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.



Service Provider
Receive client referrals and
manage vacancies.

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.

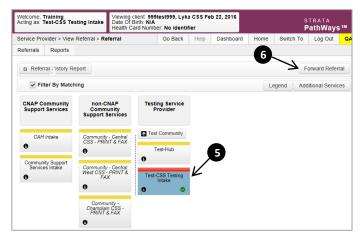
Viewing client: 999test999, Lyka CSS Feb 22, 2016 Date Of Birth: N/A Health Card Number: No identifier Welcome, Training. Acting as: Test-CSS Testing Intake PathWays1 Service Provider > View Referral Go Back Help Dashboard Home Switch To Log Out Referrals Reports ▼ Sort Status: 4 selected ▼ Updates: All ▼ @ Reset Search Search referrals Advar Search Results: 1 - 1 / 1 ▼ Print Assign / Edit client 🛭 🧿 Admit 🗷 Forward A 999test999, Lyka CSS Feb 22, 2016 Request For Information Search Results: 1 - 1 / 1 Client Matches 3 Category ✓ Will client be 55 or older this calendar year?

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.



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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

