Completing A Referral

Overview

This guide describes the navigational components that are present in all of the RM&R referral forms required to complete a referral. ***The guide will not provide individual descriptions of fields required to complete a referral.***

Please contact your organization's ***SuperUser(s)*** for details descriptions of the fields.

Navigational Components

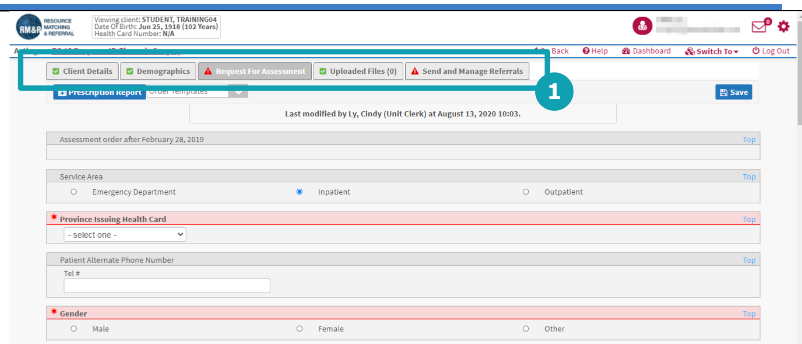
1. Tab Status

The following tab statuses are:

A) ***Incomplete*** when mandatory information on the tab is not entered

B) ***Complete*** once all of the mandatory information on the tab has been entered

Please view specific Care Type guides for detailed descriptions of the tabs in the RM&R referral form.



2. Mandatory Fields

Any field ***with*** the characteristics below, must be completed in order for a referral to be sent:

- Red star
- Pink field bar

Upon completion of the mandatory field, the exclamation mark will disappear. Once all mandatory fields in the tab is completed, the tab status will change.

3. Non-Mandatory

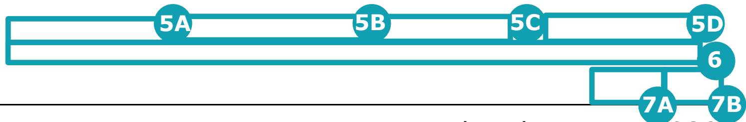
Any field ***without*** a red exclamation mark beside the field ***does not*** need to be completed in order for the referral to be sent.

However, providing insufficient information to the receiving organization may result in a "Request for Information".

For more information, please review the quick guide "Requests for Information".

4. Trigger Question/Tabs

When certain fields/tabs are completed, additional fields/tabs are prompted. These may be required in order to send a referral.



Type of Fields

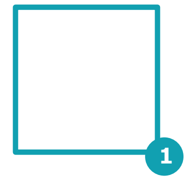
1. Tab Status

The following tab statuses are:

C) ***Incomplete*** when mandatory information on the tab is not entered

D) ***Complete*** once all of the mandatory information on the tab has been entered

Please view the specific Care Type guides for detailed descriptions of the tabs in the RM&R referral form.



2. Step 2

Select your organization:

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

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

3. Step 3

Click on the ***Task List*** tab.

4. Step 4

Filters

You can search for incomplete referrals from your service area by using the following filters:

A) **All assigned users** Designated as the 'Responsible Person(s)'

B) **All care types** – Type of referral form

C) **Select incomplete sign-off** – Which referrals have no received Physician or Nurse Practitioner Sign-off (if applicable)

Click on the ⌄ to select an option.