Referral

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



List Maintenance

Name: WRICC Receiving List Type: Receiving Sort: Update Date Newest to Oldest Default Worklist

Refer To Location

Refer To Clinical Staff

Treatment Function

Status

Priority

Referral Type

Refer From Clinical Staff

Dates

Assignment

Problem Code

Available Locations

Blindon Clinic SCS

Cancer Rehab Program NGS

Cardiac Rehab Office SCS

Cardiac Rehab SCS

Cardiology Assessment Clinic SCS

Cardiology Follow Up SCS

Cardioversion NGS

Cardioversion SCS

CH Paediatric Clinic SCS

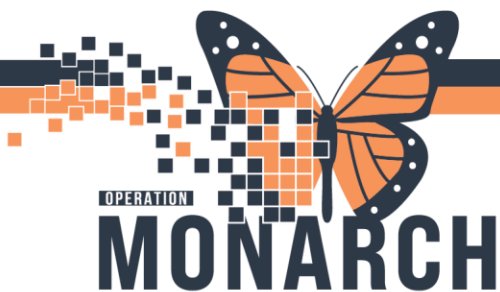
Phoniatrics SCS

Add Remove

Selected Locations

RH Wellness Recovery SCS

Delete Cancel Save Done



TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

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



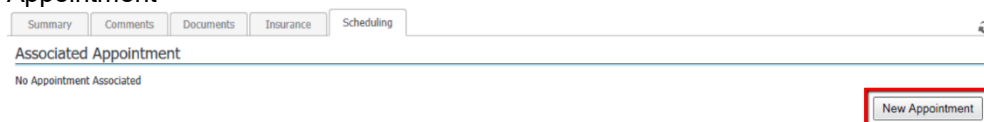
Case Details					Edit
Medical Service Mental Health	Referral Reason test	Codified Reason --	Treatment to Date --	Referral Type --	
Refer from Provider NHS Test01, Psychiatrist	Refer from Location St. Catharines Site/SC 1MA	Referral Written Date 10/17/2024	Requested Start Date 10/17/2024	Service By Date --	
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.

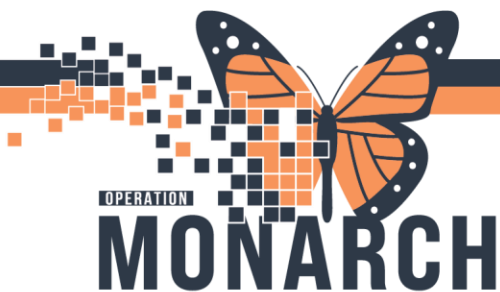
Authorization				
Authorization Number 1234567	Authorization Type Authorization	Authorization Status Approved	Number Authorized 3	Begin Date --
End Date --	Contact Name --	Contact Phone --		

Authorization cannot be modified from the referral after it has been copied to the person or encounter. The authorization 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"



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



TIP SHEET

HOSPITAL INFORMATION SYSTEM (HIS)

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

SYSTEMTEST, MHANINETYFIVE
71 yrs Female DOB: 12 DEC 1952 MRN: 11001537 FIN: 22-005958

Status: **Scheduled** Edit
Substatus: -- Edit Unassigned Assign to me Assign Case Number: 190408

Summary Comments Documents (1) Insurance Scheduling (1)

Associated Appointment

Date/Time	Appointment Type	Location	Resource	Duration	Status	Access Chart
10/22/2024, 08:30 AM	MHA Assessment/Triage Fa...	SC MHWRIICC	Sirianni, Vince RN	30 minutes	Confirmed	Open

You can remove the appointment associated to the referral by highlighting it in the table and clicking the 'Disassociate' button.

Confirmed Appointments

The patient's appointment is associated to the referral.

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”

MRN: 6437 FIN: 63074785

Complete

Unassigned Assign to me Assign

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