

E-Referrals Instructions and Business Rules

Article #271

Revised: July 10, 2013

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E-Referral Protocols

E-Referrals module provides agencies with the capability to make electronic referrals between agencies. For the agency making the referral, documents can be attached and deleted to the referral; for the receiving agency, documents can be downloaded and saved for accepted incoming E-Referrals. It is the responsibility of the agencies and the Addiction Community to ensure that protocols are established and met when making referrals between agencies

Definition

An E-Referral is:

- a client referral that one DATIS participating agency makes to another DATIS participating agency
- occurs on-line within Catalyst
- essential information about the client is transmitted electronically
- received immediately by the DATIS Participating Organization

Outgoing E-Referral

Steps to make an E-referral to a DATIS Participating Agency:

- Navigate to the Outgoing Referral List screen by selecting the <Referrals> button: at the bottom of the Client Information screen for clients not yet admitted to the agency or from the Admission Information screen for admitted clients.
- Available options on the Outgoing Referral List Screen are: *Add E-Referral*; *Add Referral*; *Go Back*; and, *Go to Client Info*. The *Add E-Referral* button will remain greyed out until an e-referral participating agency is selected from the “Agencies” drop down selection list.

Agencies :

Referral Number	Date Referred	Referral Destination	Provincial Service Category	E-Referral?
1	07/12/2012	Participating Agency - Test Agency - Site 01	Community Treatment	

- Select the *Agency* (agencies opting out of using e-referrals are greyed out and cannot be selected). For information on how to populate Outgoing Referrals go to KB Article 24 or go directly to the article by clicking on the link: http://datishelpdesk.issuetrak.com/Kb_ArticleView.asp?ArticleNbr=24

Agencies :

Referral Number	Date Referred	Referral Destination	Provincial Service Category	E-Referral?
1	04/03/2013	Participating Agency - psite-01	Initial Assessment Treatment Planning	Y
2	04/03/2013	Participating Agency -	Initial Assessment Treatment Planning	N

- Once an agency is selected from the list, click the *Add E-Referral* button; The Outgoing Referral Information screen appears.

Referral Information

Referral #: 3

Referral to Participating Agency

Refer To *: psite-01

Referred By *:

Refer to Provincial Service Category *:

Other Referral Information:

Referring Program: N/A

Referred On *: / / (dd/mm/yyyy)

Contact *:

Department:

Telephone *: () x

Email:

Fax: ()

Reason For Referral:

Status of Referral:

Notes:

Type of Data to Transmit

Demographic: Y

Approved by Client *:

Attachments can be a of the referral is saved

Outcomes/Comments:

1:

2:

Custom Fields:

selection list:

textfield:

Numeric:

textArea:

datefield: / / (dd/mm/yyyy)

Save Reset Cancel

- At a minimum, enter information for fields marked with a red asterisk
 - Select *Referred By* (case worker name). Refer to KB Article 22 or click on the link below to go directly to the article for information on how to add a case worker name to the agency maintained selection list http://datishelpdesk.issuetrak.com/Kb_ArticleView.asp?ArticleNbr=22
 - Select *Refer to Provincial Service Category*: the Service Category that is most appropriate for the referral.
 - Select *Referred On*: the date the referral is being referred out.

- *Contact*: is the name of the contact person at the referring agency that should be contacted by the receiving agency in regards to this e-referral
- *Telephone*: is the phone number of the contact person from the referring agency. There is no Email Address or Department fields provided on the Incoming E-Referral Information Screen, this information is not transmitted with the outgoing e-referral. If you wish to transmit this information, use the *Note* field.
- The Demographic field is not a selectable option for the E-Referral screen and is pre-populated with 'Y'. This means the demographic information for the client, as noted in the business rules in Appendix A, will be shared with the receiving agency.
- In order to transmit the referral data client approval must be obtained. If the client agrees, select "Yes" in the *Approved by Client* field. If 'No' is selected this is an indication that the client has not approved the e-referral, and the referral will not be sent out. Should this happen, the referral will be saved in the Referral history of the client. The referral will NOT appear in the "You have NN outstanding E-referrals(s)" list as it appears on the Home Page.
- *Note* (located under Other Referral Information section on the Outgoing Referral Information screen): This is not a required field. Information entered in the Note field will be electronically transmitted to the receiving agency along with the referral.
- **Save** – Once the referral is saved:
The client's demographic information will immediately appear on a list of Incoming Referrals on the Catalyst home page of the receiving agency. See [Incoming E-Referrals](#) section for details. See Appendix A for a list of transferred information.

A document can be attached by returning to the Outgoing Referral Information screen by clicking on the link to the referral, scrolling to the "Type of Data to Transmit" section and clicking on the Attachments link. More on this in the [Attachments: Creating and Managing E-Referral Attachment section](#).



Outgoing Referral Status

An outgoing Referral can have one of 3 types of statuses:

Type of Status	Definition of Terms
Accepted	The receiving agency accepts the referral
Declined	The receiving agency declines the referral
Viewed	The receiving agency has 'viewed' the client referral in their Catalyst database (the referral was clicked on by a Catalyst user at the receiving agency). The receiving agency has not recorded a status of Accepted or Declined; the Viewed status is automatically generated by Catalyst

- To check the status of your Agency's E-Referrals go to the Catalyst Home Page




The screenshot shows the Catalyst Home Page navigation bar with the following items: Home, Click Home, Activity Log, Reports, Admin, Support & Resources, and Logout. Below the navigation bar, the 'Current Items' section displays: 'Referrals You have 52 outstanding E-referrals', 'Waitlists There are 5 clients who are currently active on waitlists', and a notification 'You have feedback from 7 outgoing E-referral(s)'. A red arrow points to the 'Referrals' link, and another red arrow points to the feedback notification.

- Item 'a' from the above screenshot: You have NN outstanding E-referral(s). This link lists the e-referrals made by your agency. Even though the referral may have been viewed by the receiving agency, the referrals do not have a status of accepted or declined. When you click on the link you will see a list of those referrals in the following format:

Referral Date	Name	Referral Destination	Referred By	Referral Status
13/02/2013	C D	Test Agency	Carol	Viewed
13/02/2013	Even More	Test Agency	vivian	Viewed
11/02/2013	Deniece Denephew	Test Agency	Lara	
11/02/2013	Deniece Denephew	Test Agency	Lara	
11/02/2013	Jane Smith	Test Agency	Lara	
11/02/2013	Another A	Test Agency	Marie	
06/02/2013	Test Client	Test Agency	Deborah	Viewed

This is an indication that there is a document attached to the E-Referral

- Item 'b' from the screen shot: You have feedback from NN outgoing E-referral(s). Lists the clients that your agency referred out to another DATIS participating agency and provides a feedback status (Accepted or Declined) from the receiving agency. When you click on the link you will see a list in the following format:

Referral Date	Name	Referral Destination	Referred By	Referral Status	Reason for Decline	Status Date	Acknowledge
18/06/2013	Bilbo Ereff 	psite-00	Lara	Accepted		18/06/2013 13:33	<input type="checkbox"/>
11/02/2013	Ada Apples	Test Agency	Marie	Accepted		11/02/2013 11:47	<input type="checkbox"/>
01/02/2013	Ally Ace	Test Agency	Marie	Accepted		11/02/2013 11:38	<input type="checkbox"/>
17/06/2013	Bilbo Ereff 	psite-00	Brenda	Declined	Service Not Available	18/06/2013 10:59	<input type="checkbox"/>
10/01/2013	Samantha Smith	Test Agency	Arpie	Accepted		10/01/2013 10:40	<input type="checkbox"/>
09/01/2013	Deniece Denephew	Test Agency	Allison	Accepted		09/01/2013 18:25	<input type="checkbox"/>
28/06/2013	Joe Barters 	psite-00	Marie	Accepted		28/06/2013 11:10	<input type="checkbox"/>

- Select the check box in the Acknowledge column and then click on <Acknowledge> to acknowledge that you have seen the referral's status. Once acknowledged, it will disappear from the list.
- To see the details of the referral, click on the name and you will see the Feedback Details screen:

Feedback Details
Client: Bilbo Ereff
Referral Date: 18/06/2013
Gender: Male
D.O.B.: 08/08/1968
Referral Destination: psite-00
Referred By: Lara
Referral Status: Accepted
Referral Status Date: 18/06/2013 13:33
Reason Referral was Declined: N/A
Attachments

- **The agency that made the e-referral can update an already sent e-referral:** Up until the receiving agency either accepts or declines the e-referral, it can be updated. In other words even if an e-referral has been viewed, information on the referral can be changed and the change will appear in the already transmitted referral by the receiving agency.

- **Recalling an already sent E-Referral.** In order to recall an already transmitted E-Referral, the referral has to be deleted from the particular client's Outgoing Referral Information. Accepted or declined referrals cannot be recalled.
- **Identifying Electronic Referrals from the Outgoing Referral List Screen.** Outgoing referrals lists both e-referrals and regular non e-referrals. Electronic referrals will display 'Yes' in the 'Demographic' field. Non-electronic referrals will display N/A in this field.



The status of the e-referrals can be found in the last column of the Outgoing e-Referrals list:

Client Name: [Butter Cup](#) Chart/File #: 88
 D.O.B.: 22/01/1970 Gender: Female
 Admission #: Admission Status:
 Admission Date: Time In (hh:mm 24hr):
 Client Type:
 Primary Worker:
 Discharge Date: Time Out:

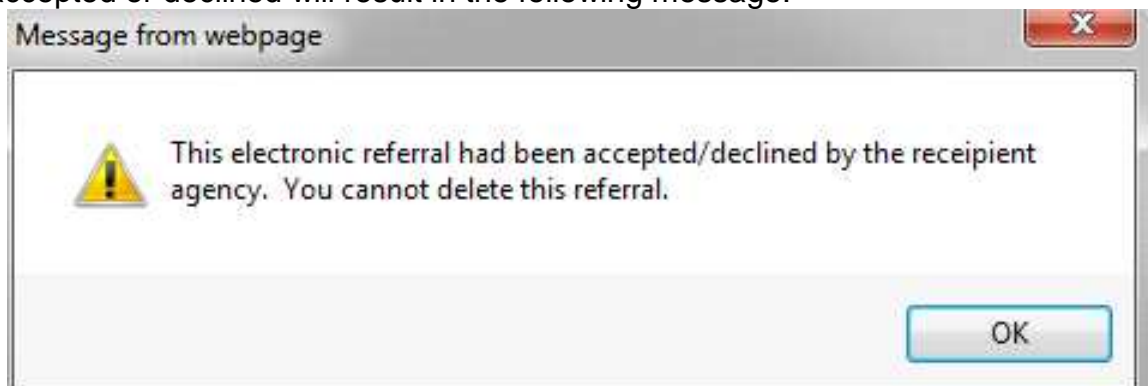
Agencies:

Referral Number	Date Referred	Referral Destination	Provincial Service Category	E-Referral?
1	04/03/2013	Participating Agency - psite-01	In	Y
2	04/03/2013	Participating Agency -	In	N
3	08/07/2013	Participating Agency - psite-01	In	Y

E-Referrals? Yes with Attachment, No or Yes

Buttons: Add E-Referral | Add Referral | Go Back | Go to Client Info

- **Deleting an e-referral:** 'Accepted' or 'Declined' e-referrals cannot be deleted: 'Viewed' e-referrals can be deleted. An attempt to delete an e-referral that was accepted or declined will result in the following message:



Incoming E-Referral

Steps to accepting / declining an e-referral

On the Catalyst Home Page, in the *Current Items* section, the scrolling marquee is a hyperlink to the incoming referrals and it advises the agency of incoming referrals to the agency:

You have [NN incoming E-referral\(s\)](#). This link takes you to a list of clients that were electronically referred to your own agency. When you click on the link you will see a list in the following format:

Loading time: 1.793 seconds

Referral Date	Client Name	D.O.B.	Gender	Referral Source	Refer to Provincial Service Category
12/07/2012	DATISOratest TestingIntegration	01/01/1901	Female	pmult - Test Agency : Sandra	Community Withdrawal Management Services Level 2
12/07/2012	DATISOratest TestingIntegration	01/01/1901	Female	pmult - Test Agency : Sandra Chan II	Residential Medical/Psychiatric Treatment Services

[Go Back](#)

- Click on the client's name and you will be taken to a screen showing the details of the incoming referral:

Loading time: 0.163 seconds

Client Information	
Information about Referring Agency	
Agency: 00004- Test Agency	Contact: Vivian
Telephone: 416-111-1111 ext.2222	
Information about Referred Client	
Name: DATISOratest TestingIntegration	D.O.B.: 01/01/1901
Age: 111	Gender: Female
Name at Birth: DATISOratest TestingIntegration	Alternate Name: The dev machine
Ethnicity: Aboriginal - Non Status	Preferred Language: Arabic
Health Card: 4554456564 gg	
Current Address: 1234 Test St.	
City: TORONTO	County: TORONTO METR
Province: Ontario	Postal Code: M1N1N1
Home Phone: (444)456-4546	
Home: OK to Call: Y	OK to Leave Message: Y
Work Phone: (123)123-4678 x 3434	
Work: OK to Call: Y	OK to Leave Message: Y
Emergency Phone: (444)444-5567	Contact: My Mother
Note: Client Referred for imeediate assistance for Residential Psyc tx	

[Accept](#) [Decline](#) [Go Back](#)

Declining the e-referral: Click on <Decline> button to decline the referral. A reason for declining the e-referral must be selected from the available selection list:

Reason	Details
Does not meet agency criteria	Based on the information sent, the client does not meet the agency criteria for admission
Long Wait List	The agency wait list is to long and it is not feasible to add additional referrals (relevant to agencies using the Wait List module.)
Service Not Available	The agency does not offer the service that is being requested

To complete the action, click on <Decline> again, the status will be transmitted immediately to the referring agency. <Go Back> returns you to the Incoming E-Referral Information screen without declining the incoming e-referral.

cata|yst DATE ?

Decline Incoming Referral Information

Home Client Info Activity Log Reports Admin Support & Resources Logout

Loading time: 0.276 seconds

Referral Date: **13/12/2012**

Referral Source - Agency: **00004- TEST**

Referral Source - Staff: **Allison**

Client: **New Client**

Client Type:

D.O.B.: **09/09/1999**

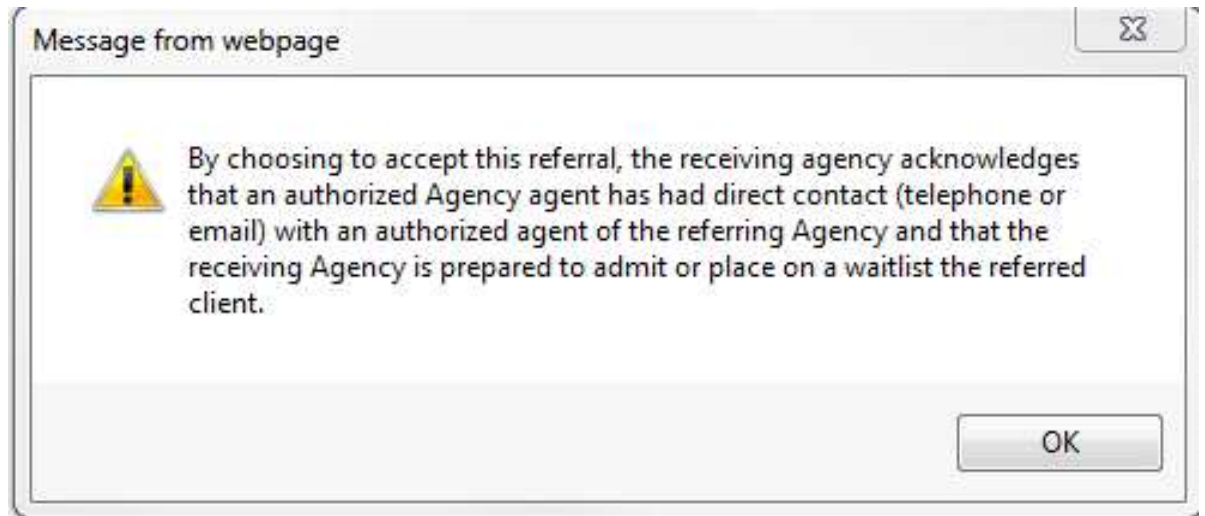
Gender: **Female**

Reason Referral was Declined: **Does Not Meet Agency Criteria** ▼

- Does Not Meet Agency Criteria
- Long Wait List
- Service Not Available

- **Accepting the e-referral:** Click on the <Accept> button to accept the e-referral. Once selected, you will be prompted with a message that requires you to acknowledge that you are authorized at the agency to admit the client or put them

on a wait list (the Wait List module is only available to those agencies who have requested access):



- The system does a client search to help you determine if the client already exists in your database.
 - **New Client:** If there are no matches, then a client record will be automatically created in your database and the user will be directed to the Client Info screen of the newly created client where all the demographic fields from the referring agency are copied (See Appendix A for details)
 - **Past or Existing Client:** If one or more matches are found (based on the existing client search criteria in Catalyst), a list of possible matches will be displayed. It is important that you look closely at this list and determine if the referred client is one of the clients already in your database. There is a risk of creating duplicate clients if the list is not adequately checked before adding the client to the database. If the search returns a match, select the correct client by clicking first on the radio button that corresponds to the client and then on the <Select Client> button. You will be taken to the client information screen for the selected client and you can proceed with inputting the client information.

In situations where the client is selected from the client search result list, the demographic information will NOT be copied to this client's record from the referring agency with the exception of the Referral Agency information



Client Search Result List



Home	Client Info	Activity Log	Reports	Admin	Support & Resources	Logout
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.loading time: 1.78 seconds

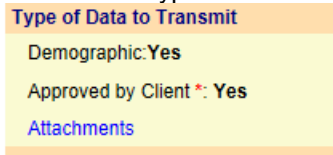
This client may already exist.

Search returned 8 results (Page 1 of 1)

Name	Client Site No	D.O.B.	Gender	Chart/File #	Health Card	Admission Status	Last Admission	Middle Name	Last Name @Birth	Variable Matched
DATISOratest TestingIntegration	01	01/01/1901	Female	2	4554456564	Closed	01/01/1901	DATIS	Testing	
Test Client	01	01/01/1901	Female	6		Open	20/03/2012	ClientTesting	Client	
Catalyst Frenchie	01	01/01/1901	Female	14		Open	15/11/2011	French	Frenchie	
DATISORATEST Oratest	01	01/01/1902	Female	3		Open	15/11/2011	DATIS II	ORATEST	
Catalyst Test	01	01/01/1901	Female	11		Pending	02/05/2012	Middname	Testing	
Testy Test	01	01/01/1901	Female	23					Test	
Test One Test ONE	01	01/01/1901	Female	5					Test One	
EReferral Testing	01	01/01/1901	Female	25					Testing	

- Possible Client List results but there are no positive match:** If after checking the Client Result List, you determine that the client is a new client, click on <Add Client> and you will be directed to the Client Information screen. The demographic information from the referring agency will automatically be populated in your agency's database, for this client (See Appendix A for details). **At this point, the new client record is saved in your database.** Clicking on <Cancel> does not cancel the transaction once you are on the Client Information screen; the new client record is automatically saved in your database.
- The Referral Information section on the Client Information screen. The following referral information is saved on the accepted client record whether a new client was created or an existing one was selected:
 - The name of the referring agency, click [here](#) to see Business Rules about this.
 - The 'Referred On' date

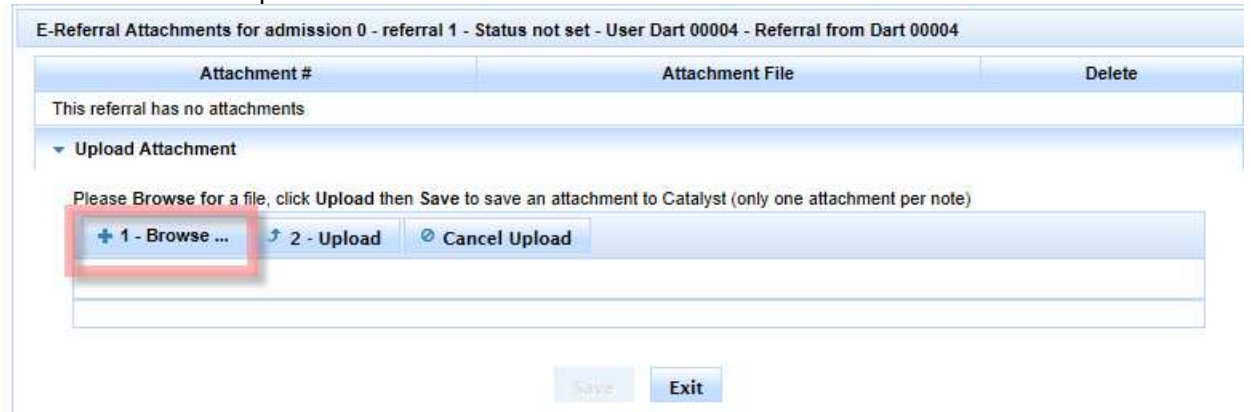
- Scroll to the Type of Data to Transmit section and click on the Attachments link



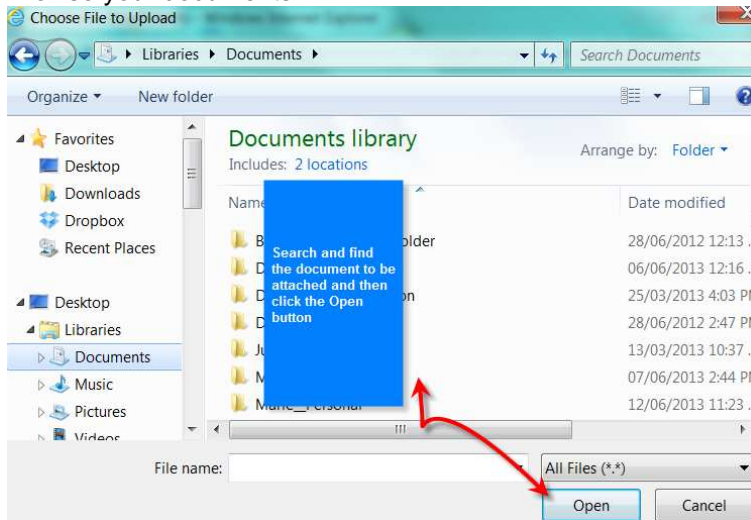
- The E-Referral Attachments screen opens up, click on the Upload Attachments link



- Click on the Browse option



- Browse your documents



- Click on the Upload button

E-Referral Attachments for admission 0 - referral 1 - Status not set - User Dart 00004 - Referral from Dart 00004

Attachment #	Attachment File	Delete
This referral has no attachments		
▼ Upload Attachment Please Browse for a file, click Upload then Save to save an attachment to Catalyst (only one attachment per note)		
<input type="button" value="+ 1 - Browse ..."/> <input type="button" value="↻ 2 - Upload"/> <input type="button" value="⊗ Cancel Upload"/>		
Advanced DHTML Viewer.docx <input type="text"/> <input type="button" value="↻"/> <input type="button" value="⊗"/>		
<input type="button" value="Save"/> <input type="button" value="Exit"/>		

- There is one file format that is NOT compatible when uploading an attachment. Attachments cannot have the extension of .xlsx. Files with the following extensions are compatible: gif, jpg, jpeg, png, doc, docx, pdf and txt. The following message will result in an attempt is made to attach a document with the extension of .xlsx

e-Referrals Attachments - Windows Internet Explorer
 http://172.19.200.40/faces/jsf/eref/e_ref_upload.xhtml?sid=LvtXRf1MKrsl2vcyXvDhLswPVTsvQvwQwzfmQ81kshhvpI

E-Referral Attachments for admission 2 - referral 1 - Accepted - User Dart 00004 - Referral from Dart 00004

Attachment #	Attachment File
This referral has no attachments	
▼ Upload Attachment Please Browse for a file, click Upload then Save to save an attachment to Catalyst (only one attachment per note)	
<input type="button" value="+ 1 - Browse ..."/> <input type="button" value="↻ 2 - Upload"/> <input type="button" value="⊗ Cancel Upload"/>	
<p style="color: red;">File Book1 test on file extensions.xlsx has not one of the allowed extensions (gif,jpg,jpeg,png,doc,docx,pdf,txt)</p>	
<input type="button" value="Save"/> <input type="button" value="Exit"/>	

- Once the Upload is complete the Save option becomes available, SAVE

E-Referral Attachments for admission 0 - referral 1 - Status not set - User Dart 00004 - Referral from Dart 00004

Attachment #	Attachment File	Delete
This referral has no attachments		
▼ Upload Attachment Please Browse for a file, click Upload then Save to save an attachment to Catalyst (only one attachment per note)		
<input type="button" value="+ 1 - Browse ..."/> <input type="button" value="↻ 2 - Upload"/> <input type="button" value="⊗ Cancel Upload"/>		
File Advanced DHTML Viewer.docx uploaded on form. Click Save Note to push to Catalyst.		
<input type="button" value="Save"/> <input type="button" value="Exit"/>		

- Once saved the options available at this point are:
 - Remove the document by clicking on the link available under the Delete column
 - Attach additional documents
 - Exit the window

E-Referral Attachments for admission 0 - referral 1 - Status not set - User Dart 00004 - Referral from Dart 00004

Attachment #	Attachment File	Delete
1	Advanced DHTML Viewer.docx	Remove Advanced DHTML Viewer.docx

Upload Attachment

Save Exit

- The screen returns to the Outgoing Referral Information screen

Outgoing E-Referrals: Feedback detailed information screen

Current Items

Referrals [You have 54 outstanding E-referral\(s\)](#) → [You have feedback from 7 outgoing E-referral\(s\)](#)

You have 5 incoming E-referrals

Click on the link “You have feedback from NN outgoing E-Referral(s)”

Outgoing E-Referral Feedback List screen

Outgoing E-Referral Feedback List 

Home Client Info Activity Log Reports Admin Support & Resources Logout

..loading time: 0.959 seconds


Referral Date	Name	Referral Destination	Referred By	Referral Status	Reason for Decline	Status Date	Acknowledge
18/06/2013	Bilbo Ereff 	psite-00	Lara	Accepted		18/06/2013 13:33	<input type="checkbox"/>
11/02/2013	Ada Apples	Test Agency	Marie	Accepted		11/02/2013 11:47	<input type="checkbox"/>
01/02/2013	Ally Ace	Test Agency	Marie	Accepted		11/02/2013 11:38	<input type="checkbox"/>
17/06/2013	Bilbo Ereff 	psite-00	Brenda	Declined	Service Not Available	18/06/2013 10:59	<input type="checkbox"/>
10/01/2013	Samantha Smith	Test Agency	Arpie	Accepted		10/01/2013 10:40	<input type="checkbox"/>
09/01/2013	Deniece Denephw	Test Agency	Allison	Accepted		09/01/2013 18:25	<input type="checkbox"/>
28/06/2013	Joe Barfers 	psite-00	Marie	Accepted		28/06/2013 11:10	<input type="checkbox"/>

Acknowledge Go Back

The column for “E-Referrals?” will now display an “attachment symbol”

When you click on a client name notice the Attachments link near the bottom

Outgoing E-Referral Feedback Detailed Information




Home	Client Info	Activity Log	Reports	Admin	Support & Resources	Logout
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loading time: 4.088 seconds

Feedback Details

Client: **Bilbo Ereff**
 Referral Date: **18/06/2013**
 Gender: **Male**
 D.O.B.: **08/08/1968**
 Referral Destination: **psite-00**
 Referred By: **Lara**
 Referral Status: **Accepted**
 Referral Status Date: **18/06/2013 13:33**
 Reason Referral was Declined: **N/A**

Attachments



Clicking on this link will enable you to upload documents, download documents attached to the E-Referral or delete documents

Outgoing Referrals: Business Rules for feedback on outgoing referrals

Declined E-Referrals with attachments (screen shot 1 below)	The attachments can be viewed or removed; it is not possible to add new attachments
Accepted (Approved) E-Referrals with attachments (screen shot 2 below)	The attachments can be viewed and new attachments can be uploaded as necessary for client care
No Status or Viewed E-Referrals (screen shot 3 below)	Files can be uploaded or removed freely

Declined: Screen shot 1:

The attachments can be viewed or removed; it is not possible to add new attachments

This screenshot shows the 'Declined' status for a referral. The main page displays 'Feedback Details' for Client: Bilbo Ereff, Referral Date: 17/06/2013, Gender: Male, D.O.B.: 08/08/1968, Referral Destination: psite-00, Referred By: Brenda, Referral Status: Declined, Referral Status Date: 18/06/2013 10:59, and Reason Referral was Declined: Service Not Available. An inset window titled 'e-Referrals Attachments - Windows Internet Explorer' shows a table with one attachment: Attachment # 1, Attachment File JSF tips.docx, and a Delete button labeled 'Remove JSF tips.docx'. The 'Upload Attachment' button is absent.

Attachment #	Attachment File	Delete
1	JSF tips.docx	Remove JSF tips.docx

Accepted: Screen shot 2:

The attachments can be viewed and new attachments can be uploaded as necessary for client care

This screenshot shows the 'Accepted' status for a referral. The main page displays 'Feedback Details' for Client: Joe Barthers, Referral Date: 28/06/2013, Gender: Male, D.O.B.: 12/01/1970, Referral Destination: psite-00, Referred By: Marie, Referral Status: Accepted, Referral Status Date: 28/06/2013 11:10, and Reason Referral was Declined: N/A. An inset window titled 'e-Referrals Attachments - Windows Internet Explorer' shows a table with one attachment: Attachment # 1, Attachment File Sample.jpg, and an Upload Attachment button. The 'Delete' button is absent.

Attachment #	Attachment File
1	Sample.jpg

No Status or Viewed: Screen shot 3

Files can be uploaded or removed freely

This screenshot shows the 'No Status or Viewed' status for a referral. The main page displays 'Feedback Details' for Client: Deniece Denephe, Referral Date: 11/02/2013, Gender: Female, D.O.B.: 10/10/1988, Referral Destination: Test Agency, Referred By: Lara, Referral Status: (empty), Referral Status Date: (empty), and Reason Referral was Declined: Declined. An inset window titled 'e-Referrals Attachments - Windows Internet Explorer' shows a table with one attachment: Attachment # 1, Attachment File Bugs.docx, and a Delete button labeled 'Remove Bugs.docx'. The 'Upload Attachment' button is present.

Attachment #	Attachment File	Delete
1	Bugs.docx	Remove Bugs.docx

Receiving Incoming E-Referrals

Incoming E-Referrals notification scrolls back and forth on the Home Page, click to access

Current Items

Referrals [You have 54 outstanding E-referral\(s\)](#) [You have feedback from 7 outgoing E-referral\(s\)](#)

You have 5 incoming E-referral(s)

Waitlists



[There are 5 clients who are currently active on waitlists.](#)

Incoming E-Referrals with attachments will display the attachment symbol

Incoming E-Referrals List 

Home Client Info Activity Log Reports Admin Support & Resources Logout

Loading time: 1.069 seconds

Referral Date	Client Name	D.O.B.	Gender	Referral Source	Refer to Provincial Service Category
26/06/2013	AA	01/01/1965	Female	00004- Test Agency : Carol	Community Treatment
27/06/2013	Another A	22/01/2000	Male	00004- Test Agency : Lisa	Case Management
27/06/2013	Bob Sample 	01/01/2001	Male	00004- Test Agency : Deborah	Initial Assessment Treatment Planning
27/06/2013	Ally Ace 	22/01/1970	Male	00004- Test Agency : Deborah	Initial Assessment Treatment Planning
31/01/2012	Anonymous Female		Female	00004- Test Agency : vivian	Initial Assessment Treatment Planning

Click on the client name to access the Incoming E-Referral Information screen.

Once the screen opens, you will notice the link "This referral has attachments. Click to see list.

Attachments can be opened from Client Information, only after acceptance.

Client Information

Information about Referring Agency

Agency: 00004- Test Agency Contact: Jonsie
Telephone: 123-124-1234

Information about Referred Client

Name: Alice Allworth D.O.B.: 22/01/1989
Age: 24 Gender: Male
Name at Birth: Alice Allworth Alternate Name:
Ethnicity: Preferred Language:
Health Card:
Current Address:
City: TORONTO GORE County: PEEL
Province: Ontario Postal Code: NFA
Home Phone: ()
Home: OK to Call: N OK to Leave Message: N
Work Phone: () x
Work: OK to Call: N OK to Leave Message: N
Emergency Phone: () Contact
Note:
[This referral has attachments. Click to see list. Attachments can be opened from Client Information, only after acceptance.](#)

Accept Decline Go Back

As the link suggest, you can click to see the list, but you will not be able to view the document until the E-Referral is accepted by the agency

E-Referral Attachments for admission 1 - referral 3 - Viewed - User Dart psite - Referral from Dart 00004

Attachment #	Attachment File
1	DQ_-_Integrated_View_R05(1).pdf

[Exit](#)

Following the steps to accepting the referral, you can then go to the Client Information Screen and view the document attached to the E-Referral. Scroll to and expand the Referral Information section on the Client Information screen and click on the link 'List of Client's accepted e-referrals with attachments'.

Entry Services

Save and Enter Entry Services

Referral Information

Referred On: 03 / 07 / 2013 (dd/mm/yyyy)

Referring Source:

Referring Agency: 00004- Test Agency - Site 01

Telephone: (111) 111-1111 ext Contact: Joan

[List of Client's accepted e-referrals with attachments](#)

The documents are listed by date, the Referral Source and Provincial Service Category, click on the hyperlinked date to view the attachment in the list that you would like to work with.

Client Accepted Incoming Referrals

Referral Date	Referral Source	Provincial Service Category
03/07/2013	00004- Test Agency : Marie	Community Withdrawal Management Services Level 3

[Exit](#)

Another window pops up and a link to the document is provided. Click on this link. The document can be viewed and saved, but it cannot be deleted.

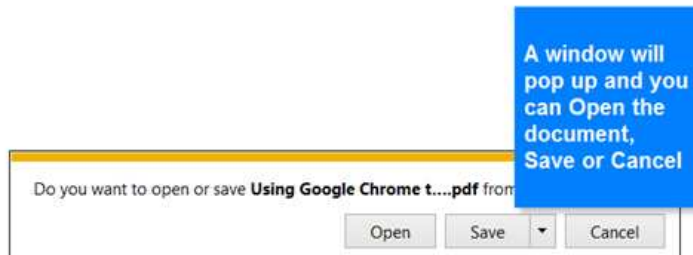
E-Referral Attachments for admission 2 - referral 3 - Accepted - User Dart psite - Referral from Dart 00004

Attachment #	Attachment File
1	Using Google Chrome to Print a Report.pdf

[Exit](#)

The view, compared to the screen shot below, may be different as it is dependent the browser that is used to download the attachment.

E-Referral Attachments for admission 2 - referral 3 - Accepted - User Dart paite - Referral from Dart 00004	
Attachment #	Attachment File
1	Using Google Chrome to Print a Report.pdf



Appendix A

Demographic Data transferred with E-Referrals

The following data are transferred when a client referral is accepted and the client is added to the receiving agency's database:

- Names, includes, first, middle, last, last name at birth and alternate names
- Gender
- DOB (Date of Birth)
- DATIS key
- Current address
- Home/Work phone numbers and whether it is ok to leave messages **
- Health card # - displayed as 'null null' if not available
- Emergency contact
- Ethnicity
- Preferred language
- Referral Agency and contact information (this information comes from the referral screen)

Notes that are entered when making the referral: See step #3 in the E-Outgoing Referral Section in this document

Loading time: 0.273 seconds

Client Information

Information about Referring Agency

Agency: **Test Agency**

Contact:

Telephone:

Information about Referred Client

Name: **Jo Bellum**

D.O.B.: **22/01/1958**

Age: **54**

Gender: **Female**

Name at Birth: **Jo Coles**

Alternate Name: **Joey**

Ethnicity: **Central American**

Preferred Language: **English**

Health Card:

Current Address: **123 Forest Avenue**

City: **LOCHALSH**

County: **ALGOMA**

Province:

Postal Code: **H0H0H0**

Home Phone: **(905)111-1212**

Home: OK to Call: **Y**

OK to Leave Message: **Y**

Work Phone: **(416)222-1213 x 123**

Work: OK to Call: **N**

OK to Leave Message: **N**

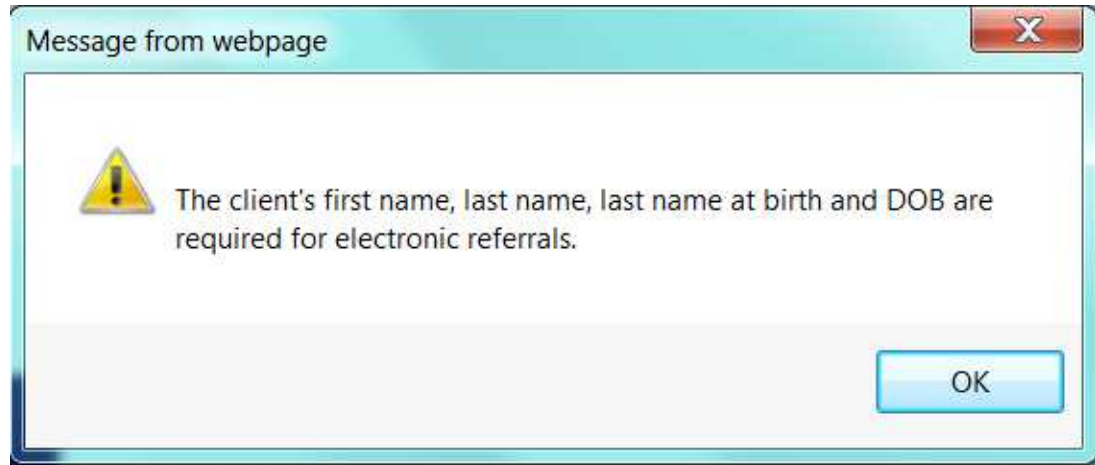
Emergency Phone: **(905)333-1122**

Contact: **Mose**

Note: **This is a note on the Outgoing Referral Screen**

Appendix B – General Business Rules

- The receiving and sending of electronic referrals is optional. Please contact DATIS Helpdesk at helpdesk@dati.ca if your agency does **not** want to participate and use E-Referrals.
- The *Referred On* date cannot be in the future. This new rule affects both e-referrals and regular referrals.
- If an E-referral is sent pre-admission and the client does not have a name or DOB, the e-referral will not be saved. The following error message will appear:



- Business rules that apply to the Referral module also apply to the E-Referrals
- Referrals linked to the Client Information Screen are not included in the *PR-04: Outgoing Referrals for Open Admissions* report, nor will the referral information appear in the *PR-06: Referral Patterns for Open Admissions* report. You will be able to access this information by running the Data Download report *DD-12: Referral Information*
- Recalled or Delete E-Referrals: An E-referral can be recalled (deleted) as long as the E-referral has not been accepted or declined by the receiving agency. A viewed e-referral can be deleted as long as the referral has not been accepted or rejected by the receiving agency. To delete the transmitted referral, the referral must be deleted from the client's Outgoing Referral Information screen.
- The name of referring agency gets populated in the *Referring Agency* field on the Client Information Screen (Referral Information section) of the accepted client; the *Referred On* date is also populated and saved automatically.

Entry Services

Save and Enter Entry Services

Referral Information ☒

Referred On: 12 / 07 / 2012 (dd/mm/yyyy)

Referring Source:

Referring Agency: pmult - Test Agency - Site 01

Telephone: () ext Contact:

Admission Services ☒

Presenting Issues at Contact ☒

Custom Fields ☒

- Participating Agency Selection List for Referring Agencies: If the referring agency is not on your agency's list of selected Referring Agencies, the referring agency name will be automatically added to the list if the referring agency is on the list but inactive, it will be activated.

Potential Risk for Duplication of Referring Agencies in the Referring Agency selection lists: The list of Referring Agencies is **maintained and populated by agencies** themselves in the Catalyst admin module therefore, the spelling of the e-referring agency name may not match the name in the list of Referring Agencies; this may result in some agencies being duplicated in the *Referring Agency* list after an E-referral is made. See [KB Article #23 - Removing an Item From an Agency Maintained Selection List](#) for more info on removing duplications.

Appendix C – Setting Agency Preferences for e-Referrals

It is up to each agency to manage whether or not they would like to receive e-referrals. This administrative tool can be found by selecting the Admin tab from the Main Menu in Catalyst, selecting the Administration option and then clicking on Agency Preferences.

Options: Y (Yes) or N (No)

By selecting the No option, agencies will appear greyed out in the selection list available to agencies making E-Referrals

By selecting the Yes option, other agencies will be able to make electronic referrals to that participating agency.

E_REFERRALS	
Can receive e-referrals	Y ▼