



Health Partner Gateway Reference Guide for Health Partners

MODULE 5 Referral Management

Revision Table

Date	Version	Author	Comments
May 2013	1.0	Kimberly Hanson & Colleen Poirier Reviewed by: Darlene Patgunurajah	Reference Guide divided into multiple modules focusing on different areas/functionalities. Updates to include CHRIS 2.2/ HPG 3.0 release enhancements. Module 5– Description of functionalities within the Referral Management area of HPG for e- Referral to Community, LTCH, Complex Care and Rehab

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1. INTRODUCTION

1.1 Background & Overview

The Health Partner Gateway (HPG) provides a single solution to securely exchange health information between a CCAC and its partners. It was built to interoperate with longer term e-Health initiatives and to enable Health Partner access to client health information held within CCAC tools and applications such as the Client Health and Related Information System (CHRIS).

HPG is deployed with CHRIS and serves as the Health Partner interface for Service Offers, Orders, Billing/Invoicing, and Document Sharing. Since the application was made available in 2007, it has evolved into a robust, integrated application that enables CCACs and Health Partners to communicate and share information in ways that go far beyond the initial applications of one way notifications, service offer responses and equipment/supply orders between CCAC and Services Providers/Vendors.

The HPG is now integrated with document management systems and more intricately with CHRIS to enable more sophisticated methods of information sharing, including the access of client information through the Community Health Portal (CHP) and through Referral Management.

1.2 Overview of Functionality

The HPG is one application, featuring a main area that links to each of the 14 CCACs. Each CCAC has its own secure area for their internal or external partners where information is exchanged.

There are two ways to access HPG:

- Internally - from within the CCAC network, logging in as a CCAC user/CCAC Admin user using Active Directory credentials
- Externally - from outside the CCAC network – accessible via internet – logging in as a Health Partner user.

This reference guide version update will outline the functionalities within HPG for the **External HPG User** – i.e. health partner users (providers, community agencies, complex care/rehab facilities and LTCHs, etc.) that access HPG from outside the CCAC network.

A user's account type, team membership and role assignments determine what that user is able to see and do within HPG.

Summary of functional principles in HPG:

- All communication in HPG occurs between teams, as opposed to between individual users
- A team is always owned by a single CCAC

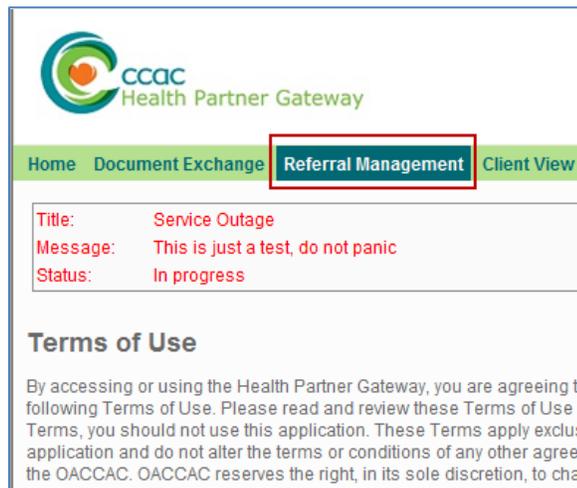
- A single user can belong to many teams
- A team can have members (users) from other CCACs
- A user can either be a person or a system (such as CHRIS)
- Teams are either designated as a CCAC Team or a Health Partner Team
- Only users set up as CCAC users can be members of CCAC (internal) Teams
- Only users that are set up as Health Partner users can be members of Health Partner Organization (external) Teams

1.3 Referral Management

The Referral Management tab in HPG enables Health Partners to manage electronic referrals (e-referrals) sent from a CCAC user in CHRIS. Referral types that are managed in HPG Referral Management include:

- e-Referral to Long Term Care (LTCH)
- e-Referral to Complex Care Hospital
- e-Referral to Rehab Hospital
- e-Referral to Community Support Service Agencies

Health Partners access e-Referrals in HPG Referral Management:



This allows the Health Partner user to:

- Search for Referrals
- View Waitlist
- View Notification Logs
- View Referral Details
 - Client Information
 - Referral Notification Log
- View Referral Documents
- Respond and update referral statuses

1.4 Module 5 Layout

This document is intended for **HPG Health Partners** that have been assigned roles providing them access to the **Referral Management** area of HPG. This document provides a high level overview on the following areas in HPG:

- Section 2: Referral Status
- Section 3: Referral Search
- Section 4: Referral Details
- Section 6: Referral Documents

Three sub-modules are available by referral type. Each sub-module describes detailed processes on responding to referrals in Referral Management and email notifications and updates:

- Module 5.1: Managing Referrals for LTCH Health Partners
- Module 5.2: Managing Referrals for Complex Care and Rehab Facilities
- Module 5.3: Managing Referrals for Community Support Service Agencies

Other modules available:

- Module 1: Introduction to HPG (*available March 2013*)
- Module 2: Document Exchange (*available March 2013*)
- Module 3: Offer Management (*available March 2013*)
- Module 4: Community Health Portal (CHP) (*available March 2013*)
- Module 6: Self-User Management (*available May 2013*)

1.4.1 Abbreviations used in this document

LTCH – Long Term Care Home

SSI – Short Stay Interim

SSCC – Short Stay Convalescent Care

CC – Complex Care

HPG – Health Partner Gateway

DMS – Document Management System

2. REFERRAL STATUS

There are four possible status categories for e-Referrals that are managed in HPG Referral Management:

- Awaiting Response
- Admitted
- Closed
- Waitlisted

Some statuses may not apply to all referral/service and/or bed types (e.g. the Admitted status does not apply to e-Referral to LTCH – Long Stay bed types).

2.1 Awaiting Response

Awaiting Response is the referral status assigned to any new referral created in CHRIS. This status indicates to the Health Partner that a response is required on the referral; (either from the Health Partner or from the CCAC when 'Additional Information is requested').

2.1.1 LTCH Referrals

When a LTCH receives a new referral, the status of that referral is 'Awaiting Response (CCAC Creates Referral)'. Other status options that automatically assign the Awaiting Response status include:

- When the LTCH selects a Tier 1 refusal, the referral status is updated to 'Awaiting Response' because the CCAC must take the action to confirm the Tier 1 refusal.
- When the LTCH selects 'Requests Additional Information

2.1.2 Complex Care and Rehab Referrals

Complex Care and Rehab Referrals are returned to this state prior to the client's admission to a bed and each time that a CCAC provides updated information about the client's referral. Because the update might affect the hospital's ability to care for the client, they are forced to respond again with their acceptance or refusal of the client's referral.

2.1.3 Community Support Service Referrals

Means that a new/updated referral has been sent by the CCAC and the CSSA needs to respond to the CCAC.

2.2 Admitted

An admitted status indicates that the client has started the program, has been admitted to a Complex Care/Rehab facility or Short Stay bed.

2.2.1 LTCH Referrals

This status pertains only to the **Short Stay Interim** and **Short Stay Convalescent Care** referrals.

Once a client has been admitted and is receiving treatment/care in a LTCH bed, the referral status of the client remains in 'Admitted Status' until the client is discharged from the LTCH.

2.2.2 Complex Care and Rehab Referrals

Means that the client has been admitted to a complex care bed in the selected Facility, and is receiving care/treatment. Selecting Admitted status provides the facility with a list of all the CCAC referred clients who are currently in beds in the selected Facility.

2.2.3 Community Support Service Referrals

A status of Admitted means that the client will be starting the community program or has been accepted to move in to the residence. A CCAC may set up some community referral types to automatically 'Close Upon Admission'. This means that the status will automatically change from Admitted to Close.

2.3 Closed

The length of time that Closed referrals remain visible in HPG is configured for each CCAC. The CCAC needs to determine with their privacy officer what an appropriate length of time is for this function. This status may indicate that the client is admitted to the facility/residence or has started the community program.

2.3.1 LTCH Referrals

Closed Status occurs as a result of:

- Admitting a client to LTCH for LTC referral (long stay)
- Discharging a client from LTCH for SSI or SSCC
- LTCH withdraw referral approval (Tier 2 reject)
- CCAC confirms Tier 1 refusal

The Status on the referral Search Results shows 'Closed' along with the event that resulted in the closed status beside it in brackets

2.3.2 Complex Care and Rehab Referrals

A status of Closed for Complex Care and Rehab Referrals means that the client no longer requires care by the hospital. This can be one of two reasons: the client withdrew their application prior to admission to a bed or the client was admitted for care and has been discharged from the complex care bed. Selecting Closed status gives the hospital a list of all recent discharges and withdrawn referrals.

2.3.3 Community Support Service Referrals

Means that the client no longer requires service related to the referral. This can be one of three reasons:

- the client withdrew their application prior to admission for service
- the client was accepted/admitted to the service
- the client was offered service and refused

2.4 Waitlisted

A status of waitlisted indicates that the e-referral has been waitlisted due to availability, staffing, etc. Waitlisted e-referrals may be viewed in the **Waitlist** tab.

2.4.1 LTCH Referrals

The referral status will remain in 'Waitlisted' status as the CCAC progresses through the process of bed matching and bed offer (for Long Stay referrals) with each update displaying in brackets in the Status column.

2.4.2 Complex Care and Rehab Referrals

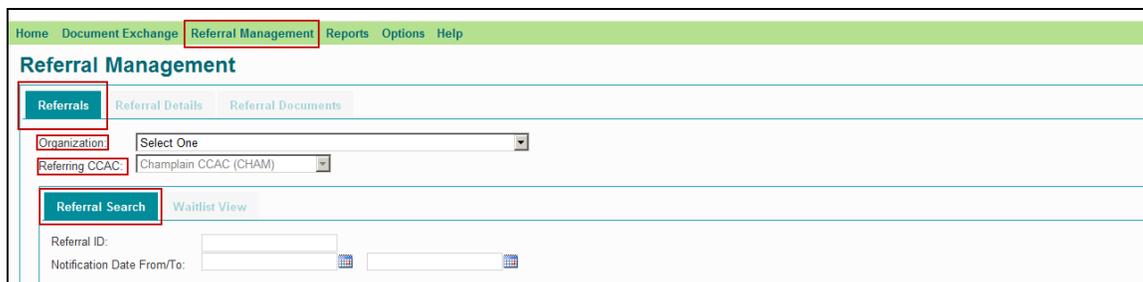
Indicates that the hospital has accepted the client's referral, but the client has not yet been admitted for service. They are waiting for a vacant bed

2.4.3 Community Support Service Referrals

Indicates that the agency has accepted the referral, but the client has not yet been admitted for service.

3. REFERRAL SEARCH

The **Referrals** tab is the default when you select **Referral Management** in HPG. This page allows you to search for referrals sent to your Organization team, with a further option to filter by Referring CCAC.



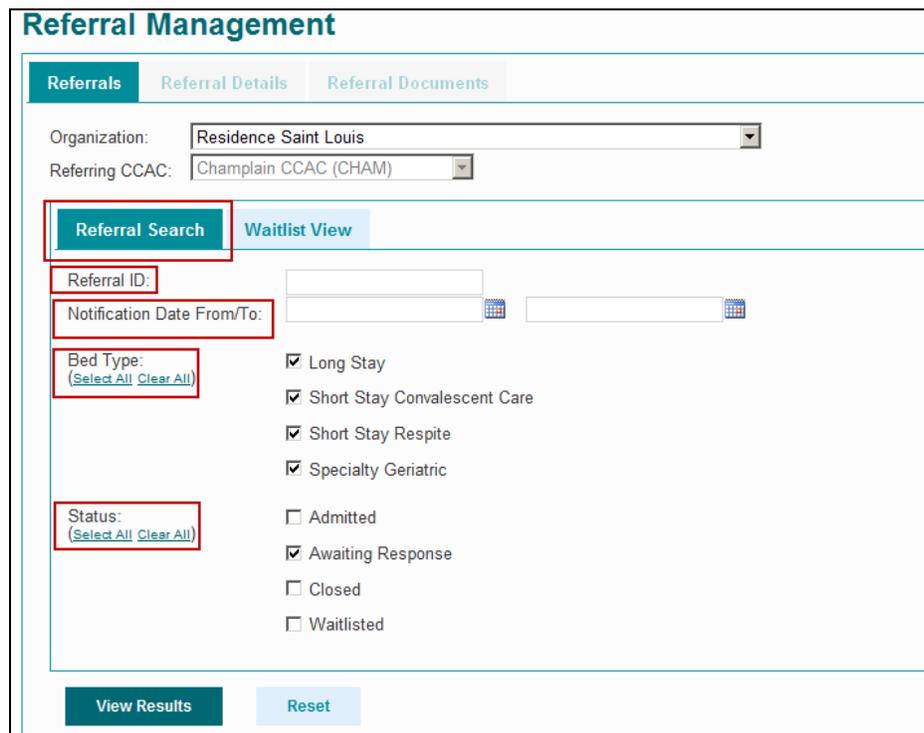

Organization and Referring CCAC Drop Down(s) may appear greyed out (no other options) if the HPG user is assigned to one Organization and/or CCAC.

3.1 Search Criteria

When the Organization and Referring CCAC is selected from the drop down options, HPG displays the **Referral Search** tab to further refine your search results.

Available criteria include:

- Referral ID
- Notification Date From/To
- Bed Type or Service Type
- Status



The screenshot shows the 'Referral Management' interface with the following elements:

- Organization:** Residence Saint Louis
- Referring CCAC:** Champlain CCAC (CHAM)
- Referral Search** (highlighted in red) and **Waitlist View** tabs.
- Referral ID:** (highlighted in red)
- Notification Date From/To:** (highlighted in red)
- Bed Type:** (highlighted in red) with options:
 - Long Stay
 - Short Stay Convalescent Care
 - Short Stay Respite
 - Specialty Geriatric
- Status:** (highlighted in red) with options:
 - Admitted
 - Awaiting Response
 - Closed
 - Waitlisted
- View Results** and **Reset** buttons.

Referral Search for LTCH Referral

Referral Management

Referrals
Referral Details
Referral Documents

Organization:

Referring CCAC:

Referral Search
Waitlist View

Referral ID:

Notification Date From/To:

Service Type: [\(Select All\)](#) [\(Clear All\)](#)

Adult Day Program
 Home Maintenance & Repair
 Supportive Housing
 Transportation - Accessible
 Transportation - Disabled Parking Permit

Admitted
 Awaiting Response
 Closed
 Waitlisted

Status: [\(Select All\)](#) [\(Clear All\)](#)

Referral Search for Community Referrals

To search for referrals:

1. Set the search criteria on the **Referral Search** page according to the table below.
2. Select View Results to see a list of referrals that match the refined criteria.

Referral Search Criteria and Descriptions:

Criteria	Description/Comments
a) <i>Referral ID</i>	System generated identifier for the referral. If it is known, it can be entered here to find the specific referral
b) <i>Notification Date From/To</i>	DD/MM/YYYY can be entered as an additional filter (calendar tool available) Select the dates to filter and display referrals based on the Notification Date-the date the notice was sent to the Health Partner
c) <i>Bed Type (for LTCH, CC, Rehab referral types)</i>	Multiple Check boxes available for Health Partners that offer more than one bed type.(Any or all can be selected)

	<p>Check the Bed Type(s) that you wish to display in the Search Results</p> <p>(Select All, Clear All available)</p>
d) <i>Service Type (for Community referral types)</i>	<p>Multiple Check boxes available for Health Partners that offer more than one service type.</p> <p>Check the Service Type(s) that you wish to display in the Search Results</p> <p>(Select All, Clear All available)</p>
e) <i>Status</i>	<p>Refers to the Referral Status, and defaults to 'Awaiting Response'; other choices include Waitlisted, Admitted and Closed</p> <p>Check the Status(s) that you wish to display in the Search Results</p> <p>(Select All, Clear All available)</p>

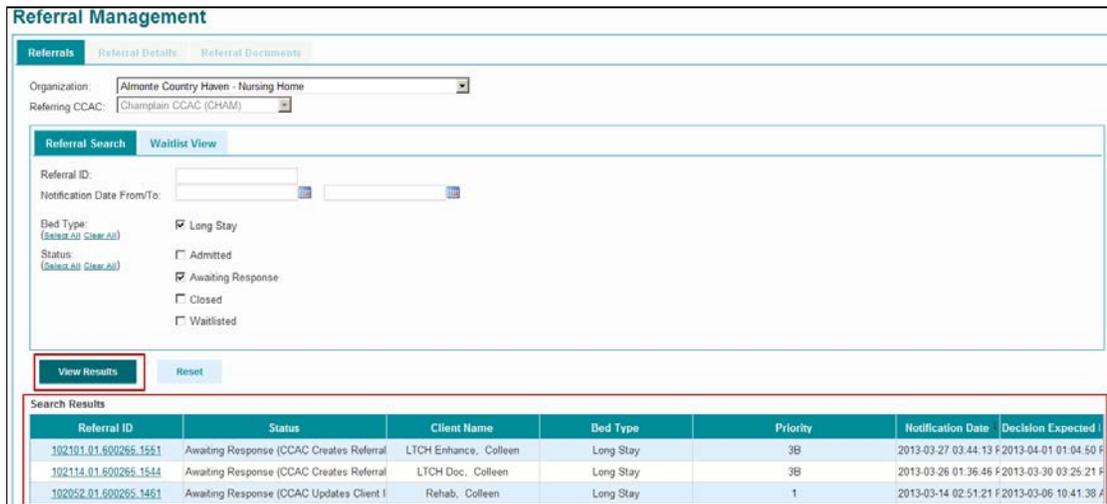
3. *[Reset](#) clears all criteria

3.1.1 Search Results



Search results generated in the Referrals tab will be available until a new search is performed.

The information displays in the Search Results grid in several columns:



The screenshot shows the 'Referral Management' interface with the following search filters:

- Organization: Almonte Country Haven - Nursing Home
- Referring CCAC: Champlain CCAC (CHAM)
- Referral ID: [Empty field]
- Notification Date From/To: [Empty date range]
- Bed Type: Long Stay
- Status: Admitted, Awaiting Response, Closed, Waitlisted

Buttons: [View Results](#) (highlighted), [Reset](#)

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
102101.01.600265.1551	Awaiting Response (CCAC Creates Referral	LTCH Enhance, Colleen	Long Stay	3B	2013-03-27 03:44:13 F	2013-04-01 01:04:50 F
102114.01.600265.1544	Awaiting Response (CCAC Creates Referral	LTCH Doc, Colleen	Long Stay	3B	2013-03-26 01:36:46 F	2013-03-30 03:25:21 F
102052.01.600265.1451	Awaiting Response (CCAC Updates Client I	Rehab, Colleen	Long Stay	1	2013-03-14 02:51:21 F	2013-03-06 10:41:38 F

Referral ID – unique system generated identifier assigned to the client's referral. If you click on this link, the referral details for the selected referral will display in the **Referral Details** tab.

Status – displays the referral status followed by the most recent business action/event in brackets.

Client Name – the name of the referred client, in the format “Surname, First Name”

Bed Type (for LTCH, CC, Rehab referral types) – the name of the bed type related to the referral set in CHRIS

Priority (for LTCH Referral type only) – displays priority level assigned to the bed choice in CHRIS

Notification Date – the date on which the most recent business event relating to the referral occurred

Decision Expected By – the date by which the facility is expected to respond to a new/updated referral. This only applies to referrals in ‘*Awaiting Response*’ status.

3.2 Waitlist View

The Waitlist View tab allows you to view Referrals that are on the ‘Waitlist’. This includes referrals that may be in the “Awaiting Response” status from a ‘Waitlist’ status (e.g. Health Partner has requested more information from the CCAC prior to admission from the Waitlist). Therefore you are able to view all referrals in any status that have been put on the Waitlist.

The Waitlist search filters are specific to each referral and bed type. What displays is determined by the first filter selected.

3.2.1 Waitlist View for LTCH Referral

The Waitlist View tab provides the LTCH with a list of clients who have been waitlisted for that LTCH and Bed Type. You can refine the list using the **Filter Criteria** with the filters of:

- Bed Type:
 - selection based on the Bed Types available in the LTHC
 - can only select one Bed Type at a time
- Gender:
 - Choices of Any, Female and Male
- Accommodation Type:
 - Displays for Long Term Stay Types
 - Displays the accommodation type(s) that are available for the particular Long Stay Bed Type in this LTCH

Referral Search **Waitlist View**

Bed Type: Long Stay
 Gender: Any
 Accommodation Type: Basic Private Semi-Private

View Results **Reset**

Total # of clients matching the criteria: 13

Page 1 of 1

#	Client Name	Age	Gender	Priority	Waitlist Date	Bed Type	Status (Action)	Secure/Non-Secure	Accommodation Type	Additional Information
1	Long Stay 2, Colleen (#100764) Eagle Terrace, 329 Eagle St, Newmarket, Ontario L3Y 1K3 (Other - LTC Home)	75	Female	1 - Crisis (as of --)	01-Mar-2013	Long Stay	Awaiting Response (CCAC Creates Referral)	--	Basic	New Referral -
1	Rehab, Colleen (#102052) 130 Bloor St W, Toronto, Ontario M5S 1N5 (Home - Private Dwelling)	89	Female	1 - Crisis (as of --)	01-Mar-2013	Long Stay	Awaiting Response (CCAC Updates Client Information)	--	Basic	new assessment completed
2	Client_0807, CHRIS (#101624) OTTAWA HOSPITAL (THE)-GENERAL SITE, Complex care Hospital/Unit, 501 Smyth Rd, Ottawa, Ontario K1H 8L6 (Other - Hospital)	62	Male	2 - Spouse/Partner Reur	01-Mar-2012	Long Stay	Waitlisted (LTCH Accepts Referral)	--	Basic	--

3.2.2 Waitlist View for Complex Care/Rehab Referral

The Waitlist View tab provides the CC/Rehab Facility with a list of clients who are on the waitlist for that CC/Rehab Facility and Bed Type. You can refine the list using the **Filter Criteria** with the filters of:

- Bed Type:
 - Options on the pick list are based on the Bed Types available in the selected CC or Rehab Facility
 - can only select one Bed Type at a time
- Gender:
 - Choices of Any, Female and Male

Waitlist View:

Organization: BRUYERE CONTINUING CARE INC, ELISABETH BRUYERE HOSPITAL, Complex care hosp/unit
 Referring CCAC: Champlain CCAC (CHAM)

Referral Search **Waitlist View**

Bed Type: Geriatric Assessment
 Gender: Female

View Results **Reset**

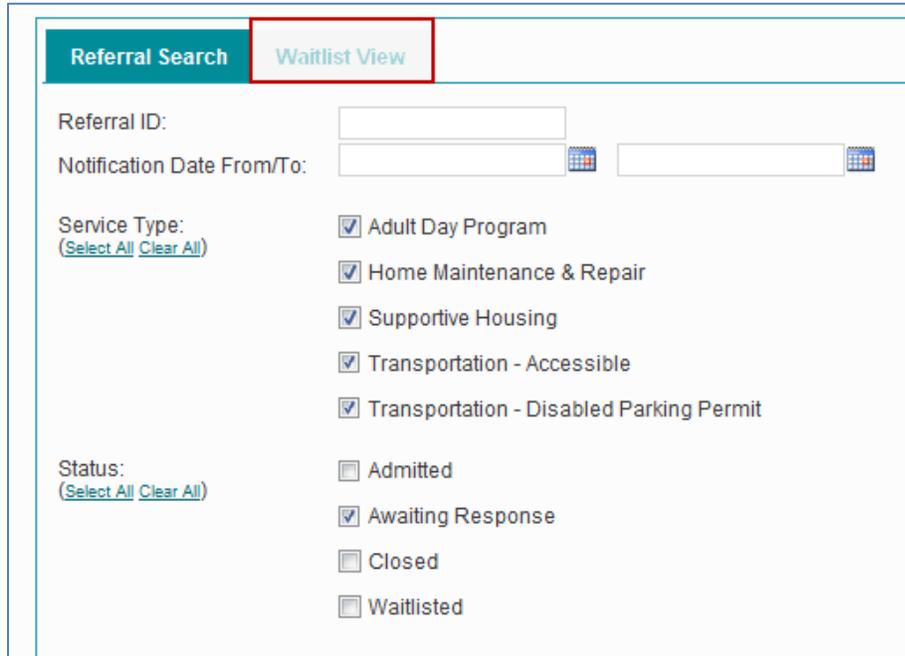
Total # of clients matching the criteria: 3

Page 1 of 1

#	Client Name	Gender	Priority	Waitlist Date	Bed Type	Status (Action)	ALC Designation	Application Notes
1	Hill_Test1 (#100791) BRANT COMMUNITY HEALTHCARE SYSTEM, Complex care Unit/hosp, 200 Terrace Hill St, Brantford, Ontario N3R 1G9 (Other - Hospital)	Female	3 - All Others	20-Feb-2013	Geriatric Assessment	Awaiting Response (CCAC Creates Referral)	None	New Referral -
2	CC R2 2, Colleen (#102102) 130 Bloor St W, Toronto, Ontario M5S 1N5 (Home - Private Dwelling)	Female	3 - All Others	06-Mar-2013	Geriatric Assessment	Waitlisted (CCAC - Client Accepts Bed Offer)	None	New Referral -
3	Complex Care May, Colleen (#102116) BRUYERE CONTINUING CARE INC, ELISABETH BRUYERE HOSPITAL, Complex care hosp/unit, 43 Bruyere St, Ottawa, Ontario K1N 5C8 (Other - Hospital)	Female	3 - All Others	14-May-2013	Geriatric Assessment	Waitlisted (CCAC - Client Accepts Bed Offer)	None	New Referral -

3.2.3 Waitlist View for Community Referral Types

The Waitlist View tab is (greyed out) for community referral types:



Referral Search | **Waitlist View**

Referral ID:

Notification Date From/To:  

Service Type: [\(Select All\)](#) [Clear All](#)

- Adult Day Program
- Home Maintenance & Repair
- Supportive Housing
- Transportation - Accessible
- Transportation - Disabled Parking Permit

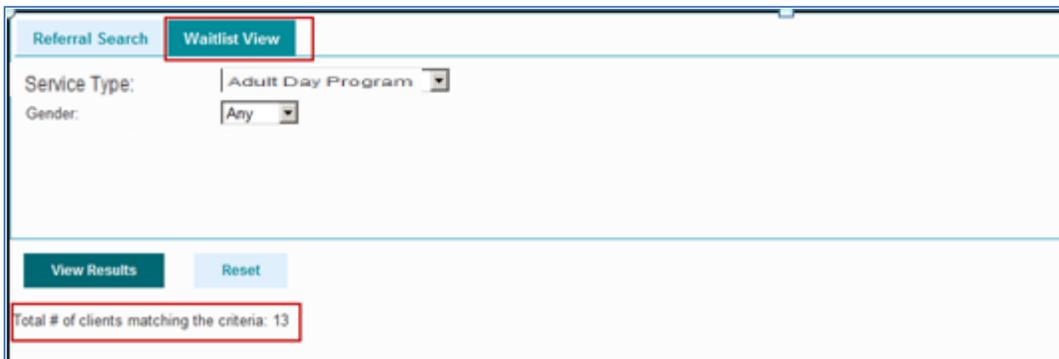
Status: [\(Select All\)](#) [Clear All](#)

- Admitted
- Awaiting Response
- Closed
- Waitlisted

The expanded role referral types (Adult Day Program, Assisted Living and Supportive Housing) have access to the Waitlist View tab.

You can refine the list using the **Filter Criteria** with the filters of:

- Service Type:
 - Options on the pick list are based on the Service Types available in the selected Agency or Residence
 - You can only select one Service Type at a time
- Gender:
 - Choices of Any, Female and Male



Referral Search | **Waitlist View**

Service Type:

Gender:

Total # of clients matching the criteria: 13

4. REFERRAL DETAILS

The **Referral Details** tab allows you to view the details of the referral, the notification logs as well as perform an action on the notification. The Referral Details tab is disabled (greyed out) on first entry until a referral is selected for viewing. Once you have opened the Referral Details view, you will be able to toggle between the Referral and Referral Details tabs without losing the focus/settings.

You can access the Referral Details tab by selecting the [Referral ID](#) link from the referral results:

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
102116.01.700981.1585	Waitlisted (CCAC – Client Accepts Bed Offer)	Complex Care May, Colleen	Geriatric Assessment	All Others	2013-05-14 03:56:04 F	
102102.01.700981.1496	Waitlisted (CCAC – Client Accepts Bed Offer)	CC R2.2, Colleen	Geriatric Assessment	All Others	2013-05-09 04:59:46 F	

The Header:



Referral Management

Referrals | **Referral Details** | Referral Documents

Referral ID: [100791.01.700981.1428](#)

Referral Status: Awaiting Response

Client: Hill, Test1 (100791)

Action:

- Select One
- Facility Requests More Information
- Facility Accepts Referral
- Facility Refuses Referral

Referral Details

Referral ID – unique identifier assigned by the system; selecting the link generates a PDF version of the Referral Details

Client – client last and first name

Referral Status – current status of the referral (Awaiting Response, Waitlisted, Admitted or Closed)



The choice of actions depends on the current status of the referral and the referral type.

Referral Details Section:



Information included in the Referral Details section:

Organization – the name of CC/Rehab/LTCH Facility or Community Agency to which the client has been referred

Address of the above

Bed Type (for LTCH, CC, Rehab referrals) - type of bed client requires

Priority (for LTCH, CC, Rehab referrals) - Priority of the choice entered in CHRIS

Waitlist Date-the date the client is added to the waitlist

Notes – additional information relevant to the referral.

Referral Date/Time – date and time when the referral was initially sent to the organization

Referring CCAC – the CCAC that referred the client to the facility/agency

CCAC Team – the team at the CCAC primarily responsible for the client

Caseload – name of the primary caseload responsible for the client

Care Coordinator–name of care coordinator responsible for the client

Other information contained in the Referral Details tab:

Client Information – all information is derived from the Client Information screen in CHRIS; client identifiers and demographics and selected information

Health Profile			
Infection Status:		Clear from Infection	
Diagnoses:			
Dx Code	Description	Start Date	
Uncoded	Multiple Sclerosis	08-May-2013	
Uncoded	COPD	08-May-2013	
Surgical/Other Procedures:			
Date	Code	Description	
Allergies:			
Category	Specifics	Additional Information	Start Date
Animal	Cat dander		08-May-2013

- **Health Profile** – selected information taken from the Client Health Profile in CHRIS
- **Contacts** – contains Active Personal and Medical Contacts information derived from CHRIS

Contacts				
Personal Contacts:				
Name	Relationship/Role/Legal	Contact Restriction Details	Phone	Additional Information
May, Jane	Daughter / Caregiver - Informal / POA - Personal Care	Share All PHI	(454) 545-4545	
Medical Contacts:				
Name	Specialty	Contact Restriction Details	Phone	Additional Information

Notification Log

The Notification Log records all the actions and updates sent/completed between the Health Partner and the CCAC. It is located at the bottom of the Referral Details page.

5. RESPONDING TO REFERRALS

The Referral header in the Referral Details tab contains an Action drop down menu that enables the Health Partner to respond to a referral based on its current status;

Referral Management	
Referrals	Referral Details
Referral ID: 102101_01_600265_1551	
Referral Status: Awaiting Response	Client: LTCH Enhance, Colleen (102101)
	Action: <div style="border: 1px solid black; padding: 2px;"> Select One Select One LTCH Refuses Referral LTCH Accepts Referral LTCH Requests More Information </div>
Referral Details	

5.1 LTCH Health Partners

The following table displays all of the possible actions for each LTCH referral status:

Referral Status	Possible Actions
Awaiting Response	LTCH Requests More Information LTCH Admits Referral LTCH Refuses Referral LTCH Accepts for Bed
Waitlisted	LTCH Admits Client LTCH Withdraws Approval
Admitted – applies to SSCC and SSI	LTCH Discharges Client
Closed	None

For detailed information on Status Actions and responding to LTCH e-Referrals, access sub-module 5.1 'Managing Referrals for LTCH Health Partners' [here](#)

5.2 Rehab/CC Health Partners

The following table displays all of the possible actions for each referral status:

Referral Status	Possible Actions
Awaiting Response	Facility Requests More Information Facility Accepts Referral Facility Refuses Referral
Waitlisted	Facility Admits Client
Admitted	Facility Requests Client Reassessment Facility – Client Ready for Discharge Facility Discharges Client
Closed	None

For detailed information on Status Actions and responding to LTCH e-Referrals, access sub-module 5.2 'Managing Referrals for Complex Care and Rehab Facilities' [here](#)

5.3 Community Support Service Agency Partners

The following table displays all of the possible actions for each CSSA referral status:

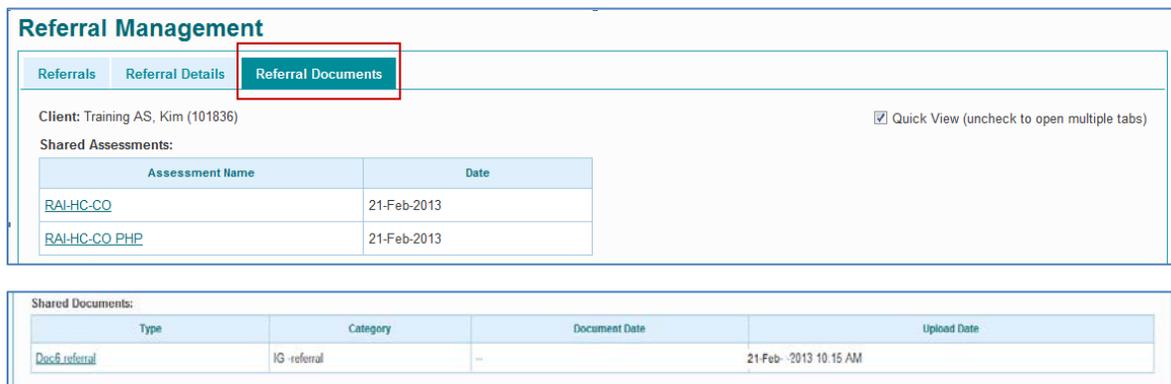
Referral Status	Possible Actions
Awaiting Response	CSSA Accepts Referral CSSA Refuses Referral CSSA Admits Referral
Waitlisted	CSSA Admits Referral
Admitted	CSSA Discharges Referral
Closed	None

For detailed information on Status Actions and responding to LTCH e-Referrals, access sub-module 5.3 'Managing Referrals for Community Support Service Agencies' [here](#)

6. REFERRAL DOCUMENTS

As part of the e-Referral 'Referral Package', CCAC CHRIS users have the ability to share documents from their Document Management System (DMS) library and interRAI Assessments from PointClickCare.

The Documents tab is disabled (greyed out) on first entry until a referral is selected. When a referral is selected from the results grid, the documents and assessments can be accessed by the Health Partner from the **Referral Documents** tab:



Referral Management

Referrals | Referral Details | **Referral Documents**

Client: Training AS, Kim (101836) Quick View (uncheck to open multiple tabs)

Shared Assessments:

Assessment Name	Date
RAIHC-CO	21-Feb-2013
RAIHC-CO PHP	21-Feb-2013

Shared Documents:

Type	Category	Document Date	Upload Date
Doc# referral	IG - referral	--	21-Feb-2013 10:15 AM

Only those documents and assessments associated with the referral will be displayed.

There are two views when accessing shared Referral Documents:

1. When the **Quick View is checked**;



By selecting the [Document Type](#) link from the [Shared Documents](#) grid, HPG navigates you to the document tab where you can view the document within that tab (if the document is a PDF or TIFF).



Referral Management

Referrals | Referral Details | **Referral Documents**

Client: LTCH Doc, Colleen (102114) Quick View (uncheck to open multiple tabs)

Shared Assessments:

Assessment Name	Date

Shared Documents:

Type	Category	Document Date	Upload Date
Doc6 referral	IG -referral	--	25-Mar-2013 03:17 PM

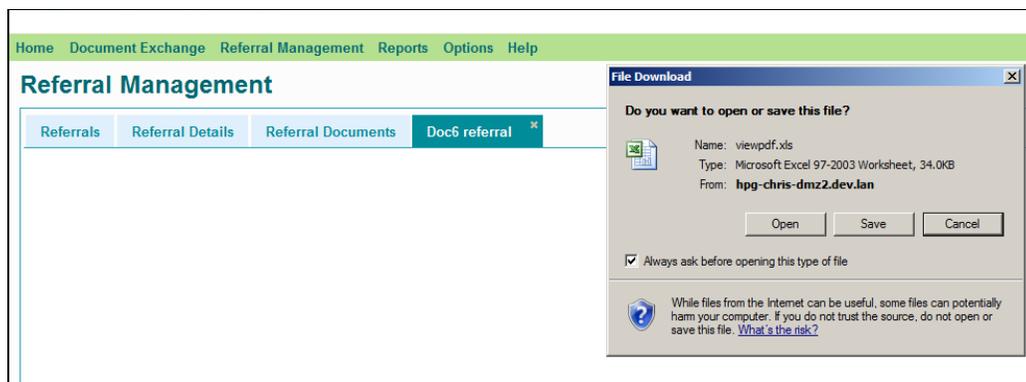
You are automatically taken to the [Document Type](#) tab, and will need to toggle back to the [Referral Documents](#) tab to open up another document.



Referral Management

Referrals | Referral Details | Referral Documents | **Doc6 referral** *

A File Download window may pop up (if the document format is not PDF) prompting you to either Open or Save the document:



Home | Document Exchange | Referral Management | Reports | Options | Help

Referral Management

Referrals | Referral Details | Referral Documents | **Doc6 referral** *

File Download

Do you want to open or save this file?

Name: viewpdf.xls
Type: Microsoft Excel 97-2003 Worksheet, 34.0KB
From: hpg-chris-dmz2.dev.lan

Open Save Cancel

Always ask before opening this type of file

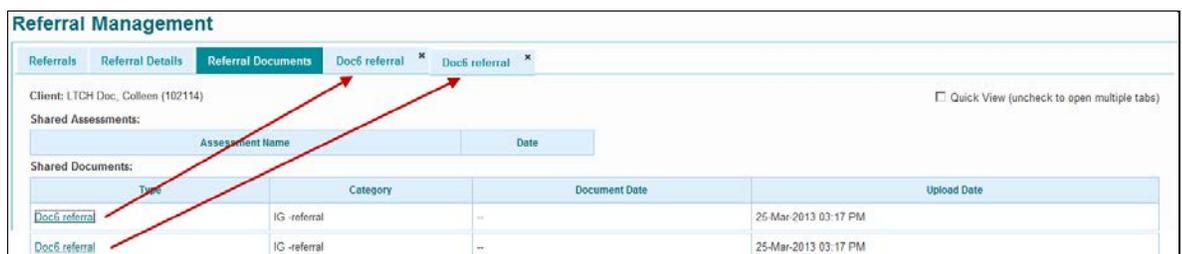
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

2. When the Quick View is **not** checked;



Quick View (uncheck to open multiple tabs)

You can open multiple document tabs without having to go back to the [Referral Documents](#) tab each time you wish to open a new document.



Referral Management

Referrals | Referral Details | **Referral Documents** | Doc6 referral * | Doc6 referral *

Client: LTCH Doc, Colleen (102114) Quick View (uncheck to open multiple tabs)

Shared Assessments:

Assessment Name	Date

Shared Documents:

Type	Category	Document Date	Upload Date
Doc6 referral	IG -referral	--	25-Mar-2013 03:17 PM
Doc6 referral	IG -referral	--	25-Mar-2013 03:17 PM

6.1 Shared Assessments

Assessment Reports may be shared by the CCAC as part of the Referral Package. The last completed and locked Assessment Report is made available in the Referral Documents tab. CCAC staff are responsible for deciding what Assessment Reports are made available; as well as sending an update when a new Assessment is completed.

Assessment tools and reports for sharing include:

RAI – Contact Assessment (displays as [RAI-CA](#))

- Full report available to Complex Care/Rehab and Community Referral types

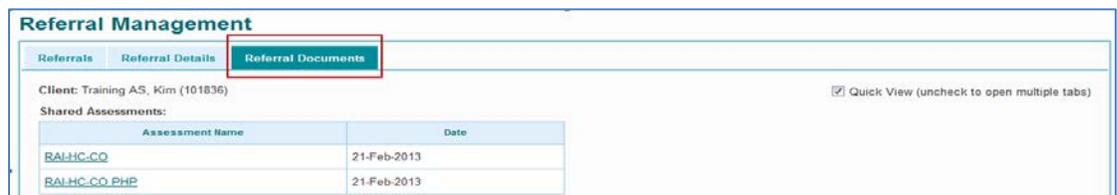
RAI – Hospital (displays as [RAI-HC-HO](#) and [RAI-HC-HO PHP](#))

- Full report and Personal Health Profile report available for **all** Referral types

RAI – Community (displays as [RAI-HC-CO](#) and [RAI-HC-CO PHP](#))

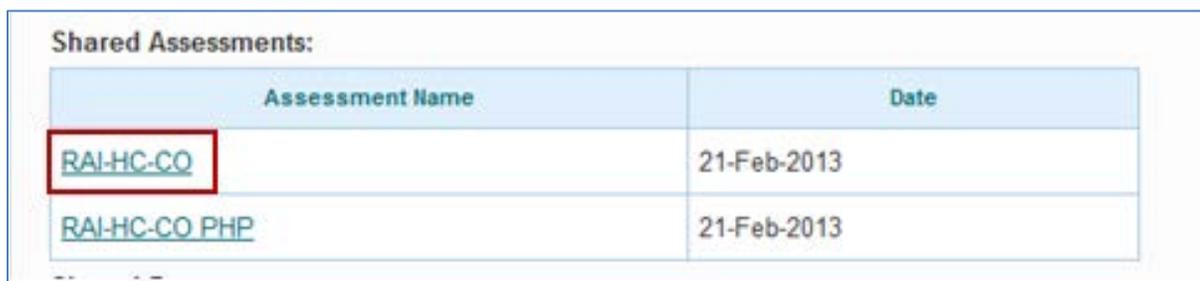
- Full report and Personal Health Profile report available for **all** Referral types

When Assessment Reports are shared, an [Assessment Name](#) hyperlink displays under the Referral Documents tab.



Referral Management	
Referrals	Referral Documents
Client: Training AS, Kim (101836) <input checked="" type="checkbox"/> Quick View (uncheck to open multiple tabs)	
Shared Assessments:	
Assessment Name	Date
RAI-HC-CO	21-Feb-2013
RAI-HC-CO PHP	21-Feb-2013

To view an assessment report, select the [Assessment Name](#) link from the table:



Shared Assessments:	
Assessment Name	Date
RAI-HC-CO	21-Feb-2013
RAI-HC-CO PHP	21-Feb-2013

A PDF version of the assessment opens in a tab

Referral Management

Referrals | Referral Details | Referral Documents | RAI-HC.CO

1 / 16 149%

Comment



Central West Community Care Access Center
RAI – HC Community Report and PHP

Client's Name: Kim Training AS Health Card Number: 0
 Assessment Reference Date: 02/21/2013 Case Record No: 19000000670
 Signature of Assessor: Kimberly Hanson

MINIMUM DATA SET HOME CARE (MDS-HC)
CANADIAN VERSION

SECTION AA. NAME AND IDENTIFICATION INFORMATION		SECTION CC. REFERRAL ITEMS (Complete at Intake Only)	
1	NAME OF CLIENT Training AS a.Last/Family Kim	1	DATE CASE OPENED/REOPENED Year Month Day
		2/REASON FOR REFERRAL	1. Post hospital care 4. Eligibility for home care 2. Community chronic care

Select 'x' to Close the Report.

6.2 Shared Documents

As part of the LTCH e-Referral Add Choice Wizard, CCAC CHRIS users have the ability to share documents from the client's DMS library. Documents may be shared or unshared throughout the application process.

By selecting the [Document Type](#) link from the [Shared Documents](#) grid, HPG navigates you to the document tab where you can view the document within that tab (if the document is a PDF or TIFF).

Referral Management

Referrals | Referral Details | Referral Documents | provider

Client: Chris, Tester7 (102088) (PDF) Quick View (uncheck to open multiple tabs)

Shared Assessments:

Assessment Name	Date

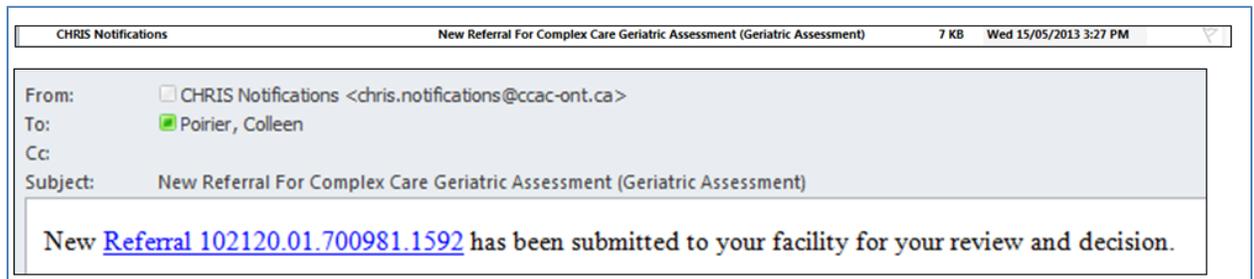
Shared Documents:

Type	Category	Document Date	Upload Date
provider	IG-Provider	--	23-Nov-2012 09:47 AM

7. EMAIL NOTIFICATIONS

In order to make the referral and application process seamless, e-mail notifications may be enabled for the Health Partner user to be notified of any changes or updates made to the Referral application.

Example of email notification for a new Complex Care referral:



The [Referral ID](#) hyperlink sends you to HPG Referral Management for you to respond to the referral.

7.1.1 LTCH Referrals

For those CCACs and LTCHs that have Sharing Authorization for referrals, the LTCH will automatically receive an email notification for these events:

- New Referral
- Response to Request for More Information
- Bed Offer Accepted
- Admission Consideration to a Bed
- Bed Offer Refused (with or without exception)
- Referral Record Corrected (*e.g. a CCAC may have deleted or reversed a status in CHRIS*)
- Referral Withdrawn
- Referral Record Corrected

7.1.2 Complex Care and Rehab Referrals

For those CCACs and CC/Rehab Facilities that have Sharing Authorization for referrals, the CC/Rehab Facility will automatically receive an email notification for these events/actions:

- New Referral
- Client Information Updated
- Bed Offer Refused
- Bed Offer Accepted

- Referral Record Corrected (*e.g. a CCAC may have deleted or reversed a status in CHRIS*)
- Referral Withdrawn

7.1.3 Community Referrals

For those CCACs and CSSA's that have Sharing Authorization for referrals, the LTCH will automatically receive an email notification for these events:

- CCAC creates a referral
- CCAC withdraws a referral
- CCAC send an update to the referral
- CCAC creates a data entry correction, i.e. status is rolled back.