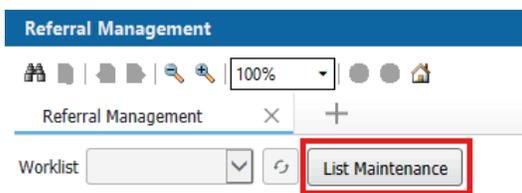


REFERRAL MANAGEMENT: CREATING REFERRAL LISTS

Originating Referral List

An originating referral list is the list to manage the location the referral is being sent to.
“Generated From”

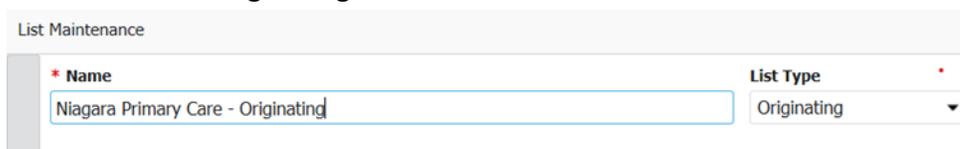
1. Navigate to Referral Management
2. Go to List Maintenance



3. Click Add



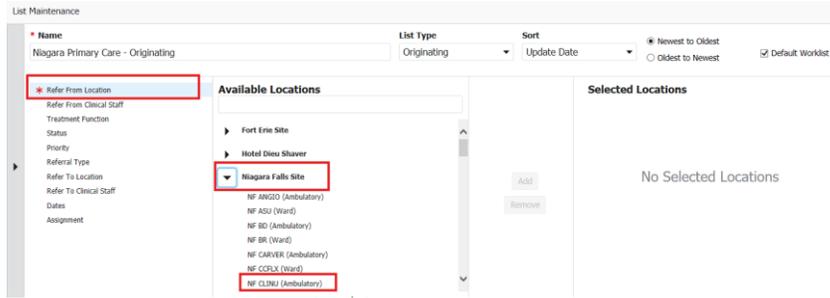
4. You need to create an originating. Name your list to indicate which one it is.
le: SCS Thrombosis Clinic Originating
le: SCS PARC Clinic Originating
le: MCKC Clinic Originating



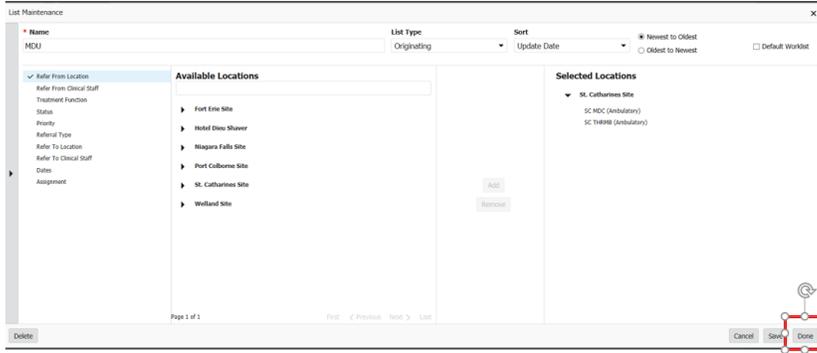
5. After choosing the type of list and naming it, you need to select the locations to associate. Click the locations you want added and click “Add” to move them over to the selected locations box. You can add additional criteria to the list like specific providers, statuses, etc. by clicking each on each item in the left-hand column and selecting the check box.



REFERRAL MANAGEMENT LISTS HOSPITAL INFORMATION SYSTEM (HIS)



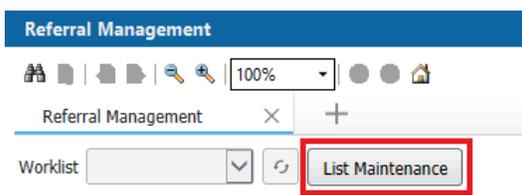
6. When you are done creating your list, select Done and close out of list maintenance



Receiving Referral List

A receiving referral list is the list to manage the location the referral is being sent to: the “Receiving Clinic”.

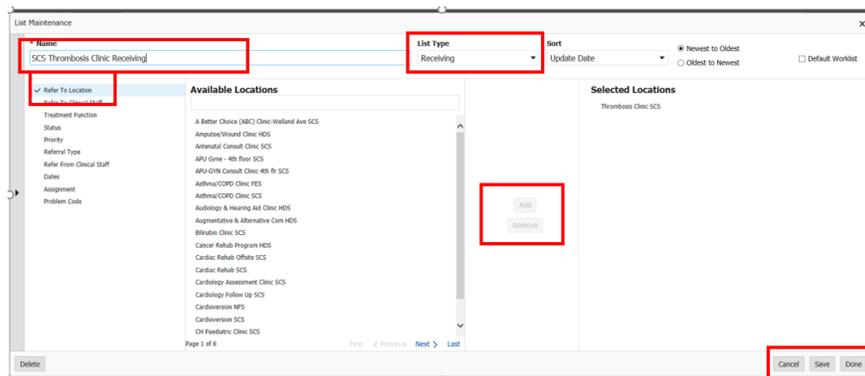
1. Navigate to Referral Management
2. Go to List Maintenance



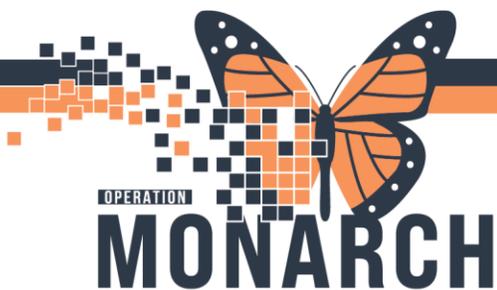
3. Click Add



4. You need to create a receiving list. Name your list to indicate which one it is.
 le: SCS Thrombosis Clinic Receiving
 le: SCS PCC Clinic Receiving
 le: MCKC Clinic Receiving



5. After choosing the type of list and naming it, you need to select the locations to associate.
6. 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.
7. When you are done creating your list, select Done and close out of list maintenance

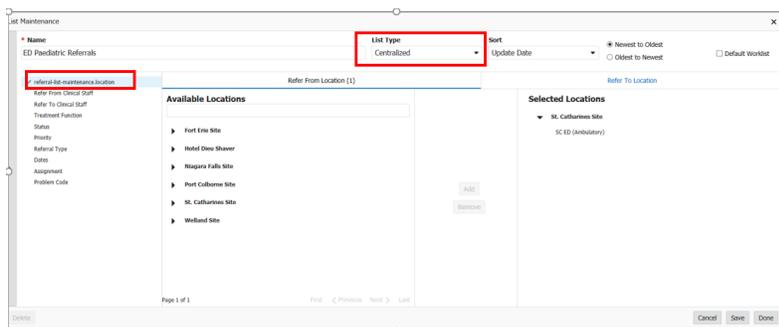


REFERRAL MANAGEMENT LISTS HOSPITAL INFORMATION SYSTEM (HIS)

Centralized Referral List

A centralized referral list allows the individual managing the referral list to see both the originating referral and receiving referral in the same list. This enables the user to both generate referrals and to accept referrals. This is beneficial in places like the ED where the staff if Sending the Referral and Accepting the Referral for the purpose of booking the patients in.

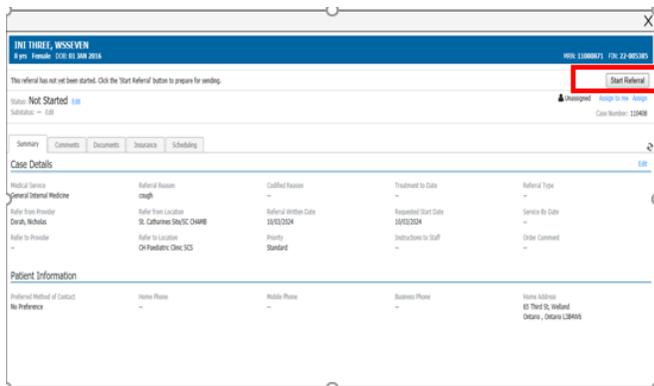
1. Follow steps outlined above
2. Click on Centralized List and Referral List Maintenance Locations



3. Save the list once it is set up.
4. You may need to filter the list more since you are doing both. You can filter by the headings at the top and sort by Alphabetic Order or by Date.

Patient	Requested Sta...	Last Updated...	Status	Priority	Referred By	Referred To	Assigned To	Requested Ser...	Indicators	Service By Date
***ZTESTGELLAR, SARAH MICHEL... 34... F	21/08/2024	21/08/2024 10:26	Sent	Standard	NHS Test01, Physicia... 21/08/2024 10:20	Cardiology Associates of Niagara Kobrac, Marian, MD, FRCP		Cardiology assessment		
***ZTESTGELLAR, SARAH MICHEL... 34... F	21/08/2024	21/08/2024 10:16	Pending Acceptance	Standard	NHS Test01, Physicia... 21/08/2024 10:12	Cardiology Assessment Clinic SCS Kobrac, Marian, MD, FRCP		Cardiology assessment		
***ZTESTGELLAR, SARAH MICHEL... 34... F	21/08/2024	21/08/2024 09:18	Not Started	Standard	NHS Test01, Physicia... 21/08/2024 09:18	Cardiology Associates of Niagara		Cardiology 2nd opin		
INI THREE, WISSEVEN 8 yrs F	03/10/2024	03/10/2024 10:23	Not Started	Standard	Dorah, Nicholas 03/10/2024 10:23			General Internat... cough		
ADAMS, TAYLOR 66 yrs F	11/10/2023	27/06/2024 10:49	Prep for Send	Standard	NHS Test02, Physicia... 11/10/2023 14:54			Medical Oncology test		
***ZZTEST, MIATHREE 34 yrs F	24/01/2024	08/08/2024 13:23	Prep for Send	Standard	Cerner Test, Psychiatr... 24/01/2024 13:28			Mental Health pt need to be see...		26/01/2024
SYSTEMTEST, MHAONEHUNDRE... 29... M	05/06/2024	05/06/2024 13:13	Not Started	Standard	NHS Test, Resident 05/06/2024 13:13	MH Geriatric Mental Health SCS		Mental Health Add... Test		
***ZTESTGELLAR, SARAH MICHEL... 34... F	21/08/2024	21/08/2024 10:46	Prep for Send	Standard	NHS Test01, Physicia... 21/08/2024 10:46			Neurology assessment		
***ZZTEST, DKA 58 yrs M	29/07/2024	08/08/2024 13:24	Prep for Send	Standard	NHS Test02, Physicia... 29/07/2024 09:50	Early Pregnancy Clinic SCS		Obstetrics bleeding		
***TTTWO, EARLY PREGNANCY 29 yrs F	01/08/2024	02/08/2024 12:33	Scheduled	Standard	NHS Test01, Physicia... 01/08/2024 12:44	Early Pregnancy Clinic SCS		Obstetrics Bleeding in early p...		

5. Confirm all details are correct and start the referral



JINI THREE, WISSEVEN
8 yrs Female DOB: 01 JAN 2016 MRN: 11000871 FPN: 22-065385

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

Status: **Not Started** [Edit](#) Unassigned [Assign to me](#) [Assign](#) Case Number: 110408

Summary | Comments | Documents | Insurance | Scheduling

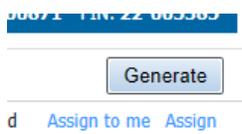
Case Details [Edit](#)

Medical Service General Internal Medicine	Referral Reason cough	Collected Reason --	Treatment to Date --	Referral Type --
Refer from Provider Dorah, Nicholas	Refer from Location St. Catharines Site/SC OHWB	Referral Written Date 10/03/2024	Requested Start Date 10/03/2024	Service By Date --
Refer to Provider --	Refer to Location OH Paediatric Clinic SCS	Priority Standard	Instructions to Staff --	Order Comment --

Patient Information

Preferred Method of Contact No Preference	Home Phone --	Mobile Phone --	Business Phone --	Home Address 65 Third St, Welland Ontario, Ontario L3B4W5
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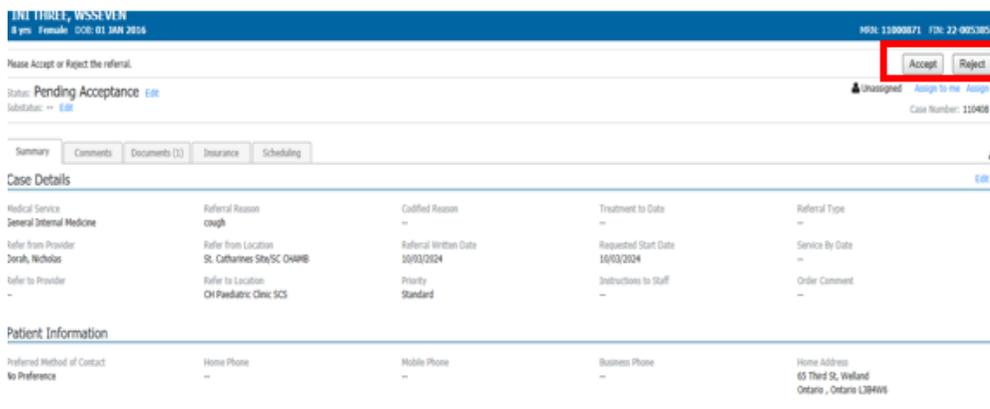
6. Generate the referral



Generate

[Assign to me](#) [Assign](#)

7. Accept or Reject the Referral and move on to scheduling the appointment.
(following the scheduling tip sheets)



JINI THREE, WISSEVEN
8 yrs Female DOB: 01 JAN 2016 MRN: 11000871 FPN: 22-065385

Please Accept or Reject the referral.

Status: **Pending Acceptance** [Edit](#) Unassigned [Assign to me](#) [Assign](#) Case Number: 110408

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

Case Details [Edit](#)

Medical Service General Internal Medicine	Referral Reason cough	Collected Reason --	Treatment to Date --	Referral Type --
Refer from Provider Dorah, Nicholas	Refer from Location St. Catharines Site/SC OHWB	Referral Written Date 10/03/2024	Requested Start Date 10/03/2024	Service By Date --
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Patient Information

Preferred Method of Contact No Preference	Home Phone --	Mobile Phone --	Business Phone --	Home Address 65 Third St, Welland Ontario, Ontario L3B4W5
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REFERRAL MANAGEMENT LISTS HOSPITAL INFORMATION SYSTEM (HIS)