

Edit or Update a Referral

Instructions

Upon editing or updating a referral, the RM&R application will identify you as the last modifier. Your name, clinical designation, along with the date and time will be stamped on the referral.

Step 1

Access patient referral

For more details on how to access existing patient profile, please review the [Edit or Update guide](#).

Step 2

Select your organization:

A) If you have access to **multiple organizations**, select the vendor/hospital (e.g. Toronto General Hospital)

A) Select your service provider/unit (e.g. TG-IC Program IP-SMB Cardiology)

Step 3

Search for the patient's referral

There are 3 options to search for patients"

- A) Active Referrals
- B) Task List
- C) Client Search

For more details on how to use the search functions, please refer to either of the documents below:

1. Assessment Dashboard [Active Referrals]
2. Assessment Dashboard [Task List]
3. Assessment Dashboard [Client Search]

Name	Care type	Form status	Days Since Start New Referral
999test999, userpreview-02	Rehab/CCC	Incomplete	29 days
999test999, userpreview2020	Rehab/CCC	Incomplete	24 days
999test999, Alice CSS Sept 24	LHIN - Home and Community Care	Incomplete	15 days
999TEST999, RM&R Automated Test-LHIN 1 - 101520	LHIN - Home and Community Care	Incomplete	8 days
999TEST999, RM&R Automated Test-LHIN 2 - 101520	LHIN - Home and Community Care	Incomplete	8 days
999test999, cindy123	LHIN - Home and Community Care	Incomplete	7 days
999test999, cindy-userpreview	LHIN - Home and Community Care	Incomplete	7 days
999test999, cindyuser-previewOct6	Rehab/CCC	Incomplete	3 days
999Test999, Tom - Demo Oct 8	LHIN - Home and Community Care	Incomplete	3 days
999test999, cindy-userpreview	Palliative Care	Incomplete	0 days

Step 4

Select referral caretype

Select the **existing button** next to the referral care type you wish to edit/update

Viewing client: 999test999, userpreview2020
Date of Birth: Mar 15, 1969 (51 Years)
Health Card Number: No Identifier

Acting as: TEST - Referral Sender

Existing Care Types

Care type	Status	
LHIN - Home and Community Care(Historical)	Incomplete	Select Existing
Palliative Care(Historical)	Deactivated	Select Existing
Rehab/CCC(Historical)	Incomplete	Select Existing

Other Care Types

Care type	Description	
LHIN - Home and Community Care		Already Exists
Outpatient Rehab - TJR		Start New Referral
Palliative Care		Already Exists
Rehab/CCC		Already Exists
Retired - Rehab/CCC Application	Long Term Care	Start New Referral

All Care Types

Client Profile (Non-Care Type Specific) [Edit Client](#)

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ServerBuildInformation[applicationName='gateway', revision='f9b4f44a11c7ba7706d61e31905b128219b1dd4', build='bamboo', buildHost='zion.stataehealth.org', branch='PWI10.2.2-rc-5', buildCode='SHS-PJ86661-JOB1-1', buildDate='2020-10-19T09:56:52.947-06:00', databaseVersion='630']

Step 5

Make edits/updates

- You can now update any tab that you have permission to edit
- After you have completed your edits, click **Save**

Viewing client: 999test999, userpreview2020
Date of Birth: Mar 15, 1969 (51 Years)
Health Card Number: No Identifier

Acting as: TEST - Referral Sender

The application was created on September 29, 2020 and last edited on September 29, 2020. Ensure the application is current by updating all tabs.
To start a new application, please click this button: [Deactivate](#)

Client Details Demographics Supplementary Information Referral Information Social Information Care Requirements
Acute Care Medical Assessment Functional Assessment Archive Uploaded Files (0) Send and Manage Referrals

Show previous encounter [Save](#)

Last modified by Ly, Cindy at September 29, 2020 10:15.

Gender [Top](#)

Male Female Other

Gender - Other [Top](#)

Specify
Specify: Illo ut in repellendus Aspernatur ut dolorum elus

Date of Birth [Top](#)

Date
13-Aug-1979

Client's Age [Top](#)