

REFERRAL: RECEIVING AN EXTERNAL REFERRAL

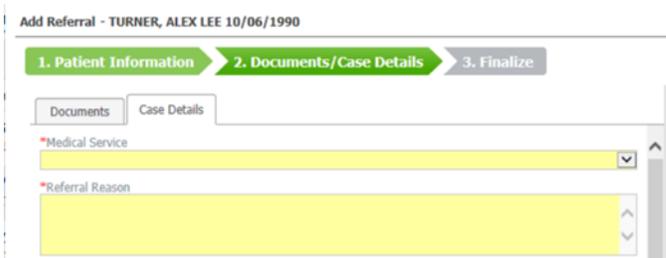
1. If you received an outside referral, click “Add Referral” within Referral Management



Referral Management x +

Worklist OPD- Med Red Orig Refresh List Maintenance **+ Add Referral**

2. Search for your patient in Smart ID using the First Name, Last Name, Date of Birth and Gender. Select the correct one and click “Accept”. If you can’t find your patient, click “Create New” and go through the process to add a patient and then start with step 1 again.
3. Go to the Case Details tab and fill in the required fields based on the paper referral



Add Referral - TURNER, ALEX LEE 10/06/1990

1. Patient Information 2. Documents/Case Details 3. Finalize

Documents Case Details

*Medical Service

*Referral Reason

4. Referral Forms sent will be received in WQM (work queue monitoring) and attached to the patients name in the chart. You will be able to find the referral in the documents field and attach to the referral for Triaging.
4. Once the required fields are populated, click “Next”
5. Then choose “Accept Referral”: if you are the individual accepting referrals or assign to the staff triaging for them to review the referral lists. The staff triaging the list will then review and accept or reject the referral.



MRN: 11000871 FIN: 22-005385

Accept Reject

Unassigned Assign to Me Assign

Case Number: 110408

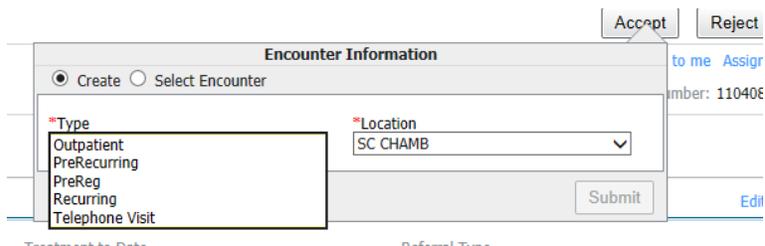


Add Referral - TURNER, ALEX LEE 10/06/1990

1. Patient Information 2. Documents/Case Details 3. Finalize

Status: Pending **Accept Referral** Reject Referral

6. Once you accept the referral the encounter information will open. Pick the appropriate encounter. This will 80% of the time be PreReg

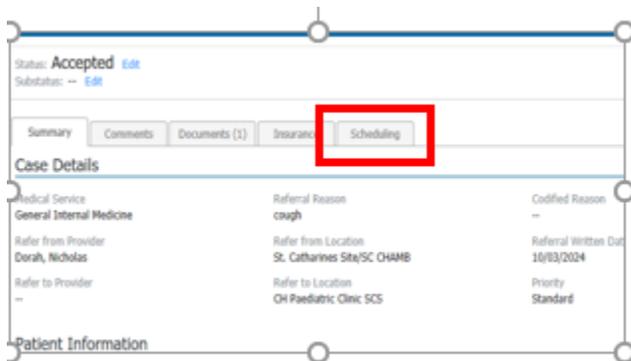


7. Once the referral is accepted, click "Submit" and the referral will show on your receiving worklist to start working



8. This will update the status to accepted and an appointment can be scheduled.

9. By clicking the scheduling tab it will launch the staff into the scheduling app to schedule an appointment.



Medical Service	Referral Reason	Codified Reason
General Internal Medicine	cough	--
Refer from Provider Dorah, Nicholas	Refer from Location St. Catharines Site/SC CHAMB	Referral Written Date 10/03/2024
Refer to Provider --	Refer to Location OH Paediatric Clinic SCS	Priority Standard

10. Refer to scheduling tip sheets for how to schedule appointments.