

Health Partner Gateway Reference Guide for Health Partners

MODULE 5.3

Managing Community Referrals

Revision Table

Date	Version	Author	Comments
Feb 2016	1.0	Kimberly Hanson	Overview of general functionality for Community Service Referral Management role in HPG

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1. INTRODUCTION

1.1 Background & Overview

As a result of new provincial legislation, CCAC's are taking on an expanded role of system navigators for clients who require assistance accessing community services as a part of their care plan. Often, CCAC clients may need to be linked to community services that could enhance the care that is being offered in the community. Each CCAC has identified Community Health Partners as Health Information Custodians who can access and manage referrals in HPG Referral Management.

1.1.1 Community Referral Types

Community Referral types available for management in HPG include:

- Community Services
 - Such as Meal Delivery Services, Friendly Visiting, Diabetic Teaching etc. (a list of all the possible services that may be managed as a part of the Community Services Referral is listed at the end of this document)
- Adult Day Programs
- Assisted Living
- Supportive Housing

1.2 Overview of Functionality

In Health Partner Gateway (HPG) the **Referral Management module/tab**, the community agency HPG user can:

- Searches for Referrals according to HPG/CCAC team assignment
- Responds to Referrals by;
 - Accepting the referral
 - Refusing the referral
 - Admitting the referral
 - Discharging the referral
 - Waitlist the referral

(The response options in HPG are dependent on the referral typ

2. COMMUNITY E-REFERRALS IN HPG

2.1 Referral Management

The Referral Management tab in HPG allows CSSAs to access and respond to e-Referrals. Within Referral Management the HPG user can:

- Search for Referrals
- View Referral details which include;
 - Client Information
 - Referral Notification Log
- View Referral Documents (when included as part of the Referral from the CCAC)
- Respond and Update Referral status based on service/referral type



This will only be available when Sharing Authorization has been set up for the CSSA and the CSSA user has been assigned to the HPG Team and the Referral Manager role

The Referral Management section has three tabs:

- **Referrals** – allows the CSSA user to search for referrals by their HPG team and Referring CCAC
- **Referral Details** – allows the CSSA user to view the details of the selected referral from the search results grid, and respond to the chosen referral
- **Referral Documents** – allows the CSSA user to view shared documents in a PDF format;

two sub tabs include:

- **Referral Search** – allows the user to the further refine their referral search using Sent To/From Date parameters and Status
- **Waitlist View**

3. COMMUNITY SERVICE REFERRAL STATUS FLOW

The following section reviews the status flow of a Community Service Referral:

In  by the CCAC user:

1. E-Referral is created and sent to the CSSA

Status: (Awaiting Response)

2. E-mail notification received by CSSA HPG user



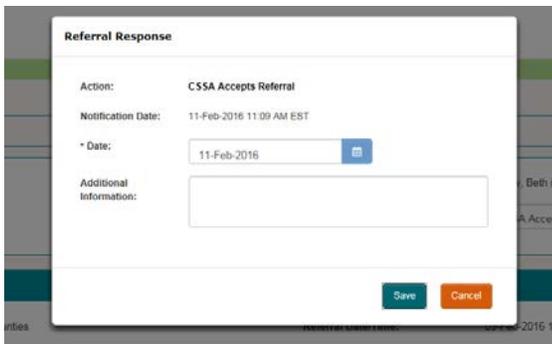
3. From Action drop down in Referral Header:
 - o Accept Referral or Refuse Referral



4. Accept/Refuse Referral and Complete Additional Information (this is displayed to the CCAC CHRIS user)
5. Select *Save*

Status: (Closed)

 The status of the referral changes to closed and the action drop down option is greyed out



- The update displays in the Status Event Log with the Additional Information from the HPG user in 'Comments'

Status Event Log

Current Status: Complete Delete Status
 Date: 11-Sep-2012
 Discharge Reason: Other

Date/Time sent	From	To	Action (Status)	Comments
11-Sep-2012 03:54 PM	Training, Kim	Toronto Central Community Care Access Centre	CSSA Discharges Client (Closed)	Start Meal Delivery on Monday XXXXXXXX
11-Sep-2012 03:54 PM	Training, Kim	Toronto Central Community Care Access Centre	CSSA Accepts Referral (Admitted)	Start Meal Delivery on Monday XXXXXXXX
11-Sep-2012 03:52 PM	Wong, Kimberly	ABC Meals on Wheels	CCAC Creates Referral (Awaiting Response)	

4. ADULT DAY PROGRAM, ASSISTED LIVING AND SUPPORTING HOUSING REFERRAL STATUS FLOW

The following section describes the following functional possibilities of an Expanded Role Referral (Adult Day Program, Assisted Living and Supportive Housing):



1. E-Referral is created and sent to the CSSA

Status: (Awaiting Response)

2. E-mail notification received by CSSA HPG user



3. Review Referral and Respond from Action Drop Down Header:
 - Accept or Decline
 - Waitlist
 - Admit
 - Discharge (from an Admit state) see section [4.4](#)

4.1 'CSSA Accepts Referral'



1. Select *CSSA Accepts Referral*

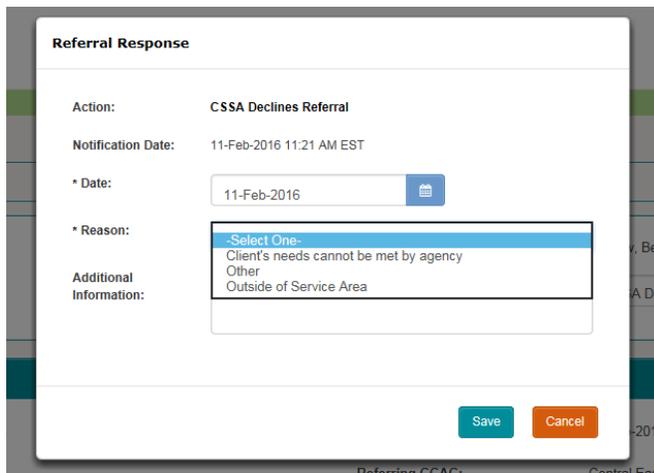
When the Referral has been Accepted, the Action drop down allows you to;

- Admit the Client
- Waitlist the Client
- Withdraw the Referral (Client or CSSA choice)



4.2 'CSSA Declines Referral'

1. Select *CSSA Refuses Referral*



2. Select a Reason from the Drop Down and add *Additional Information* to be shared with the CCAC CHRIS user and Save

Status: **(Closed)**



In :

- The update displays in the Status Event Log with the *Refusal Reason* and *Additional Information* displayed in the Comments Section

Status Event Log				
Current Status:	CSSA Refused			
Date:	12-Sep-2012			
Refusal Reason:	Client's needs cannot be met by agency			
Date/Time sent	From	To	Action (Status)	Comments
12-Sep-2012 10:21 AM	Training, Kim	Toronto Central Community Care Access Centre	CSSA Refuses Referral (Closed)	
12-Sep-2012 10:20 AM	Wong, Kimberly	ABC Meals on Wheels	CCAC Creates Referral (Awaiting Response)	

4.3 'CSSA Waitlists Referral'

1. Complete the *Reason for Waitlisting* and Add *Additional Information* for communication with the CCAC CHRIS user

Referral Response

Action: CSSA Waitlists Client

Notification Date: 11-Feb-2016 11:24 AM EST

* Date: 11-Feb-2016

* Reason:

- Select One -
- Waitlisted - No availability
- Waitlisted - No availability for day requested
- Waitlisted - Other

Additional Information:

Save Cancel

Referring CCAC: Central East

⚠ (Waitlisted- No availability for day requested) applies to Adult Day Program Referrals only.

2. Select Save

4.4 'CSSA Admits Referral'

This drop down option is only available when the referral is in the *Waitlisted* or *Awaiting Response* Status.

1. Select CSSA Admits Client
2. Select the *Admission Date* from the Calendar and add *Additional Information* to be communicated with the CCAC CHRIS user



The Admission Date cannot be greater than today's date

3. Select Save

Status: **(Admitted)** or **(Closed)**



- The Current Status states Complete depending on the Set up in CHRIS maintenance

Status Event Log					
Current Status:	Complete				
Date:	12-Sep-2012				
Discharge Reason:	Other				
Date/Time sent	From	To	Action (Status)	Comments	
12-Sep-2012 11:09 AM	Training, Kim	Toronto Central Community Care Access Centre	CSSA Discharges Client (Closed)	Client has been admitted on 2012-09-12	
12-Sep-2012 11:09 AM	Training, Kim	Toronto Central Community Care Access Centre	CSSA Admits Client (Admitted)	Client has been admitted on 2012-09-12	
12-Sep-2012 11:02 AM	Wong, Kimberly	Assisted Living Organization	CCAC Creates Referral (Awaiting Response)		

4.5 'CSSA Discharges Referral'

This option is only available when the current status of the Referral is "Admitted" and the CCAC has configured in CHRIS maintenance to Close the Referral upon Admission. This eliminates the step of Discharging the Referral in CHRIS if the client is Admitted for service.

Status: **(Admitted)**

1. Select *CSSA Discharges Service*

Referrals	Referral Details	Referral Documents	Shared Notes
Referral ID:	3093773.01.90001026.55230	Client:	Education1, Team (3093773)
Referral Status:	Admitted	Action:	<input type="button" value="-Select One-"/> CSSA Discharges Client

2. Complete the *Discharge Date* and *Reason* mandatory fields and add *Additional Information*

Referral Response

Action: CSSA Discharges Client

Notification Date: 11-Feb-2016 11:31 AM EST

* Discharge Date:

* Reason:
Client Died
Client/Family Preference
No longer appropriate for service
Admitted to hospital
Admitted to LTC
Transfer to another CCAC
Other
Transfer to another Adult Day Program

Additional Information:

Referring CCAC: Central East



Discharge Date, Reason and Additional Information appear in CHRIS for the CCAC CHRIS user

3. Select Save

Status: **(Closed)**

5. APPENDIX

5.1 List of Community Referrals Services:

- ABI - Personal Support/Independence Training
- Bereavement Support
- Care for the Caregiver / Caregiver Support
- Case Management (M.H.)
- Crisis Intervention and Support
- Deaf, Deafened and Hard of Hearing Care Services
- Dementia Training
- Dietetics/nutrition
- Elder Abuse Service
- Emergency Response Support Services
- Foot Care Services
- Friendly Visiting
- Geriatric Mental Health
- Health Promo & Education
- Home Help & Homemaking
- Home Maintenance & Repair
- Hospice Care
- Meal Delivery Services
- Overnight Stay Care
- Personal Support/Independence Training
- Respite Care for Adults with Disabilities
- Respite Care for Children with Disabilities
- Respite Care for Seniors
- Respite Care for People with Alzheimer's Disease & Related Dementias
- Service Arrangement/Coordination
- Social and Congregate Dining
- Substance Abuse/Gambling
- Telephone Reassurance & Security Checks
- Transportation - Accessible
- Transportation - Client
- Transportation - Disabled Parking Permit
- Transportation - Volunteer & Non-Accessible
- Transportation - Driver Assessment & Rehabilitation
- Visiting - Social and Safety
- Visiting - Hospice Service

