

## Ordering Provider - Saving 'Internal' Referral

### Step 1 Ordering Provider (MD, NP)

- Referral can be initiated from an Encounter, Referral section or Forms

### Step 2 Sending a Form or Letter as a referral

- **Scenario 1 - Send a Form as a Referral**
  - a) Click on 'Add form' in the forms section and complete the fields.
  - b) Click on 'Referral' and select 'Internal'
- **Scenario 2 - Create a Letter**
  - a) Click on 'Add Letter' in the referral section.
  - b) Select a 'receptient'
  - c) Free text/ Add encounter note / Add a template in the body of the letter
  - d) Sign the letter
  - e) Open the letter and click on 'Referral' and select 'Internal'

### Step 3 Update the Referral Card

- Update referral card
- + Attachment (if any)
- Default Status - Requested, Priority - Not yet Triaged
- Save and Close

## Ordering Provider - Sending 'Outgoing' Referral

### Step 1 Ordering Provider

- Referral can be initiated from an Encounter, Referral section or Forms

### Step 2 Sending a Form or Letter

- **Scenario 1 - Send a Form as a Referral**
  - a) Click on 'Add form' in the forms section and complete the fields.
  - b) Click on 'Referral' and select 'Outgoing'
- **Scenario 2 - Create a Letter**
  - a) Click on 'Add Letter'
  - ba) Click on 'Add Letter' in the referral section.
  - b) Select a 'receptient'
  - c) Free text/ Add encounter note / Add a template in the body of the letter
  - d) Sign the letter
  - e) Open the letter and click on 'Referral' and select 'Outgoing'

### Step 3 Select Referral -Outgoing

- Update referral card
- + Attachment (if any)
- Default Status - Letter Sent, Priority - Not yet Triaged
- **Scenario 1 - Click on 'Message'**
  - a) Ask MOA to fill in missing information ie. add Service Provider/Additional Information.
  - b) MOA clicks on 'Generate & Send'.
  - c) Review the PDF and fax to the Service Provider/Program.
- **Scenario 2 - Click on 'Generate and Send'**
  - a) Review the PDF and fax to the Service Provider/Program.

## [Outgoing] Ordering Provider – MOA Managing Referrals

[Set Filter in 'Outgoing' Referral folder – 'All Status'; Name of Ordering Provider to Update the referral]

### Step 1 Receives a response

- Receives Response of the Referral sent: In Inbox as 'Incoming Fax' OR By Mail
- NOTE** - If the response is received via MAIL, scan the document and save it on the desktop/laptop to upload.

### Step 2 Upload the response to the Patient's Chart

- Upload or Attach the response letter to the patient chart.
- Rename appropriately. Eg: Acceptance Reference Letter from OBGYN
- Adding a tag 'referral' is mandatory.

### Step 3 Update the referral card

- a) Navigate to 'Outgoing' Referral Folder - Set Filters as mentioned above
- b) Open the patients referral card
- c) Change the status to 'Received' if referral is accepted/ waitlisted
- d) Update priority if mentioned in the response.
- e) Leave comment about the update.
- f) Save & Close.

### Note:

- **If the referral is rejected** – MOA will change the status to 'Rejected' and message the Ordering Provider with the update.  
**NOTE:** The rejected referral can be '**Archived**' after a year by the Ordering Provider's location.  
For referrals over one year, ensure proper investigations are completed before referrals are archived. MOA's are to leave a comment documenting the reason for archiving.
- **If the Service Provider asked for Additional Information** – MOA will change the status to 'Needs Follow Up' and message the Ordering Provider with the update.
- Sometime **MOA may call to confirm** if the referral was received or not – Resend if not received.

## [Outgoing] Ordering Provider – Managing ‘Rejected’ Status

[Set Filter in ‘Outgoing’ Referral folder – Name of Ordering Provider to track the referral]

### Step 1 Ordering Provider

- Filter to 'Rejected' status
- Sort by 'Recently Updated'

### Step 2 Create a new Referral Card

Create a new referral card and direct it to the another or suggested service provider.

## [Outgoing] Ordering Provider – Managing ‘Needs Follow Up’ Status

[Set Filter in ‘Outgoing’ Referral folder – Name of Ordering Provider to track the referral]

### Step 1 Ordering Provider

- Filter to 'Needs Follow Up' status
- Sort by 'Recently Updated'.

### Step 2 Action the Comments

- a) Review the comment/document.
- b) Take action based on the comment/document.
- c) Leave a new comment once the action has been taken.

**NOTE:** Upload/attach the additional information document once available to the referral card. Also, fax the document to the Service Provider and leave comment about the update.

## Managing 'Incoming' Referrals – MOA Role

[Set Filter in 'Incoming' Referral folder – Name of Service Provider to manage the referral]

### Step 1 Receives Referral from external provider

Receives Referral in Inbox as 'Incoming Fax' OR By Mail.

**NOTE -**

If the referral is received via MAIL, scan the document and save it on the desktop/laptop to upload into the patient's chart.

### Step 2 Attach the referral to Patient Chart

**Scenario 1 - Incoming Fax**

- Attach the referral to a patient chart.
- Click on 'Doc Info' and fill in the fields.

**NOTE -** Rename Referral 'Title' as the reason and Tag as 'Referral'.

**Scenario 2 - By Mail**

- Upload the document into the Inbox.
- Attach the referral to a patient chart.
- Click on 'Doc Info' and fill in the fields.

**NOTE -** Rename Referral 'Title' as the reason and Tag as 'Referral'.

### Step 3 Create a Referral card

- Click 'Referrals' tab at the bottom of the attached/uploaded file.
- Complete referral card using the information from the file.  
**NOTE -** Check that the status is set to 'Requested' and priority is 'Not Yet Triaged'.
- Save and Close.

## [Incoming] Service Provider – Managing 'Requested' Status Referrals

[Set Filter in 'Incoming' Referral folder – Name of Service Provider to manage the referral]

### Step 1 Service Provider

- Filter to 'Requested' status.

### Step 2 Review the Referral

**Scenario 1 - Accept or Waitlist the referral**

- Change Status to 'Triage Complete'.
- Change Priority as needed.
- Leave Comment for MOA to action.
- Save & Close.

**Scenario 2 - Rejecting the referral**

- Change Status to 'Rejected'.
- Leave Comment for the MOA to action.  
(Mention the name of the MOA, reason for rejection and suggestion if any.)
- Save & Close.

**Scenario 3 - Additional Information Required**

- Change Status to 'Additional Information Required'.
- Leave Comment for the MOA to action.  
(Mention the name of the MOA and additional information needed.)
- Save & Close.

## **[Incoming] MOA actioning Service Provider comments**

[Set Filter in 'Incoming' Referral folder – Name of Service Provider to manage the referral]

### **Step 1 MOA to set filters**

- Filter to statuses as needed in step 2.  
MOA has to manage the following statuses:  
Triage Complete  
Rejected  
Additional Information Required

### **Step 2 Review the Referral**

#### **Scenario 1 - Accept or Waitlist the referral**

- a) Filter Status to 'Triage Complete'.
- b) Filter Priority [Highest/High/Medium/ low/Lowest]
- c) Action comments left by the Service Provider (Add to the waitlist if applicable)
- d) Click on the 'New tab' symbol to open the patient's chart. Create and fax a letter to Ordering Provider notifying the update on the referral.
- e) MOA leaves a comment about the action taken and update the status to 'Accepted/Waitlisted' as needed.
- f) Save & Close.

#### **Scenario 2 - Rejected the referral**

- a) Filter Status to 'Rejected'.
- b) Action comments left by the Service Provider.
- c) Click on the 'New tab' symbol to open the patient's chart. Create and fax a letter to Ordering Provider notifying the update on the referral.
- d) MOA leaves a comment about the action taken.
- e) Save & Close.

**NOTE:** The rejected referral can be 'Archived' after a year by the Service Provider's location.  
The MOA is to leave a comment documenting the reason for archiving.

#### **Scenario 3 - Additional Information Required**

- a) Filter Status to 'Additional Information Required'.
- b) Action comments left by the Service Provider.
- c) Click on the 'New tab' symbol to open the patient's chart. Create and fax a letter to Ordering Provider notifying the update on the referral.
- d) MOA leaves a comment about the action taken.
- e) Save & Close.

**NOTE:** When the additional information is received MOA has to upload/attach the document to the patient's chart. MOA also has to attach the document to the referral card and leave comment for the service provider.

## **[Incoming] Service Provider – Managing ‘Additional Information Required’ Status Referrals**

[Set Filter in ‘Incoming’ Referral folder – Name of Service Provider to track the referrals]

### **Step 1 Service Provider**

- Filter to 'Additional Information Required' status
- Sort by 'Recently Updated'.
- Review the 'Comments' added by the MOA.

### **Step 2 Managing the Referral**

Based on the new information, choose one of the following actions.

#### **Scenario 1 - Accept or Waitlist the referral**

- a) Change Status to 'Triage Complete'.
- b) Change Priority as needed.
- c) Leave Comment for MOA to action.
- d) Save & Close.

#### **Scenario 2 - Rejecting the referral**

- a) Change Status to 'Rejected'.
- b) Leave Comment for the Ordering Provider to action  
(Mention the Ordering Provider, reason for rejection and suggestion if any.)
- c) Save & Close.

## [Internal] Service Provider – Managing ‘Requested’ Status Referrals

[Set Filter in ‘Internal’ Referral folder – Name of Service Provider to track the referrals]

### Step 1 Service Provider

- Filter to 'Requested' status;
- Priority set as 'Not Yet Triaged';
- Sort by 'Recently Updated'.

### Step 2 Review Referral Card

#### Scenario 1 - Accept or Waitlist the referral

- a) Change Status to 'Triage Complete'.
- b) Change Priority as needed.
- c) Leave Comment for MOA to action.
- d) Save & Close.

#### Scenario 2 - Rejecting the referral

- a) Change Status to 'Rejected'.
- b) Leave Comment for the MOA to action  
(Mention the name of the reason for rejection and suggestion if any.)
- c) Save & Close.

#### Scenario 3 - Additional Information Required

- a) Change Status to 'Additional Information Required'.
- b) Leave Comment for the MOA to action  
(Mention the additional information needed.)
- c) Save & Close.

## [Internal] Service Provider – Managing ‘Additional Information Required’ Status Referrals

[Set Filter in ‘Internal’ Referral folder – Name of Service Provider to track the referrals]

### Step 1 Service Provider

- Filter to 'Additional Information Required' status
- Sort by 'Recently Updated'.
- Review the 'Comments'/ added document for additional information asked.

### Step 2 Managing the Referral

Based on the new information, choose one of the following actions.

#### Scenario 1 - Accept or Waitlist the referral

- a) Change Status to 'Triage Complete'.
- b) Change Priority as needed.
- c) Leave Comment for actions required.
- d) Save & Close.

#### Scenario 2 - Rejecting the referral

- a) Change Status to 'Rejected'.
- b) Leave Comment for the MOA to action  
(Mention the reason for rejection and suggestion if any.)
- c) Save & Close.

## **Internal MOA actioning Service Provider comments**

[Set Filter in 'Internal' Referral folder – Name of Service Provider to track the referral]

### **Step 1 Review Referral Card**

- Filter to statuses as needed in step 2.  
MOA has to manage the following statuses:  
Triage Complete  
Rejected  
Additional Information Required

### **Step 2 Action the Comments**

#### **Scenario 1 - Accept and Book the referral**

- a) Filter Status to 'Triage Complete'.
- b) Change Status to 'Booked'.
- c) Click on 'Book Now' and book an appointment.
- d) Leave Comment with the booking update.
- e) Save & Close.

#### **Scenario 2 - Waitlist the referral**

- a) Filter Status to 'Triage Complete'.
- b) Change Status to 'Waitlisted'.
- c) Add the referral to the 'waiting list' folder. (If applicable)
- d) Save & Close.

#### **Scenario 3 - Rejected the referral**

- a) Filter Status to 'Rejected'.
- b) Action comments left by the Service Provider.
- c) Click on the 'New tab' symbol to open the patient's chart. Send a message to the Ordering Provider notifying the update on the referral.
- d) MOA leaves a comment about the action taken.
- e) Save & Close.

**NOTE:** The rejected referral can be 'Archived' after a year by the Service Provider's location. The MOA is to leave a comment documenting the reason for archiving.

#### **Scenario 4 - Additional Information Required**

- a) Filter Status to 'Additional Information Required'.
- b) Action comments left by the Service Provider.
- c) Click on the 'New tab' symbol to open the patient's chart. Send a message to the Ordering Provider notifying the update on the referral.
- d) MOA leaves a comment about the action taken.
- e) Save & Close.

**NOTE:** When the additional information is received MOA has to upload/attach the document to the patient's chart if needed. MOA also has to attach the document to the referral card and leave comment for the service provider.

## **[Internal] Ordering Provider – Managing ‘Additional information Required’ Status**

[Set Filter in ‘Internal’ Referral folder – Name of Ordering Provider to track the referral]

### **Step 1 Ordering Provider**

- Filter to 'Additional Information Required' status
- Sort by 'Recently Updated'.

### **Step 2 Action the Comments**

- a) Review the comment left by the Service Provider or Program
  - b) Take action based on the comment
  - c) Leave a new comment once the action has been taken.
  - d) Send an internal message to the Service Provider's MOA attaching the Additional Information asked.
- NOTE** - The MOA of the service provider adds the new information to the referral card for the Service Provider to re-triage.

**IMPORTANT NOTE** – If any attachment is added to the referral card after the referral is triaged or waitlisted –  
Leave a comment explain the new information and send an 'Urgent' Internal Message to the Service Provider's MOA.

## **[Internal] Ordering Provider – Managing ‘Rejected’ Status**

[Set Filter in ‘Internal’ Referral folder – Name of Ordering Provider to track the referral]

### **Step 1 Ordering Provider**

- Filter to 'Rejected' status
- Sort by 'Recently Updated'
- Review the comment left by the Service Provider

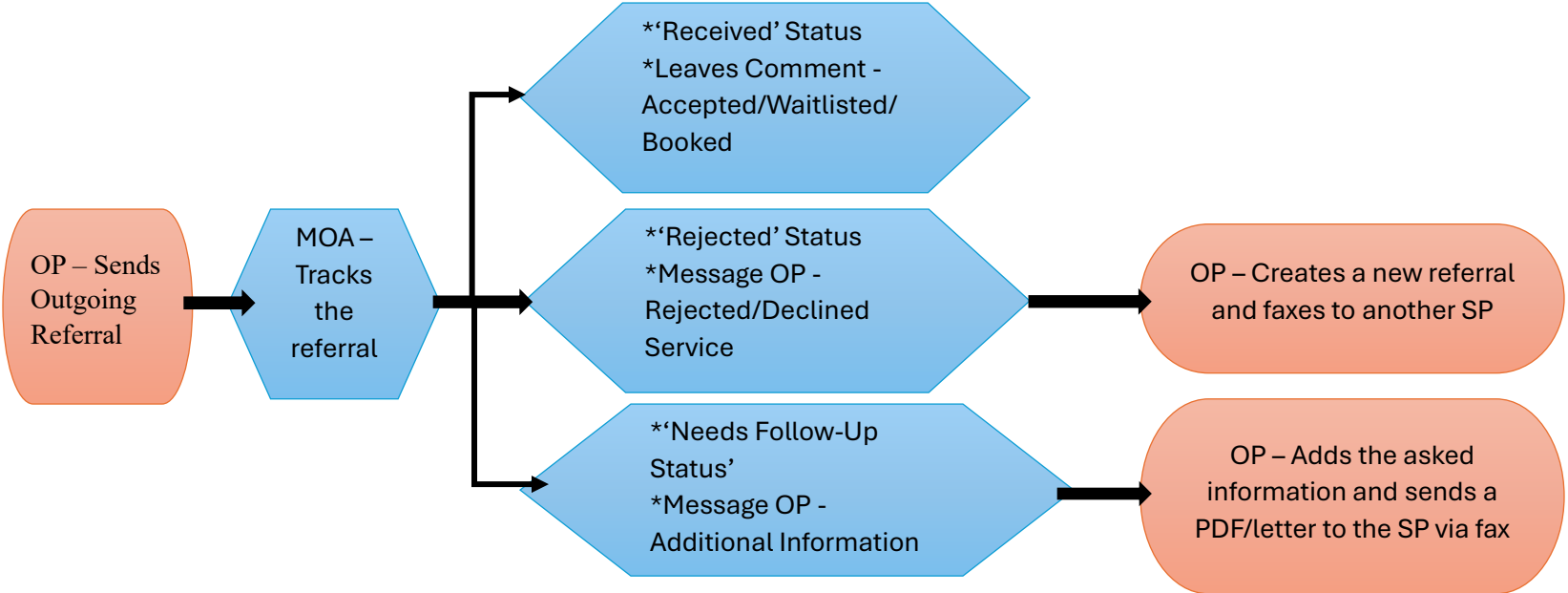
### **Step 2 Create a new Referral Card**

Create a new referral card and direct it to the another or suggested service provider.

**IMPORTANT NOTE** – Ordering Providers **MUST** manage their Referrals dashboard regularly.

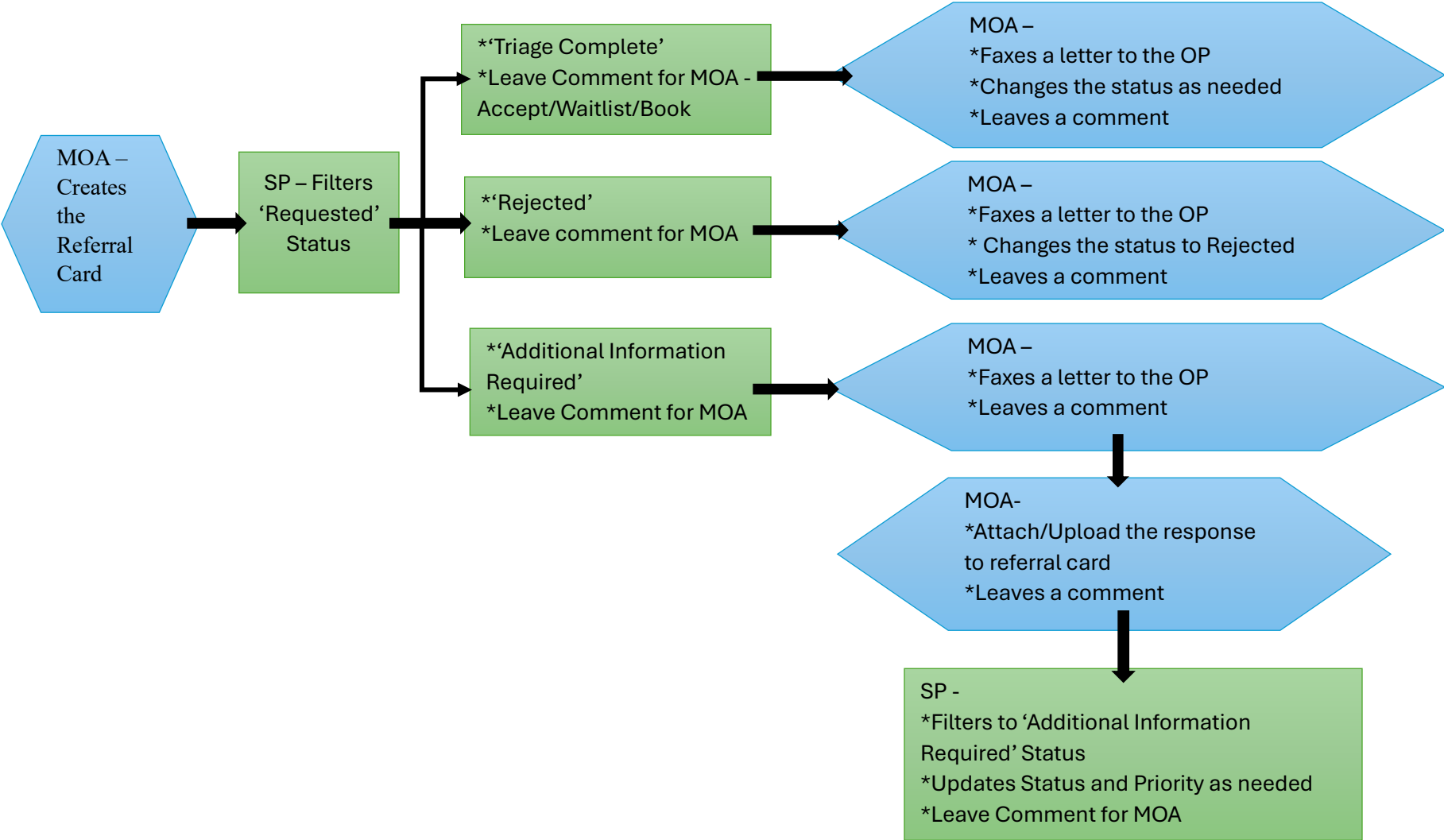
# Outgoing Referral Workflow

[OP Manages – Rejected and Additional Information statuses; MOA manages All statuses]



# Incoming Referral Workflow

[SP Manages – Requested and Additional Information statuses; MOA manages Triage Complete, Rejected and Additional Information Required]



## Internal Referral Workflow

[SP Manages – Requested and Additional Information statuses; MOA of SP manages Triage Complete, Rejected and Additional Information Required; OP Manages – Rejected and Additional Information Required]

