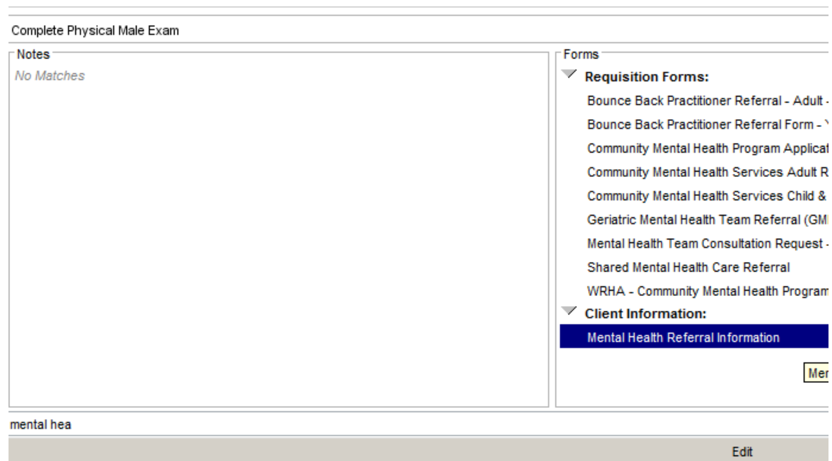
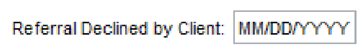
REFERRAL INTAKE FORM

This form is not intended to track all referrals submitted to counsellors. Its intention is to track the wait time for clients that are eligible for services. Please DO NOT initiate this form for client's that do not qualify for services.

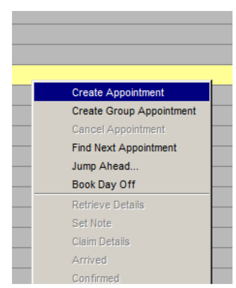
1. Load/Search for the patient that the referral was received for.
2. Select the **EMR tab**
3. Select the Encounter note tab
4. From the drop-down menu select Mental Health Referral Information.
5. Update the form with relevant referral information.
6. Select OK to save to the chart.



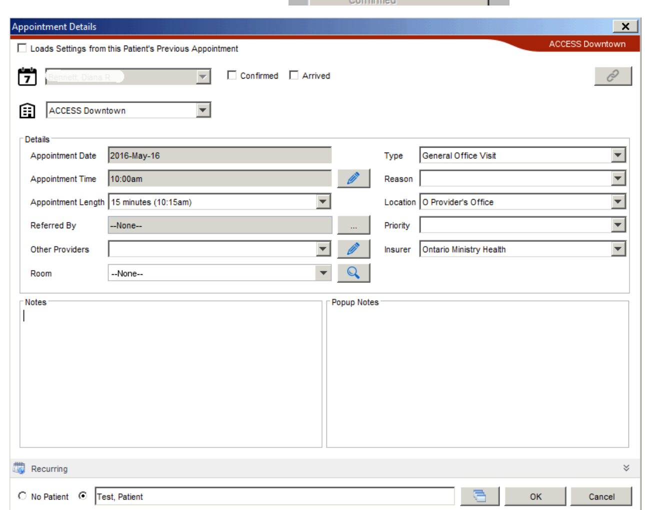
If the client declines services, please ensure to reopen existing referral information form to update with the client decline status.



CREATE INITIAL VISIT APPOINTMENT



1. **Load/Search for a Patient. (F1)**
   The Client will now apear under the **Patient** field in the **Scheduler** section.
2. **Right-click** on the desired **time slot** > **Create Appointment**
3. The **Appointment Details** window opens.
4. In the **Appointment Details** window, the top left fields will be automatically filled in from the appointment information. Review and edit any information as necessary.
5. Fill in the following information on the right side of the **Appointment Details** window:
   - Type any additional comments in the **Notes** text box. These notes are only associated with this appointment.

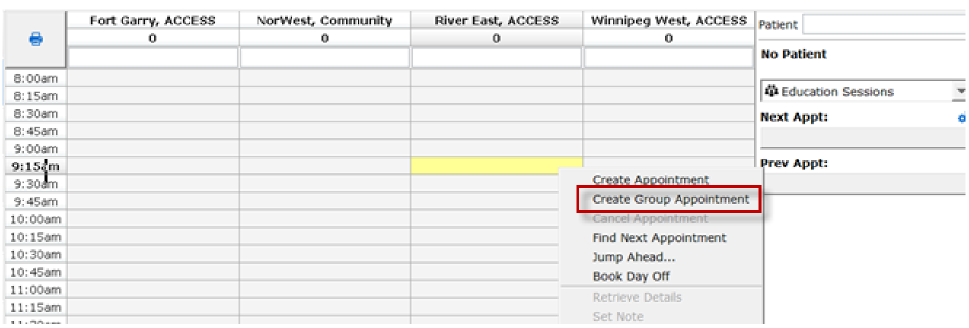


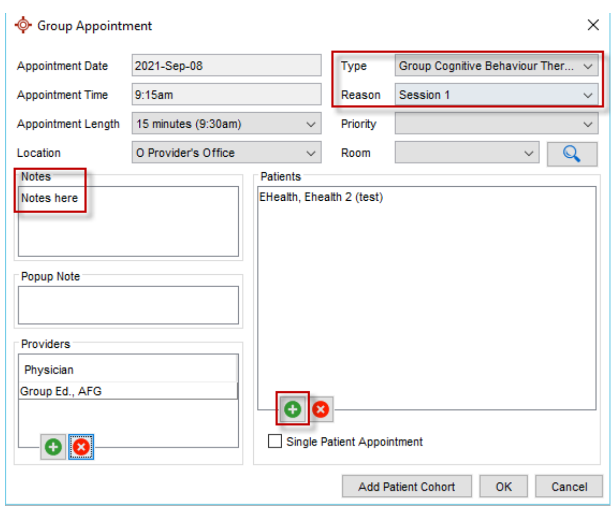
Fields	Information
Type	New Client Initial Visit
Reason	Counselling

6. Click **OK**
7. The appointment will now appear on the schedule table.

CREATE GROUP APPOINTMENT

1. **Right click** on the date and time of the Group Education Session in the template of the site holding the session
2. Select 'Create Group Appointment' from the list of options In the **Group Appointment** window.





3. Fill in the following information on the right side of the **Appointment Details** window:
   - Type any additional comments in the **Notes** text box

Fields	Information	
Type	Group Cognitive Behaviour Therapy with mindfulness	Group Dialectical Behaviour Therapy (DBT) Informed
Reason	Session #	Session #

4. To add patients to the group appointment select the green plus sign and search for the patient
5. Click **OK**
6. The appointment will now appear on the schedule table.