

How do I send a referral?

Toronto Seniors Helpline Referrals



Step 1

Complete all tabs in the Toronto Seniors Helpline eReferral form. Please view the 'What is Toronto Seniors Helpline referral form?' guide for more details.

Step 2

Once all tabs are complete, you have 2 options to send the referral:

1. Click the **Send and Manage Referrals (2a)** link in the green banner.
2. Click the **Send and Manage Referrals (2b)** tab.

Step 3

Click the **Send Referral(s) (3)** link.

Step 4

On the resulting page, you will be shown all the service providers that the referral can be sent to.

To view all possible units, uncheck the 'Filter By Matching' checkbox (4a).

Click the service provider category (4b) and select all applicable programs that you would like to send the referral to. Selecting will change the colour of the boxes from grey to blue (4c).

You can also see further information and matching criteria for a receiving care service provider or organization by clicking the ⓘ icon (4d).

Click the **Send Referrals (4e)** button.

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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

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).

The screenshot shows the 'Selected Destination Providers' pop-up window. It has a search bar with 'Woodgreen - Foot Care' entered. Below the search bar is a 'Comments' text area, indicated by a callout '5a'. At the bottom right of the pop-up is a 'Send Referrals' button, indicated by a callout '5b'. Below the pop-up, the main interface shows a confirmation banner: '1 referral has been sent successfully', indicated by a callout '6a'. Below the banner is a row of tabs: 'Client Details', 'Demographics', 'Community Form', 'CNAP Application', 'Uploaded Files (0)', and 'Send and Manage Referrals'. The 'Send and Manage Referrals' tab is active. Below the tabs is a table of 'Active Referrals' with columns: 'Service Provider', 'Status', 'Referral Date', 'Referral Information', and 'Referral Management'. The first row shows 'Woodgreen - Foot Care' with a status of 'Pending', a referral date of 'April 26, 2016 11:37', and a 'Details' button. A callout '6b' points to the 'Status' column.

How do I check the patient's referral status



To check the referral status, you have 2 options:

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