

How do I forward a referral?



What is forwarding a referral



If this functionality is setup for your organization, you may choose to forward the referral to an alternative or more suitable program.

Step 1

Access the Referral Queue by following the 'How do I access the referral queue' guide.

Step 2

Search for the patient you want to **forward**.

Step 3

Select the patient's referral. Selecting the patient's referral will change the background colour from white to dark blue (3).

Step 4

Click the **Forward** (4) button located in the right panel.

Step 5

Select the most appropriate program. Selecting the program will change the background colour from grey to dark blue (5).

Step 6

Click the **Forward Referral** (6) button.



Service Provider
Receive client referrals and manage vacancies.

Welcome, Training
Acting as: Test-CSS Testing Intake

Viewing client: 999test999, Lyka CSS Feb 22, 2016
Date Of Birth: N/A
Health Card Number: No Identifier

Service Provider > View Referral

Referrals | Reports

Sort | Status: 4 selected | Updates: All | Reset Search | Search referrals

Refresh

Search Results: 1 - 1 / 1

999test999, Lyka CSS Feb 22, 2016
From: TEST - Referral Sender
Community Services - February 22, 2016 (16 days ago)

Print | Assign | Edit client | Admit | Forward
Deny | Request For Information

Details | Matching Profile | Clinical Profile | Comments

Attachments (0)

Client Matches

| Category | Criteria | Client |
|--|----------|--------|
| Will client be 55 or older this calendar year? | Yes | Yes |

Welcome, Training
Acting as: Test-CSS Testing Intake

Viewing client: 999test999, Lyka CSS Feb 22, 2016
Date Of Birth: N/A
Health Card Number: No Identifier

Service Provider > View Referral > Referral

Referrals | Reports

Referral: History Report | Filter By Matching | Legend | Additional Services

| CNAP Community Support Services | non-CNAP Community Support Services | Testing Service Provider |
|-----------------------------------|--|--------------------------|
| CAH Intake | Community - Central CSS - PRINT & FAX | Test Community |
| Community Support Services Intake | Community - Central West CSS - PRINT & FAX | Test-Hub |
| | Community - Champlain CSS - PRINT & FAX | Test-CSS Testing Intake |

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Step 7

A pop-up window will appear requesting you to select a **Reason (7)***.

(*reasons vary per care type)

Step 8

Click either the **Cancel (8a)** or **Send Referrals (8b)** button.

- If you no longer want to forward the referral, click the **Cancel (8a)** button
- If you want to forward the referral, click the **Send Referrals (8b)** button

