ETHP Collaborate
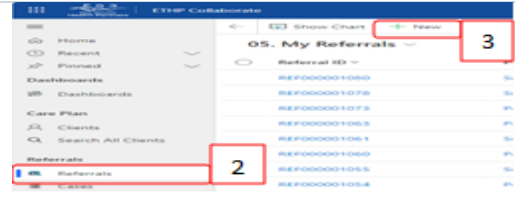
REFERRAL INSTRUCTIONS

East Toronto Health Partners

Below are instructions on how to complete a referral to Primary and Community Care Response Teams (PCCRT) or Senior Mental Health Collaborative (SMHC)

OBTAIN INFORMED CONSENT (BEFORE REFERRING)

Review & Support Signing	1. Download the PCCRT Consent Form from [ETHP Collaborate sign-in page](#) (used for both PCCRT and SMHC referrals) 2. Read all information on the form to the client 3. Have client or substitute decision maker complete/sign the form. *Note: If you are not able to obtain consent in person, temporary verbal consent can be obtained until written consent is possible.*
Scan Signed Form	Securely scan the signed consent form onto a secure device/network, so that you are ready to upload it onto the referral form.
If client does NOT consent	If the client does NOT consent to being referred, the care and support team can still get general advice from the PCCRT by submitting a deidentified case for discussion at rounds (see Case Submission Tipsheet).

COMPLETE & SUBMIT REFERRAL

Open New Referral Form	1. Sign in to [ETHP Collaborate](#) 2. Click "Referrals" in left toolbar 3. Click "+New" in top toolbar to open a new referral form

Enter initial information	4. Enter the program that the client is to be discussed at PCCRT or SMHC:
	    a. PCCRT rounds (for adults 18+) - consult with health and social services professionals representing 20+ organizations and multiple sectors
	    b. SMHC rounds (for adults 50+) - consult with a geriatric psychiatrist, behaviour support specialist, and other health and social service providers with mental health expertise
	 5. Enter other referral, consent and client information.
	    a. In the postal code field:
	      i. If the person lives in East Toronto, enter their postal code
	      ii. If the person **doesn't live in East Toronto**, enter "1. no fixed address"
	      iii. If the person, **has no fixed address**, enter "2. Lives outside East Toronto"
	 Note: The "Neighbourhood" field will auto-populate so you don't need to enter anything.
	 6. Click "Save"
	 Note: Clicking "Save & Close" at this point will save the referral in draft form (to finish later)

Upload Consent Form	7. If written consent has been obtained and the signed consent form has been scanned, click "Upload document" to attach it. *Note: if the form is not ready to be uploaded, this action will be assigned to you to do later*
Complete & Submit Referral Form	8. Enter factors affecting well-being (completing step 5 above first) *Note: you will need to have saved the case before doing this (see step 5 above)* 9. Include information for any other care/support team members you would like to attend rounds 10. Click "Save" and "Submit"

WHAT TO EXPECT

Referral Status	Within minutes of submitting the referral: • You will receive a confirmation email • Status of referral on "My Referrals" list will change from "draft" to "submitted"
Referral Acceptance	Within 3 business days: • You will receive a second email letting you know if the referral has been accepted or declined and outlining next steps. • If the referral has been accepted, a coordinated care plan (CCP) will have been created for the client which you will be able to access. *Note: until the referral is accepted and the client's CCP has been created, the client's name will not show in your "My Referrals" list*
Cancelling Referral	If for any reason you want to cancel a referral, reply all to the email confirmation to communicate this request to the PCCRT administrator.
Monitoring / Managing Your Referrals	Use the "My Referrals" list to see all of your referrals which you can sort/filter by status, program etc. *See CCP Use Instructions for details.*