

# Mental Health Wait Times Reporting

## 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.

Complete Physical Male Exam

Notes  
No Matches

Forms

Requisition Forms:

- Bounce Back Practitioner Referral - Adult
- Bounce Back Practitioner Referral Form
- Community Mental Health Program Appocal
- Community Mental Health Services Adult R
- Community Mental Health Services Child &
- Geriatric Mental Health Team Referral (GM
- Mental Health Team Consultation Request
- Shared Mental Health Care Referral
- WRHA - Community Mental Health Program

Client Information:

Mental Health Referral Information

mental hea

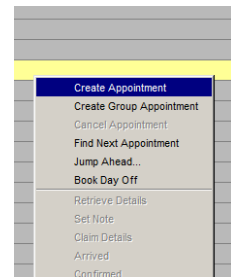
Edit

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

Referral Declined by Client: MM/DD/YYYY

## CREATE INITIAL VISIT APPOINTMENT

1. **Load/Search for a Patient. (F1)**  
The Client will now appear 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.



Appointment Details

Loads Settings from this Patient's Previous Appointment

CONFIRMED

ACCESS DOWNTOWN

Details

Appointment Date: 2016-May-16 Type: General Office Visit

Appointment Time: 10:00am Reason: [None]

Appointment Length: 15 minutes (10:15am) Location: O Provider's Office

Referred By: --None-- Priority: [None]

Other Providers: [None] Insurer: Ontario Ministry Health

Room: --None--

Notes

Popup Notes

Recurring

No Patient [X] Test Patient

OK Cancel

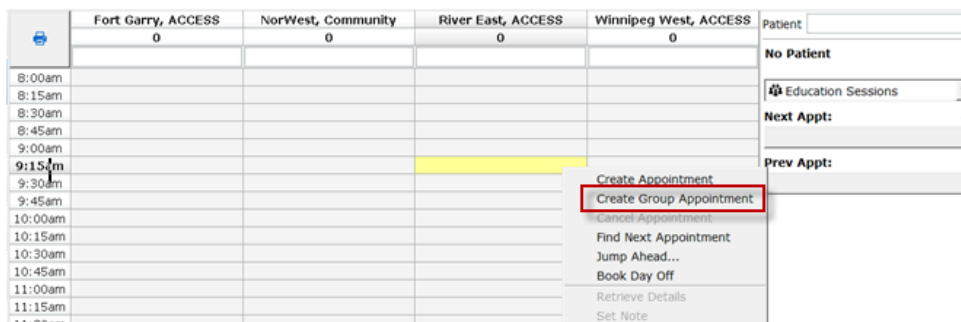
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Fields	Information
Type	New Client Initial Visit
Reason	Counselling

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.



The screenshot shows the 'Group Appointment' dialog box. The 'Appointment Date' is set to 2021-Sep-08 and the 'Appointment Time' is 9:15am. The 'Appointment Length' is 15 minutes (9:30am). The 'Location' is 'O Provider's Office'. The 'Type' field is set to 'Group Cognitive Behaviour Ther...' and the 'Reason' field is set to 'Session 1', both highlighted in red. There is a 'Notes' text box with 'Notes here' entered, also highlighted in red. The 'Providers' list includes 'Group Ed., AFG'. At the bottom, there are buttons for 'Add Patient Cohort', 'OK', and 'Cancel'.

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

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<b>Fields</b>	<b>Information</b>	
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.