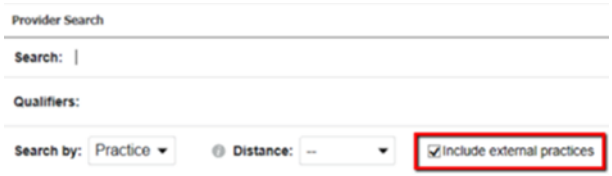
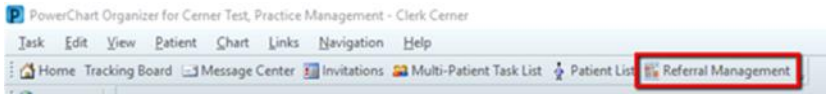
ORGANIZATION: REFERRAL: SENDING AN EXTERNAL REFERRAL

1. Find the patient and click on the row to expand the case details
2. 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
4. If you decide you need to send the referral outside of the health system, when searching for a provider select “External” and choose a provider

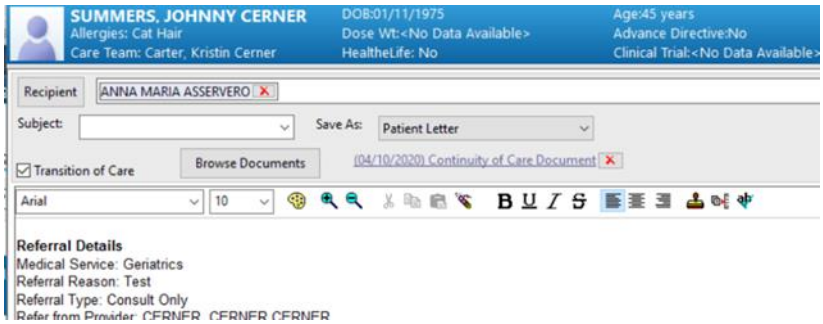


5. Go through each tab and add the appropriate details
6. Once you have the information needed, click “Generate”
7. Since you are sending this referral outside of the organization, you are prompted to go to PowerChart and create a letter

8. Navigate to PowerChart and click “Referral Management”



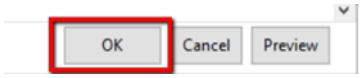
9. Find your patient on your originating list, open the case and click “Generate” again
10. A Provider Letter will automatically pop up with the case information populated and a Continuity of Care Document attached



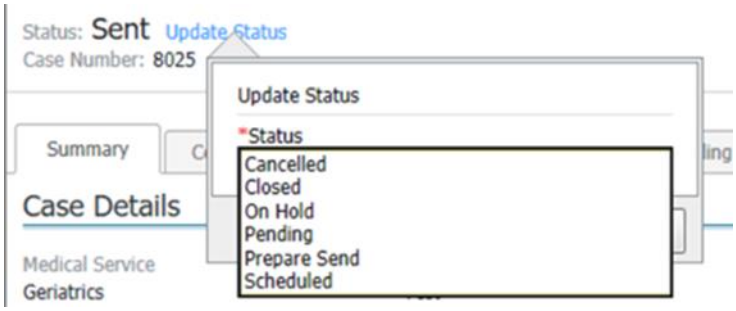
11. The physician you are referring to will automatically pull into the Recipient field with their contact information. Click “Recipient” to review the information.

12. If the provider is set up for direct messaging, the message will be sent to their inbox. If the provider’s fax was provided, then it will be faxed to them. If the provider only had an address on file, then the letter will print out and needs to be mailed.

13. Once you have the information needed within the letter, click “Ok” to send it



14. You will manually update the status of the case once you hear back from the receiving office



*********HCCSS/Ontario Health at Home-*****Staff are still required to fill out paper forms from the agency for referral management*******