

Coordinated Access – Central Region

ORTHOPEDICS – ASSESSMENT CENTRE (RAC) EREFERRAL GUIDE
SHELLEY CLEARIHUE

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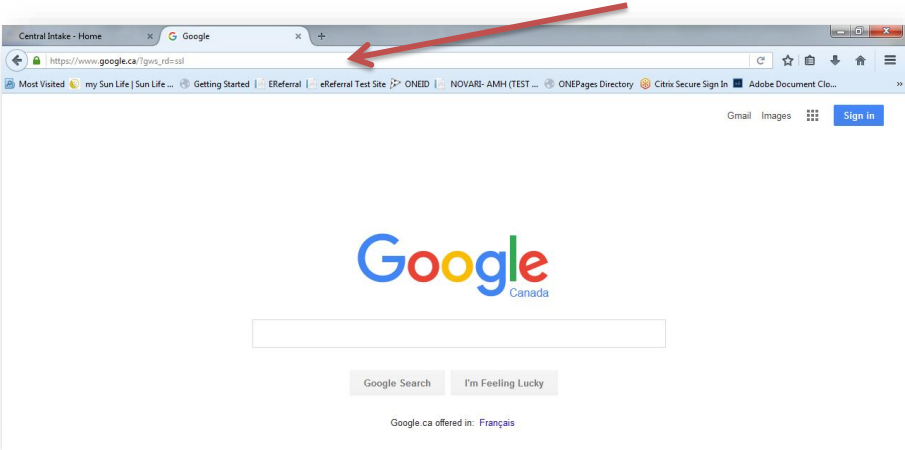
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How to Access eReferral

You can access eReferral by copying and pasting the below URL:

<https://erequest.ca.novarihealth.net>



Technical Requirements

- One of the following:
 - ✓ Google Chrome
 - ✓ Firefox 25.0.1 or better
 - ✓ Microsoft Edge
- PDF viewing extension or plug-in (for Internet Explorer users)
- Internet connection of 5 Mbps or better

eReferral Support

When to Contact:

- Log-in issues
- Unable to access eReferral Application (website down)
- New Accounts/New Users/Deactivation
- User account updates (i.e. name change, email change, password change)
- Re-opening referrals
- Transcription errors
- Processing issues (i.e. unable to save/updating appointment dates, etc.)

Do you need support for Central Intake eReferral?

Commented [CT1]: Closing accounts?



EReferralSupport@haltonhealthcare.com

Creating a bookmark

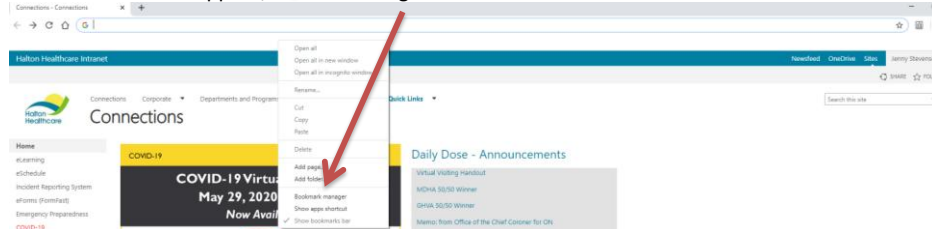
Google Chrome

****Creating bookmarks allows you to quickly access the website**

1. Open the browser and right click anywhere below the URL bar:



2. A menu will appear, select Add Page



3. The Edit bookmark window will open click in the Name field and type what you would like the bookmark to be called. Then type or copy and paste the URL:
<https://erequest.ca.novarihealth.net> & click Save

Edit bookmark

Name:

URL:

☐ Bookmarks bar
☐ Other bookmarks

4. A small icon should appear now below the URL bar displaying the name that you created.



Now you can click this bookmark to load the login page each and every time you need to access the application.

Common Definitions

eReferral – A web based application used to process and track referrals from initial request to patient's first appointment outcome.

Requester - The person who is submitting the referral.

Receiver - The program that is providing a service (i.e. Surgeon, Assessment Centre).

Outcome – Is the result of what occurred with the scheduled appointment.

Decline – A referral that is inappropriate, incomplete or if the patient would like to be referred to another location; this action should only be used when Central Intake is required to re-direct the referral or obtain additional information.

Cancel – Receivers can cancel a referral, for various reasons. (i.e. Patient declined service, unable to contact, repeated no shows)

Complete Referral – Once the patient has attended their initial appointment, the referral can be updated to a complete status

Closed – Once a referral is completed the system will automatically close after a specific amount of time.

Central Intake – A single point of access for Healthcare Providers to submit referrals. Central Intake receives, manages and triages referrals.

Delays – Referrals that you are unable to schedule due to specific reasons such as client is out of the country for a period of time, or patient is in hospital with no date of discharge. |

Queue – Each item on your dashboard is referred to as a Queue; when opened it displays those referrals in list view

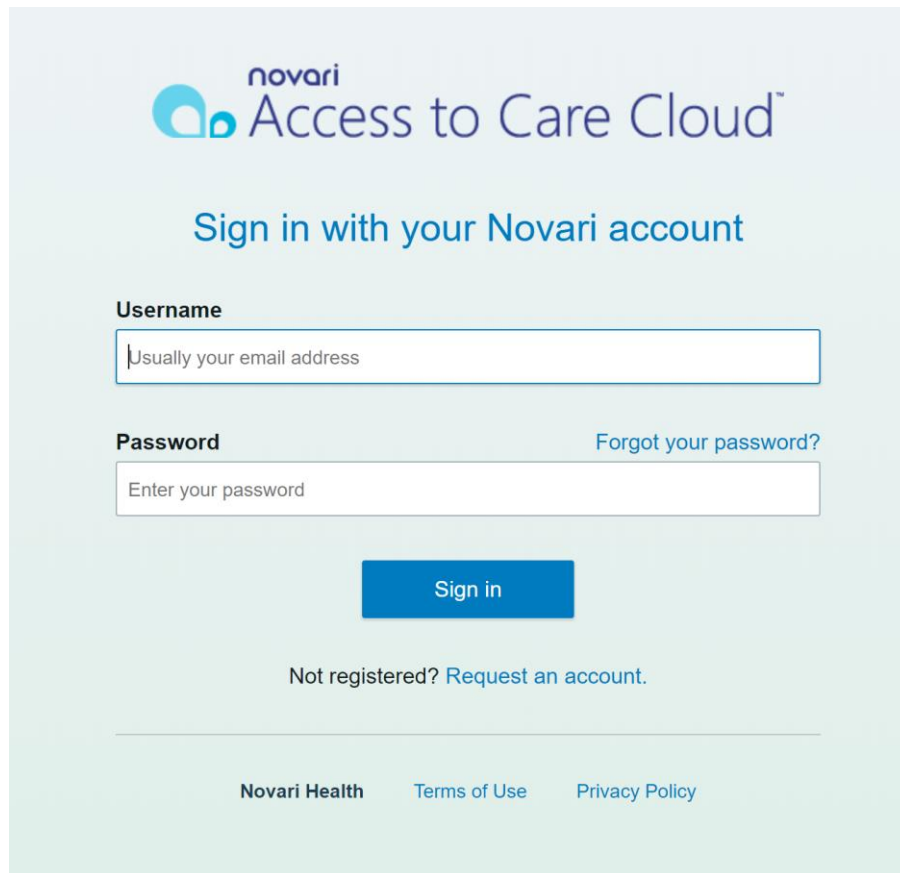
Reference number – This is a unique identifier that the application automatically assigns to each referral. This number is made up of letters and numbers (i.e. E-6FG9EUS). This number may also be referred to as the CI or RAC number.

Commented [CT2]: maybe give an example here to help someone understand?

Application Overview

Login – Username & Password

All users will be given their OWN unique username & Password. However, although all users have their own usernames they will all be logging into the SAME dashboard. This dashboard will display referrals that your user account has permissions to; you will only see referrals that are intended for your



The image shows the login interface for 'novari Access to Care Cloud'. At the top is the logo with the word 'novari' in blue and 'Access to Care Cloud™' in a larger blue font. Below the logo is the heading 'Sign in with your Novari account'. There are two input fields: 'Username' with a placeholder 'Usually your email address' and 'Password' with a placeholder 'Enter your password'. To the right of the password field is a link 'Forgot your password?'. Below the fields is a blue 'Sign in' button. Underneath the button is the text 'Not registered? Request an account.' At the bottom, there is a horizontal line followed by three links: 'Novari Health', 'Terms of Use', and 'Privacy Policy'.

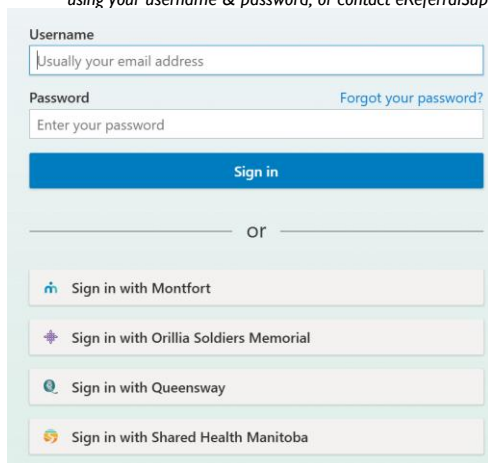
location.

NOTE: If you attempt to login 3 or more times the application will automatically lock your account for approx. 10 minutes. Once that time has passed you can try again to login, if you are still unable to login contact eReferral Support for assistance or Click Forgot your password on the login screen to reset your password.

Login – Single Sign on (Hospital Users ONLY)

Single Sign-On (SSO) is a feature that enables users to access the Novari eReferral landing page using their workplace credentials. Once SSO is activated, users can log in by selecting their organization on the sign-in page, allowing them to authenticate using their organizational Microsoft accounts rather than separate Novari Health passwords.

1. Navigate to eReferral Log in Page
<https://erequest.ca.novarihealth.net>
2. Scroll down to locate your hospital from the options provided. *(If your hospital is not listed, please sign in using your username & password; or contact eReferralSupport for further assistance)*



The screenshot shows the Novari eReferral login page. It features a 'Username' field with a placeholder 'Usually your email address', a 'Password' field with a placeholder 'Enter your password', and a 'Forgot your password?' link. Below these is a blue 'Sign in' button. Underneath the button is an 'or' separator, followed by a list of hospitals to sign in with: Montfort, Orillia Soldiers Memorial, Queensway, and Shared Health Manitoba. Each hospital name is preceded by a small icon.

3. You will be asked to enter in your hospital email address & Password

Commented [SC3]: Insert authentication steps

Sign in

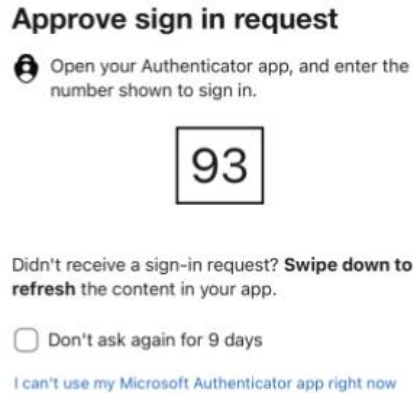
Email address, phone number or Skype

No account? [Create one!](#)

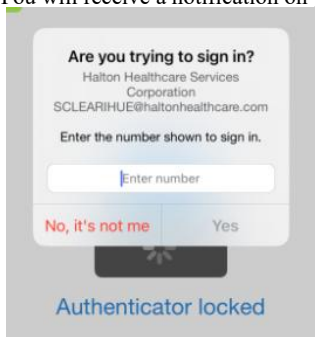
Can't access your account?

[Reset your password](#)

4. The application will ask you to confirm the number displayed on your authenticator app



5. You will receive a notification on your authenticator app



6. You will be re-directed to your user dashboard.

Important Tips

- Do you have the Microsoft authenticator app set up through your organization?
- You may only be required to follow these steps when logging in from new devices.

Dashboard

The dashboard is the first thing you will see when you login to the application. You will currently see the following sections:

- ✓ Notifications
- ✓ Direct Faxes
- ✓ To Do

Orthopedics Assessment Centre		Refresh All	
Click to view referrals in context			
Notifications		Filter by: Current Service Type	
Unread Ocean Message		15	
Requests with an outstanding message		15	
Overdue for Scheduling - 15 Days		3	
Referrals that have been awaiting scheduling for assessment for over 15 days		3	
Overdue for Scheduling - 30 Days		101	
Referrals that have been awaiting scheduling for assessment for over 30 days		101	
Overdue for Assessment Scheduling and Indefinitely Delayed - 6 Months		1	
Referrals that have been indefinitely delayed and overdue for scheduling of their assessment for over 6 months		1	
Overdue for Routing and Indefinitely Delayed - 6 months		3	
Referrals that have been indefinitely delayed and overdue for routing to a surgeon for over 6 months		3	
Direct Faxes		Filter by: Current Service Type	
My Failed Direct Faxes		26	
To Do		Filter by: Current Service Type	
Awaiting Assessment Triage		26	
Referrals waiting to be triaged		26	
Assessment Scheduling		101	
Referrals ready to be scheduled for assessment		101	
Assessment Scheduling - Urgent		3	
Urgent referrals awaiting scheduling for assessment		3	
Assessment Scheduling - Routine		98	
Routine referrals awaiting scheduling for assessment		98	
Assessment Scheduling - Non Replacement		3	
Non replacement referrals awaiting scheduling for assessment		3	
Assessment Scheduling - Follow Up		0	
Referrals ready to be scheduled for an assessment follow up		0	
Awaiting Assessment		3	
Referrals that have been scheduled for assessment		3	
Awaiting Assessment - Follow Up		0	
Referrals that have been scheduled for a follow up		0	
Assessment Outcome		101	
Referrals where appointment date has passed (requires indicated outcome)		101	
Awaiting Routing to Surgeon		0	
Referrals that have had their assessment and are ready for consult		0	
Delay for Scheduling (Indefinite)		3	
Referrals on an indefinite delay awaiting scheduling for an assessment		3	
Delay for Scheduling (Indefinite) - 30 days		1	
Referrals on an indefinite delay awaiting scheduling for an assessment for 30 days or more		1	
Delay for Routing (Indefinite) - 30 days		3	
Referrals on an indefinite delay for routing for 30 days or more		3	
Declined From Surgeon		0	
Referrals declined from the surgeon's office		0	

Notifications

This section notifies you on referrals that require an action.

- **Unread Ocean Messages** – Displays internal messages related to referrals you are involved in. If you are part of a referral, you will have access to view and respond to these messages anywhere within the application.
- **Overdue for Scheduling (15 days)** – referrals that have been accepted but not scheduled, and have been more than 15 days in the scheduling queue. (this may be changed to reflect only Urgent cases)
- **Overdue for Scheduling (30 days)** – referrals that have been accepted but not scheduled for a longer period of time. (this may be changed to reflect Routine and non-Replacement cases)
- **Overdue for Scheduling and Indefinitely Delayed – 6 Months** - referrals that have been indefinite delay and overdue for scheduling of their assessment for over 6 months
- **Overdue for Routing and Indefinitely Delayed – 6 Months** - referrals that have been indefinite delay and overdue for routing to a surgeon for over 6 months

The overdue nature of a referral will be configured under consultation with the Regional Joint Assessment Centre (RIAC) and is intended to ensure accuracy within the system and to highlight the cases that may have been overlooked and require attention.

Direct Faxes

The application gives you the ability to send outgoing faxes direct from the application.

Commented [CT4]: If a referral is on delay wouldn't it be outside of the overdue for scheduling queue?

Failed Direct Faxes – This queue is where any referral that you direct fax back from the application will populate if that fax was unsuccessful

 Direct Faxes

Failed Direct Faxes
 0

To Do

These queues are intended as worklists and will update in real time to notify you of the following:

Queue	Definition
Awaiting Assessment Triage	Referrals awaiting review by the program for appropriateness and completeness
Assessment Scheduling	Referrals awaiting an appointment to be scheduled
Assessment Scheduling (Urgent/Routine/Non-Replacement)	Referrals that are currently awaiting scheduling which have been broken down by their priority
Assessment Scheduling – Follow up	Referrals assigned an outcome of follow-up required, pending a new follow up appointment
Awaiting Assessment – Follow up	Follow up appointments scheduled
Awaiting Assessment	Referrals that have been scheduled but have not yet been seen
Assessment Outcome	Referrals where the appointment date has passed and require an outcome to be entered
Awaiting Routing to Surgeon	Referrals that have had their assessment completed <i>and are</i> waiting to be routed for a surgeon consultation
Delay for Scheduling (indefinite)	Referrals on an indefinite delay, waiting for an assessment appointment to be scheduled
Delay for Scheduling (indefinite) – 30 Days	Referrals on an indefinite delay + 30 days, waiting for an assessment appointment to be scheduled
Delay for Routing (Indefinite) – 30 Days	Referrals on an indefinite delay for routing + 30 days
Declined from Surgeon	Referrals declined by the surgeon's office back to the RAC for various reasons (e.g. patient wants different surgeon) requiring attention. This queue is managed by the RAC.

Commented [CT5]: Is the difference between these that the first is <30 days?

Referral Types

There are 2 different types of referrals:



Faxed Referral – Faxed referrals are received electronically as a pdf in the application through a fax server. The Central Intake Program transcribes all faxed referrals into the application and the original fax is automatically attached as a pdf.



eReferral – eReferrals are entered directly by a Requester who has access to use the application or submitted through Ocean integration. These users complete the electronic form instead of faxing the paper copy. In these cases there may be fewer attachments and no pdf copy of the referral form.

Referral Form Functionality

PATIENT DEMOGRAPHICS & REQUESTER INFORMATION

The top section displays all patient demographic information, requester information, current location and status at the top of the screen. You can expand or minimize the details by clicking the **BLUE double arrow** in the corner of either area. Fields in this section can be copied and pasted.

1. Hover over the field
2. Notice will appear
3. Mouse click – notice that action was successful
4. Paste where needed

Smith, George				E-JQ58XYS				Awaiting Review	
Gender	Age	Health Number	Phone (Cell)	Request Date	Priority	Pathway	Current Location		
Male	19 yrs	4143513754 (ON)	2895961212	04/03/2021 08:31 AM	-	Shoulder	Central Intake		
Birthdate	Language	Address	Email	Requester	Source Location	Source Address	Phone		
02/05/2001	English	167 Centre Street	-	Shawson (Requester), Jenny	303-204 Main St	303-204 Main St	(905) 888-6666 X		
		Oakville, Ontario L7M 1H7		Fax	Reason	Notes			
				(905) 624-5214 X	-	-			

Referral Accordions

Each referral is broken down by accordions. To open and close each accordion just click the + sign or directly on the accordion.

Accordion Breakdown

Additional Patient Information – Patient’s Family Care Provider Consent, and if appropriate WSIB information

Provincial Orthopedic Referral Form – Reason for referral, diagnosis, medical history, medications, and Assessment Centre/Surgeon Preference

RCA Triage – Central Intake will review the information and provide additional communication if required.

Central Intake Reception – Used by the Central Intake Program to document patient or requester interactions and record any missing information collected.

Central Intake Routing – Displays the destination that referral was sent to (Note: you will only receive referrals that are routed to your destination)

Contact Attempts – During the workflow users have access to track their contact attempts made to obtain necessary referral information and/or appointment booking.

Triage Information – Rapid Access Clinic accordion to identify triage priority as well as supporting information (Appointment Booking)

Assessment Appointment – Rapid Access Clinic appointment accordion. Use this section to enter & outcome booked appointments.

Regional Joint Assessment Centre Information – This accordion is used to enter additional information related to the referral, when the patient is moving forward to a surgeon consultation.

Assessment Routing – A list of routable locations will display, and the accordion will provide additional information related to the location (Sub Region, Wait time, Tags)

SURGEON CONSULTATION (V2) ACCORDIONS

Scheduling – This section is used to enter the surgeon consultation appointment.

Attachments

Most referrals that are sent through the application will contain attachments, whether it is an X-ray report, blood work, or the original referral. The attachments tab will display a number telling you how many (if any) attachments are included with this referral.

To view an attachment:

1. Click the Attachments Tab

Smith, George
Male | 48 yrs | HCN 555112212 | (905) 666-1525

Hip & Knee | E-YWSH8HA
Awaiting Scheduling

Request Attachments Delays History

Active Attachments

Attachment Type	Notes	Date Attached	Actions
Request Form		17/09/2018 1:47:56 PM	View Edit Deactivate
Medication List		19/09/2018 10:46:34 AM	View Edit Deactivate

2. Click View for the attachment you want to view
3. The attachment preview window will open and load the attachment for viewing

View Attachment

Document Details

Attached Date: 17/09/2018 1:47:56 PM

Attachment Type: Request Form

Notes:

Referral Form

ONLY COMPLETED REFERRALS WILL BE ACCEPTED

Referral Processing

Awaiting Assessment Triage

The awaiting assessment triage queue is where all referrals that have been routed by Central Intake to the Rapid Access Clinic will appear. This queue is for the purpose of reviewing incoming referrals and deciding if you can accept the referral, book the patient and assign a priority (routine or urgent). If the referral is missing information or not appropriate you have the option to Decline or Cancel (see below chart on when to do which action):

The question to ask yourself is.. Does Central Intake need to send this referral to another service provider or obtain additional information required by the service provider?

DECLINE	CANCEL
A referral is declined when there is an ACTION that is needed by Central Intake	The cancel action will place the referral into a state of completed. You would cancel when no RAC consult was completed. The program can opt to send an efax to GP communicating the reason for the referral cancellation. (Unbale to Contact, No Attendance etc)
Urgent referral - CI to route directly to Ortho Surgeon (specify Surgeon)	Not Appropriate -does not meet inclusion criteria (i.e.. No OA)
Exemptions (patient had surgery on contralateral side within 2 years or revision) - CI to route directly to Surgeon office (specify Surgeon)	Patient did not attend - select reason: repeat no attendance, unable to contact, deceased, did not want service, etc..
Incomplete Referral - CI to complete missing information	No Longer Needed - patient was recently seen at your RAC and they do not require a follow up
Patient is choosing to be seen at another RAC - CI to route referral to other RAC (specify RAC)	Duplicate referral - patient already has an appointment
RAC consult already completed elsewhere- CI to send directly to Surgeon (please specify Surgeon)	Patient is already on a surgeon waitlist/ or has an appointment with Surgeon.

Commented [CT7]: Is this the only relevant example or are there other examples where CI may need to perform a different action on a declined referral?

1. Click **Awaiting Assessment Triage** from under the To Do section. A table will open that contains the list of referrals.
2. Select the referral you would like to open by clicking on the patient's name

Ref#	Origin	Name	Requ...	Rece...	Requ...	Date ...	Curr...	Status	Appt...
E-417P3BL		Doe, Jane	Jinnah, Rashid	Hip & Knee	21/08/2018 9:40:51 AM	Oakville Trafalgar Memorial Hospital	Assessment		

3. Once the referral opens the application will automatically take you to the banner called Triage Information; this is where the APP or person responsible for reviewing referrals can indicate priority and provide any notes associated with this referral such as booking instructions.

The screenshot shows a web form titled 'Triage Information' with a sub-header 'Triage Priority'. The form contains two input fields: a dropdown menu labeled 'Triage Priority' with the text '- Please Select -' and a text area labeled 'Clinician Triage Notes'. A red arrow points to the dropdown menu, and another red arrow points to the text area. Below the text area is a button labeled 'Send to Scheduling'.

4. Select the priority by clicking the field and select the priority that applies. If needed enter any notes into the Clinician Triage Notes text box. Once you are done Click Send to Scheduling, this will move the referral into the Assessment Scheduling queue.

Assessment Scheduling

Referrals that are in this state are awaiting an appointment to be entered into the application. Follow the steps below when you are ready to schedule:

1. Click the Assessment Appointment banner

The screenshot shows the 'Assessment Appointment' banner. It includes a header with 'Assessment Appointment', 'Appt Date/Time: 2/19/2022 12:35:55 PM', 'Outcome: Patient Seen', and 'Reason: Patient Seen'. Below the header, there are fields for 'Appointment Contact' (with a dropdown menu), 'Last Appointment Contact' (with a dropdown menu), and 'Notes' (with a text area). There are also tabs for 'Current Appointment' and 'Appointment History'. At the bottom, there is a 'Book Appointment' button.

To enter an appointment date and time in the scheduling widget you can click anywhere within the appointment field to open the calendar to select your date

The screenshot shows the calendar widget. It displays a calendar for March 2019. A blue arrow points to the date field, and another blue arrow points to the time selection field. The time selection field shows a list of times from 00:00 to 23:00 in one-hour intervals. A blue arrow points to the time selection field, and another blue arrow points to the 'Book Appointment' button.

Once you select a time by the hour.

After you have completed entering the information **Select à Book Appointment** this will lock in the appointment and will update the state of the referral to **Awaiting Assessment**.

Commented [SC8]: Insert screen shots and new steps

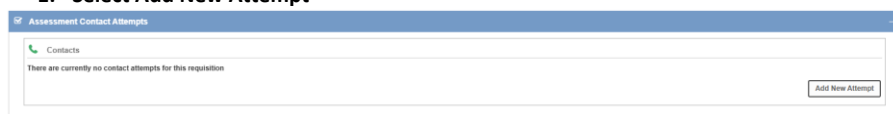
Appointment Contact Tracking

Within the Assessment Appointment banner there are 2 fields that should be used to flag a referral to show how many call attempts have been made and the date of the last call attempt. These fields are available in the list view so that you can filter or sort by them.

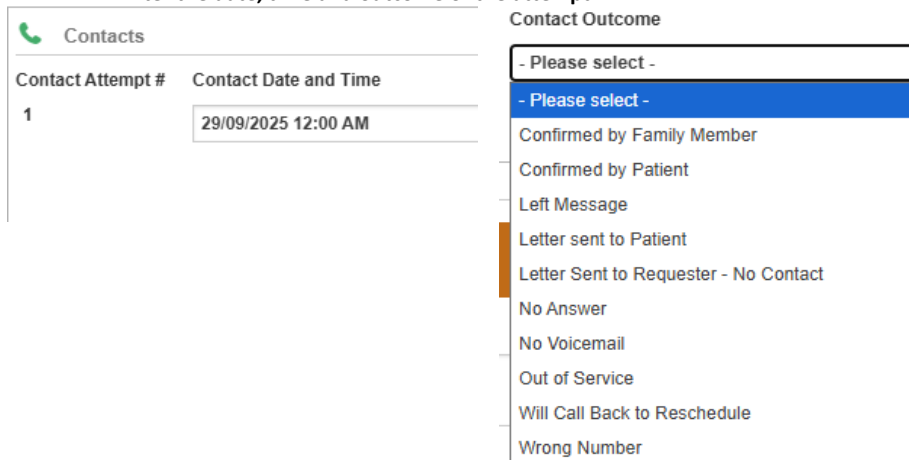
NOTE: Please ensure you also document in the notes section, your actual call attempts as these fields don't track updates. The attempts won't be added to the referral history.

When using these fields (including the Notes text box) you always must ensure you **click Save** after updating them.

1. Select Add New Attempt



2. Enter the date, time and outcome of the attempt



3. Select 'Save' – please note if you do not save and navigate away from the referral, your attempts



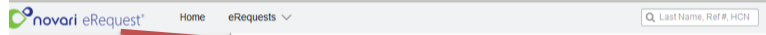
DO NOT automatically save.



Rescheduling & Cancelling Appointment

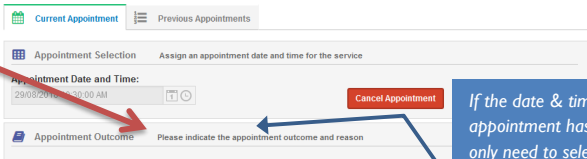
To reschedule or cancel an already booked appointment:

1. Search the record by clicking in the search field located at the top right side of the screen



(You can search by Last name, First name or Health Card Number (no version code) or eReferral Reference#)

2. Once the referral opens, scroll to the Assessment Appointment banner, click the **RED** Cancel



Appointment button

3. Select an outcome from the drop down
4. Select a reason from the drop down
5. Click the Cancel button at the bottom right corner

A screenshot of the "Appointment Outcome" form. It contains two dropdown menus: "Outcome:" with "Appointment Cancelled" selected, and "Reason:" with "Patient Cancelled/Rescheduled" selected. There is a "Comments:" text area and a "Cancel" button at the bottom right. A red arrow points from the "Cancel" button towards the bottom of the page.

If the date & time of the original appointment has passed you will only need to select an outcome and reason as no red cancel appointment button will appear.

Note: When you reschedule an appointment the application logs all previous appointments in the tab **Previous Appointments** (as below example)

A screenshot of the "Previous Appointments" tab. It displays a table with the following data:

Date:	Outcome:	Reason:	Additional Information:
29/08/2018 10:30:00 AM	Appointment Cancelled	Patient Cancelled/Rescheduled	N/A
23/08/2018 8:30:00 PM	Appointment Cancelled	Patient Cancelled/Rescheduled	N/A

The referral will refresh and the status will change back to Assessment Scheduling until you update with a new appointment or if needed cancel the referral.

Declining a Referral

You have the ability to Decline a referral back to Central Intake. **Please review the list of appropriate declining reasons.*

A referral is declined when there is an ACTION that is needed by Central Intake

- Urgent referral - CI to route directly to Ortho Surgeon (specify Surgeon)
- Exemptions (patient had surgery on contralateral side within 2 years or revision) - CI to route directly to Surgeon office (specify Surgeon)
- Incomplete Referral - CI to complete missing information
- Patient is choosing to be seen at another RAC - CI to route referral to other RAC (specify RAC)
- RAC consult already completed elsewhere- CI to send directly to Surgeon (please specify Surgeon)

To Decline:

1. Open the referral you want to Decline (referrals only in states of Awaiting Assessment Triage or Assessment Scheduling allow for you to decline)

2. Click the Decline button

Westbrook, Russell
Male | 65 yrs | HCN 0000000000 | (000) 000-0000
[Hide Details](#)

Birthdate 09/04/1953
Address 920 Norseman St.
Etobicoke, Ontario
Language -
Email -
Main (000) 000-0000

Hip & Knee | E-1T7KTQD
Assessment Scheduling

Requester tenant01, tenant01 (Novari IV)
Submitted 26/09/2018 11:13:46 AM
Priority
Current Location Queensway Health Centre

[Request](#) [Attachments](#) [Delays](#) [History](#) [Save](#) [Decline](#) [Attach](#) [Cancel](#)

3. A pop-up window will appear asking you to select a Reason for the Decline

- a. Incomplete Request
- b. Not Appropriate
- c. Patient chose another program

You will also have the option to free text any further information you may want to provide Central Intake. In order to help facilitate the referral next steps information that can be included is patient preference on program choice, as well as 'why' you are declining.

4. Click Confirm Decline

Decline eRequest

Request to:
Central Intake

Decline Reason: **Incomplete Request**

Comments:
as requested

[Do Not Decline](#) [Confirm Decline](#)

Commented [CT9]: Maybe move or repeat here that there is certain information that must be provided?

The screen will now reload and the status will appear saying Decline in Red and will be sent back to Central Intake. Declined referrals will be managed by the Central Intake Program Intake Assistant.

APPOINTMENT OUTCOME

Once the appointment date and time has passed, you are required to provide an Outcome & Reason to complete the referral.

There are 3 options for outcome, select the one that applies:

- Patient Seen
- Did not attend.
- Appointment Cancelled

The options for Reason will be different depending on the outcome you select:

RAC Appointment Outcome	Function/Status	Features & Workflow
Follow up Required	Triggers - Awaiting Scheduling	- Places the referral back into a state of scheduled. - Referral are placed in the Assessment Schedule - Follow up queue Assessment Scheduling - Follow Up eReferrals ready to be scheduled for an assessment follow up.
Surgeon Consultation – Surgical Candidate	Triggers – Assessment Routing	- Opens the Assessment Centre Accordion - Allows the RAC to route the referral to a surgeon consult
Surgical – Patient declined	Triggers – Complete – (Re-Open)	- Places the referral into a completed state with the option to re-open. - If re-opened an automatic delay is applied. - New interaction date will need to be entered & outcome. - Referral will then proceed to routing.
Conservative Management	Triggers – Completed (Re-Open)	- Places the referral into a completed state with the option to re-open. - If re-opened an automatic delay is applied. - New interaction date will need to be entered & outcome. - Referral will then proceed to routing.
Surgeon Consultation – Second Opinion by Surgeon	Triggers – Assessment Routing	- Opens the Assessment Centre Accordion - Places the referral into a state of routing
Surgical Consultation injection	Triggers – Assessment Routing	- Opens the Assessment Centre Accordion - Places the referral into a state of routing
Non-surgical management – Injections	Triggers – Completed (Re-Open)	- Places the referral into a completed state with the option to re-open. - If re-opened an automatic delay is applied. - New interaction date will need to be entered & outcome. - Referral will then proceed to routing.

For
you to

proceed with routing you **MUST** complete the outcome and reason, otherwise the routing will not appear, and you will be unable to move the referral to the next step.

1. Select the outcome and reason from the drop-down menus within the Assessment Appointment Banner
2. The Complete button will appear. Only after you select the complete routing accordion will appear. (See chart above for which reasons allow you to proceed to surgeon consultation)

FOLLOW-UP APPOINTMENTS

At the point of initial appointment you can (if needed) input a follow-up appointment. Follow the below steps in order to book follow-ups:

1. Referral state must be in **Assessment Outcome** (if a referral was already completed you will not be able to add any follow up appointments)
2. Select from the outcome drop down – Patient Seen
3. Select from the reason drop down – Follow-up with APP
4. Click the Follow-up button

Date:	Outcome:	Reason:	Additional Information:
10/11/2020 1:00:00 PM	Patient Seen	Follow-Up with APP	N/A

initial appointment will be saved within the Appointment History tab as below example:

This will put the referral back into a state of **Assessment Scheduling**

5. Input the follow-up appointment date and time into the appointment widget and click book appointment

The

The

To Do		Filter by: Current Service Type -	
Awaiting Assessment Triage eReferrals waiting to be triaged			29
Assessment Scheduling eReferrals ready to be scheduled for assessment			166
Assessment Scheduling - Urgent Urgent eReferrals awaiting scheduling for assessment		Quick Process	0
Assessment Scheduling - Routine Routine eReferrals awaiting scheduling for assessment			0
Assessment Scheduling - Non-Replacement Non-replacement eReferrals awaiting scheduling for assessment			0
Assessment Scheduling - Follow Up eReferrals ready to be scheduled for an assessment follow up			0
Awaiting Assessment eReferrals that have been scheduled for assessment			0

referral will now be in **Assessment Scheduling – Follow up**

Assessment Centre Accordion

1. Select the Priority from the **Surgeon Consultation Priority** drop down (you **MUST** select a priority)
2. Select the **Surgical Consult Reason** from the drop down menu
3. Indicate what the patient's preference is, either:
 - i. First Available
 - ii. Preferred Surgeon
 - iii. Preferred Hospital

Regional Joint Assessment Centre Information		Surgical Consult Reason	Patient Preferences
Preferred Location Select Location...		Preferred Person Select Person...	
Surgeon Consultation Priority * Please select -		Post-Assessment Notes	
Surgical Consult Reason * Please select -			
Patient Preferences *			
☒ First Available			
☐ Preferred Hospital			
☐ Preferred Surgeon			

Inappropriate for surgical consult

If the patient is not proceeding for surgeon consultation. Use the following appointment outcome reasons.

- Surgical – Patient Declined
- Conservative Management
- Non-Surgical Management - Injections

These reasons will place the referral in a state of completed but allow the RAC to re-open if the referrals need to be re-activated & routed.

****It will be the responsibility of the RAC to notify the Requester (i.e. Primary Care Physician/Referral Source) of the outcome of their patient's referral****

ASSESSMENT ROUTING (SURGEON OFFICE)

****Before Routing Remember – to attach any assessment notes, updated x-ray reports, etc. ****

Routing accordion – Filters

Service Type	Sub Region	Tags
Hip Consult Select Service Ankle Consult Elbow Consult Foot Consult Hand Consult Hip Consult Knee Consult Shoulder Consult Wrist Consult	Show All Sub-Regions Show All Sub-Regions Central Central West Halton North Simcoe Muskoka	✕ Injection French Spanish Free Parking

Assessment Routing – V2 Location vs Surgeon Office

V2 – Surgeon Name: Some surgeons have chosen to see patient's for surgical consult at the RAC. This is referred to as the V2 (visit 2) clinic. The V2 clinic referrals are managed by each RAC which they are responsible for accepting the referral, scheduling and completing (appointment outcome).

Surgeon Office: For surgeons who have chosen to see patients in their private offices. Location will be displayed using only the surgeon's name. These referrals are managed by the surgeon admin who is responsible for accepting, scheduling and completing the appointment outcome.

OFFICE ROUTING = Dr. Surgeon Last Name

V2 Clinic ROUTING = V2 – Dr. Surgeon Last Name

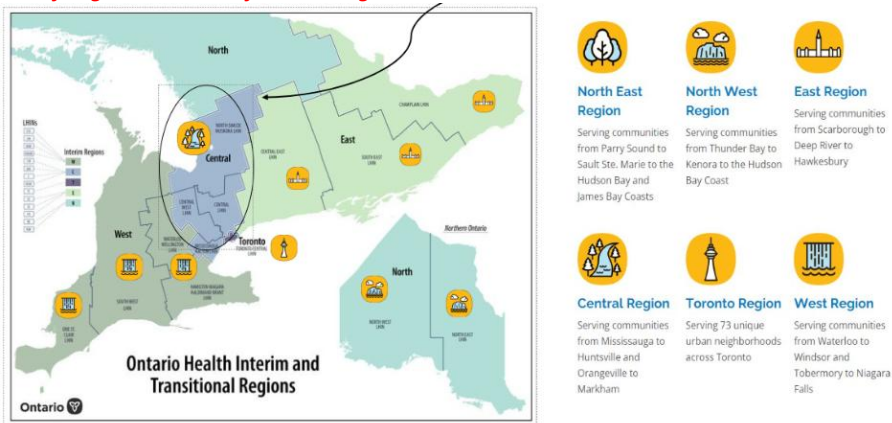
Dr. Clements - Clements, Nigel	71 King Street, Mississauga, L5B 4A2	No Priority: 848 Days	Route
Dr. Deakon - Deakon, Tim	250 Wyecroft Road, Oakville, L9K 3T7		Route
V2 - Dr. Clements - Clements, Nigel	308-190 Sherway Drive, Etobicoke, M9C 5N2		Route
V2 - Dr. Deakon - Deakon, Tim	3001 Hospital/Gate, Oakville, L6M 0L8		Route

Out of Region Surgeons

For patients requesting to be seen by a surgeon that practices outside OH Central referrals are managed by the Central Region Orthopedic Referral Hub.

(North East, North West, West Region, East Region, Toronto Region)

Out of Region = Outside of Central Region



After a RAC assessment is completed, patient chooses: **Surgeon outside Central Region**



***Method of communication with Central Intake will be through the Discussion feature in eReferral. User will trigger a notification to the message, this will allow for CI to identify the referral to be processed.**

Central Intake will obtain confirmation of receipt. Once the receipt of the referral has been received, the ownership transitions to the surgeon's respective Central Intake.

*Some regions may require the patient to go through the RAC process again. Central Intake – Central Region - Orthopedics Hub doesn't obtain wait time times for RACs or surgeons outside OH Central Region.

****IMPORTANT**** Once you click **Route Out of Region** you will no longer be able to update or add anything to this referral, so ensure you attach all documents beforehand

Assessment Routing – Wait I display

After more than 10+ referrals have been completed at the provider/service, the application will start to display the wait time for Urgent/Non Replacement/Routing/No Priority referrals. This applies for both referrals waiting to be routed to a Rapid access clinic or for Surgeon consultation.

Location/Provider	Sub-Region	Address
Oakville Trafalgar Memorial Hospital - RAC	Halton	3001 Hospital Gate, Oakville, L6M 0L8
Queensway Health Centre - RAC	Halton	159 Sherway Drive, Toronto, M9C 1A5

Cancelling a Referral

You can cancel a referral, if it's no longer required.

1. Open the referral you would like to cancel – **if the referral you want to cancel has an appointment already inputted you MUST cancel the appointment first and then cancel the referral.**
2. Click the Cancel button

Requester: tenant01, tenant01 (Novari IV)
Submitted: 26/09/2018 11:13:46 AM
Priority: -
Current Location: Queensway Health Centre

3. A pop-up window will appear asking for you to select a reason from the drop down menu – there are many options to choose from, select the one that closely relates to the reason

Personal Reason: Please Select

- Client does not want Service
- Deceased
- Duplicate
- Documentation
- Medical Reasons
- Missing Information not Received
- No Longer Needed
- Non Surgical Candidate - Entered into a Conservative Management Program
- Non Surgical Candidate - Primary Care to Re Refer if Status Changes
- Not Appropriate
- Patient Transferred to Emergent Stream for Care
- Referral Cancelled by Requester
- Requested no Intervention
- Unable to Contact Patient

4. Click Con

 **Cancel eRequest**

Removal Reason *

Client Does Not Want Service

Comments:

The referral will reload and show the state is now Cancelled.

If you need to reopen this referral in future

for example: Referral was cancelled as you were unable to contact the patient for an appointment after several attempts and the patient has now called back and wants to schedule)

To reopen a referral:

1. Search the referral
2. Once the referral opens, there will be a Reopen button to the right of the screen, Click the 'Reopen' button

Skywalker, Rey [Edit Patient](#) [Hide Details](#)

Female / 30 yrs / Health Number 555555555 RD / (453) 345-6897

Birthdate: 14/06/1989 Main (453) 345-6897

Address: 123 Fake Street
Kingston, Ontario K9H 0H9

Language: English

Email: -

Hip & Knee / E-A64E5FV / Oakville Trafalgar Memorial Hospital **Cancelled**

Requested: 26/03/2019 08:10 PM

Requester: Wartman, Olivia

Source: Kingston General Hospital - 76 Stuart St -
Department of Neurology
(613) 545-5538 X 12345

Phone: (613) 545-5538 X 12345

Fax: (132) 465-7890

Priority: Routine

Reason: Unable to Contact Patient

Notes: -

Additional Patient Information: Does the Patient Have a Family Physician? Yes Patient Consent: Full Consent

3. The referral will reload and will appear in the state that the referral was in when you cancelled it and will also **automatically have a Current Delay on it** (see next section on Delays)

Skywalker, Rey [Edit Patient](#) [Hide Details](#)

Female / 30 yrs / Health Number 555555555 RD / (453) 345-6897

Birthdate: 14/06/1989 Main (453) 345-6897

Address: 123 Fake Street
Kingston, Ontario K9H 0H9

Language: English

Email: -

Hip & Knee / E-A64E5FV / Oakville Trafalgar Memorial Hospital **Approved Scheduling** **Cancelled Delay**

Requested: 26/03/2019 08:10 PM

Requester: Wartman, Olivia

Source: Kingston General Hospital - 76 Stuart St -
Department of Neurology
(613) 545-5538 X 12345

Phone: (613) 545-5538 X 12345

Fax: (132) 465-7890

Priority: Routine

Reason: -

Notes: -

Delays

Reason	Start Date	End Date	Notes	Actions
Referral Cancellation	11/06/2020	11/06/2020		Cancel Remove

The referral is now ready to be processed.

Additional Features

Delays

This is to be used when the patient is unavailable for an appointment due to patient-related concerns/reasons. When a referral is placed on a Delay the application will subtract that timeframe from the total wait time and you will not be able to schedule any appointments during the indicated delay timeframe. You can however still schedule as long as it's outside the set delay date.

To put a referral on Delay: (Example: Patient on vacation, patient in hospital)

Commented [CT10]: Add examples?

1. Click the Delay tab

Pathinger, Don
Male | 24 yrs | HCN 123456 | (444) 444-4444 x 4
[Hide Details](#)

Birthdate 07/06/1994
Address Hallie St
Kingston, Ontario H0H 0H0
Language -
Email -
Main (444) 444-4444 x 4

Hip & Knee | E-GS6TXVD
Assessment Scheduling

Requester Intake, Central (Central Intake)
Submitted 22/08/2018 10:42:29 AM
Priority Routine
Current Location Oakville Trafalgar Memorial H

Request **Attachments** **Delays** **History**

Save Decline Attach Cancel

Patient Consent

2. Click Add Delay

Request **Attachments** **Delays** **History**

Save Decline Attach Cancel On Hold

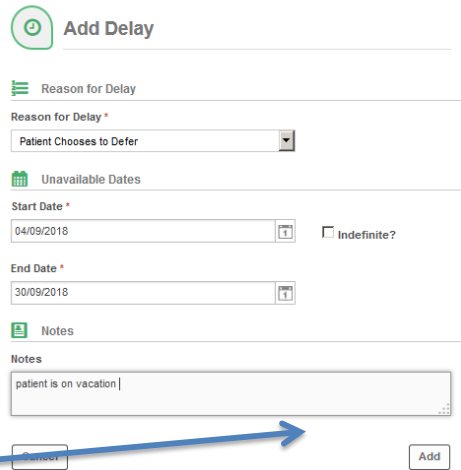
Add Delay

Delays

Reason	Start Date	End Date	Notes	Actions
--------	------------	----------	-------	---------

3. Select from the pop-up window:

- Reason for Delay
- Unavailable Dates – Start Date & End Date
- Provide any notes in the Notes section



Add Delay

Reason for Delay

Reason for Delay *

Patient Chooses to Defer

Unavailable Dates

Start Date *

04/09/2018

☐ Indefinite?

End Date *

30/09/2018

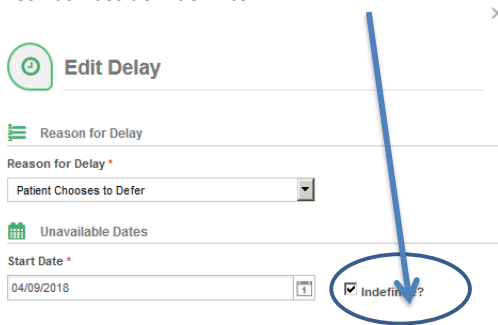
Notes

patient is on vacation

4. Click Add to Save

If the delay requires a longer timeframe, you have the option to update the delay to extend the period. Also, you can set the delay to indefinite, which is appropriate for instances when a patient may not know when they will be able to schedule an appointment (i.e. patient gets admitted to hospital).

To set a referral to Delay indefinite follow the above steps, but instead of providing an end date click the check box beside Indefinite



Edit Delay

Reason for Delay

Reason for Delay *

Patient Chooses to Defer

Unavailable Dates

Start Date *

04/09/2018

☒ Indefinite?

5. When you Save the Delay it will now appear in the Delay Tab

NOTE: Do not remove a delay unless, It is done in error.

Request

Attachments

Delays

History

...

Save

Attach

On Hold

Cancel

Add Delay

Delays

Reason	Start Date	End Date	Notes	Actions
Patient Chooses to Defer	20/11/2018	01/02/2019	On vacation	UpdateRemove

Please make sure that if a referral is put on an indefinite delay for routing that you update the end date before routing to the surgeon -- the end date can be the date the patient made the decision of where they want the consult to be done

Click & Copy

Some fields are setup as a click & copy:

PATIENT INFORMATION:

- Name
- Date of Birth
- Phone Number
- Address & postal code (does not include city or province)
- Health Card Number (not the version code)
- Email address

Requester Information:

- Name
- Phone & Fax

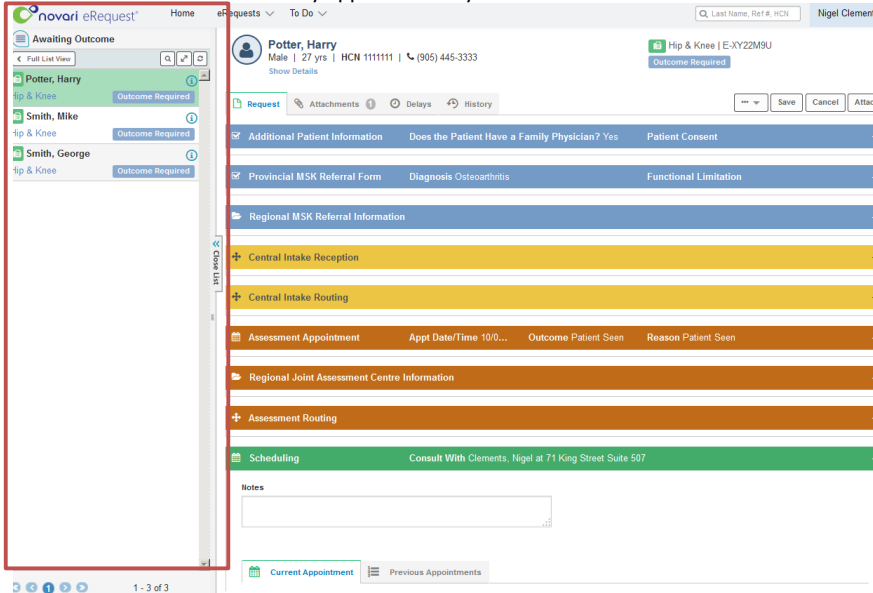
E-JQ88XYS  Click to copy				Awaiting Routing 	
Request Date 04/03/2021 08:31 AM	Priority -	Pathway Shoulder	Current Location Central Intake		
Requester Stevenson (Requester), Jenny	Source Location 303-294 Main St	Source Address 303-294 Main St	Phone (905) 888-6666 X		
Fax (905) 824-5214 X	Reason -	Notes -			

eReferral Reference Number

To use this feature, move your mouse over one of the above listed items and a pop-up will appear “Click to copy” left click your mouse and the information will be ready for you to paste into any document by right click and paste or keyboard shortcut **Ctrl + V**

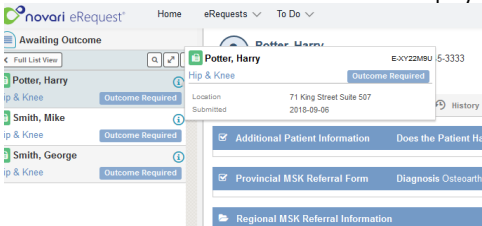
Side Bar Menu

The side bar menu automatically appears when you are in a referral no matter what state it is in.



Features are:

- Quick access to the current queue you are in
Shows an up-to-date look at how many referrals are still in that queue
- Displays Client Names, Location, and current state
-  when the mouse hovers this icon it will display some information about that referral



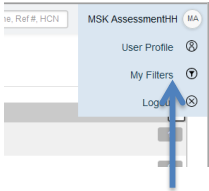
This can be closed and re-opened by clicking the double arrow on the side of the menu

Filters - Permanent

Filters are great to utilize and assist with managing your queue. They can be saved and can be accessed easily once created.

How to create a filter

1. To create a filter click the top right menu where your login name is displayed
(you can access this menu no matter where you are in the application)



2. Click My Filters, a pop-up box will appear
3. Click **Add Filter**
4. Then create a name for your filter such as **Hip & Knee**
5. Click **Select Criteria** and choose **Request Type** from the drop down menu, then click **Add Criteria**
6. A text box will appear below, click in the field and type **what you want to filter by** once you see it appear click it with your mouse to select it.
7. Then Click **Save & Add Another** and repeat this process to create as many filters needed.

Quick Filters

- Follow permanent filter steps
- Skip step 4
- Single use filter

How to use your filters:

1. Open any queue into list view

Awaiting Assessment Triage

Select Filter: [v] Quick Filter: [v] Clear

Ref#	Origin	Name	Request...	Receiv...	Requir...	Request...	Routed D...	Current L...	Status	Appt. Date
E-IVRBSW	[v]	Meter, Jay	tenant01, tenant01 (Kings Town General Clinic)		Hip & Knee	08/04/2019 9:30:28 AM	11/03/2021 12:58:26 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	
E-9EQN5SR	[v]	Test, dsa	Requester, Testing (Test Clinic)		Hip & Knee	11/01/2021 9:53:52 AM	11/03/2021 1:11:38 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	
E-KJRPDM9	[v]	Scott, Michael	Stevenson (Requester), Jenny (303-294 Main St)		Hip & Knee	11/01/2021 9:54:28 AM	11/03/2021 1:19:28 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	
E-AY3CBJN	[v]	Test, dsa	Requester, Shoulder (Shoulder Requesting Location)		Shoulder	11/03/2021 1:00:13 PM	11/03/2021 1:00:22 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	
E-LIYBHAX	[v]	Duck, Donald	Requester, Shoulder (Shoulder Requesting Location)		Shoulder	11/03/2021 1:01:11 PM	11/03/2021 1:01:24 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	

2. Click the **Select Filter** drop down menu
3. Select the **filter name** from the list (I choose to just see referrals for Shoulders)

Awaiting Assessment Triage

Select Filter: [v] Quick Filter: [v] Clear

Select Filter	Name	Request
Select Filter		
Hip & Knee		
Shoulders		

E-IVRBSW [v] Meter, Jay tenant01 (Kings Town General Clinic)

4. The list will refresh and reload displaying only Shoulder referrals

Awaiting Assessment Triage

Shoulders [v] Quick Filter: [v] Clear

Ref#	Origin	Name	Request...	Receiv...	Requir...	Request...	Routed D...	Current L...	Status	Appt
E-AY3CBJN	[v]	Test, dsa	Requester, Shoulder (Shoulder Requesting Location)		Shoulder	11/03/2021 1:00:13 PM	11/03/2021 1:00:22 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	
E-LIYBHAX	[v]	Duck, Donald	Requester, Shoulder (Shoulder Requesting Location)		Shoulder	11/03/2021 1:01:11 PM	11/03/2021 1:01:24 PM	Oakville Trafalgar Memorial Hospital - RAC1	Awaiting Assessment	

Note: Filters will stay on as long as you are on the same list of referrals. Once you open a different list or go back to the home page the filter will automatically turn off.

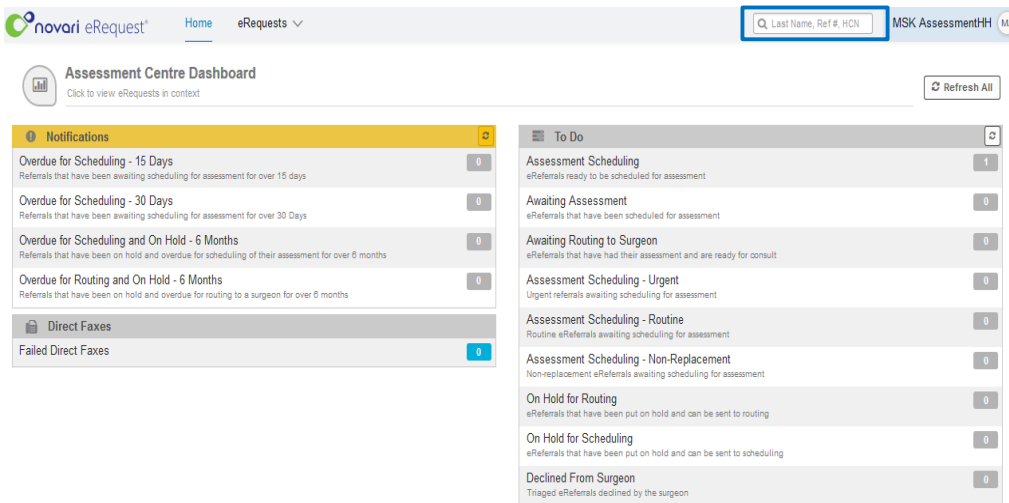
Searching

The search is accessible from all areas of the application. You are able to search by last name or (last name, first name), health card number (without version code) and eReferral reference ID.

To search for a record follow these steps:

1. Click in the search box located at the top right side of your screen
2. Type in the blank field type one of the following:
 - a. Last Name
 - b. Last Name, First Name
 - c. Health Card Number (no version code)
 - d. eReferral Reference number

3. Hit the Enter Key



The screenshot shows the 'Assessment Centre Dashboard' for 'novari eRequest+'. At the top right, there is a search bar with the placeholder text 'Q Last Name, Ref #, HCN'. A blue arrow points to this search bar. Below the search bar, the dashboard is divided into two main sections: 'Notifications' and 'To Do'.

Notifications:

- Overdue for Scheduling - 15 Days: 0 (Referrals that have been awaiting scheduling for assessment for over 15 days)
- Overdue for Scheduling - 30 Days: 0 (Referrals that have been awaiting scheduling for assessment for over 30 days)
- Overdue for Scheduling and On Hold - 6 Months: 0 (Referrals that have been on hold and overdue for scheduling of their assessment for over 6 months)
- Overdue for Routing and On Hold - 6 Months: 0 (Referrals that have been on hold and overdue for routing to a surgeon for over 6 months)
- Failed Direct Faxes: 0

To Do:

- Assessment Scheduling: 1 (eReferrals ready to be scheduled for assessment)
- Awaiting Assessment: 0 (eReferrals that have been scheduled for assessment)
- Awaiting Routing to Surgeon: 0 (eReferrals that have had their assessment and are ready for consult)
- Assessment Scheduling - Urgent: 0 (Urgent referrals awaiting scheduling for assessment)
- Assessment Scheduling - Routine: 0 (Routine eReferrals awaiting scheduling for assessment)
- Assessment Scheduling - Non-Replacement: 0 (Non-replacement eReferrals awaiting scheduling for assessment)
- On Hold for Routing: 0 (eReferrals that have been put on hold and can be sent to routing)
- On Hold for Scheduling: 0 (eReferrals that have been put on hold and can be sent to scheduling)
- Declined From Surgeon: 0 (Triaged eReferrals declined by the surgeon)

4. You will either receive a pop up window displaying all matches OR the referral will automatically open if there is only 1 match in the database

History Tab

The application tracks each user's actions on the referral as it moves through the process. This is so that you can see at a glance which user did what action and when.

Users can view this tab by clicking on the History tab when you are reviewing a referral.

There are three sections within the History of the referral:

- **Communication History** – this displays if a fax was sent out for this patient's referral. It shows the Status of that fax, when it was sent/initiated, who sent it and what fax number it was sent to. Also gives you the option to View a copy of the fax that was sent and from there you can also re-send the fax if needed. If a fax failed it will display failed under the status column.
- **History** – this part shows you what user has made actions on the referral and what type of actions and when they were done

Request

Attachments

Delays

History

Settings

Communication History

Type

Status

Time Sent

Sent By

Sent To

View

Fax

Queued

11/03/2021 2:38:45 PM

Stevenson, Jenny

(905) 111-1111

History

Date

User

Venue

Person

State

Action

14/05/2019 10:22:30 AM

tenant1@novahhealth.com

From: Lake Ontario
To: Central Intake

Awaiting Routing

Saved

14/05/2019 10:22:30 AM

tenant1@novahhealth.com

From: Lake Ontario

New

Submitted

11/11/2019 11:38:51 AM

jstevenson@haltonhealthcare.com

From: Central Intake
To: Oakville Trafalgar Memorial Hospital - RAC1

Awaiting Routing

Routed

11/11/2019 11:38:55 AM

jstevenson@haltonhealthcare.com

From: Oakville Trafalgar Memorial Hospital - RAC1

Awaiting Assessment Triage

Sent to Scheduling

11/11/2019 11:39:29 AM

jstevenson@haltonhealthcare.com

From: Oakville Trafalgar Memorial Hospital - RAC1

Assessment Scheduling

Scheduled

11/11/2019 11:39:37 AM

jstevenson@haltonhealthcare.com

From: Oakville Trafalgar Memorial Hospital - RAC1

Awaiting Assessment

Appointment Completed

11/11/2019 11:39:59 AM

jstevenson@haltonhealthcare.com

From: Oakville Trafalgar Memorial Hospital Weening, Brad
To: Dr. Weening

Assessment Routing

Routed

Other Requisitions for this Patient

Start Date

Reference Number

Requisition Type

Requester

Requesting Venue

View Details

26/09/2018 1:34:44 PM

E-05AVCV3

Hip & Knee

Wartman, Olivia

Dr. Zatzal

07/01/2019 8:29:23 AM

E-57LUWVC

one-Link

Wartman, James

OneLink

07/01/2019 8:29:23 AM

E-7REXAGL

Additions & Mental Health

Wartman, James

CCDP

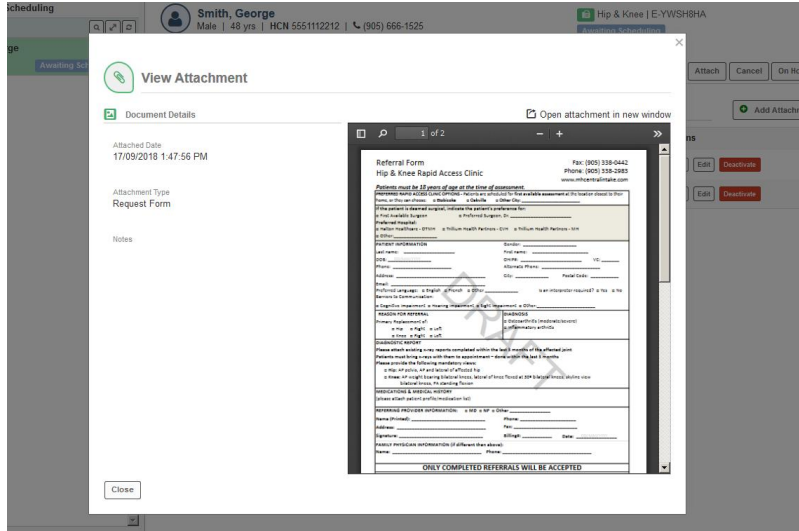
- **Other Requisitions for this Patient** – other referrals that have been submitted for this patient will be displayed.

Note: You will only see basic details of referrals unless you have specific service location permission for those referrals listed.

This information can also be used to connect with any users that handled this referral as the users email address is embedded in history section, in case you need any clarification or have questions regarding that referral.

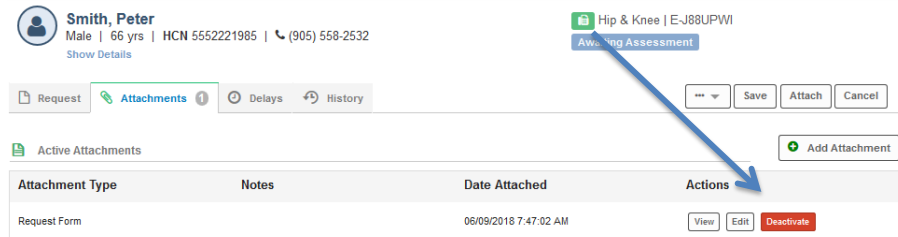
Commented [CT11]: Mention status of fax as this is where sometimes people spot a fax did not go through?

Attachments

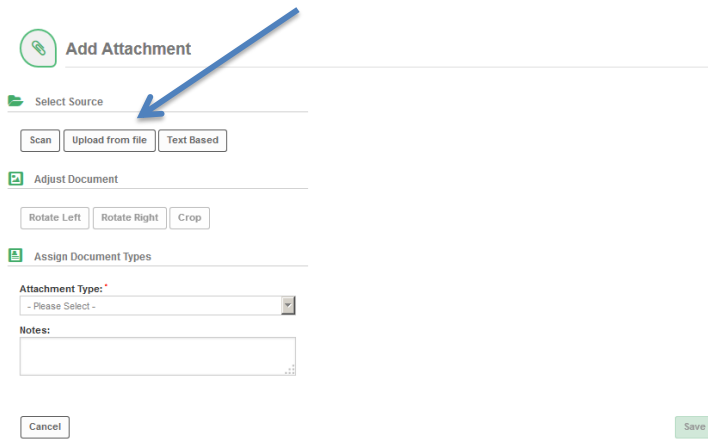


You can also attach supporting documents that may be required (before you do this you must ensure the documents are in pdf format). Follow the below steps on how to attach:

1. With the referral open click the Attach button or the Attachments Tab then Add Attachment



2. A pop-up window will appear
- Select Source - Upload from file



Add Attachment

Select Source

Scan Upload from file Text Based

Adjust Document

Rotate Left Rotate Right Crop

Assign Document Types

Attachment Type: - Please Select -

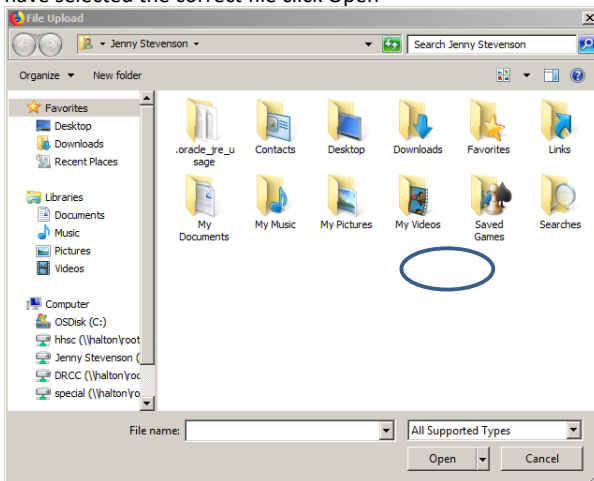
Notes:

Cancel

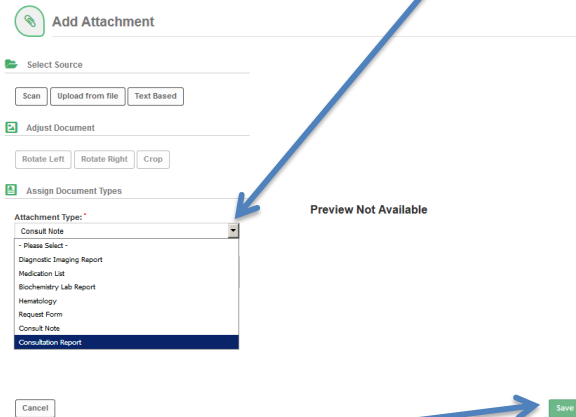
3. The application will then ask you to select it from where saved it on your computer, once you

application then ask you select it from where saved it on your computer, once you

have selected the correct file click Open



4. Then select Attachment Type from the drop down menu



The screenshot shows the 'Add Attachment' form with three main sections: 'Select Source', 'Adjust Document', and 'Assign Document Types'. The 'Assign Document Types' section has a dropdown menu for 'Attachment Type' which is open, showing options like 'Consult Note', 'Diagnostic Imaging Report', 'Medication List', 'Biochemistry Lab Report', 'Hematology', 'Request Form', 'Consult Note', and 'Consultation Report'. A blue arrow points from the instruction text to the dropdown menu. Another blue arrow points from the 'Save' button to the instruction text for step 5. The text 'Preview Not Available' is visible to the right of the dropdown menu.

Cancel Save

5. Click Save, then repeat these step if you need to attach another document

eFax's & Templates

The application gives you the ability to send outgoing faxes directly. This can be used at any point within a referral and allows you to send customized template a copy of the referral and attachments.

1. Select Patient/Referral you would like to send a fax for

Hendrix, James [Edit Patient](#) [Hide Details](#)

Male / 77 yrs / HCN 2222222222 JH / (233) 414-1234 x 124

Birthdate 27/11/1942

Address 23 - 123 Guitar Way
Rock City, Ontario E3E 3E3

Language English

Email JHendrix@hotmail.com

Main (233) 414-1234 x 124

one-Link / E-QBIEABG / OneLink **Referral Routed**

Requested 30/08/2018 09:46 AM

Requester **Wartman, James**

Source deactivated KGH that I can't get rid of :(

Phone (613) 548-3232 X 6666

Fax Not Available

Priority Non-Urgent

Reason -

Notes -

[Request](#) [Attachments](#) [Delays](#) [History](#)

[Complete](#) [Save](#) [Attach](#) [Reschedule Screening](#) [Cancel](#)

- 2.

[Print](#)

Send Fax

[Open Fax in Window](#)

3. Fill in all required information and select the template from the drop down menu

Send Fax

Fax Number * (905) 338-4401

From * TEST

To * TEST

Subject * TEST

Select Template * No Template Selected (Use Comments)

Comments

Include Printable eRequest® Form? * ☐ Yes ☒ No [Clear](#)

Include Attachments ☐ Request Form

[Cancel](#) [Send Fax](#)

Always double check the
prepopulated fax number
to ensure it is correct
before sending

4. A Pop-up window will appear with your selected fax template. Note: You will select NO under "include printable eRequest form"

Send Fax

Fax Number *
(905) 338-4801

From *
TEST

To *
TEST

Subject *
TEST

Select Template *
Fax/ida - Adult out of region doox

Include Printable eRequest Form? *
☐ Yes ☒ No

Include Attachments
☐ Request Form

one-Link
Halton Healthcare
Connecting you to solutions
and mental health services

one-Link Contact Information
2401 Bristol Circle Suite 105, Oakville, ON L6H 5S9
Phone: 905-338-4123-Main Reception
Fax: 905-338-4801
www.one-link.ca

REFERRAL UPDATE

Date:

Fax Number:

Re:

Date of Birth (dd/mm/yyyy):

Dear Dr.:

Thank you for referring your patient to one-Link. One-Link provides access to services in the Mississauga Halton LHIN. Please contact ConnexOntario for information about out of region services.

www.connexontario.ca
1-866-531-2600

Please do not hesitate to contact us if you require any further information.

Sincerely,

one-Link
905-338-4123
Fax: 905-338-4801
/nk

*****CONFIDENTIALITY NOTICE *****
This fax and any attachments transmitted herein contain sensitive or confidential information intended solely for the use of the individual or entity named.

Page 1 of 1

5. With the Template window open click into the fields to input the patient information, etc.
 6. If you are sending the fax and need to include additional information that is attached in the application you can do so by clicking the items you want under **Include Attachments**
 7. Once you have finished filling out all information Click the Send Fax button
- It is recommended that you document within your EMR that you have sent the fax virtually as the application currently does not provide fax confirmations

Commented [CT12]: ? Necessary as in the eReferral history

Commented [SC13R12]: The application will be undergoing de identification. That means any referral that is completed + 4 years will be removed from the application and no longer be searchable.

Direct Faxes

Failed Direct Faxes 2

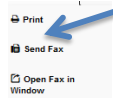
Note: The Failed Direct Faxes queue on the dashboard is to notify its users that a fax was unsuccessful. When populated you can see what faxes have failed and can re-send from this section if needed

Downloading & Printing

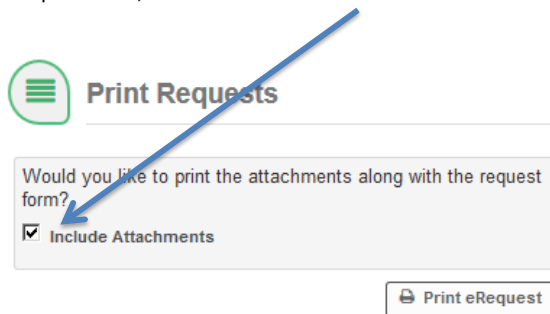
How to save the referral and supporting documents to your EMR

For users who currently use an EMR at their offices you have the ability in eReferral to download the referral and any documentation that comes with it through the application to upload into the patient's chart.

1. Open the referral in Novari
2. Click the  down arrow
3. Click Print from the menu



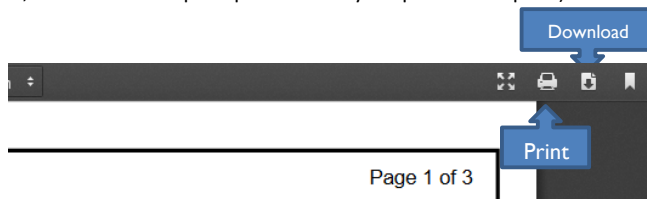
4. A pop-up menu will appear asking if you would like to print the attachment along with the request form, click the Include Attachments box



5. Click Print eRequest

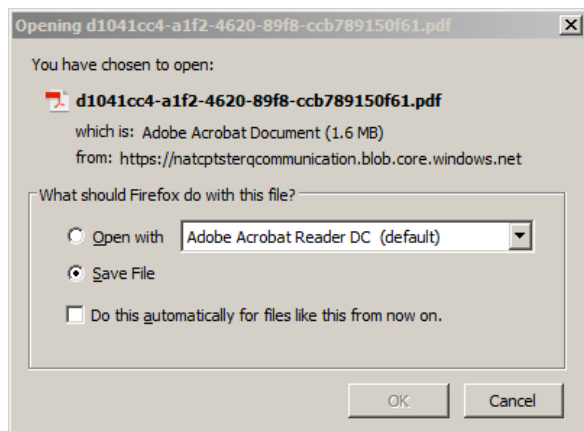
A second window in your browser will open and display the copy of the eRequest, and all attachments that have been made to the referral.

6. To download Click the download symbol from this window (if you need to print click the printer icon instead, then follow the prompts to select your printer and print)



7. A pop-up box will appear asking if you like to save or

open, choose Save File (note: the document is already in pdf format which is a common file type that is compatible with most EMRs for uploading)



8. Click Ok, and save the file either in a temporary folder on your computer or directly on your desktop. *(Once you have uploaded this to your EMR you can delete the original file)*
Now proceed to upload the save pdf document into your EMR for the patient's chart/record.

Referral Processing - ATC Hospitals

Novari eRequest

To follow existing workflows for booking patients, the following steps are required to capture the appropriate location.

Scenario: When the next available appointment is to be booked with a Surgeon and **NOT** the APP. Please follow the steps below:

1. Select → Decline

... Save Send to Scheduling **Decline** Attach Cancel

2. Select reason
→ To be booked

with Surgeon at RAC & identify which surgeon to route to (Select → Confirm Decline)



Decline eRequest

Decline To:

Central Intake

Decline Requisition Reason:

To be booked with Surgeon at RAC

Comments:

Please route to V2 - Dr. [NAME]

3. Central Intake
will obtain referral
from queue
“Declined from
Assessment
Centre”

Do Not Decline

Confirm Decline

Declined From Assessment Centre

Triaged eReferrals declined by the assessment centre

4. Central Intake will re-direct referral to the surgeon identified.

IF THE PATIENT IS GOING TO BE SEEN BY SURGEON IN THEIR OFFICE, THE
LOCATION TO BE ROUTED WILL JUST BE THEIR NAME & NOT V2

5. Referral will be located under the Hip & Knee Receiver Dashboard. Within the Awaiting Acceptance queue



To Do
Hip & Knee Surgical Candidates Awaiting Acceptance Hip & knee surgical eReferrals received but not yet accepted
Hip & Knee Non-Surgical Awaiting Acceptance Hip & Knee non-surgical eReferrals received but not yet accepted

6. The current location will be listed as V2- Surgeon Name

Current Location	⋮
V2 - Dr. Brent Mollon	

7. RAC Admin will accept referral

⋮	Save	Accept	Decline	Attach	Cancel
---	------	--------	---------	--------	--------

8. Under the scheduling banner, Admin will add in the appointment information.
9. Appointment completed: Admin will process referrals from the “Awaiting outcome” queue.

Scheduling	Consult With Mollon, Brent at V2 - Dr. Brent Mollon
Notes 	
Current Appointment	Appointment History
Appointment Selection Assign an appointment date and time for the service	
The time zone for this appointment is based on the time zone for V2 - Dr. Brent Mollon: America/Toronto	
Appointment Date and Time: DD/MM/YYYY hh:mm A	
Book Appointment	

10. Admin to select:
- a. Outcome = Consult complete
 - b. Reason = Surgical Candidate
 - c. Action = Sent to ATC

Scheduling

Consult With Miller, Mark at Dr. Mark Miller

Notes

Current Appointment

Appointment History

Appointment Selection

Assign an appointment date and time for the service

Appointment Date and Time

Wed, Mar 6, 2024 9:00 AM EST

Appointment Outcome

Please indicate the appointment outcome and reason

Outcomes

Please Select -

Did Not Attend

Consult Complete

Appointment Cancelled

Comments

Scheduling

Consult With Miller, Mark at Dr. Mark Miller

Notes

Current Appointment

Appointment History

Appointment Selection

Assign an appointment date and time for the service

Appointment Date and Time

Wed, Mar 6, 2024 9:00 AM EST

Appointment Outcome

Please indicate the appointment outcome and reason

Outcome

Consult Complete

Reason

Surgical Candidate

Comments

Send to ATC

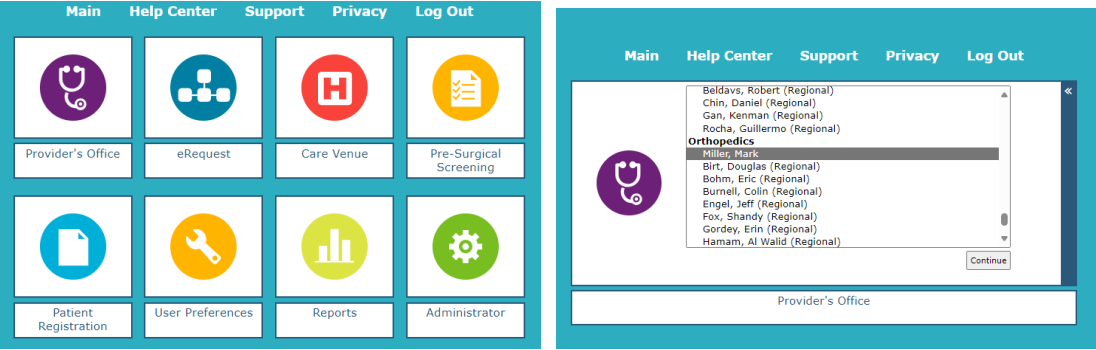
11. Referral state will update to “Completed”

Falls, Jake				E-02TAGXM				Completed	
Gender	Age	Health Number	Phone (Mobile)	Request Date	Priority	Requester	Requester Type	Current Location	
Male	32 yrs	1212121212 (QL, ON)	(123) 456-7890	05/03/2024 02:06 PM	-	Chantal J. J. J.	Hip & Knee	Dr. Mark Miller	
				Assigned To		Chantal J. J. J.	Source Location	Source Address	
				Phone		Full	Tribium Health Partners - 10H	100 Queenway W	
							Reception		

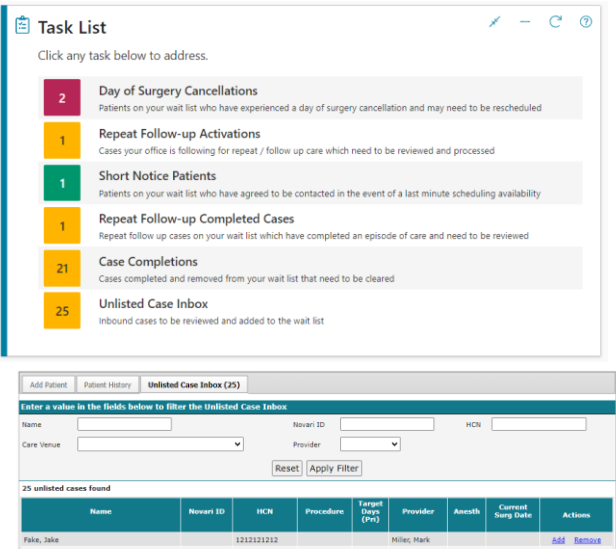
12. All steps in Novari has been completed. Next steps are to be completed in ATC

ATC Steps (Orillia ONLY)

- 1. Log into ATC
- 2. From the ATC home screen select Provider's office
- 3. Select your surgeon from the list and click continue



4. Provider's office dashboard → Select “Unlisted case inbox”



- 5. From the actions column, click Add for the patient you are adding to the wait list

6. You will be asked to confirm the correct patient by searching for the patient

Unlisted Case Inbox

Patient search criteria has been automatically populated. You may Search Registered Patients or add this patient as an Unregistered Patient.

Search Registered Patients **Add Unregistered Patient**

Enter a MRN, HCN, or Name and Birthdate to search for a Registered Patient. Fields marked "*" are required.

☒ HCN: * 121212121

☐ Name: Fake Birthdate: (YYYY/MM/DD) 1995/02/02

☐ MRN:

Care Venues: * List Type: * ☐ Practitioner List ☒ Pooled List

Search

7. You will now fill in the required fields.

- Some fields will pre-populate from data collected on the referral. (Diagnosis Category, Referral Type, Referral Source, Referring Physician, Date of Referral, Date of Consult, DARCs and Attachments)
 - Once a mapping is applied for that provider, the data elements will be populated on the next referral
8. Once all necessary fields are filled in, click Submit

Referral Information

Referral Type: * New Referral Referral Source: * Central Intake

Unlisted Case Referral Type: ☒ New Referral [Apply Mapping] Unlisted Case Referral Source: ☒ Central Intake [Apply Mapping]

Wait 1 System Delay Reasons: ☐ Yes ☐ No **Edit**

Referring Physician: Dr Maria Valente

Important Dates (YYYY/MM/DD)

Date of Referral: * 2018/06/19 Date of Consult: * 2018/09/07 Decision to Treat Date: * [Click to use Date of Consult](#)

Dates Affecting Readiness:

To Treat: * ☐ Yes **Edit** ☐ No (None Known)

To Consult: * ☐ Yes **Edit** ☐ No (None Known)

Priority & Physiological Status

Wait 2 Priority Set: * Please choose a procedure **Edit**

Wait 1 Priority: * [Descriptions] Unlisted Case Wait 1 Priority: * **Edit**

Physiological Status: * **Edit**

Unlisted Case Inbox Physiological Status: * **Edit**

Anesthetic: * **Edit**

Unlisted Case Anesthetic: * **Edit**

General Info. & Alerts

Attend Short: ☐ Yes ☒ No Patient Alerts: * ☐ Yes ☒ None Known **Edit**

Comorbidities: * ☐ Yes ☒ No (None Known) **Edit**

Relevant Medications: * ☐ Yes ☒ No (None Known) **Edit**

Admission Venues: * **Edit**

Unlisted Case Admission Venues: * **Edit**

Post Procedural Destination: * None Available **Edit**

Unlisted Case Post Procedural Destination: * **Edit**

☐ Case is part of Repeat/Follow-up Series

Attachments

The following attachments require reconciliation before adding the case (you may add additional attachments after saving the case):

Use Attachment?	Unlisted Case Attachment Type	Unlisted Case Attachment Notes	Preview
☒ Yes ☐ No	Referral Letter		Preview
	application/pdf		

Patient Concerns: (For Office Use Only) Notes: (For Office Use Only)

Submit **Reset** **Cancel**

9. For adding to Pooled lists this will appear, click Submit again to add patient onto your waitlist

FAKE, JAKE

eReferral Information

eReferral ID *

E-JEVDWSY

Submit

Back to View List

(* denotes required field)

Click the (*) for a detailed explanation of the question