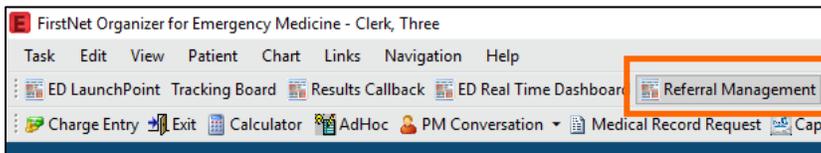


EMERGENCY & URGENT CARE CLERKS

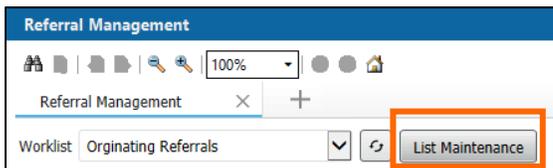
How to create a referral list to generate referrals to NH Orthopaedic Clinics, as well as how to schedule an initial consultation appointment directly from the referral.

Creating the Referral List & Generating Referrals

1. Open **Referral Management** from the top grey toolbar.

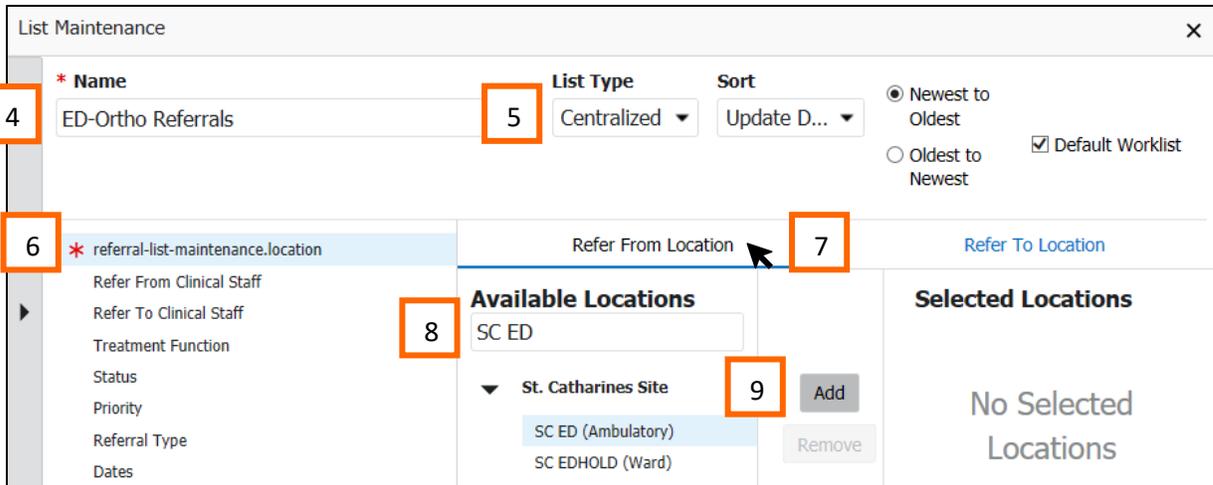


2. Click on the **List Maintenance** button.



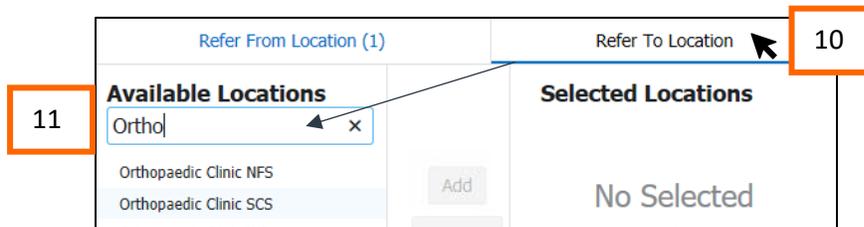
3. Click **+ Add**
4. In the **Name** field, give the list a title. (E.g. ED-Ortho Referrals)
5. Select **Centralized** from the **List Type** drop-down. This allows for referrals to be received and originated within the same process.
6. On the far-left pane, select **Referral List Maintenance Location**.
7. Click **"Refer from Location."**
8. In the search bar under **Available Locations**, enter the relevant emergency or urgent care location (E.g. SC ED, NF ED, WS ED, PC UCC). You can also select a site and use the arrows to expand to a specific location.
9. Click **Add**. Repeat Step 8 to add an additional location(s) if desired.

(See Next Page)



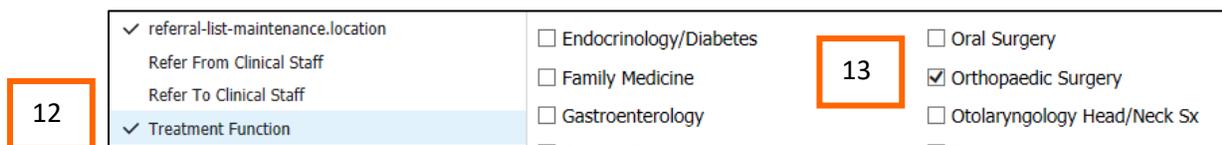
10 Click **“Refer to Location.”**

11 In the search bar, enter the desired orthopaedic clinics to which the referrals will be sent to (E.g. Orthopaedic Clinic SCS, Orthopaedic Clinic NFS). Select the clinic and click **Add**.



12 On the far left-pane, select **Treatment Function**.

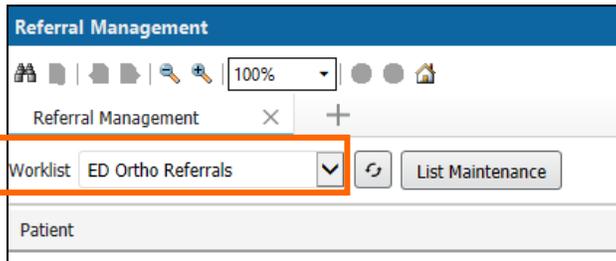
13 Click in the box next to **Orthopaedic Surgery**. This will filter-out referrals from other services.



14 Click **Save**, followed by the ‘x’ in the top right corner to exit.

Note: Creating the list is a one-time setup. Please see tip sheets for further detailed instructions on list creation.

15 Select the list you just created from the **Worklist** drop-down menu.



16 All ED-Ortho referrals will populate. Click on the header of the **Status** column to filter your list by status. Look for the status of **Not Started**.

17 From the **Patient** column the patient box of the referral that is to be processed. Do NOT click directly on the patient name as this will launch their chart.

| Patient | Referred By | Referred To | Assigned To | Requested... | Indicators | 16 | Status |
|-------------------------------------|--------------------------------------|---------------------------------------|-------------|---|------------|----------------|--------------------|
| BARTESTSIX, DELAYEDSIGNOFF 39 yrs M | NHS Test05, P... 25/10/2024 1... | | | Orthopaedic S... fracture clinic | | MINISTRY OF... | Not Started |
| 17 TEST, LEZLIE 54 yrs F | Tam, Benjami... 25/10/2024 1... | Orthopaedic Cl... Song, John Y... | | Orthopaedic S... test | | MINISTRY OF... | Not Started |
| *ZZTEST, ORDERTESTS 34 yrs F | NHS Test01, P... 14/06/2024 1... | | | Orthopaedic S... fracture | | | Not Started |
| *ZZTEST, EARLYPREG 23 yrs F | Cerner Test, P... 13/06/2024 1... | Orthopaedic Cl... Gunton, Matth... | | Orthopaedic S... bleeding 1st trl... | | | Pending Acceptance |
| ITONE, FALLSYNCOPE JESSY 41 yrs M | NHS Test01, P... 20/06/2024 0... | Orthopaedic Cl... Gunton, Matth... | | Orthopaedic S... Fractured left... | | MINISTRY O... | Pending Acceptance |
| *ZZTEST, ORDERTESTS 34 yrs F | NHS Test01, P... 14/06/2024 1... | Orthopaedic Cl... Gunton, Matth... | | Orthopaedic S... Fractured wrist | | | Pending Acceptance |

Note: To make your list more manageable, you are able to adjust its settings from **List Maintenance** to have it only populate referrals certain statuses. (E.g. Not Started)

18 From the referral summary, click on **Edit** on the far right of the Case Details section.





REFERRALS & SCHEDULING TO ORTHO

HOSPITAL INFORMATION SYSTEM (HIS)

- 19 Click on the magnifying glass icon  to enter a **Refer To** location if it is not already populated or incorrect.
- 20 From the referral look-up window, change the **Search by** field to “Practice” using the drop-down arrow.
- 21 In the top search field, enter the Orthopaedic Clinic you would like to add.
- 22 Click anywhere within the row of the desired clinic, followed by **Accept**.

Important! For South Niagara sites, alternate the **Refer To** location between NF and WS based on the Orthopaedic On-Call Rotation List.

21 Search: Orthopaedic Clinic

Qualifiers: +

20 Search by: Practice Include external practices Search Clear

| | |
|--|--|
| Orthopaedic Clinic NFS | Orthopedic Surgery Within Health System |
| Orthopaedic Clinic SCS | Orthopedic Surgery Within Health System |
| Orthopaedic Clinic WS | Orthopedic Surgery Within Health System |
| A Better Choice (ABC) Clinic-Welland Ave SCS | -- Within Health System |
| APU-GYN Consult Clinic 4th flr SCS | -- Within Health System |

22a

22b Accept Cancel

- 23 Click **Save**.
- 24 Click the **Start Referral** button.

ZZORTHOD, MARK
49 yrs Male DOB: 28 AUG 1975 MRN: 11054681 FIN: 22-006204

This referral has not yet been started. Click the 'Start Referral' button to prepare for sending.

Status: Not Started Edit Assign to me Assign Unassigned Case Number: 244707

Summary Comments Documents Insurance Scheduling

- 25 Click **Generate** which will appear in its place.
- 26 On the bottom right of the referral summary, click **Send**.

Referral Summary

| Case Details | | | | |
|---|--|-------------------------------------|------------------------------------|-----------------------|
| Medical Service Orthopaedic Surgery | Referral Reason Fractured Wrist | Codified Reason -- | Treatment to Date -- | Referral Type -- |
| Refer from Provider NHS Test01, Physician - Orthopaedic S... | Refer from Location St. Catharines Site | Referral Written Date 10/27/2024 | Requested Start Date 10/27/2024 | Service By Date -- |
| Refer to Provider -- | Refer to Location Orthopaedic Clinic WS | Priority Standard | Instructions to Staff -- | |

| Attached Documents | | | | |
|--------------------|--|-----------------------------|---|----------------|
| Date 10/27/2024 | Subject Transition of Care/Referral Summary | Author NHS Test01, Clerk | Type Transition of care/Referral summary | Source CAMM |

✔ Transition of Care generated successfully.

- 27 Click the **Accept** button.
- 28 From the **Encounter Information** drop-down window, select **Pre-Reg** as the **Type**. The location will auto-populate.
- 29 Click **Submit**. The referral status will now change to **Accepted**.

MRN: 11054681 FIN: 22-006204

Encounter Information

Create Select Encounter

*Type: *Location:

Treatment to Date: -- Referral Type: --

Scheduling the Appointment

1. Open the **Scheduling** tab in the referral window.
2. Click **New Appointment**.



ZZORTHOED, MARK
49 yrs Male DOB: 28 AUG 1975 MRN: 11054681

Status: Accepted Edit
Substatus: -- Edit

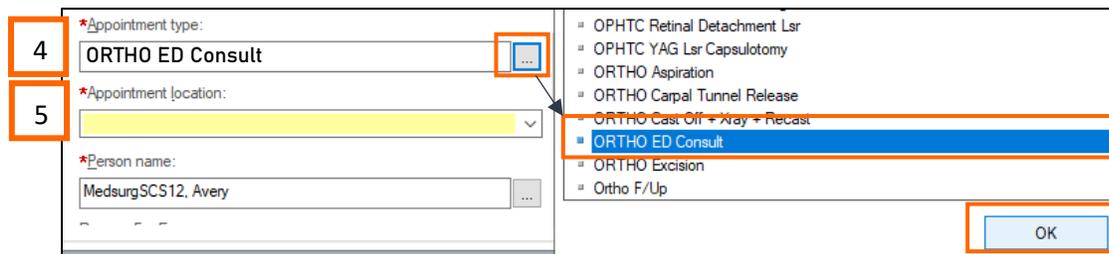
Unassigned Assign to me Assign
Case Number: 244707

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

Associated Appointment
No Appointment Associated **2** New Appointment

Confirmed Appointments

3. From Scheduling Appointment Book, navigate to the **Appointment** tab.
4. Enter the **Appointment Type** by either typing in “**ORHO ED Consult**” or clicking on the three-dots to open the search dialog box, selecting the type, followed by clicking **OK**.
5. Select the desired site by clicking the drop-down arrow next to **Appointment Location**.



*Appointment type:
ORTHO ED Consult ...

*Appointment location:
[Yellow Highlighted]

*Person name:
MedsurgSCS12, Avery

- OPHTC Retinal Detachment Lsr
- OPHTC YAG Lsr Capsulotomy
- ORTHO Aspiration
- ORTHO Carpal Tunnel Release
- ORTHO Cast Off + Xray + Recast
- ORTHO ED Consult**
- ORTHO Excision
- Ortho F/Up

OK

6. Scroll down to enter the other mandatory fields; **Reason for Exam** and **Attending Physician**. Use the  to open the **Physician Search** dialog box.
7. Click **Move**.
8. In the **Work in Progress** box, click on **Resource**.
9. Select the desired physician from the top toolbar of the booking window below.
10. Depending on your view, you may also select the desired date to book the appointment.
11. Click **Schedule**.

(See next page)

The screenshot shows the Appointment interface. Callout 6 points to the calendar grid. Callout 7 points to the Reason For Exam field containing 'fractured wrist'. Callout 8 points to the Resource field in the Work in Progress box. Callout 9 points to the drop-down menu for the attending physician, currently showing 'McCloy, Robert MD'. Callout 10 points to the appointment grid for Thursday, Jan 16, 2025. Callout 11 points to the Schedule button in the Work in Progress box.

12. In the **Default Slot** field, select the first available **ED Consult** appointment from the drop-down list.

13. Click **OK**.

The dialog box shows the 'Default slot' field selected with 'ED Consult (8:00 AM - 8:15 AM)'. Callout 12 points to this field. Callout 13 points to the OK button.

You will now be able to see the patient's name slotted into the selected date and time.

| | Thu, 16/Jan/2025 | | | |
|---------|------------------|----------------|----------------|----------------|
| 8:00 AM | Webster... | Office Pati... | Ortho Patie... | Ortho Patie... |
| 8:15 AM | ED Consult | Office Pati... | Ortho Patie... | Ortho Patie... |
| 8:30 AM | ED Consult | Office Pati... | Ortho Patie... | Ortho Patie... |

14. In the **Work in Progress** box, click the **+** next to either **Resource** or **Patient** to see the appointment details.

15. Click **Confirm**.



REFERRALS & SCHEDULING TO ORTHO

HOSPITAL INFORMATION SYSTEM (HIS)

Work in progress:

Webster, Evelyn

ORTHO ED Consult 15

Current Schedule

SC ORTHO

Resource

McCloy, Robert MD (16/Jan/2025, 8:00 AM, 15 min.)

Patient

Webster, Evelyn (16/Jan/2025, 8:00 AM, 15 min.)

14

Schedule

Confirm

Recur

Suggest

Request

16. From the appointment confirmation, select **Print**, then click **OK**.

Webster, Evelyn

16/Jan/2025 - 8:00 AM 15 Minutes ORTHO ED Consult SC ORTHO McCloy, Robert MD

Options Print... Print ABN...

OK Cancel

***Ensure that the patient is given the copy of their appointment confirmation prior to leaving the emergency department.**

Note: SCS appointments are booked into first available slot. WS/NF will follow on-call rotation (continue to place a check mark on the rotation list, following it accordingly).

For more Scheduling information view:

Scheduling Essentials Demo: [NH HIS - Scheduling](#)
View Scheduling Tip Sheets: [HIS Tip Sheets - Clerical](#)