

How do I print a referral summary?



Which report do I use to see a referral summary



The **Referral History Report** is used to show the history of a referral as it transitions through various stages of referral statuses. This report also allows you to see the dates with each referral status update.

Step 1

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

Step 2

Select the **Send and Manage Referral (2)** tab.

Step 3

Click the **Referral History Report (3)** button.

Step 4

In the resulting **Referral history report** window, ensure that you select the parameters of your report.

- Select a **Date range (4a)** – ensure this date range is wide enough to capture all the history required
- Select how you would like to **Sort (4b)** your report

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.

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Overview

Patient information and the parameters of the report are seen in the header (1).

Each row on the report represents a referral status change. *For example*, in the report shown to the right, the referral was originally 'pending' and was 'accepted' on March 3, 2016 at 13:44, at which point the status was 'Accept'.

The columns seen on the report are as follow:

- **Destination (2)** – receiving service provider the referral was/is planned to be sent
- **Source (3)** – sending service provider
- **Referring responsible person (4)** – most responsible person (set in the client details tab)
- **Status (5)** – status of the referral at the time of the update
- **Referral date (6)** – the date the referral was sent (via send and manage referrals tab)
- **Admitted (7)** – date the referral was admitted by the receiving service provider (if applicable)
- **Accepted (8)** – date the referral was accepted by the receiving service provider (if applicable)
- **Denied (9)** – date the referral was denied by the receiving service provider (if applicable)
- **Request for Information (10)** – date the receiving service provider submitted a request for information (if applicable)
- **Cancelled (11)** – date the referral was cancelled by the sending service provider (if applicable)
- **Redirected (12)** – date the referral was redirected by the receiving service provider (if applicable)
- **Reason (13)** – any reason associated with any referral status update (numbers 6 – 11 above)

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Client: 99966599, Lyka CSS Feb 22, 2016 (Health Card Number: No Identifier)
Date range from: March 1, 2013 08:37
Date: April 6, 2016 08:37

2	3	4	5	6	7	8	9	10	11	12	13
Destination	Source	Referring Responsible Person(s)	Status	Referral date	Admitted	Accepted	Denied	Request For Information	Cancelled	Redirected	Reason
Test-CSS Testing Intake	TEST - Referral Sender	User, Training	Accept	February 22, 2016 13:34		March 3, 2016 13:44					
Test-CSS Testing Intake	TEST - Referral Sender	User, Training	Pending	February 22, 2016 13:34							

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