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

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

3. Click Add
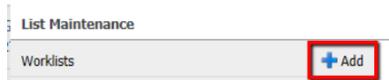
4. You need to create an originating. Name your list to indicate which one it is.

   Ie: SCS Inpatient Referral List

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.

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List Maintenance   ✕

* Name		List Type	Sort	
SCS Inpatient Referrals.		Originating	Update Date	⦿ Newest to Oldest ◯ Oldest to Newest ☐ Default Worklist

	Available Locations		**Selected Locations**
✱ Refer From Location			
Refer From Clinical Staff	SC 1AA (Ward)		
Treatment Function	SC 1BA (Ward)		
Status	SC 1BB (Ward)		
Priority	SC 1MA (Ward)		
Referral Type	SC 2AA (Ward)		No Selected Locations
Refer To Location	SC 2AASU (Ward)		
Refer To Clinical Staff	SC 2AB (Ward)	Add	
Dates	SC 2AC (Ward)	Remove	
Assignment	SC 2AD (Ward)		
	SC 2BA (Ward)		
	SC 2BB (Ward)		
	SC 2BC (Ward)		
	SC 2BD (Ward)		
	SC 2DFDS (Ward)		
	SC 2DFLX (Ward)		
	SC 2DFPR (Ward)		
	SC 3AA (Ward)		

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Delete   Cancel   Save   Done

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

List Maintenance   ✕

* Name		List Type	Sort	
SCS Inpatient Referrals.		Originating ▾	Update Date ▾	⦿ Newest to Oldest ◯ Oldest to Newest ☐ Default Worklist

	Available Locations		**Selected Locations**
✓ Refer From Location			
Refer From Clinical Staff	▶ **BALSAM HEALTHCARE**		▼ **St. Catharines Site**
Treatment Function			SC 2AA (Ward)
Status	▶ **Fort Erie Site**		SC 2AASU (Ward)
Priority			SC 2AB (Ward)
Referral Type	▶ **Hotel Dieu Shaver**		SC 2AC (Ward)
Refer To Location			SC 2AD (Ward)
Refer To Clinical Staff	▶ **Niagara Falls Site**		SC 2BA (Ward)
Dates		Add	SC 2BB (Ward)
Assignment	▶ **Port Colborne Site**	Remove	SC 2BC (Ward)
			SC 2BD (Ward)
	▶ **St. Catharines Site**		
	▶ **Welland Site**		

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Delete   Cancel   Save   Done

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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.**

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.

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

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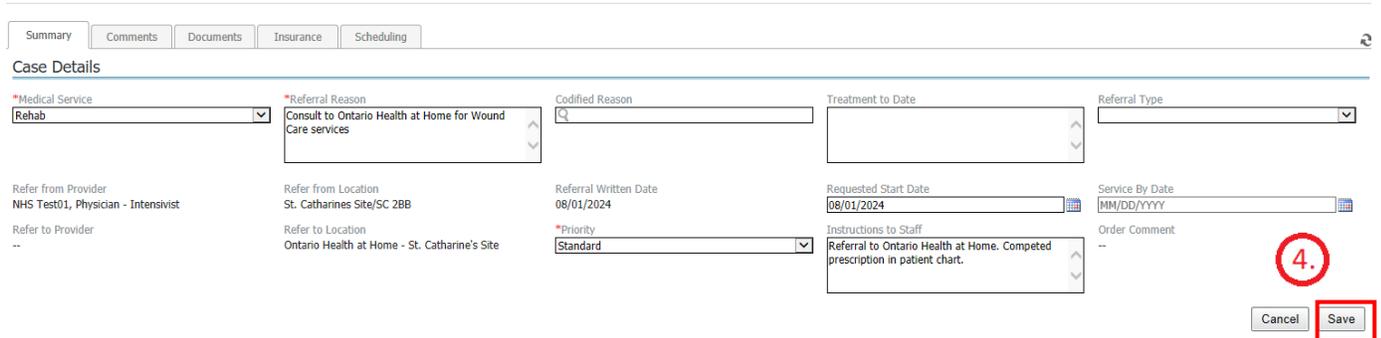
5. You can attach documents to the referral by clicking the Documents tab and adding the documents you would like to add

<mark>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**</mark>

6. Once you have the information needed, click "Generate" and Send.
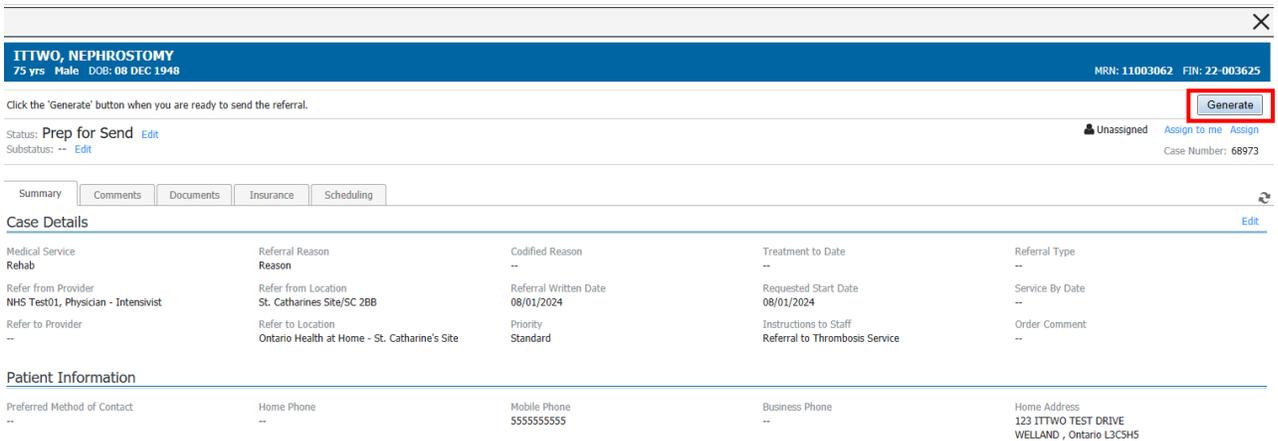
7. The Ontario Health at Home referral is an external referral process, the user will be prompted to create a Provider Letter. (see Provider Letter Tip Sheets for more details)
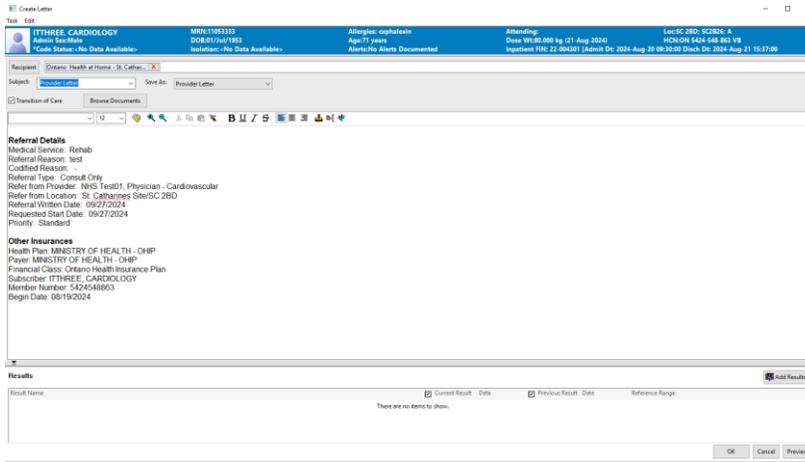
8. The Ontario Health at Home location that the Provider is referring to will automatically pull into the Recipient field with their contact information. Click "Recipient" to review the information.

9. Once you have reviewed the information needed within the letter you can preview the letter and click "Ok" to send it

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