



**Ontario
Health**

Health Partner Gateway Reference Guide for Health Partners

Module 5.1 – eReferral to LTCH
July 2026

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Introduction & Background

The eReferral to LTCH Referral process involves the placement of clients in Long Term Care Homes (LTCH). This process allows for accurate communication of information between Ontario Health at Home (OHaH) and LTC Homes. It also provides an electronic record of all major events encountered in the process of placing an OHaH client into a LTCH.

Also note that while HPG still uses Ontario Health at Home's former 'LHIN' name, the Reference Guides generally use the current 'OHAH' name, but will use the term 'LHIN' where it applies specifically to a label in the HPG system.

The Long Term Care Home e-Referral functionality applies to the following referral types:

- Long Stay (LS)
- Short Stay Interim (SSI)
- Short Stay Convalescent Care (SSCC)
- Short Stay Respite (SSR)

The LTCH eReferral functionality allows OHaH staff to:

- Assess clients and send electronic referrals for Long Stay, Short Stay Interim, Short Stay Convalescent Care and Short Stay Respite to various LTCHs
- Maintain an accurate and complete waitlist for each LTCH and Bed Type
- Match a client to an available bed and work through the bed offer process with the client to the point of admission to the LTCH
- Facilitate discharge planning from Short Stay Interim, Short Stay Convalescent Care and Short Stay Respite Beds
- Update LTCH referrals as necessary and communicate to LTCHs

The LTCHs through HPG Referral Management:

- Receive, review, and respond to Long Stay, Short Stay Interim, Short Stay Convalescent Care and Short Stay Respite referrals
- Receive and view Referral Package shared documents and assessments
- View the waitlist for each Bed Type in their Facility
- Record client admissions and discharges from their LTCH

This document covers the functionality related to:

- Access to HPG Referral Management by the LTCH user to manage LTCH eReferrals received from one or more OHaH site

In Referral Management, the LTCH user can:

- Search for referrals sent to the LTCH
- View the Referral Details, Referral Package documents and assessments, Notification Logs and Waitlist
- Respond to the Referral

Referral Management in HPG for the LTCH

You, the LTCH user, will be to access the eReferrals to LTCH in HPG via the Referral Management tab.



This allows you to:

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

The Referral Management section has four tabs:

- **Referrals:** allows searching for referrals by their HPG team (Organization) and Referring OHaH
- Four sub-tabs include:
 - **Referral Search:** allows you to the further refine your referral search using a number of filters (Referral ID, Notification Date, Bed Type and Status)
 - **Waitlist View:** provides a list of clients who have been waitlisted for the LTCH and the bed in focus, excluding SSR referrals
 - **Bookings:** eReferral to LTCH for SSR – view current and future bookings for SSR at the LTCH
 - **Service Utilization:** HPG user can search for past reports and report new periods (visits/hours per client for the agency) to the OHaH; this tab is only visible when set and feature is primarily for Community Support Service Agencies (CSSA) Personal Support and other Expanded Role referrals

- **Referral Details:** allows you to view the details of the selected referral from the search results grid and respond to the chosen referral
- **Referral Documents:** allows you to view shared documents and assessments in a PDF format
- **Shared Notes:** displays all the client notes that have been shared with the organization based on the selected referral – this applies to Complex Care and Placement Referral types and Referrals to Community

Referrals

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 optional filter of Referring LHIN.

The screenshot displays the 'Health Partner Gateway' interface. At the top, a green navigation bar contains links: Home, Document Exchange, **Referral Management**, Client View, Administration, Reports, Options, and Help. Below this, the 'Referral Management' section is active. It features four tabs: **Referrals**, Referral Details, Referral Documents, and Shared Notes. Under the 'Referrals' tab, there are two dropdown menus: 'Organization' (currently showing 'Select One') and 'Referring LHIN' (currently showing 'Toronto Central LHIN (TC)'). Below these are four more tabs: **Referral Search**, Waitlist View, Bookings, and Service Utilization. The 'Referral Search' tab is active, showing input fields for 'Referral ID' and 'Notification Date From/To' (with calendar icons).

Refine the Referrals you want to Search for by your Organization Team and Referring OHaH.



Organization and Referring LHIN drop-down options may appear greyed out (no other options) if the HPG user is assigned to only one Organization and/or LHIN (i.e. OHaH site).

Referral Search

When you select the Organization and Referring LHIN from the drop-down options, HPG displays the **Referral Search** tab to further refine your search results.



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

Available criteria for Long Stay, Short Stay Interim, Short Stay Convalescent Care and Short Stay Respite Search Screens:

- a. Referral ID
- b. Notification Date From/To
- c. Bed Type
- d. Status

Health Partner Gateway

Home Document Exchange Referral Management Client View Administration Reports Options Help

Referral Management

Referrals Referral Details Referral Documents Shared Notes

Organization: Belmont House - Long Term Care Facility ▼

Referring LHIN: Toronto Central LHIN (TC) ▼

Referral Search Waitlist View Bookings Service Utilization

a Referral ID:

b Notification Date From/To:

c Bed Type: (Select All Clear All)

d Status: (Select All Clear All)

☒ Long Stay

☒ Reunification Priority Access Beds

☐ Admitted

☒ Awaiting Response

☐ Closed

☐ Waitlisted

View Results Reset

Search Results

Referral ID	Status	Client Name
-------------	--------	-------------

The 'Bed Types' displayed are those Bed Types that are available in the LTCH selected in the Organization field in the 'Search Criteria' section above.

The examples below show this variation in Bed Types based on the Organization selected:

Home Document Exchange Referral Management Offer Management Client View Invoice Entry Adm

Referral Management

Referrals Referral Details Referral Documents Shared Notes

Organization: Golden Plough Lodge

Referring LHIN: Central East LHIN (CE)

Referral Search Waitlist View Bookings Service Utilization

Referral ID:

Notification Date From/To:

Bed Type: (Select All Clear All)

- ☒ High Acuity Priority Access Bed
- ☒ Long Stay
- ☒ Long Term Veteran Priority Access
- ☒ Reunification Priority Access Beds

Home Document Exchange Referral Management Offer Management Client View Invoice Entry Adm

Referral Management

Referrals Referral Details Referral Documents Shared Notes

Organization: Extendicare - Peterborough

Referring LHIN: Central East LHIN (CE)

Referral Search Waitlist View Bookings Service Utilization

Referral ID:

Notification Date From/To:

Bed Type: (Select All Clear All)

- ☒ Long Stay
- ☒ Reunification Priority Access Beds
- ☒ Short Stay Convalescent Care/Activation Restoration
- ☒ Short Stay Interim
- ☒ Short Stay Respite

Home Document Exchange Referral Management Offer Management Client View Invoice Entry Administration Reports

Referral Management

Referrals Referral Details Referral Documents Shared Notes

Organization: Tony Stacey Centre for Veterans Care

Referring LHIN: Central East LHIN (CE)

Referral Search Waitlist View Bookings Service Utilization

Referral ID:

Notification Date From/To:

Bed Type: (Select All Clear All)

- ☒ Long Stay
- ☒ Long Term Veteran Priority Access
- ☒ Reunification Priority Access Beds
- ☒ Short Stay Respite

There are four status categories:

- Admitted
- Awaiting Response
- Closed
- Waitlisted

You can search for referrals in a particular state(s) using the Status filter in the **Referral Search** (any or all can be selected):

Health Partner Gateway

Home Document Exchange Referral Management Client View Administration Reports Options Help

Referral Management

Referrals Referral Details Referral Documents Shared Notes

Organization: Belmont House - Long Term Care Facility ▼

Referring LHIN: Toronto Central LHIN (TC) ▼

Referral Search Waitlist View Bookings Service Utilization

Referral ID:

Notification Date From/To:

Bed Type: ☒ Long Stay ☒ Reunification Priority Access Beds

Status: ☐ Admitted ☒ Awaiting Response ☐ Closed ☐ Waitlisted

View Results Reset

Search Results

Referral ID	Status	Client Name
-------------	--------	-------------

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) Referral ID	System generated identifier for the referral. If it is known, it can be entered here to find the specific referral
b) Notification Date From/To	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 LTCH
c) Bed Type	Multiple Check boxes available for LTCHs that offer more than one bed type. (Any or all can be selected) Check the Bed Type(s) that you wish to display in the Search Results (Select All, Clear All available)
d) Status	Refers to the Referral Status, and defaults to 'Awaiting Response'; other choices include Waitlisted, Admitted and Closed Check the Status(s) that you wish to display in the Search Results (Select All, Clear All available)

*Reset clears all criteria

Search Results Grid

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

Referral Management

Referrals
Referral Details
Referral Documents
Shared Notes

Organization: Fudger House
Referring LHIN: Toronto Central LHIN (TC)

Referral Search
Waitlist View
Bookings
Service Utilization

Referral ID:
Notification Date From/To:
Bed Type:
(Select All Clear All)
☒ Long Stay
☒ Reunification Priority Access Beds
☒ Short Stay Convalescent Care/Activation Restoration
Status:
(Select All Clear All)
☐ Admitted
☒ Awaiting Response
☐ Closed
☐ Waitlisted

View Results
Reset

Search Results

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expecte
9263427.03.600558.3738	Awaiting Response (LHIN Creates Refr	Andrews, Susan	Long Stay	4A	2022-05-18 12:44:2	2022-05-25 12:44:2

-Referral ID: unique system generated identifier assigned to the client's LTCH 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: the name of the bed type related to the referral (Long Stay, Short Stay Interim, Short Stay Convalescent, or Short Stay Respite)

-Priority: displays priority level assigned to the referral or application (1-Crisis, 2-Spouse/Partner Reunification, 3A-4A + Ethno-Cultural/Religious Choice, etc.)

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

-Decision Expected By: the date by which the LTCH is expected to respond to a new/updated referral and applies only to referrals in 'Awaiting Response' status:

- Long Stay and SSR – 5 business days
- SSCC and SSI – 3 business days



The search results only show the latest status for each referral. To view the history of the notifications for each referral, click on the Referral ID link.

Select a **Referral ID** link in the Search Results grid to navigate to the **Referral Details** tab, where the application/referral is displayed.

View Results

Reset

Search Results

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
9263427.03.600558.3738	Awaiting Response (LHIN Creates Refr	Andrews, Susan	Long Stay	4A	2022-05-18 12:44:2	2022-05-25 12:44:2

Waitlist View

The Waitlist View tab provides you with a list of clients who have been waitlisted for your 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 your LTHC
 - can only select one Bed Type at a time
- **Gender:**
 - Choices of Any, Female and Male

- **Accommodation Type:**
 - Displays for Long Stay Types
 - Displays the accommodation type(s) that are available for the particular Long Stay Bed Type in your LTCH

Waitlist View:

Referral Management

Referrals | Referral Details | Referral Documents | Shared Notes

Organization: Fairview Nursing Home
Referring LHIN: Toronto Central LHIN (TC)

Referral Search | **Waitlist View** | Bookings | Service Utilization

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

View Results | Reset

Total # of clients matching the criteria: 7

Page 1 of 1 50

#	Client Name	Age	Gender	Priority	Waitlist Date	Bed Type	Status (Action)	Requires Secure	Accommodation Ty	Additional Informa
1	Andrews, Susan (#9263427) 127 Camelia Ave, Ottawa, Ontario K1K 2X5 (Home - Private Dwelling)	77	Male	4A - Comm High Needs/Hosp ALC/LTCH tfr to 1st choice	18-May-2022	Long Stay	Awaiting Response (LHIN Creates Referral)	No	Basic, Semi-Private, Private	New Referral -

The information (columns) in the Waitlist View search results grid are as follows:

- # (number sign):** indicates the client's actual place on the waitlist, not influenced by any filters
- Client Name:** Client's name and client number in brackets, followed by the client's present location. *This link navigates the user to the Referral Details tab.*
- Age:** the client's age today
- Gender:** male or female
- Priority:** the priority assigned by the OHaH user in CHRIS –applies to Long Stay referrals only. For Short Stay Interim, Convalescent Care or Respite, it displays '—'
- Waitlist Date:** the date the client was added to the Wait List
- Bed Type:** type of bed for which the client has been waitlisted
- Status (Action):** the Referral Status with the action that resulted in the status in brackets
- Requires Secure:** indicates how your LTCH will handle the security requirements of the client

-Accommodation Type: indicates the type of accommodation requested by the client (Basic, Semi-Private, Private, Couples); only applies to Long Stay and Short Stay Interim referrals

-Additional Information: information provided by your LTCH or the OHaH for the current action and status

At the top of the grid:

#	Client Name	Age	Gender	Priority	Waitlist Date	Bed Type	Status (Action)	Requires Secure	Accommodation Ty	Additional Informa
1	Andrews, Susan (#9263427) 127 Camellia Ave, Ottawa, Ontario K1K 2X5 (Home - Private Dwelling)	77	Male	4A - Comm High Needs/Hosp ALC/LTCH tfr to 1st choice	18-May-2022	Long Stay	Awaiting Response (LHIN Creates Referral)	No	Basic, Semi-Private, Private	New Referral -

- **Total # of clients matching the criteria: 7** identifies the number of clients matching the selected criteria
- There is the option to print the Wait List in the upper right of the grid. A printer dialogue box will appear for you to print the list
- Paging functionality has been added to the Waitlist Search results. You can see the total number of clients matching the search criteria and then decide whether to display 25, 50 or 100 clients at a time on the screen. You can then move through the pages by using the arrows -



Note the following points about the Waitlist:

- The Clients are displayed or grouped according to priorities-highest to lowest
- Within each Priority, the clients are sequenced according to Waitlist Date-old to new
- Client with the same Priority and Waitlist Date have the same sequence #
- Within each sequence #, the clients are listed in alphabetical order according to surname
- Application Notes column displays the content of notes entered in CHRIS by the OHaH user. These notes provide additional information related to the Referral-either new or updated

Referral Details

The **Referral Details** tab allows you to view the details of the Referral, the Notification Log, and the available actions that you can take. 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 **Referrals** and **Referral Details** tabs without losing the focus/settings.

The Header:

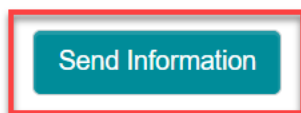


-**Client:** client last and first name with client number

-**Referral ID:** unique identifier assigned by the system; selecting the link generates a PDF version of the Referral

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

-**Action:** drop-down menu that allows you to respond to the LTCH referral; communication is sent back to OHaH (available action options depend on the referral type and the referral status). When an action is selected, a window will pop up to allow you to add comments and/or additional information.



Send Information:

- Applicable only to LT, SSI, SSCC and SSR referrals
- When clicked, opens a window to allow the LTCH user to send additional information back to OHaH
- Always visible even after the referral is closed until 'delay days' date is reached
- The Notification Log is updated each time the LTCH sends information
- The choice status remains unchanged

Send Information

Notification Date: 25-May-2022 04:21:19 PM

* Additional Information:

Save

Cancel



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

Referral Details Section

Referral Management

Referrals

Referral Details

Referral Documents

Shared Notes

Client:

Andrews, Susan (9263427)

Action:

-Select One-

Go

Referral ID:

[9263427.03.600545.3737](#)

Send Information

Referral Status:

Awaiting Response

Referral Details

Organization:

Fairview Nursing Home

Referral Date/Time:

18-May-2022 12:44 PM EDT

Address:

14 Cross St
Toronto, Ontario M6J 1S8

Referring LHIN:

Toronto Central LHIN

Bed Type:

Long Stay

Team:

Priority:

3A - 4A + Ethno-Cultural/Religious choice

Caseload:

Ethocultural Preferences:

--

Care Coordinator:

Accommodation Type:

Basic, Semi-Private, Private

Updated On:

18-May-2022 12:44 PM EDT

Additional LT Information:

--

Waitlist Date:

18-May-2022

Notes:

New Referral -

The **Referral Details** section identifies:

- Organization:** your LTCH to which the client has been referred
- Address:** of the LTCH
- Bed Type:** type of bed client requires

-**Priority, Ethnocultural Preferences, Accommodation Type** and **Additional LT Information**, if relevant to the Bed Type

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

-**Notes**: additional information relevant to the referral; for a new referral the note will default to 'New Referral'. Any comments added in CHRIS by the OHaH user are viewed here as well. For updated referrals, existing notes will be replaced by new notes entered in CHRIS by the OHaH user.

-**Referral Date/Time**: date and time when the Referral was initially sent to your LTCH

-**Referring LHIN**: the LHIN/ OHaH that referred the client to your LTCH

-**Team**: the OHaH team primarily responsible for the client

-**Caseload**: name of the primary OHaH caseload responsible for the client

-**Care Coordinator**: name of Care Coordinator responsible for the client

-**Updated On**: date the referral was last updated

Other information contained in the Referral Details tab:

Client Information			
Name:	Andrews, Susan (9263427)	Home Address:	
HCN:	6703772746	Phone Number:	
Province Issuing Health Card:	Ontario	Alternate Phone Number:	
Date of Birth:	09-Nov-1944	Current Location and Address:	
Gender:			
Preferred Language:	--		
Marital Status:	--		

Health Profile			
Infection Control:	--	Is the Patient Capable to Make LTC Admission Decisions:	--
Assessment Completion Date:	--		

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

-**Health Profile**: selected information taken from the Client Health Profile in CHRIS

Contacts

Personal Contacts:

Name	Relationship	Non-Legal Role	Legal Responsibility	Contact Restriction Details	Phone	Additional Information

Medical Contacts:

Name	Specialty	Phone	Comments
--	--	--	--

Referral Documents:

Provincial Documents included with the referral

Health Assessment Form

Home Care Assessment (e.g., interRAI)

Smoking Assessment (if patient currently has or has had behaviours in the last 12 months)

Behavioural Assessment (if patient currently has or has had behaviours in the last 12 months)

-**Contacts:** contains Active Personal and Medical Contacts information derived from CHRIS

-**Referral Documents:** documents shared as part of the application package and are accessed by clicking the Referral Documents tab. For assessments, the system will always share the latest completed.

Notification Log

The **Notification Log** records all the actions and updates sent/completed between your LTCH and the OHaH. It is located at the bottom of the **Referral Details** page:

Notification Log				
Date/Time Sent	From	To	Action (Status)	Notes
18-May-2022 12:44 PM EDT	Anderson, Lisa	Fairview Nursing Home	LHIN Creates Referral (Awaiting Response)	New Referral -

Referral Documents

OHaH users have the ability to share documents and interRAI Assessments as part of the Referral Package. These documents and assessments can be accessed by you from the **Referral Documents** tab:

Referral Management

Referrals

Referral Details

Referral Documents

Shared Notes

Client: Andrews, Susan (9263427)

☒ Quick View (unchecked to open multiple tabs)

Shared Assessments:

Assessment Name	Date

Shared Documents:

Type	Category	Document Date	Upload Date

Referral Management

Referrals
Referral Details
Referral Documents
Shared Notes

Client: Bright, Harold1 (10054349) (Vanessa) ☒ Quick View (uncheck to open multiple tabs)

Shared Assessments:

Assessment Name	Date
interRAI Home Care Personal Health Profile (PHP) Report	24-Feb-2022
interRAI Home Care Assessment Report	24-Feb-2022

Shared Documents:

Type	Category	Document Date	Upload Date
Behavioural Assessment	Placement	--	03-May-2022 12:00 AM
Health Assessment - MOH	Placement	--	03-May-2022 12:00 AM
Smoking Assessment	Placement	--	03-May-2022 12:00 AM

The Documents tab is disabled (greyed out) on first entry until a referral is selected. Only those documents and assessments associated with the referral will be displayed.



You can only see these documents if the OHaH uses this functionality.

There are two views when accessing shared Referral Documents:

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

☒ Quick View (uncheck to open multiple tabs)

This will open the document you select to review right away. It does not open multiple documents at one time.

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

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.

Home
Document Exchange
Referral Management
Offer Management
Client View
Invoice Entry
Administration
Reports
Options
Help

Referral Management

Referrals
Referral Details
Referral Documents
Shared Notes

interRAI Home Care Assessment Report
Behavioural Assessment
Health Assessment - MOH

Client: Bright, Harold1 (10054349) (Vanessa) ☐ Quick View (uncheck to open multiple tabs)

Shared Assessments:



This functionality also applies to Shared Assessments and Shared Documents.

Select the document link to open a PDF of the document or assessment, for example:

Referral Management

Referrals Referral Details **Referral Documents** Shared Notes

Client: Bright, Harold1 (10054349) (Vanessa) Quick View (unchecked to open multiple tabs)

Shared Assessments:

Assessment Name	Date
interRAI Home Care Personal Health Profile (PHP) Report	24-Feb-2022
interRAI Home Care Assessment Report	24-Feb-2022

Shared Documents:

Type	Category	Document Date	Upload Date
Behavioural Assessment	Placement	--	03-May-2022 12:00 AM
Health Assessment - MOH	Placement	--	03-May-2022 12:00 AM
Smoking Assessment	Placement	--	03-May-2022 12:00 AM

Health Partner Gateway

User: lisa.anderson-ce
Version 3.11.0.8083
Logout

Home Document Exchange Referral Management Offer Management Client View Invoice Entry Administration Reports Options Help

Referral Management

Referrals Referral Details Referral Documents **Shared Notes** **interRAI Home Care Assessment Report**

1 of 17

interRAI™ Home Care (HC) Assessment Form 1
(CODE FOR LAST 3 DAYS, UNLESS OTHERWISE SPECIFIED)

SECTION A. Identification Information

1. NAME
a. (Given name) Harold1
b. (Initial or middle name)
c. (Family name) Bright
d. (Suffix)

2. SEX / GENDER IDENTITY [EXAMPLE — CANADA]
2a. Sex
M Male F Female UN Not assigned male or female
2b. Gender identity
M Male F Female OTH Other gender identity
UNK Not known NA Not applicable
2c. Person self-identifies gender as
(Enter up to 25 characters)

10. LOCATION OF ASSESSMENT (Additional interRAI items)
a. Type of location
1 Private home, condominium, apartment, assisted living setting
2 Hospital
3 Residential care facility
4 Other—e.g., hospice, correctional facility
b. Facility admission date
(Date of admission to facility; leave blank if A10a is coded 1)
Year Month Day

11. PERSON'S EXPRESSED GOALS OF CARE
Enter the primary goal in boxes at bottom.
(Do not include any names that are partial; the person's Healthcare Identification Number, date of birth, sex or gender.)
Continue with home care services and start application for long term placement.

Referral Management

Referrals Referral Details **Referral Documents** Shared Notes

Client: Bright, Harold1 (10054349) (Vanessa) Quick View (unchecked to open multiple tabs)

Shared Assessments:

Assessment Name	Date
interRAI Home Care Personal Health Profile (PHP) Report	24-Feb-2022
interRAI Home Care Assessment Report	24-Feb-2022

Shared Documents:

Type	Category	Document Date	Upload Date
Behavioural Assessment	Placement	--	03-May-2022 12:00 AM
Health Assessment - MOH	Placement	--	03-May-2022 12:00 AM
Smoking Assessment	Placement	--	03-May-2022 12:00 AM

Home Document Exchange Referral Management Offer Management Client View Invoice Entry Administration Reports Options Help

Referral Management

Referrals Referral Details Referral Documents **Shared Notes** **Behavioural Assessment**

1 of 24

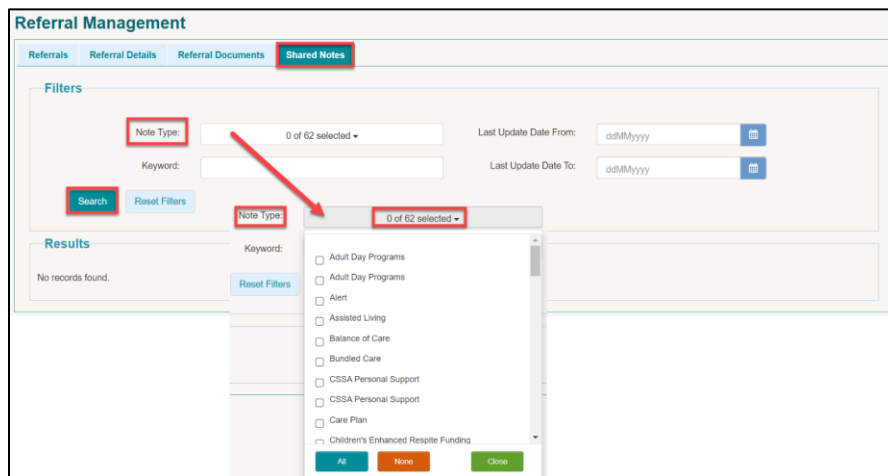
PLACEMENT SERVICES BEHAVIOURAL ASSESSMENT
Client Name: Bright Harold1, HCN:

Central East LHIN

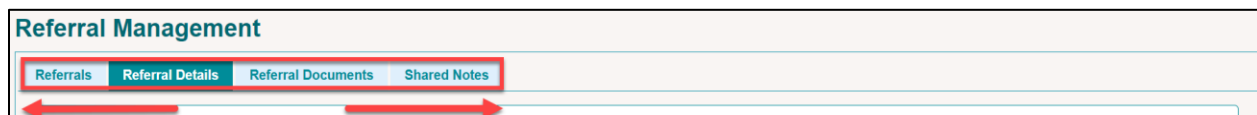
BRN: 610646763
LHIN: CE

Shared Notes

Displays all the client notes that have been shared with the organization based on the selected referral. This applies to Complex Care and Placement Referral types and Referrals to Community.



You can toggle between the **Referrals** (search) tab, the **Referral Details** tab, **Referral Documents** and **Shared Notes** tab without losing focus:



LTCH Management of eReferrals

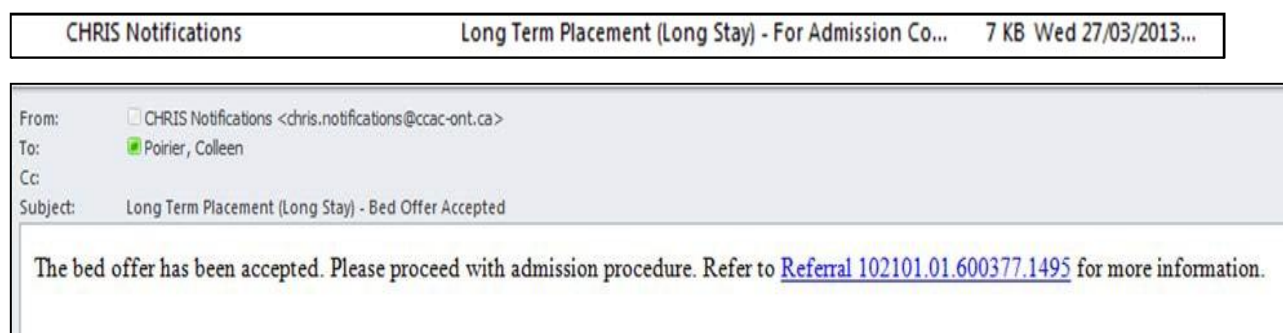
Email Notifications

When your LTCH receives a new referral in HPG from OHaH, you are notified by email. The Referral type is in the subject line of the email so that you can distinguish between notifications for Long Stay Placement, Short Stay Interim, Short Stay Convalescent Care and Short Stay Respite programs. This is beneficial if your LTCH has more than one Bed Type.

CHRIS Notifications	New Referral For Long Term Placement (Long Stay)	7 KB Wed 27/03/2013...
---------------------	--	------------------------

From:	CHRIS Notifications <chris.notifications@ccac-ont.ca>
To:	Poirier, Colleen
Cc:	
Subject:	New Referral For Long Term Placement (Long Stay)
New Referral 102101.01.600265.1551 has been submitted to your facility for your review and decision.	

Email notifications are also received when there are updates to the Referral:



The email prompts you to access HPG (clicking on the Referral ID link will take you to the HPG log in page) to review and respond to the Referral.

Events that trigger email notifications to the LTCH are:

Action by the OHaH user/CHRIS Event	Notification (Email) Description Received by the LTCH
Create Choice/LTCH Applied	New Referral for Long Stay Placement/SSCC/SSI/SSR
OHaH sends update (because more information has been requested by the LTCH)	Client Information Updated
Considered for bed/matched to bed – OHaH notifies the LTCH that the client is being considered for a bed	For Admission Consideration to a Bed
Client Accepts/Offer Accepted – OHaH notifies the LTCH that the client has accepted the bed offer	Bed Offer Accepted
OHaH Withdraws/Withdraw – OHaH notifies the LTCH that the application is withdrawn from the waitlist (this could be for several different reasons)	Referral Withdrawn
Client Refused with Exception	Client Refuses Bed Offer Temporarily
Client Refuses without Exception	Client has refused Bed Offer – Choice is Closed
OHaH Confirms Refusal – Tier 1	Confirm Refusal – Referral Closed
LTCH Choice Status in CHRIS is undone	Referral Record Corrected

Referral Management – Referral Status Categories

Once your LTCH has been notified that a Referral or Update has been completed by the OHaH by email, go into HPG Referral Management to view and respond to the Referral. This section describes the many possible actions that you can take in response to the actions of the OHaH.

As mentioned previously, the Referral header in the **Referral Details** tab contains an Action drop-down menu that enables you to respond to a Referral based on the current status of the referral:

The screenshot shows the 'Referral Management' interface with the 'Referral Details' tab selected. The interface includes the following elements:

- Client:** Andrews, Susan (9263427)
- Referral ID:** 9263427.03.600545.3737
- Referral Status:** Awaiting Response
- Action:** A dropdown menu with '-Select One-' and a 'Go' button.
- Send Information:** A button located below the Action dropdown.

Each **Referral Status category** and the potential actions are listed below:

1. **Awaiting Response** is the Referral Status assigned in Referral Management when a response is required by either the LTCH or the OHaH for LS, SSI, SSCC and SSR referral types. In the following situations the resulting Referral Status is '**Awaiting Response**':
 - A new Referral has been created and sent by the OHaH and your LTCH is required to respond to the OHaH about acceptance of the client on the Waitlist.
 - Your LTCH requests additional information and the OHaH has sent a Referral Update prior to your LTCH accepting the Referral
 - Your LTCH has responded with a Tier 1 Rejection and the OHaH must now confirm receipt of the Tier 1 Rejection
 - The OHaH updates the LTCH choice status in CHRIS to '**Considered for bed**' (in the Long Stay Referral type only) and is awaiting a response from your LTCH regarding acceptance of the client for the specific bed
2. **Waitlisted** is the Referral Status assigned in Referral Management in the following situations for LS, SSI, SSCC and SSR referral types:
 - Your LTCH has accepted the Referral and the client is on the LTCH Waitlist (LT, SSI, SSCC and SSR referral types.)
 - The client is bypassed (Long Stay only)
 - Your LTCH has responded that the client is an appropriate candidate for a matched bed '**LTCH Accepts for Bed**' (Long Stay referral type only)
 - The client has been offered a bed and accepts the bed offer (Long Stay referral type only)
 - When the client refuses a bed offer 'With Exception' (Long Stay referral type only)



(Use the **Waitlist View** tab to view a list of all the clients who are on the waitlist. The Waitlisted Status filter only displays those clients whose referral status is Waitlisted and not the full Waitlist)

3. **Admitted** is the Referral Status assigned when the client is admitted to your LTCH. This status applies to SSI, SSCC and SSR referral types only. Selecting the '**Admitted**' status filter provides your LTCH with a list of all the OHaH referred clients who are currently admitted to a SSI, SSCC or SSR bed.
4. **Closed** is the referral status assigned when the Referral is no longer open for one of the following reasons:
 - The client is admitted to a Long Stay bed type
 - The client is discharged from a SSI, SSCC or SSR bed type
 - The client/ OHaH withdraws the LTCH application prior to admission to the LTCH
 - The client refuses a bed offer without exception
 - The LTCH refuses/withdraws-Tier 1 and Tier 2

Referral Management: Awaiting Response Status/Actions

When your LTCH receives a new referral, the status of that referral is '**Awaiting Response (LHIN Creates Referral)**'. With a new Referral, you have **3 actions** to choose from:

The screenshot shows the 'Referral Management' interface with the 'Referral Details' tab selected. The 'Client' is 'Andrews, Susan (9263427)' and the 'Referral ID' is '9263427.03.600545.3737'. The 'Referral Status' is 'Awaiting Response'. The 'Action' dropdown menu is open, showing three options: 'LTCH Refuses Referral', 'LTCH Accepts Referral', and 'LTCH Requests More Information'. A red arrow points to the 'LTCH Refuses Referral' option.

1. Action: LTCH Refuses Referral (available for LS, SSI, SSCC, SSR)

If your LTCH determines you are unable to care for the client based on the assessment and referral information provided, you would select '**LTCH Refuses Referral**' option in the Action drop-down menu.

When this is selected, an Action Dialog will display:

Notification Date: is set to the system date and time

Date Refused: the date your LTCH refused the Referral

Reason: is a mandatory field and is defined as the reason why your LTCH cannot care for the client. Currently there are two choices that have been configured for 'Reason' for refusal:

- Tier 1 Lack of Nursing Expertise
- Tier 1 Lack of Physical Facilities Necessary for Care

Additional Information: is an optional field that you can use to communicate with the OHaH any extra details related to the refusal



The Additional Information field holds a maximum of 250 characters

When you select a Tier 1 refusal, the Referral Status is updated to **'Awaiting Response'** because the OHaH must take the action to confirm the Tier 1 refusal.

Your LTCH still has the option to select **'LTCH Accepts Referral'**.

The OHaH must confirm the Rejection (approval withheld) or Withdraw the referral at which point the Referral Status changes to **'Closed'**. At this point you can no longer accept the Referral.

2. Action: LTCH Accepts Referral (available for LS, SSI, SSCC, SSR)

When your LTCH has determined you are able to provide the necessary bed/care for a client after having reviewed the Referral and Referral package, select **'LTCH Accepts Referral'** from the action drop-down.

Referral Management

Referrals **Referral Details** Referral Documents Shared Notes

Client: Andrews, Susan (9263427) **Action:** -Select One- Go

Referral ID: 9263427.03.600545.3737

Referral Status: Awaiting Response

Send Information -Select One- Go

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

When this is selected, an Action Dialog will display:

Referral Response

Action: LTCH Accepts Referral

Notification Date: 18-May-2022 04:04 PM EDT

* Date Accepted: 18-May-2022

Secure/Not Secure:

Additional Information:

Save Cancel

-Notification Date: is set to the system date and time.

-Date Accepted: defaults to the current date and time; this is editable.

-Secure/Not Secure: field is optional and applicable only for Long Stay referral types. Enter information to advise the OHaH about the client's suitability for a secure or non-secure bed.

-Additional Information: field is optional and can be used to record a short note to the OHaH regarding the acceptance of the client referral (250 character field capacity)

As a result of accepting a referral, the client referral is no longer displayed in the Awaiting Response Referral Status category. The status on the Referral Search Results will now display **'Waitlisted (LTCH Accepts Referral)'**.

As the OHaH progresses the client through the bed matching and bed offer process, the Referral Status in HPG remains as **'Waitlisted'** but the most recent update will be displayed in brackets in the Status column:

Referral Management

Referrals **Referral Details** Referral Documents Shared Notes

Client: Andrews, Susan (9263427) **Action:** -Select One- Go

Referral ID: 9263427.03.600545.3737

Referral Status: Waitlisted

Send Information

Notification Log				
Date/Time Sent	From	To	Action (Status)	Notes
18-May-2022 04:15 PM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Accepts Referral (Waitlisted)	--
07-Mar-2019 01:44 PM EST	Tomanovic, Nevenka	Fairview Nursing Home	LHIN Creates Referral (Awaiting Response)	New Referral -

3. Action: LTCH Requests More Information (available for LS, SSI, SCCC, SSR)

Select this response in the Action drop-down menu if you feel that the information provided (referral and package) is insufficient to make a decision.

Referral Management

Referrals **Referral Details** Referral Documents Shared Notes

Client: Andrews, Susan (9263427) **Action:** -Select One- Go

Referral ID: 9263427.03.600545.3737

Referral Status: Awaiting Response

Send Information -Select One- Go

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

When this is selected, an Action Dialog will display:

Referral Response

Action: LTCH Requests More Information

Notification Date: 18-May-2022 04:09 PM EDT

*** Date Requested:** 18-May-2022

*** Additional Information:**

Save Cancel

-**Notification Date:** is set to the system date and time.

-**Date Requested:** defaults to current date and time; this is editable.

-**Additional Information:** field is mandatory and can be used to identify what information is missing or incomplete.

As a result of selecting 'LTCH Requests More Information' action, the client referral will remain in 'Awaiting Response' status. The most recent action in the Status column (in brackets) of the Search Results now displays 'LTCH Requests More Information (Awaiting Response)'.

Referral Management

Referrals **Referral Details** Referral Documents Shared Notes

Client: Andrews, Susan (9263427) **Action:** -Select One- Go

Referral ID: 9263427.03.600545.3737

Referral Status: Awaiting Response

Send Information

Notification Log

Date/Time Sent	From	To	Action (Status)	Notes
18-May-2022 04:27 PM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Requests More Information (Awaiting Response)	Behavioural Assessment Required

When the OHaH provides an update, the Action (Status) will change to ‘**LHIN Updates Client Information**’.

Notification Log				
Date/Time Sent	From	To	Action (Status)	Notes
20-May-2022 10:24 AM EDT	Anderson, Lisa	Fairview Nursing Home	LHIN Updates Client Information	test

The action choices for you in response to the update are: **Accept**, **Refuse** or **Request More Information**.

Referral Management: Considered for Bed

1. Action: LTCH Accepts for Bed (available for LS only)

View Results

Reset

Search Results

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date -	Decision Expected By
9263427.03.600545.3737	Awaiting Response (Considered for Bed)	Andrews, Susan	Long Stay	4A	2022-05-19 08:26:24 AM	2022-05-25 12:44:18 PM

When the OHaH applies for client to be considered for a bed, a notification goes to your LTCH. Your LTCH determines that you are still able to provide the necessary bed/care for a client and that the client is suitable for the vacant bed. At this point select ‘**LTCH Accepts for Bed**’ from the action drop-down.

Referral Management

ReferralsReferral DetailsReferral DocumentsShared Notes

Client: Andrews, Susan (9263427)

Referral ID: 9263427.03.600545.3737

Referral Status: Awaiting Response

Action:

-Select One-Go

Send Information

-Select One-Go

-Select One-
LTCH Accepts for Bed
LTCH Withdraws Approval

When this is selected, an Action Dialog will display:

Referral Response

Action: LTCH Accepts for Bed

Notification Date: 19-May-2022 08:31 AM EDT

* Date Accepted for Bed: 19-May-2022

Additional Information:

SaveCancel

-**Notification Date:** is set to the system date and time

-**Date Accepted for Bed:** defaults to the current date and time; this is editable

-**Additional Information:** field is optional and can be used to record a short note to the OHaH regarding the acceptance of the client for the specific bed vacancy

Once you take this action, the OHaH will contact the client to offer the bed to the client. The Referral Status is changed to **'Waitlisted'**.

View Results Reset						
Search Results						
Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected By
9263427.03.600545.3737	Waitlisted (LTCH Accepts for Bed)	Andrews, Susan	Long Stay	4A	2022-05-19 08:35:48 AM	

2. Action: LTCH Withdraws Approval (available for LS, SSI, SSCC, SSR)

Referral Management

ReferralsReferral DetailsReferral DocumentsShared Notes

Client: Andrews, Susan (9263427)

Referral ID: 9263427.03.600545.3737

Referral Status: Awaiting Response

Action: -Select One- Go

Send Information

-Select One- Go

If the LTCH withdraws the approval, the Action Dialog will pop up and a reason is required for the withdrawal. The two options are:

Referral Response

Action: LTCH Withdraws Approval

Notification Date: 18-May-2022 04:37 PM EDT

* Date Withdrawn: 18-May-2022

* Reason: -Select One-
-Select One-
Tier 2 Lack of Nursing Expertise
Tier 2 Lack of Physical Facilities Necessary for Care

Additional Information:

Save Cancel

When a Tier 2 reason is selected, the referral automatically becomes **'Closed'**.

Referral Management: Waitlisted Status and Actions

After selecting '**LTCH Admits for Bed**' as shown in the previous step, the OHaH will contact the client with a bed offer. When the client accepts the bed offer, the OHaH will update the status in CHRIS. The status within HPG will change to '**Waitlisted (LHIN – Client Accepts Bed Offer)**'

View Results

Reset

Search Results

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected By
9263427.03.600545.3737	Waitlisted (LHIN – Client Accepts Bed Offer)	Andrews, Susan	Long Stay	4A	2022-05-19 08:26:24 AM	2022-05-25 12:44:18 PM

Referral Management

ReferralsReferral DetailsReferral DocumentsShared Notes

Client:Andrews, Susan (9263427)

Referral ID:[9263427.03.600545.3737](#)

Referral Status:Waitlisted

Action:-Select One-Go

Send Information

The next step is for your LTCH to arrange the admission of the client to the LTCH bed.

1. Action: LTCH Admits Client (available for LS, SSI, SSSC, SSR)

When the client arrives at your LTCH and is **admitted** to the unit, select '**LTCH Admits Client**' option in the Action drop-down menu.

Referral Management

ReferralsReferral DetailsReferral DocumentsShared Notes

Client:Andrews, Susan (9263427)

Referral ID:[9263427.03.600545.3737](#)

Referral Status:Waitlisted

Action:-Select One-Go

-Select One-
LTCH Admits Client

When this is selected, an Action Dialog will display:

Referral Response

Action:LTCH Admits Client

Notification Date:19-May-2022 12:37 PM EDT

* Admission Date:19-May-2022

Additional Information:

SaveCancel

-Notification Date: is automatically set to the system date and time

-Admission Date: is mandatory and the calendar tool will already be open when the Action Dialog is opened. Admission Date is defined as the actual date on which the client was admitted to your LTCH

-Additional Information: by default, displays admit date: 'Client has been admitted on <YYYY-MM-DD>'

As a result of this action, the Referral Status changes to **'Closed'** for a Long Stay Referral Type.

Referral Management

Referrals | **Referral Details** | Referral Documents | Shared Notes

Client: Andrews, Susan (9263427) Action: -Select One- Go

Referral ID: 9263427.03.600545.3737 Send Information

Referral Status: Closed

If the referral is SSI, SSCC or SSR the Referral Status will change to **'Admitted'** until your LTCH discharges the client and selects **'LTCH Discharges Client'**.

Referral Management: Admitted Status and Actions for Short Stay Referrals

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

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

Referral Management

Referrals | **Referral Details** | Referral Documents | Shared Notes

Client: Andrews, Susan (9263427) Action: -Select One- Go

Referral ID: 9263427.03.600545.3737

Referral Status: Admitted

-Select One-
-Select One-
LTCH Discharges Client

1. Action: LTCH Discharges Client (available for SSI, SSCC, SSR)

When **'LTCH Discharges Client'** is selected, an Action Dialog will display:

Referral Response

Action: LTCH Discharges Client

Notification Date: 20-May-2022 10:05 AM EDT

* Discharge Date: 20-May-2022

10 : 05 AM

Additional Information:

Save Cancel

-**Notification Date:** is automatically set to the system date and time

-**Discharge Date:** is mandatory and is defined as the actual date and time on which the client was discharged from the LTCH

-**Additional Information:** is optional and may contain information related to the discharge, which ends the LTCH Referral and changes the Referral Status to '**Closed**'

Notification Log				
Date/Time Sent	From	To	Action (Status)	Notes
20-May-2022 10:09 AM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Discharges Client (Closed)	--

Referral Management: Closed Status

Closed Status occurs as a result of:

- Admitting a client to LTCH for LTC referral (Long Stay)
- OHaH withdraws application
- Discharging a client from LTCH for SSI, SSCC, SSR Referral Type
- LTCH withdraws referral approval (Tier 2 reject)
- OHaH confirms Tier 1 refusal

In HPG, the Status on the Referral Search Results shows '**Closed**' along with the event that resulted in the '**Closed**' status beside it in brackets:

View Results

Reset

Search Results

Referral ID	Status	Client Name	Bed Type	Priority	Notification Date	Decision Expected
102114.01.600265.1544	Closed (CCAC Withdraws Referral)	LTCH Doc, Colleen	Long Stay	3B	2013-04-03 09:35:19 /	
102112.01.600265.1531	Closed (LTCH Admits Client)	Train March Secondary, Colleen	Long Stay	3A	2013-03-22 10:31:29 /	
102111.01.600265.1538	Closed (LTCH Admits Client)	Train March, Colleen	Long Stay	3B	2013-03-22 10:12:48 /	



Closed Referral types eventually drop off the Search Results grid. The length of time that '**Closed**' referrals and the associated documents and assessments remain accessible to your LTCH in HPG is determined by each OHaH.

Example of Action/Status in HPG for LS Referral:

Notification Log				
Date/Time Sent	From	To	Action (Status)	Notes
19-May-2022 12:38 PM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Admits Client (Closed)	Admitted (Preferred Choice)
19-May-2022 08:55 AM EDT	Anderson, Lisa	Fairview Nursing Home	LHIN – Client Accepts Bed Offer (Waitlisted)	--
19-May-2022 08:35 AM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Accepts for Bed (Waitlisted)	--
19-May-2022 08:26 AM EDT	Anderson, Lisa	Fairview Nursing Home	Considered for Bed (Awaiting Response)	--
19-May-2022 08:25 AM EDT	Anderson, Lisa	Toronto Central LHIN	LTCH Accepts Referral (Waitlisted)	--
18-May-2022 12:44 PM EDT	Anderson, Lisa	Fairview Nursing Home	LHIN Creates Referral (Awaiting Response)	New Referral -

Example of Event/Status in CHRIS for LS Referral:

Event	Status Date	Status	Comment
Admission to Preferred Placement	19-May-2022	Admitted	Admitted (Preferred Choice) Location Before Placement: Private Dwelling
Client Accepts	19-May-2022	Offer Accepted - Preferred Placement	--
Offer Bed	19-May-2022	Offered (Bed)	--
Accept for Bed	19-May-2022	Appropriate (for Bed)	--
Apply for bed	19-May-2022	Considered (for Bed)	--
LTCH Accepts	19-May-2022	LTCH Accepted	--
Create Choice	18-May-2022	LTCH Applied	New Referral -

Short Stay Referrals: Bookings

Specific to SSR, this view gives the LTCH user a view of the bookings for their particular home. The users can filter the view based on booking dates, bed ID, bed gender, bed security, bed status and booking type.

If searching by booking dates, the search results will return bookings that overlap with the search dates.



Pagination is enabled for the Booking grid and will follow the HPG Paging standards. If number of records returned in the result set is greater than 500 records, the following will be displayed 'More than 500 records returned. Please refine your search criteria.'

The user can click on the Print hyperlink to obtain a printout of the current page that is being viewed.