

Put a Referral on Hold



Overview

You would place a referral on **hold** in cases where it needs to be delayed. Perhaps the patient has been placed in another service temporarily, or you are deciding whether the patient requires a different referral type. Placing on hold allows you to resume the referral later.

Please note that if a referral is placed on hold, it can be resumed at a later date and will remain on both your dashboard and the receiving organization's dashboard. Please view the **'Resume a Referral'** guide

Instructions

Step 1

Access patient referral

For more details on how to access existing patient profile, please review the **Edit or Update guide**.

Step 2

Hold a Referral

- A) Click on **Client Details** tab
- B) Click the **|| Place on Hold** button

The screenshot shows the RM&R system interface. At the top, there is a navigation bar with 'Help', 'Switch To', 'Log Out', and 'TRAINING'. Below this is a dashboard with three main sections: 'Assessment' (Send, Assess and Manage Referrals), 'Service Provider' (Receive client referrals and manage vacancies), and 'Reports' (View and analyze each step of the placement process). A red box highlights the 'Assessment' section with a '1' in a circle.

Below the dashboard is a warning message: 'A referral requires attention.' Below this is a tabbed interface with 'Client Details' selected. The 'Client Details' tab has sub-tabs for 'Demographics', 'Supplementary Information', 'Referral Information', 'Social Information', and 'Care Requirements'. The 'Client Details' sub-tab has sub-sub-tabs for 'Acute Care', 'Assessment', 'Functional Assessment', 'Archive', and 'Uploaded Files (0)'. A red box highlights the 'Client Details' sub-tab with a '2A' in a circle.

Below the tabs is a 'Profile Report' section with buttons for 'Profile History Report' and 'Print Client'. Below this is a table with the following data:

Care Type	Rehab/CCC (manage)
Name	999test999, cindy-userpreview
Health Card Number	No Identifier
MRN	0008407(StrataHealth)
CHRIS ID	
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TEST - Referral Sender Ly, Cindy Remove Responsible Person
Other Interested Parties	
Other Care Types	LHIN - Home and Community Care Palliative Care Outpatient Rehab - TJR
Referral Owner	TEST - Referral Sender 123 Fake Street Toronto ON M9M 9M9 Canada Phone: (416)123-9874 Extension: 1111
Profile Status	Incomplete
Start New Referral Date	October 15, 2020 15:16
Last Assessed Date	

Below the table is a 'Save' button. To the right of the table is a '2B' in a circle next to the 'Place On Hold' button.

At the bottom of the page is a footer with the following text: 'The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information. Strata PathWays is copyright © 2001-2020 Strata Health Solutions. ServerBuildInformation[applicationName='gateway', revision='f9b4f44a11c7ba77706d61e31905b128219b1dd4', builder='bamboo', buildHost='zion.stratahealth.org', branch='PW10.2.2-rc-5', buildCode='SHS-PJ8661-JOB1-1', buildDate='2020-10-19T09:56:52.947-06:00', databaseVersion='830']'

Step 3

Select a reason

In the resulting Place On Hold pop-up

- A) Select the most appropriate reason
- B) Enter an optional comment

From here, you have two options:

- C) If no longer want to place the referral on hold, click the Cancel button
- D) If you want to place the referral on hold, click the || Place On Hold button

After placing on hold, you will receive a confirmation banner message. The RM&R application will identify you as the last modifier. Your name, clinical designation, along with the date and time will be stamped in the referral.

Place On Hold

Setting this client record to On Hold will put all client's referrals On Hold for this care type, please note:

- o This referral will be placed Place On Hold and may be Resumed at a later date.
- o This referral will remain on the dashboard and service provider queues.

Reason: * - select one -

Comment:

Cancel Place On Hold