

### Ontario Health at Home Referral Process – Unit Clerk/Charge Nurse

To send a referral, if not already done, the unit clerk/charge nurse will need to set up an Originating Referral List.

#### **Originating Referral List**

Worklists

The 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

	Referral Management			
	A	100%	• • • 🗳	
	Referral Management	×	+	
	Worklist	<b>v</b>	List Maintenance	
3.	Click Add			
Li	st Maintenance			

🕂 Add

- 4. You need to create an originating. Name your list to indicate which one it is.
  - Ie: SCS Inpatient Referral List

List	Maintenance		
	* Name	List Type	
	SCS Inpatient Referrals.	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		List Type		Sort	Newest to Oldest	
	SCS Inpatient Referrals.		Originating	•	Update Date	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 SC 1AA (Ward) SC 1BA (Ward) SC 1BB (Ward) SC 1BB (Ward) SC 2AA (Ward) SC 2AAS (Ward) SC 2AAS (Ward) SC 2AA (Ward) SC 2AC (Ward) SC 2AD (Ward) SC 2AD (Ward) SC 2AD (Ward)	^	Add Remove	Selected	Locations No Selected Locations	
		S (2.84 (Ward) SC 286 (Ward) SC 280 (Ward) SC 28D (Ward) SC 20PDS (Ward) SC 20PLX (Ward) SC 20PLX (Ward) SC 3AA (Ward) Page 1 of 1	First < Previous Next > Last				
De	elete					Са	ncel Save Done

#### 6. When you are done creating your list, select Save and then Done and close out of list maintenance

List Maintenance							×
List Maintenance   Name  SCS Inpatient Referrals.   Refer From Locaton  Refer From Clinical Staff  Testiment Function  Status Priority Refer To Location Refer To Location Refer To Clinical Staff Dates Assignment	Available Locations            BALSAM HEALTHCARE             Fort Erie Site             Hotel Dieu Shaver             Niagara Falls Site             Port Colborne Site             St. Catharines Site             Welland Site	List Type Originating	Add Remove	Sort Update Date Select	st. Catharines Site SC 2AA (Ward) SC 2AASU (Ward) SC 2AA (Ward) SC 2AD (Ward) SC 2AD (Ward) SC 2AD (Ward) SC 2BA (Ward) SC 2BD (Ward) SC 2BD (Ward)	Newest to Oldest     Oldest to Newest	Default Worklist
Delete	Page 1 of 1 First <						Cancel Save Done



#### **REFERRAL: SENDING AN EXTERNAL REFERRAL**

1. Find the patient within the referral list and click on the row to expand the case details. **\*\*Do not click on the patient name, click on the blank area within the box.** 

Referral Management         ×         +           Worklist         SCS Inpatient Referrals.         Ist Maintenance	Click here									Add Inbound Re	eferral
Patient	Referred By	Referred To 🗸 🗸	Assigned To	Requested S	Indicators	Insurance	Status	Priority	Last Update	Requested S	Service
*ITTWO, NEPHROSTOMY 75 yrs M :	NHS Test01, Physician - Intensivist 01/08/2024 14:48	Ontario Health at Home - St. C		Rehab Reason		MINISTRY OF H	Not Started	Standard	06/11/2024 20:19	01/08/2024	
*ITTHREE, CARDIOLOGY 71 yrs M	NHS Test01, Physician - Cardiovascular 27/09/2024 16:06	Ontario Health at Home - St. C		Rehab cardiac rehab fo		MINISTRY OF H	Not Started	Standard	06/11/2024 20:13	27/09/2024	

- 2. At this time, the referral is in a "Not Started" state. In the upper right-hand corner click "Start Referral"
- 3. 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. If additional information is needed, contact the provider.

eferral has not yet been started. Click th started Edit artus: Edit	he 'Start Referral' button to prepare for sending.			Unassigned Assign to mu Case Numbe
Summary <u>Comments</u> Document	nts Insurance Scheduling			
Medical Service Rehab	Referral Reason Reason	Codified Reason	Treatment to Date	Referral Type
Refer from Provider NHS Test01, Physician - Intensivist	Refer from Location St. Catharines Site/SC 2BB	Referral Written Date 08/01/2024	Requested Start Date 08/01/2024	Service By Date
Refer to Provider	Refer to Location Ontario Health at Home - St. Catharine's Site	Priority Standard	Instructions to Staff Referral to Thrombosis Service	Order Comment
Patient Information				
Preferred Method of Contact 	Home Phone 	Mobile Phone 5555555555	Business Phone	Home Address 123 ITTWO TEST DRIVE WELLAND , Ontario L3CSH5

4. Once all information is confirmed and edits are done, select the Save button.



Summary Comments Documents	Insurance Scheduling			ર
Case Details				
*Medical Service Rehab	*Referral Reason Consult to Ontario Health at Home for Wound Care services	Codified Reason	Treatment to Date	Referral Type
Refer from Provider NHS Test01, Physician - Intensivist	Refer from Location St. Catharines Site/SC 2BB	Referral Written Date 08/01/2024	Requested Start Date 08/01/2024	Service By Date MM/DD/YYYY
Refer to Provider 	Refer to Location Ontario Health at Home - St. Catharine's Site	*Priority Standard	Instructions to Staff Referral to Ontario Health at Home. Competed prescription in patient chart.	- Comment
				Cancel

5. You can attach documents to the referral by clicking the Documents tab and adding the documents you would like to add

NOTE: The Ontario Home Health at Home paper requisition will still need to be completed by the prescriber. Once completed and a scanner is available on your unit, it can be scanned into the chart and then attached to the referral. This will save the Referral form in the documents section of the chart. **If no** scanner available, ensure that the paper requisition form is in the patient's physical chart

6. Once you have the information needed, click "Generate" and Send.

					×	
ITTWO, NEPHROSTOMY           75 yrs         Male         D08: 08 DEC 1948         MRN: 11003062         FIN: 22-003625						
Click the 'Generate' button when you are re	eady to send the referral.				Generate	
Status: Prep for Send Edit Substatus: Edit				📥 Unassigned	Assign to me Assign Case Number: 68973	
Summary Comments Docum	nents Insurance Scheduling				e	
Case Details					Edit	
Medical Service Rehab	Referral Reason Reason	Codified Reason	Treatment to Date	Referral Type		
tefer from Provider IHS Test01, Physician - Intensivist	Refer from Location St. Catharines Site/SC 2BB	Referral Written Date 08/01/2024	Requested Start Date 08/01/2024	Service By Date		
Refer to Provider -	Refer to Location Ontario Health at Home - St. Catharine's Site	Priority Standard	Instructions to Staff Referral to Thrombosis Service	Order Comment		
Patient Information						
Preferred Method of Contact 	Home Phone	Mobile Phone 5555555555	Business Phone	Home Address 123 ITTWO TEST DRIVE WELLAND , Ontario L3C5H5		

7. The Ontario Health at Home referral is an external referral process, the user will be prompted to create a Provider Letter. (see Provider Letter Tip Sheets for more details)



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Terral Details dical Service: Rehab erral Reason: Lest diffed Reason: - erral Type: Consult Only er from Provider: NHS Test01, Physician - Card er from Provider: NHS Test01, Physician - Card				
erral Withen Date: 092/7024 and 0.200 period With Date: 092/7024 with Standard ef Flourance and Date: 092/0024 and 0.200 and Date: 092/0024 and 0.200 period D	OKES-CARE			
ults				🕅 Add Resul
uit Name		Current Result Date	Previous Result Date Reference	e Range
		There are no items to show.		

- 8. The Ontario Health at Home location that the Provider is referring to will automatically pull into the Recipient field with their contact information. Click "Recipient" to review the information.
- 9. Once you have reviewed the information needed within the letter you can preview the letter and click "Ok" to send it

OK Cancel Preview				~
on concer mener	ОК	Cancel	Preview	

10. Status of the referral will update to "Sent"

Status:	Sent	Edit
Substat	us:	Edit