How do I send a referral?

Community Support Services Referrals



Step 1 Welcome, Training Acting as: TEST - Referral Sender Health Card Number: No identifier ssment > Dashboard > Select Care Type > Dashboard Complete all tabs in the Community Support i All tabs are complete. You may visit Send and Manage Referrals, tab **2**a Services referral form. Please view the 'What is Client Details O Demographics O Community Form O Uploaded Files (0) **Community Support Services referral form?**' Last modified by User, Training at April 19, 2016 09:48 Consent (Express consent is best practice. Please document if you captured consent for the information to be disclosed to facilitate Top this referral.) guide for more details. Implied Express Consent obtained from O SDM Client ۲ Date of Referral {Mon DD, YYYY} Top Step 2 ttr. Discharge Date (Only applicable for hospital discharges) {Mon DD, YYYY} Тор ۱ŵ Once all tabs are complete, you have 2 options to Urgent Situation? (Client requires contact from an agency within 1 Business day) Тор send the referral: Yes 1. Click the Send and Manage Referrals Gender Тор Male (2a) link in the green banner. Additional Address Information Apartment # Top Buzz Code 2. Click the Send and Manage Referrals Intersection Phone Number (Alternate) (2b) tab. Email Address Viewing client: 999Test999, Training Date Of Birth: N/A Health Card Number: No identifier Welcome, Training. Acting as: TEST - Referral Sender STRATA PathWays[™] Assessment > Dashboard > Select Care Type > Go Back Help Dashboard Home Switch To Log Out Step 3 i All tabs are complete Click the Send Referral(s) (3) link. Client Details O Demographics O Community Form O Uploaded Files (0) Active Referrals Referral History Report Service Provider Referral Date Referral Management Status **Referral Information** No Active Referrals Found Step 4 3 Send Referral(s) Viewing client: 999test999, Training Date Of Birth: N/A Welcome, Training. Acting as: TEST - Referral Sender Number: No identifier PathWays™ On the resulting page, you will be shown all the Assessment > Dashboard > Referral Dashboard Home Switch To Log Out Training Go Back Help service providers that the referral can be sent to. a Referral History Report Update Client Send Referrals 4a Filter By Matching To view all available units, uncheck the 'Filter By Additional Services 4d Matching' checkbox (4a). non-CNAP Community Support Services CNAP Community Support Services Select all applicable programs that you would like to ommunity Suppo Services Intake Community - Central CSS - PRINT & FAX send the referral to. Selecting will change colour of the boxes from grey to blue (4b). Community - Central East CSS - PRINT & FAX You can also see further information and matching criteria for a receiving palliative care service Community - Central West CSS - PRINT & provider/organization by clicking the ① icon (4c). Community -Champlain CSS PRINT & FAX

Click the Send Referrals button (4d).

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Step 5

In the resulting **Selected Destination Providers** pop-up, enter additional comments, if desired, in the **Comments (5a)** box and click **Send Referrals (5b)** button.

Step 6

How do I check

the patient's

referral status

You will be redirected to the Send and Manage Referrals tab. A confirmation banner **(6a)** will be displayed, confirming that your referral has been successfully sent.

You may return to send and manage referrals tab at any time to check the referral status **(6b)**.

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To check the referral status, you have 2 options:

- a) Via the 'Status' column in the active referrals section see the guide: 'What is an Assessment Dashboard [Active Referrals]?'
- b) Via the 'Send and Manage Referrals' tab see the guide: 'How do I edit/update a referral' and click the Send and Manage Referrals tab.