## **Assign a Referral**



## **Overview**

The assign feature in RM&R enables a referral to be associated with a single user within the Service Provider view. Through this feature, users can identify the referrals that they or their colleagues are responsible for and act on them accordingly.

## Instructions

Step 1	
Access referral queue	
For more details on how to access existing patient profile, please review the Access The Referral Queue.	
Step 2	🕻 Strata PathWays - Referrals X +
Search for referral	← → C ① in resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/facility/refer Q ☆ Q i
	ni opp dagi tari anterio de la caracterización de Caracterización de la caracterización
For more details on how to	Arting as: Sumybrook LHIN Office (IP) Viewing: Referrals + & & Dashboard & Switch To * O Log Out TRAINING
access existing patient	Sort Status 4 selected V Updates: All C Apply Filters Mark all cancelled referrals as reviewed Search referrals Q Advanced     title+Lamb Mary     Print A Assim C Reviewed Q Accent [2] Redirect Q Deny A Request for Information
Search For a Referral.	Portunal      From: SIGC-IP-CS      Updates Details Matching Profile Clinical Profile Comments (0) Attachments (0)
	Chine House and Community Care: September 7, 200(52 days age) Incomplete Medical Orders Menu 21 2010 21 and 21 and Menu 21 2010 21
Select the patient's referral.	P OKI, KEBRY
Selecting the referral will	The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed     securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy     securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy     securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy
change the background	2019 521 day app)         Resolutions of products on productions           2019 521 day app)         Stress Past/Ways is copyright \$2003-2020 Stress Mesh Solutions.
colour from white to blue.	Construction     C
	From: SHSC-IP-BSSU LIHIN-Home and Community Care: May 21,
Step 3	Acting as: Sunnybrook LHIN Office (IP) Viewing: Referrals - & Doshboard & Switch To - O Log Out TRAINING
Assign referral	Sort: Statu: 4 selected ✓ Updates: All C Apply Filters Nark all cancelled referrals as reviewed Search referrals Q Advanced     EutiteLamb, Mary      Print ▲ Assign 3 △ wed O Accept C Redirect O Deny O Request For Information
A) Click on Assign button	
	Assign User
In the resulting pop-up you	Selectuser
have two options to assign	Type 3 characters or more to find a user
the referral:	★ Ci 3B → Assign to me
Assign to yourself:	
B) Click the Assign to me	
DUTTON	
Assign to another user:	Assign User X
C) Regin typing the name of	30 moneil
the user you want to	Select use
assign the referral to	Last name First name Phone
D) Select the desired user	3D McNeil Tom
from the list of matching	I
names by clicking on the	
name	

E) Click Assign	
<ul> <li>Step 4</li> <li>Assign referral</li> <li>A) Once a user has been assigned to a referral, the icon on the referral tile will turn black</li> <li>B) Hovering the mouse cursor over the icon will display the assigned user's name</li> </ul>	P       OKI, KERRY         (72 Yarra)       The information disple securely in compliance         From: SH5C - IP - D5       The information disple securely in compliance         LHIN - Home and Community Care: May 21, 2019 (521 days ago)       Referred Updated: May 21, 2019 12:02         Referred Updated: May 21, 2019 12:02       4A         Max       Assigned to: McNeil, Tom         QUADRAMED, DIRECT ADMIT       buildHost='zion.stratation.stration.stratation.stratation.s
Please note: You may only assign a referral to one person at a time. To reassign, follow steps 3-5 again.	
Step 5 Remove assigned referral	pdates: All $\bigcirc$ Apply Filters     Mark all cancelled referrals as reviewed      Search referrals $\bigcirc$ 5A $▲$ Reassign $\bigcirc$ Reviewed $\bigcirc$ Accept $\bigcirc$ Redirect $\bigcirc$ Deny $⊕$ Request For Information           Undetern $\bigcirc$ Accept $\bigcirc$ Accept $\bigcirc$ Accept $\bigcirc$ Accept $\bigcirc$ Deny $⊕$ Request For Information
If there is not another user to immediately assign it to, they are able to dissociate themselves from the referral.	Reassign User X Currently assigned to: Tom McNeil Select user: Type 3 characters or more to find a user X Cancel Assign 5B O Dissociate health information must be stored
A) Click on the Reassign button	May 21, May 21, Securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or cont resource, for practices you should apply to protect this information. Strate PathWays is copyright § 2001-2020 Strate Health Solutions.
<ul><li>B) Select Dissociate button.</li><li>The icon will turn light grey again.</li></ul>	<ul> <li>ServerBuildInformation{applicationName='gateway', revision=' f9b4f44a11c7ba77706d61e31905b128219b1dd4', builder='bat buildHost='zion.stratahealth.org', branch=' PW10.2.2-rc-5', buildCode=' SHS-PJ86661-JOB1-1', buildDate=' . 2020-10-19T09:56: databaseVersion='830'}</li> </ul>