2025

Coordinated Access – Central Region

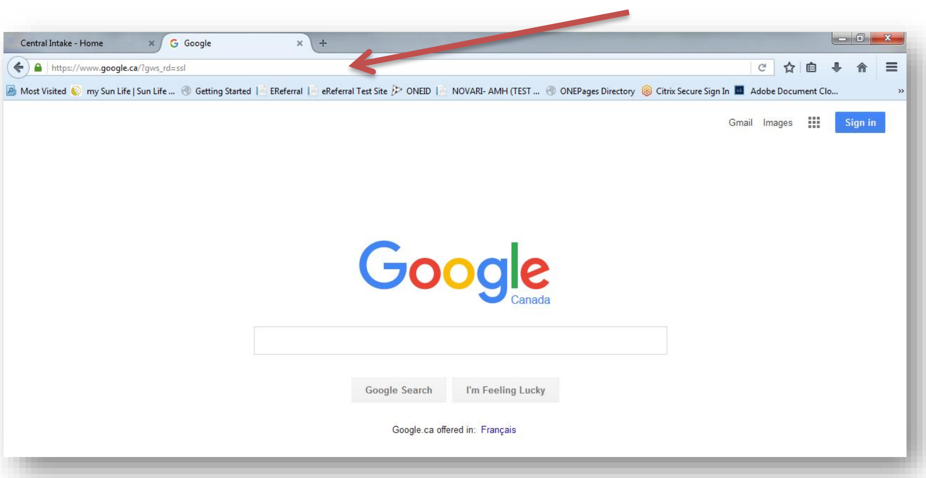
ORTHOPEDICS – ASSESSMENT CENTRE (RAC) EREFERRAL GUIDE

SHELLEY CLEARIHUE

Contents

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?

EReferralSupport@haltonhealthcare.com

Commented [CT1]: Closing accounts?

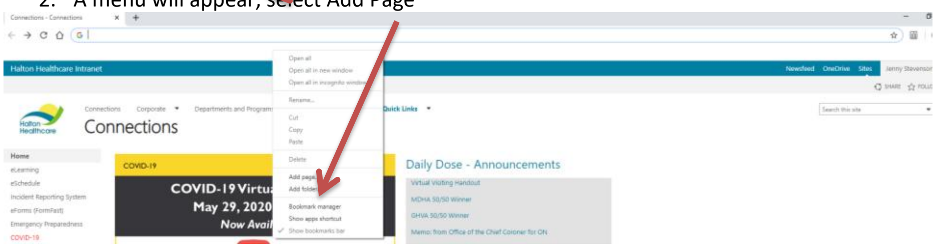
Creating a bookmark

Google Chrome

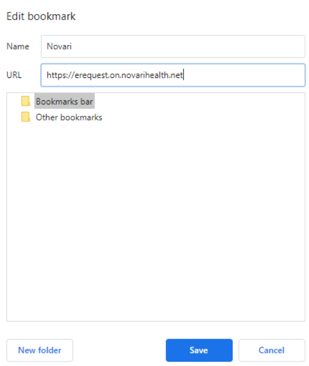
****Creating bookmarks allows you to quickly access the website**

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

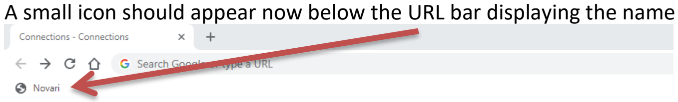
2. A menu will appear, select Add Page



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



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.

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

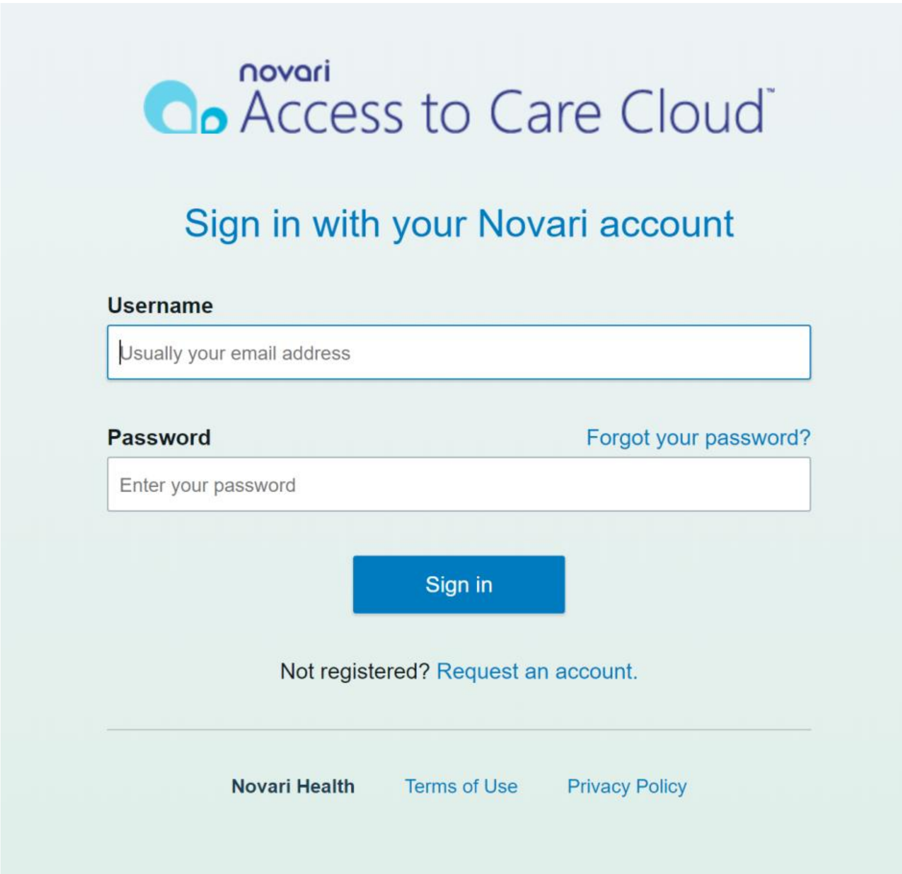
Queue – Each item on your dashboard is referred to as a Queue; when opened it displays those referrals in list view

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.

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



location.

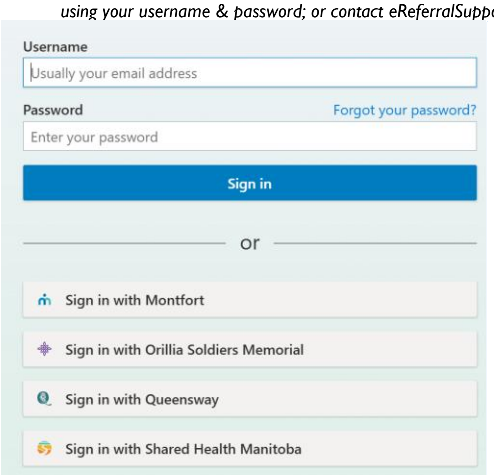
NOTE: *If you attempt to login 3 or more times the application will automatically lock your account for approx. 10 minutes. Once that time has passed you can try again to login, if you are still unable to login contact eReferral Support for assistance or Click Forgot your password on the login screen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



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

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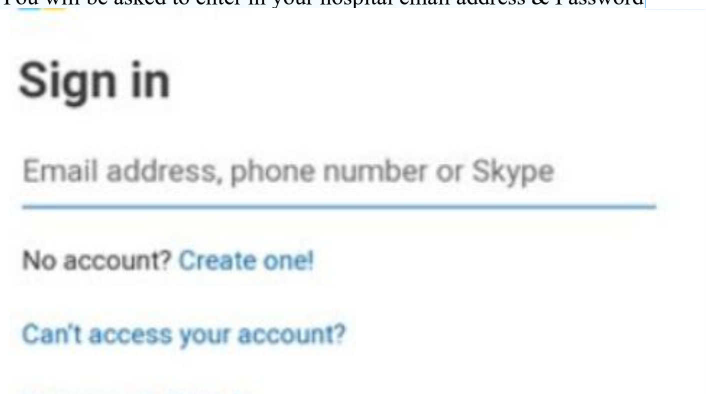
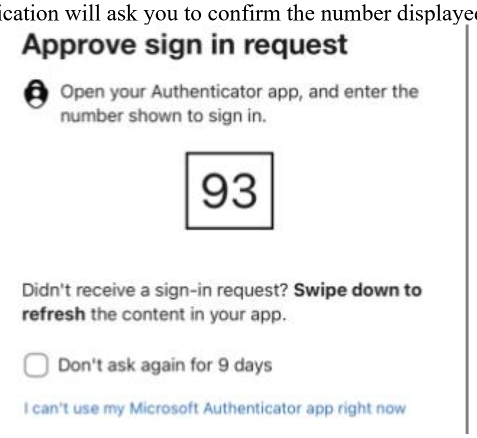
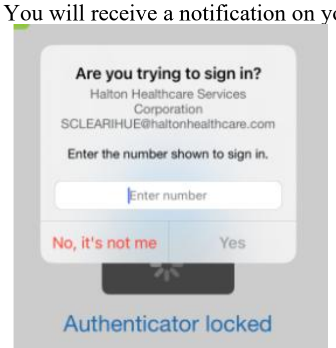


4. The application will ask you to confirm the number displayed on your authenticator app



5. You will receive a notification on your authenticator app



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

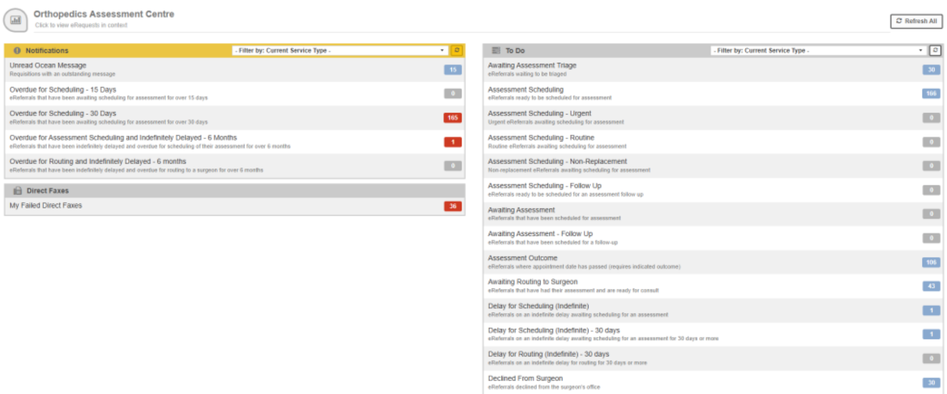
Important Tips

- 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



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 (RJAC) 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

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 *and are* 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.

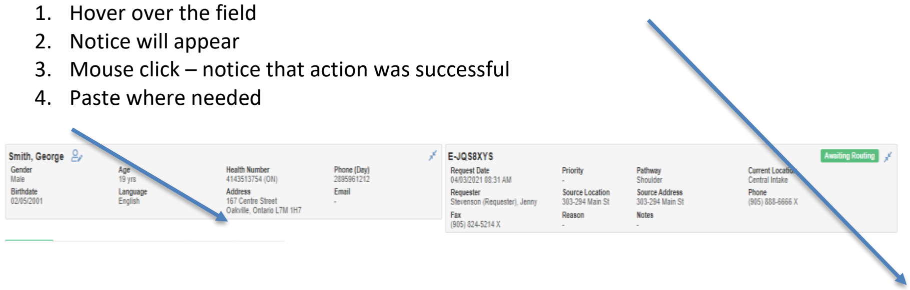
eReferral – eReferrals are entered directly by a Requester who has access to use the application or submitted through Ocean integration. These users complete the electronic form instead of faxing the paper copy. In these cases there may be fewer attachments and no pdf copy of the referral form.

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



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

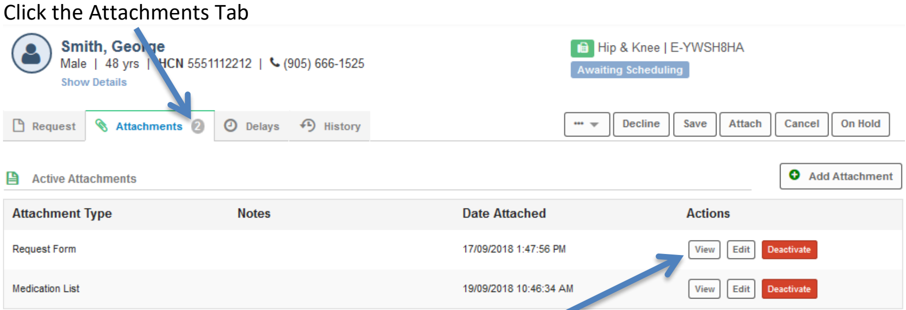
Scheduling – This section is used to enter the surgeon consultation appointment.

Attachments

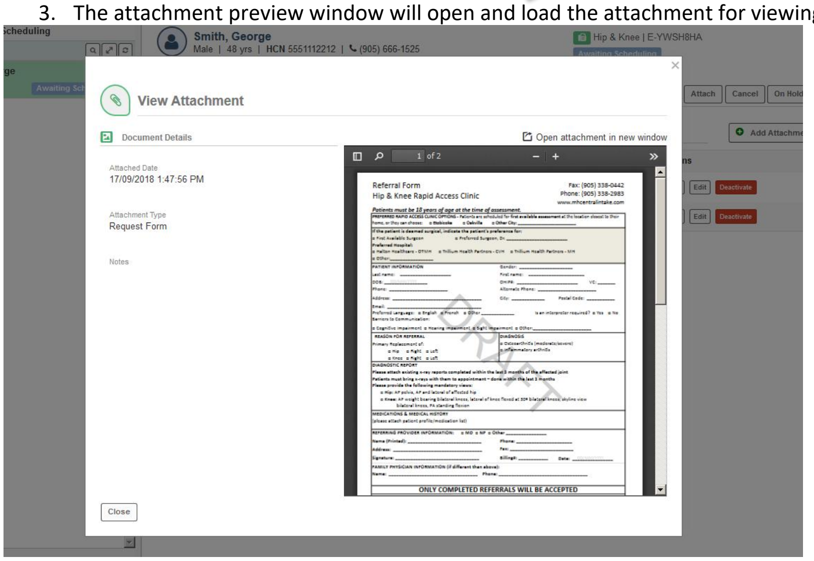
Most referrals that are sent through the application will contain attachments, whether it is an X-ray report, blood work, or the original referral. The attachments tab will display a number telling you how many (if any) attachments are included with this referral.

To view an attachment:

1. Click the Attachments Tab



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



Referral Processing

Awaiting Assessment Triage

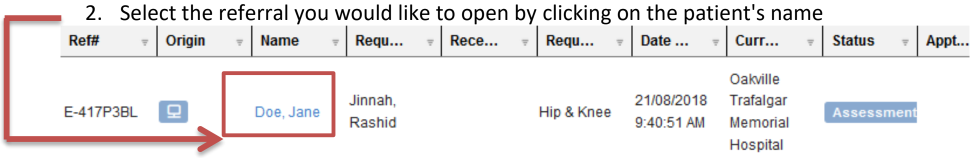
The awaiting assessment triage queue is where all referrals that have been routed by Central Intake to the Rapid Access Clinic will appear. This queue is for the purpose of reviewing incoming referrals and deciding if you can accept the referral, book the patient and assign a priority (routine or urgent). 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?

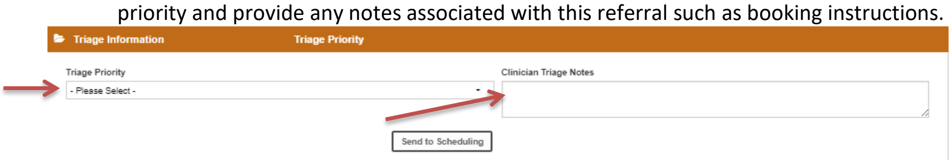
DECLINE	CANCEL
A referral is declined when there is an ACTION that is needed by Central Intake	**The cancel action will place the referral into a state of completed. You would cancel when no RAC consult was completed. The program can opt to send an efax to GP communicating the reason for the referral 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



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.

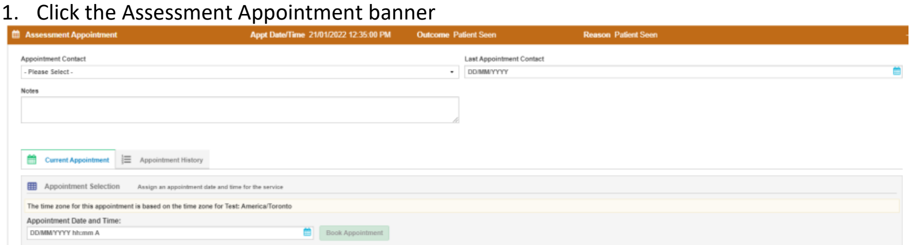


4. Select the priority by clicking the field and select the priority that applies. If needed enter any notes into the Clinician Triage Notes text box. Once you are done Click Send to Scheduling, this will move the referral into the Assessment Scheduling queue.

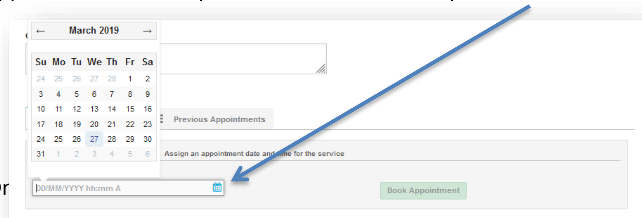
Assessment Scheduling

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:

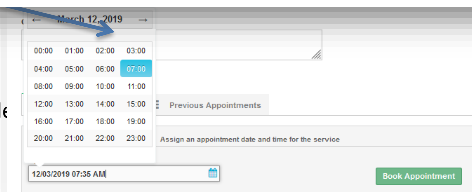
1. Click the Assessment Appointment banner



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



Or ... to select a time by the hour.



Once you sele... minute intervals

...AL TIMES TO BE ABLE TO BOOK THE APPOINTMENT**

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**.

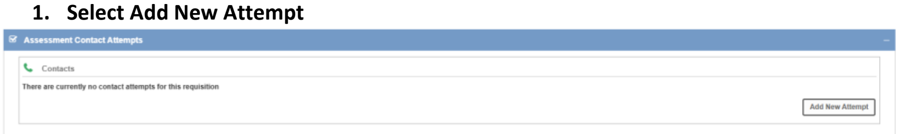
Appointment Contact Tracking

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.

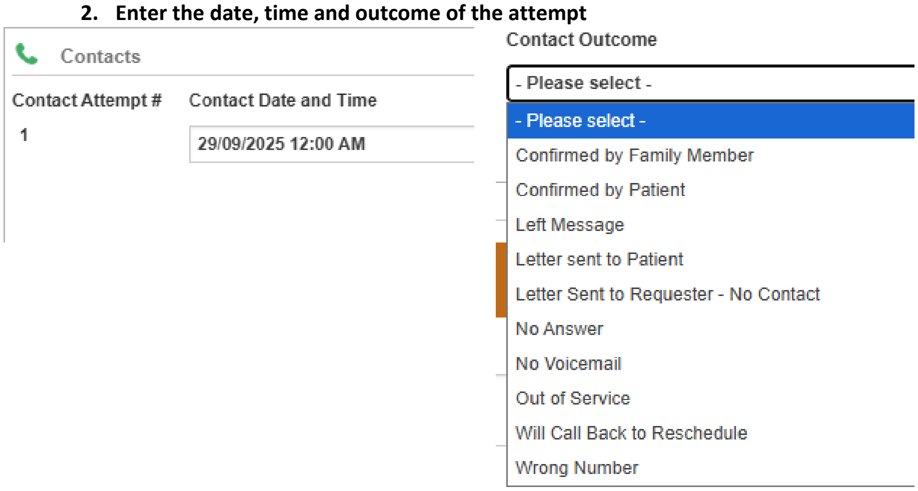
NOTE: *Please ensure you also document in the notes section, your actual call attempts as these fields don't track updates. The attempts won't be added to the referral history.*

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.*

Commented [SC8]: Insert screen shots and new steps

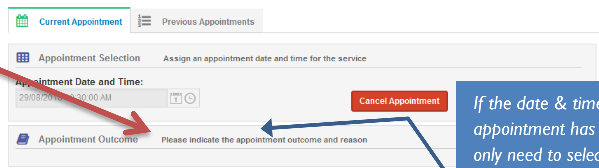
Rescheduling & Cancelling Appointment

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#)

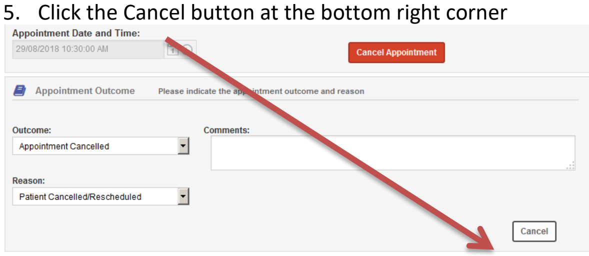
2. Once the referral opens, scroll to the Assessment Appointment banner, click the **RED** Cancel



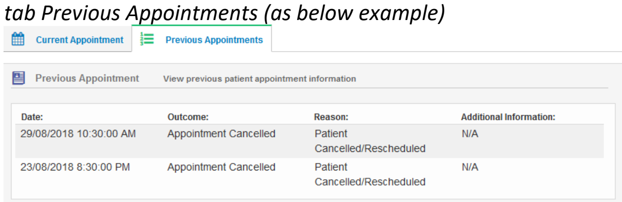
Appointment button

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.

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



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



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:

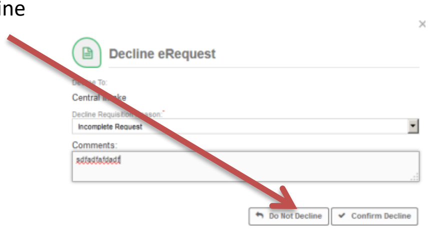
1. Open the referral you want to Decline (referrals only in states of Awaiting Assessment Triage or Assessment Scheduling allow for you to decline)

2. Click the Decline button

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



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:

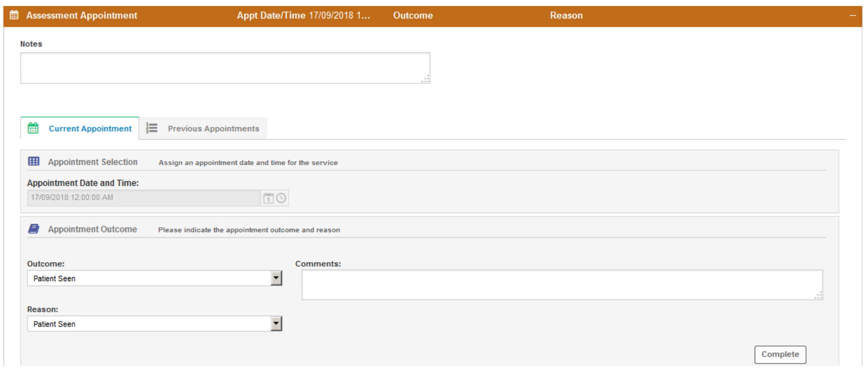
- Patient Seen
- Did not attend.
- Appointment Cancelled

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:

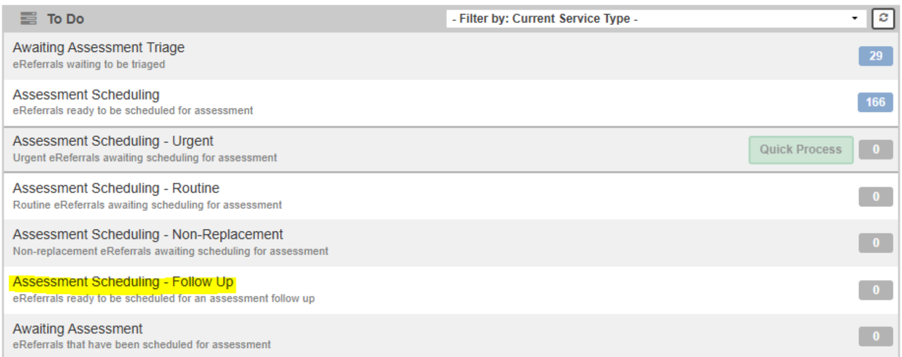
1. Referral state must be in **Assessment Outcome** *(if a referral was already completed you will not be able to add any follow up appointments)*
2. Select from the outcome drop down – Patient Seen
3. Select from the reason drop down – Follow-up with APP
4. Click the Follow-up button

The 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

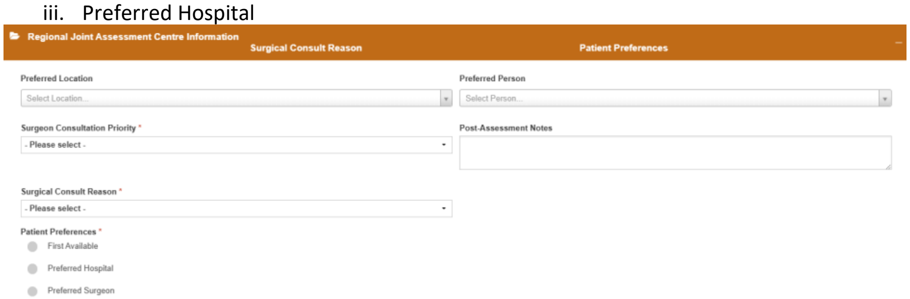
The



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



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

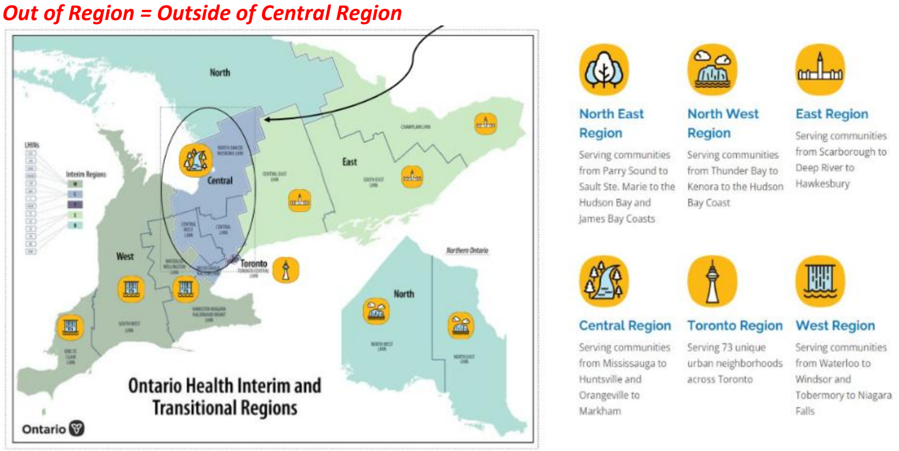
Dr. Clements - Clements, Nigel	71 King Street, Mississauga, L5B 4A2	No Priority: 846 Days	Route
Dr. Deakon - Deakon, Tim	250 Wyecroft Road, Oakville, L5K 3T7		Route
V2 - Dr. Clements - Clements, Nigel	308-190 Sherway Drive, Etobicoke, M9C 5N2		Route
V2 - Dr. Deakon - Deakon, Tim	3001 Hospital Gate, Oakville, L6M 0L8		Route

Out of Region Surgeons

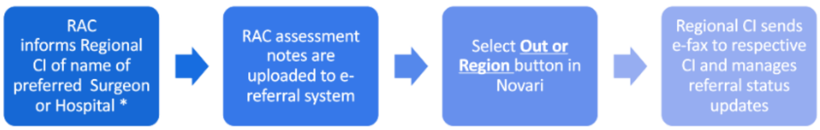
For patients requesting to be seen by a surgeon that practices outside OH Central referrals are managed by the Central Region Orthopedic Referral Hub.

(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.***

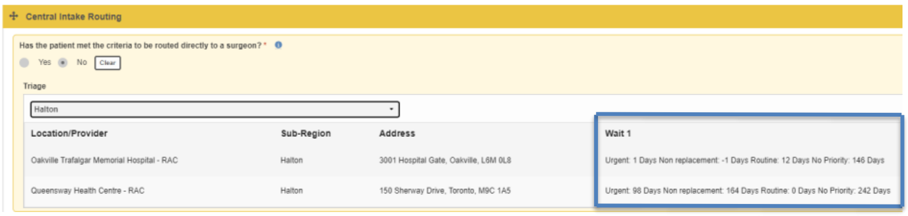
Central Intake will obtain confirmation of receipt. Once the receipt of the referral has been received, the ownership transitions to the surgeon's respective Central Intake.

*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 – Wait1display

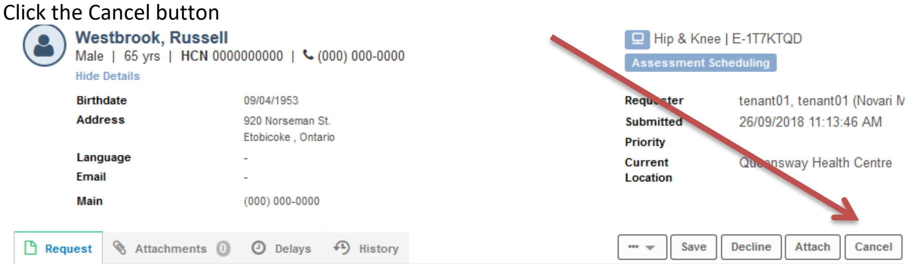
After more than 10+ referrals have been completed at the provider/service, the application will start to display the wait time for Urgent/Non Replacement/Routing/No Priority referrals. This applies for both referrals waiting to be routed to a Rapid access clinic or for Surgeon consultation.



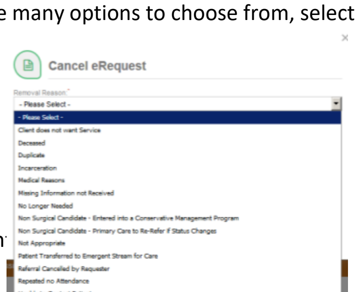
Cancelling a Referral

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

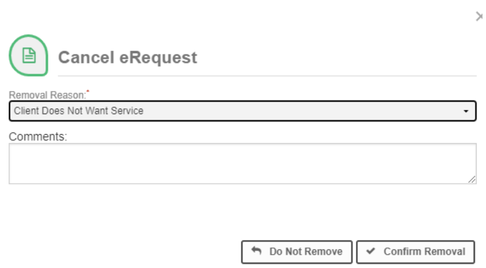
1. Open the referral you would like to cancel – ***if the referral you want to cancel has an appointment already inputted you MUST cancel the appointment first and then cancel the referral.***
2. Click the Cancel button



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



4. Click Con

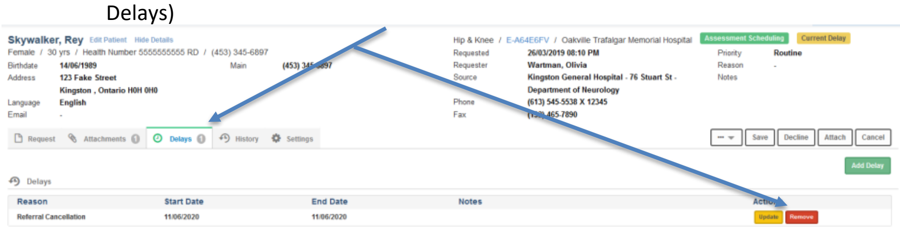


The referral will reload and show the state is now Cancelled.
If you need to reopen this referral in future
for example: Referral was cancelled as you were unable to contact the patient for an appointment after several attempts and the patient has now called back and wants to schedule)

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

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)



The referral is now ready to be processed.

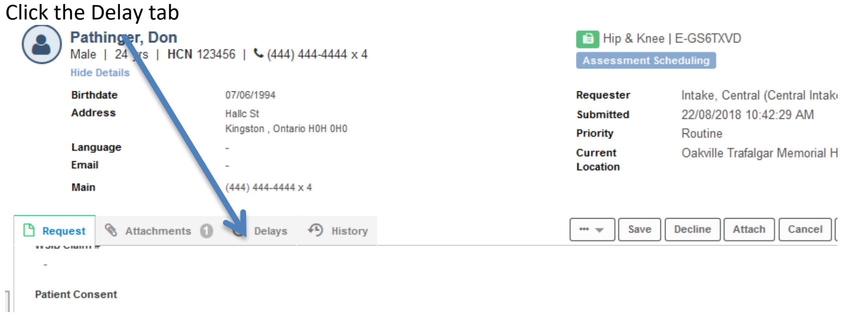
Additional Features

Delays

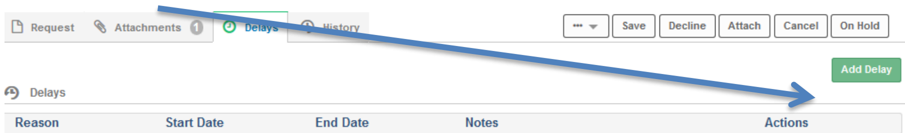
This is to be used when the patient is unavailable for an appointment due to patient-related concerns/reasons. When a referral is placed on a Delay the application will subtract that timeframe from the total wait time and you will not be able to schedule any appointments during the indicated delay timeframe. 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?

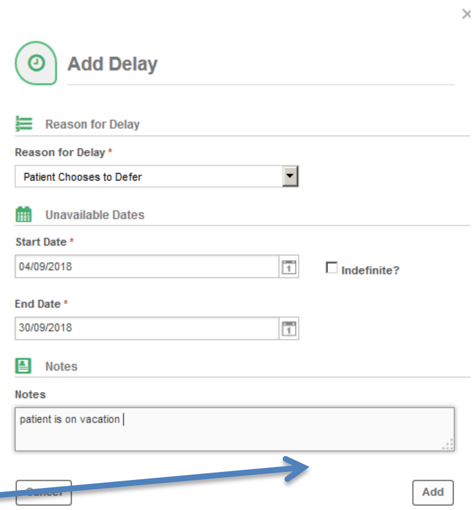
1. Click the Delay tab



2. Click Add Delay



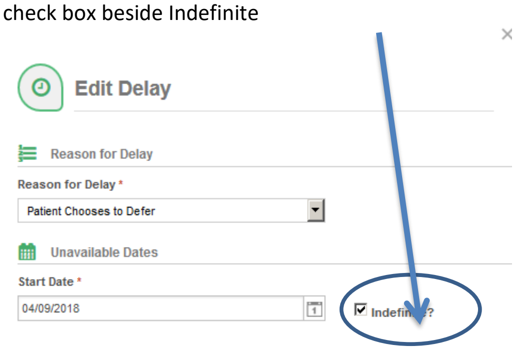
3. Select from the pop-up window:
    a. Reason for Delay
    b. Unavailable Dates – Start Date & End Date
    c. Provide any notes in the Notes section



4. Click Add to Save

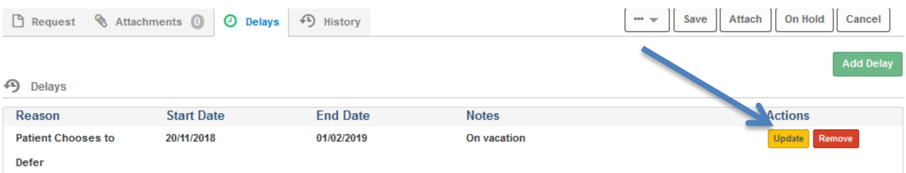
If the delay requires a longer timeframe, you have the option to update the delay to extend the period. Also, you can set the delay to indefinite, which is appropriate for instances when a patient may not know when they will be able to schedule an appointment (i.e. patient gets admitted to hospital).

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



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.



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

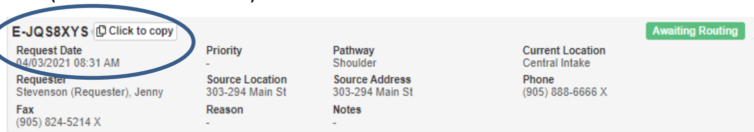
Some fields are setup as a click & copy:

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

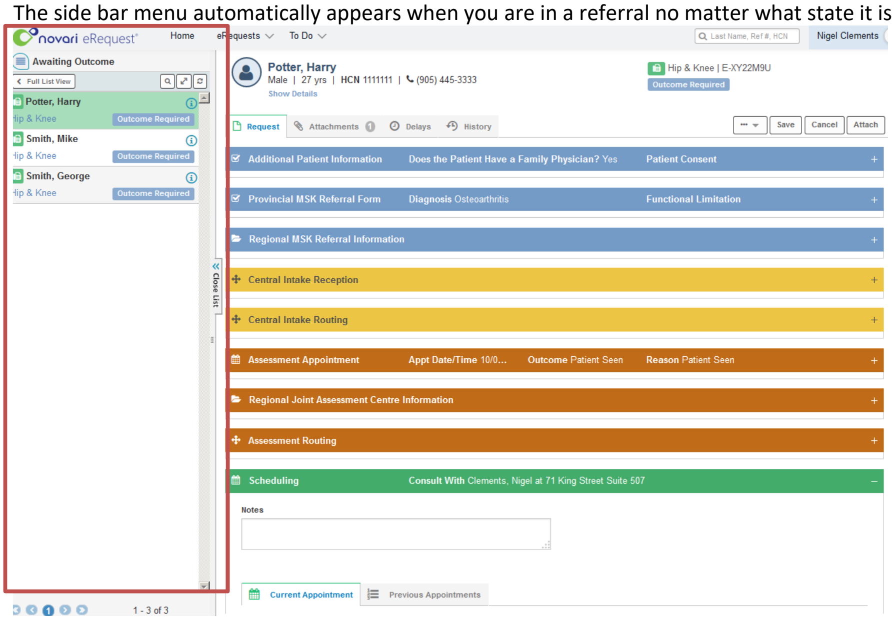


eReferral Reference Number

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**

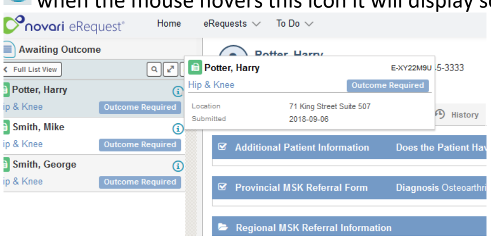
Side Bar Menu

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



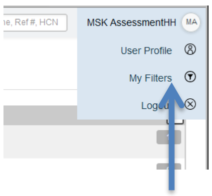
This can be closed and re-opened by clicking the double arrow on the side of the menu

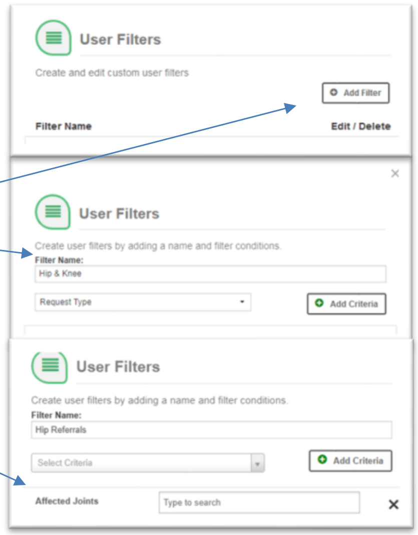
Filters - Permanent

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)





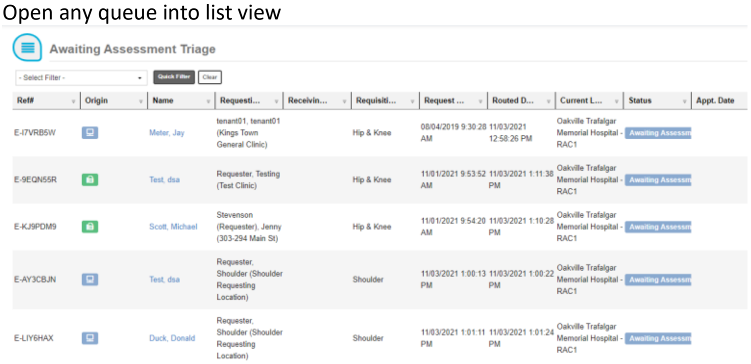
2. Click My Filters, a pop-up box will appear
3. Click **Add Filter**
4. Then create a name for your filter such as **Hip & Knee**
5. Click **Select Criteria** and choose **Request Type** from the drop down menu, then click **Add Criteria**
6. A text box will appear below, click in the field and type **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

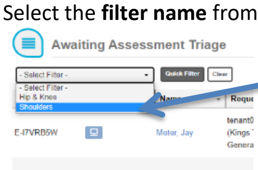
- Follow permanent filter steps
- Skip step 4
- Single use filter

How to use your filters:

1. Open any queue into list view



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



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

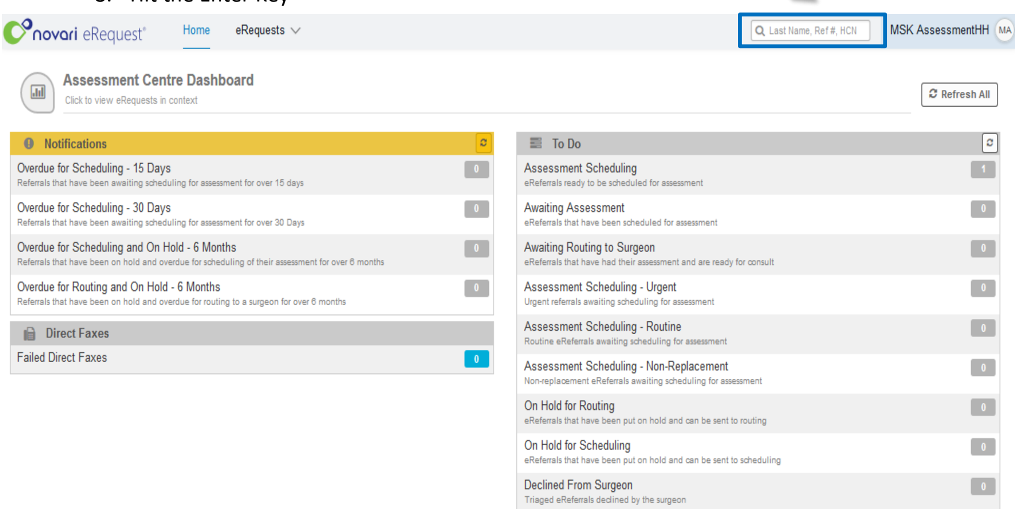
Note: Filters will stay on as long as you are on the same list of referrals. Once you open a different list or go back to the home page the filter will automatically turn off.

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

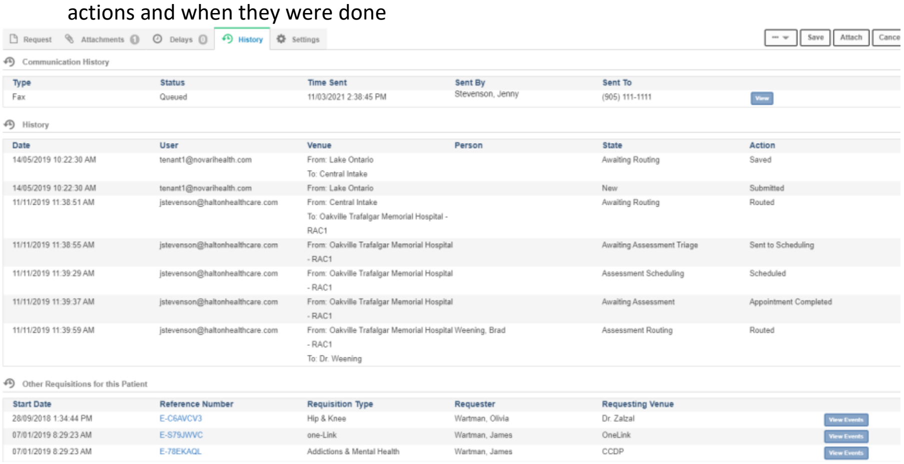


4. You will either receive a pop up window displaying all matches OR the referral will automatically open if there is only 1 match in the database

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



Communication History

Type	Status	Time Sent	Sent By	Sent To	
Fax	Queued	11/03/2021 2:38:45 PM	Stevenson, Jenny	(905) 111-1111	View

History

Date	User	Venue	Person	State	Action
14/05/2019 10:22:30 AM	tenant1@novarihealth.com	From: Lake Ontario To: Central Intake		Awaiting Routing	Saved
14/05/2019 10:22:30 AM	tenant1@novarihealth.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 - RAC1 To: Dr. Weening	Weening, Brad	Assessment Routing	Routed

Other Requisitions for this Patient

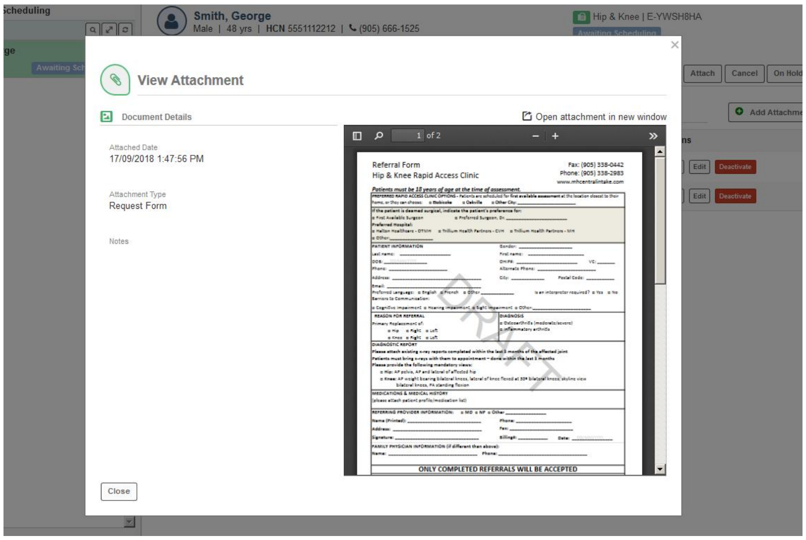
Start Date	Reference Number	Requisition Type	Requester	Requesting Venue	
28/09/2018 1:34:44 PM	E-C6AVCV3	Hip & Knee	Wartman, Olivia	Dr. Zalzal	View Events
07/01/2019 8:29:23 AM	E-S79JWVC	one-Link	Wartman, James	OneLink	View Events
07/01/2019 8:29:23 AM	E-78EKAQL	Addictions & Mental Health	Wartman, James	CCDP	View Events

- **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.

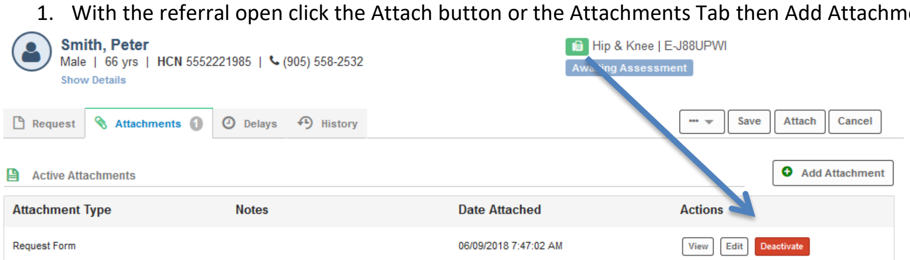
Commented [CT11]: Mention status of fax as this is where sometimes people spot a fax did not go through?

Attachments

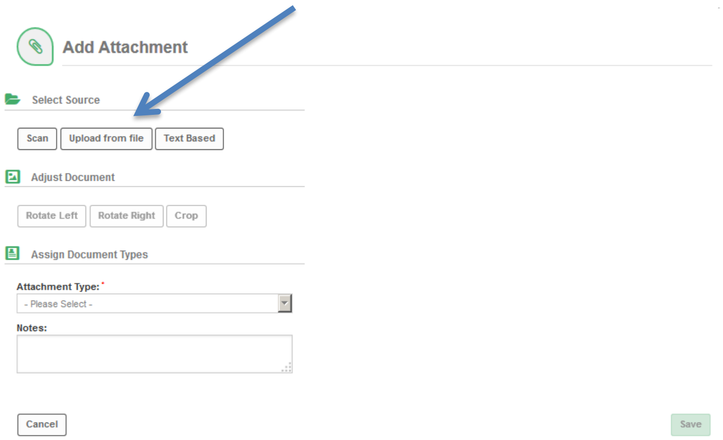


You can also attach supporting documents that may be required (before you do this you must ensure the documents are in pdf format). Follow the below steps on how to attach:

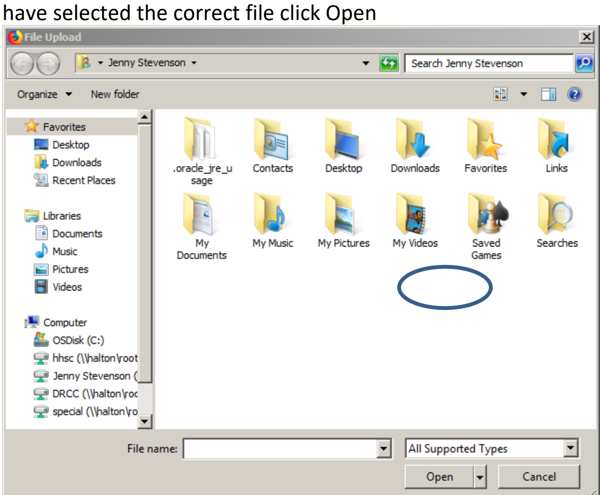
1. With the referral open click the Attach button or the Attachments Tab then Add Attachment



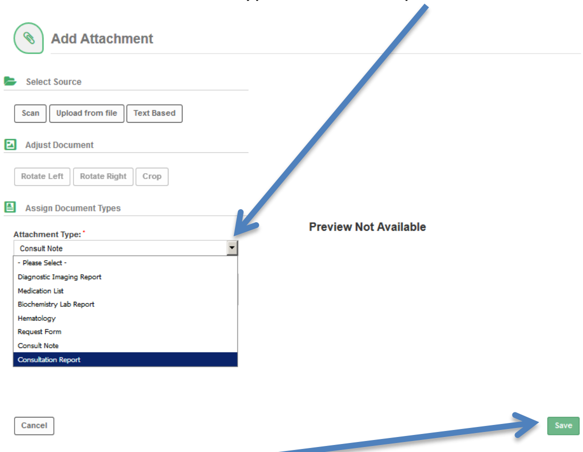
2. A pop-up window will appear
    - Select Source - Upload from file



3. The application will then ask you to select it from where you saved it on your computer, once you have selected the correct file click Open



4. Then select Attachment Type from the drop down menu

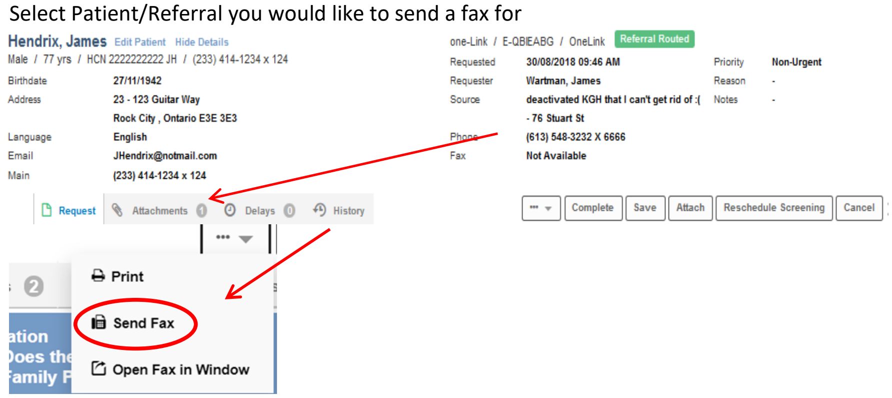


5. Click Save, then repeat these step if you need to attach another document

eFax's & Templates

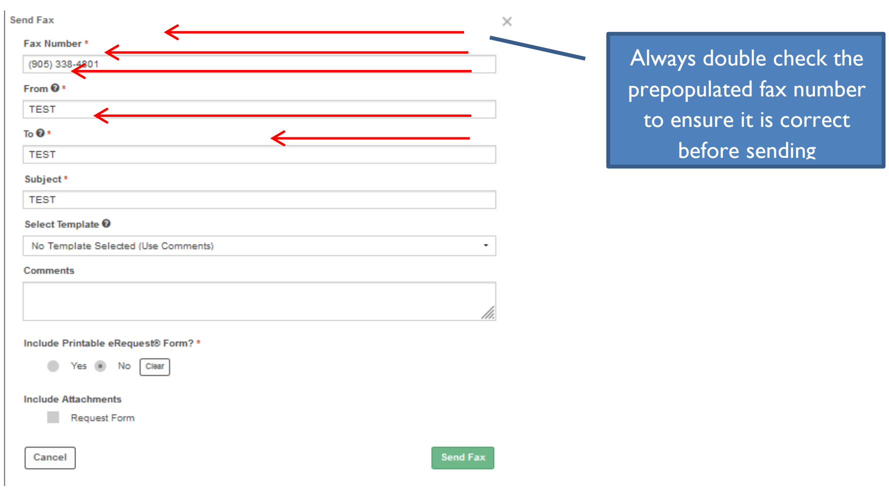
The application gives you the ability to send outgoing faxes directly. This can be used at any point within a referral and allows you to send customized template a copy of the referral and attachments.

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

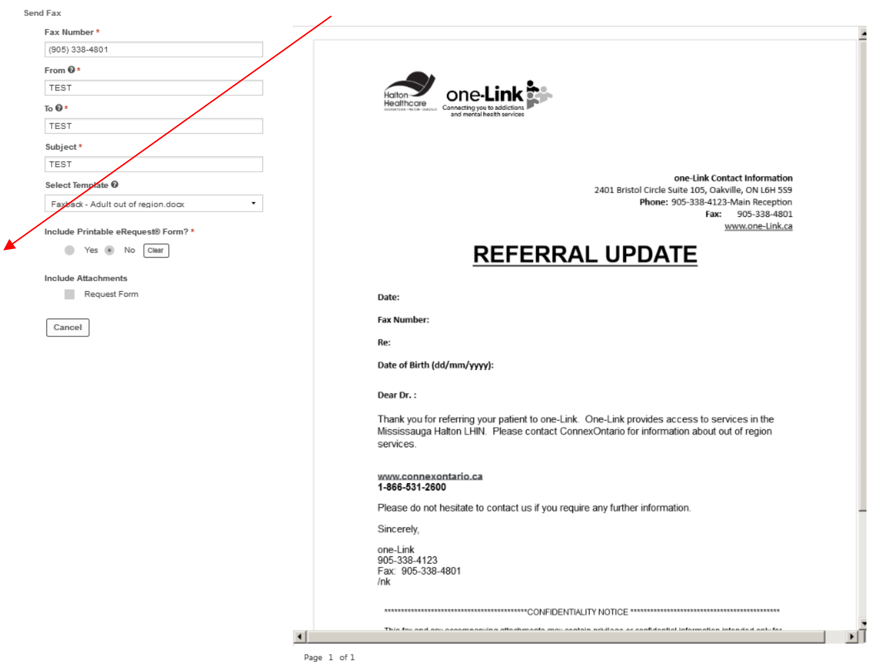


2.

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



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



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 **<u>Include Attachments</u>**
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.

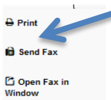
Note: The Failed Direct Faxes queue on the dashboard is to notify its users that a fax was unsuccessful. When populated you can see what faxes have failed and can re-send from this section if needed

Downloading & Printing

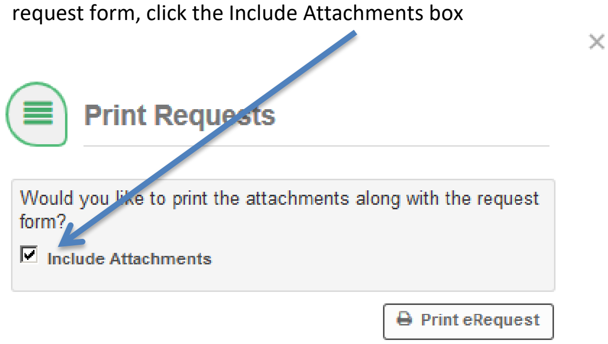
How to save the referral and supporting documents to your EMR

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



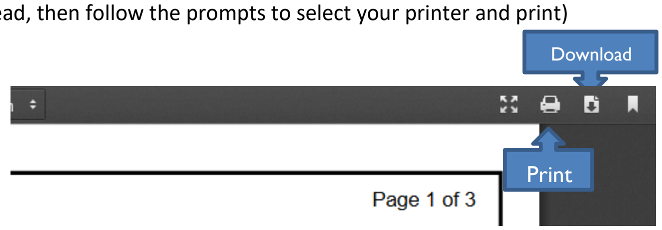
4. A pop-up menu will appear asking if you would like to print the attachment along with the request form, click the Include Attachments box



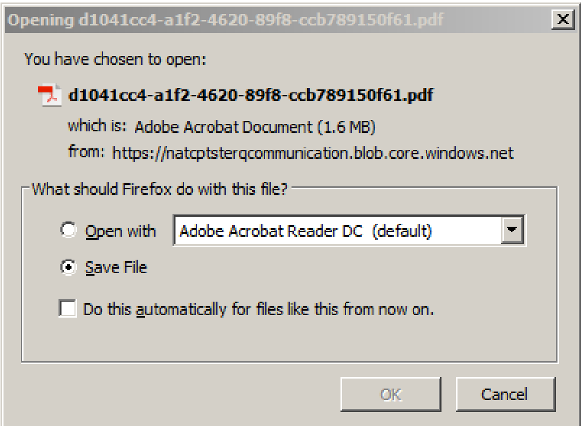
5. Click Print eRequest

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 would 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.

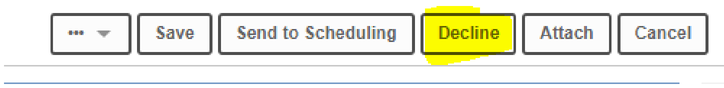
Referral Processing - ATC Hospitals

Novari eRequest

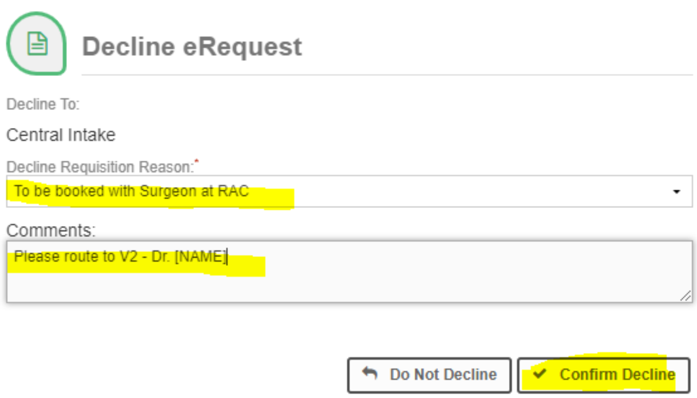
To follow existing workflows for booking patients, the following steps are required to capture the appropriate location.

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

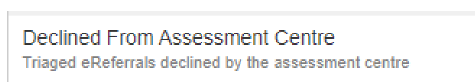
1. Select → Decline



2. Select reason → To be booked with Surgeon at RAC & identify which surgeon to route to (Select → Confirm Decline)



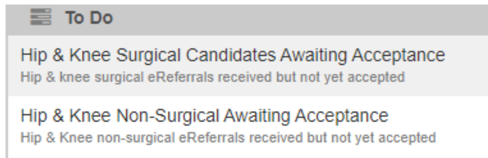
3. Central Intake will obtain referral from queue “Declined from Assessment Centre”



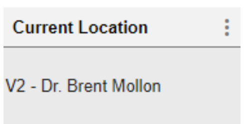
4. Central Intake will re-direct referral to the surgeon identified.

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

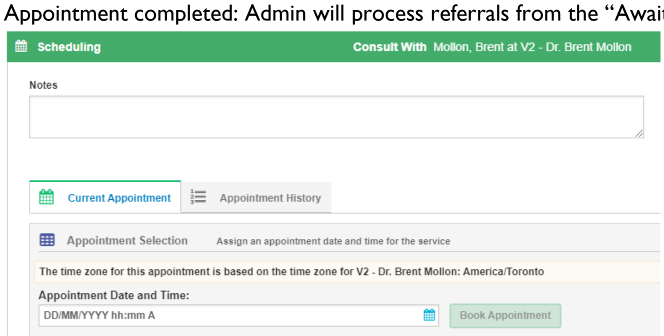


6. The current location will be listed as V2- Surgeon Name

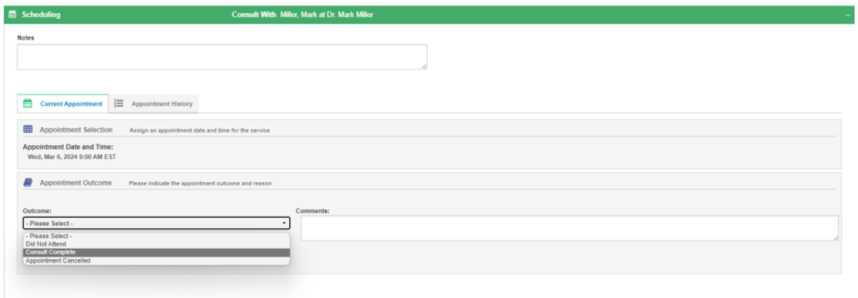


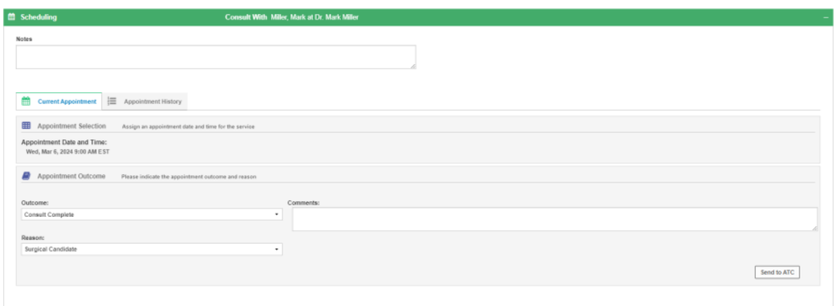
7. RAC Admin will accept referral

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

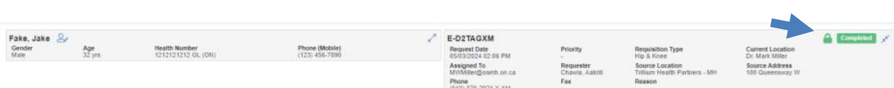


10. Admin to select:
    a. Outcome = Consult complete
    b. Reason = Surgical Candidate
    c. Action = Sent to ATC





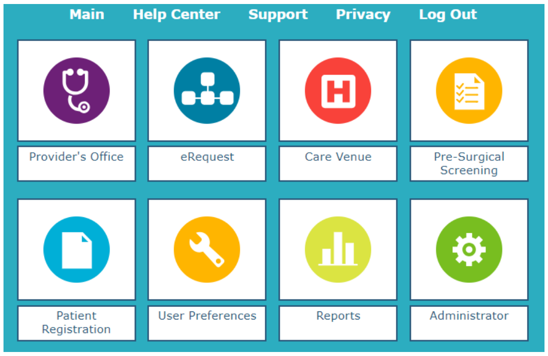
11. Referral state will update to "Completed"

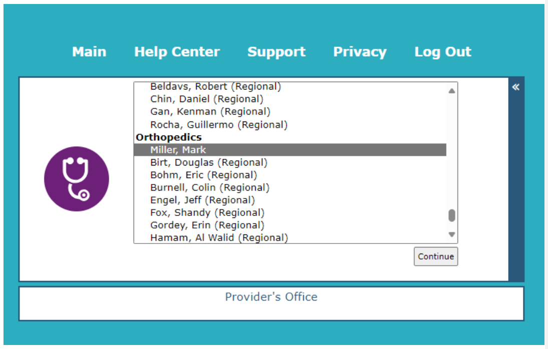


12. All steps in Novari has been completed. Next steps are to be completed in ATC

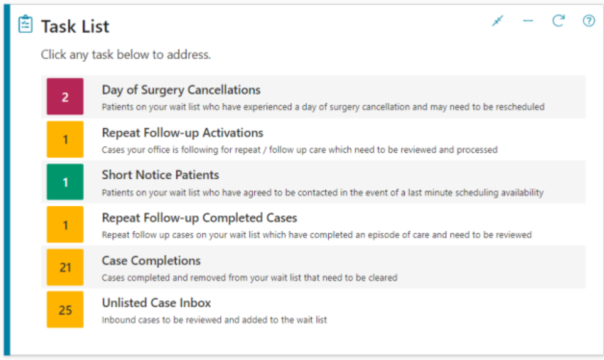
ATC Steps (Orillia ONLY)

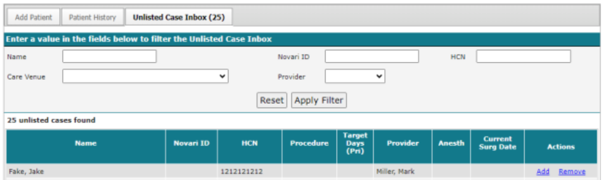
1. Log into ATC
2. From the ATC home screen select Provider's office
3. Select your surgeon from the list and click continue





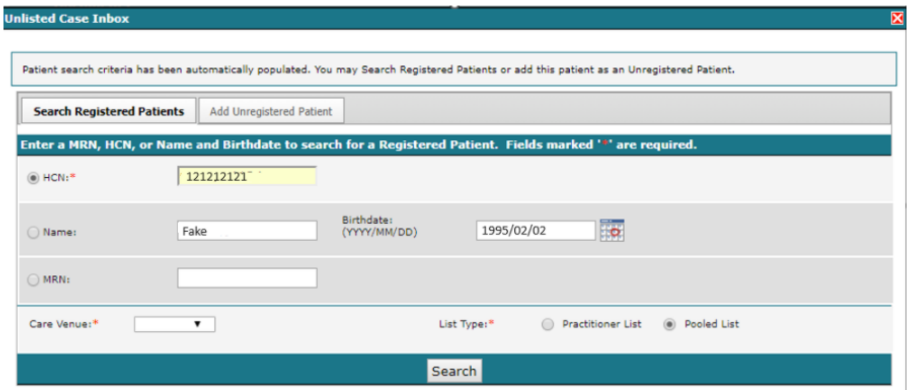
4. Provider's office dashboard → Select "Unlisted case inbox"



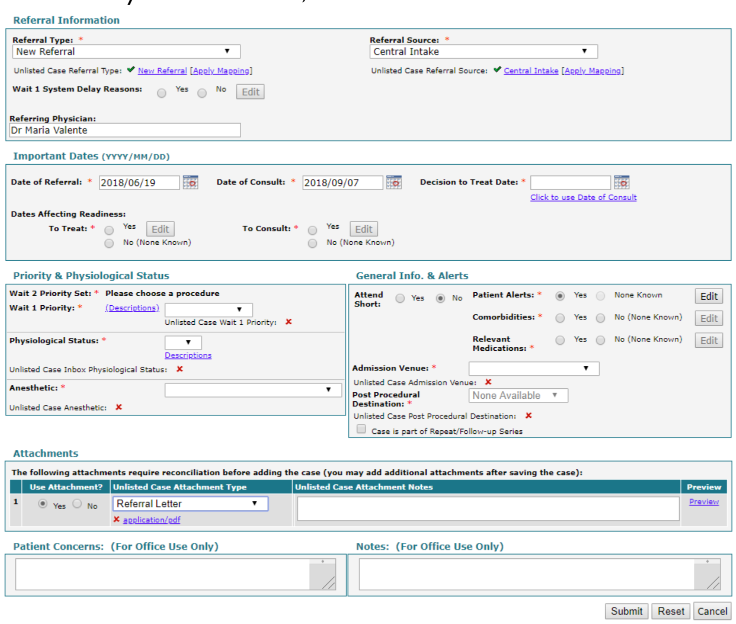


5. From the actions column, click Add for the patient you are adding to the wait list

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



7. You will now fill in the required fields.
   a. 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)
   b. 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



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

The eReferral application is NOT intended to function as a repository for PHI. Please remember to print or copy required referral information as the eReferral solution will not retain information for longer than 6months after the referral has closed


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