

How do I print a referral report?



What is a referral report



A **referral report** prints a patient referral for a specific receiving service provider. All of the information is organized in sections, which includes details completed in the referral tabs. To print an overview of an referral, please see the guide '**How do I print a profile report**' guide.

Step 1

Access the existing complete patient referral by following the '**How do I edit or update a referral**' guide, or complete a referral by following the '**How do I complete a referral**' guide.

Step 2

In the patient's referral, select the **Send and Manage Referrals (2)** tab.

Step 3

Click the **Print icon (3)** button beside the pertinent receiving service provider under the 'Active Referrals' header.

Step 4

In the resulting **Referral Report** window, you can specify the output settings of the report & select which sections of the referral you would like to print:

- Under **Output settings (4a)**, you can insert a page break after each section and also specify whether you would like to see blank fields or not (questions in the referral which have not been completed)
- Under **Print sections (4b)**, you can specify which tabs on the referral you would like to print by clicking the pertinent checkbox

Step 5

You now have multiple options:

- Save (5a)** the file as a PDF
- View (5b)** the report within your current browser window
- Print (5c)** the report to a local printer



Assessment

Create and view assessments.

Active Referrals

Service Provider	Status	Referral Date	Referral Information	Referral Management
Test-CCAC1 Office	Sent to CCAC Updates sent	April 6, 2016 15:56	Details	

Referrals To Be Sent

Service Provider	Accept Wait	Admit Wait	Match Status
Test-CCAC2 Office	0 days	0 days	Details

Send Referral

Output settings

Insert a page break after every section

Display blank fields

Print sections

Referral Information Referral Destination Matching Details

Request For Assessment Physician/NP Sign-Off Tab Demographics

Medical Treatment Orders

Save View in browser Print

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Overview

Patient information and the parameters of the report are seen in the header (6).

Each tab on the referral is represented by a large header (7); in this case you can see that the *Referral Information*, *Referral Destination*, *Matching Details* and *Demographics* tab/section has been selected to print (see step 4b).

Referral Destination and Matching Details, are specific to the referral report as this report is intended to be specific to each receiving location listed on the referral:

- **Referral Destination (8a)** provides you with details on the receiving location, including address and contact number
- **Matching Details (8b)** will display for all receiving service providers who have set matching criteria (such as accepts only Male or Female patients), in this case we match to the provider as they have stipulated that the current location on the eReferral must be 'Test – Referral Sender' and our current location is Test – Referral Sender (8c). The Green check donates that we match, you will see a red cross for any criteria the referral doesn't match to

Finally, we can see when each referral tab/section was last updated. The Demographics tab was last modified on *March 10, 2016 17:09 by User, Training* (9).

Referral report		Page 1 of 4
Client: 999test999, Lyka CSS Feb 22, 2016 (Health Card Number: No identifier)		← 6
Referral date: April 6, 2016 15:56		
Referral Information ← 7		
Source service provider	TEST - Referral Sender	
Source service provider contact	(416)123-9874 x1111 (416)987-1235 x2222 1659839	
Source service provider address	123 Fake Street Toronto Ontario M9M 9M9 Canada	
Responsible Person(s)	Obial, Lyka	
Clinical profile originally completed by	User, Training April 6, 2016 15:40	
Most recent clinical profile completed by	User, Training April 11, 2016 11:05	
Referring Responsible Person(s)	User, Training	
Referral date	April 6, 2016 15:56	
Referral comments		
Referral Destination ← 8a		
Service provider:	Test-CCAC1 Office	
Contact:		
Phone number:		
Fax number:		
Address:		
Matching Details ← 8b		8c
<i>This client matches the service provider's admission / exclusion criteria.</i>		
Category	Service criteria	Client
✓ All of:		
✓ Current location	TEST - Referral Sender	TEST - Referral Sender
Demographics		
Last modified by User, Training at March 10, 2016 17:09 ← 9		
Title		
Client Name	Surname	999test999
	Given Name(s)	Lyka CSS Feb 22, 2016
Date Of Birth	Date Of Birth	Mar 10, 2016
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<small>Report created by Strata Health Solutions Inc. Generated by User, Training at April 11, 2016 11:46</small>		



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