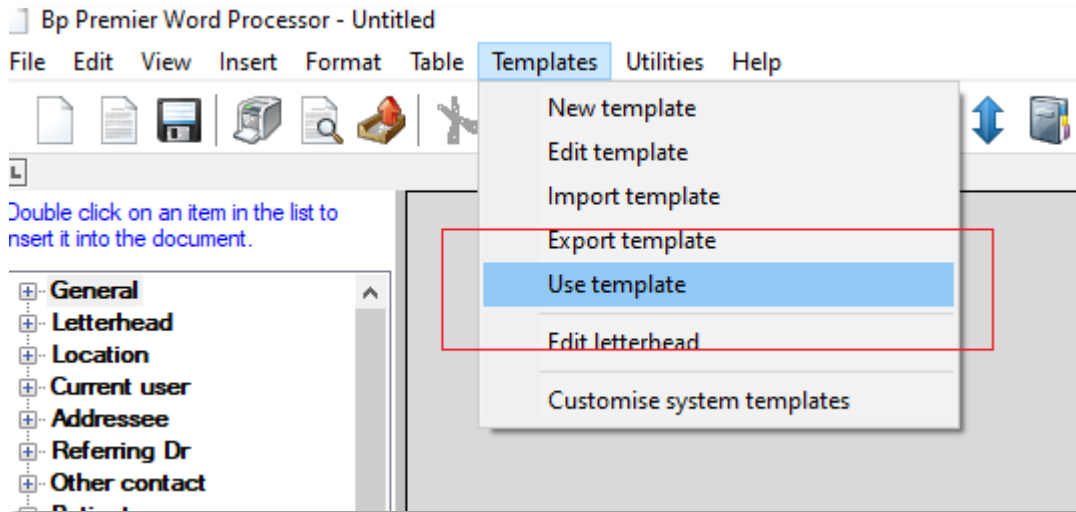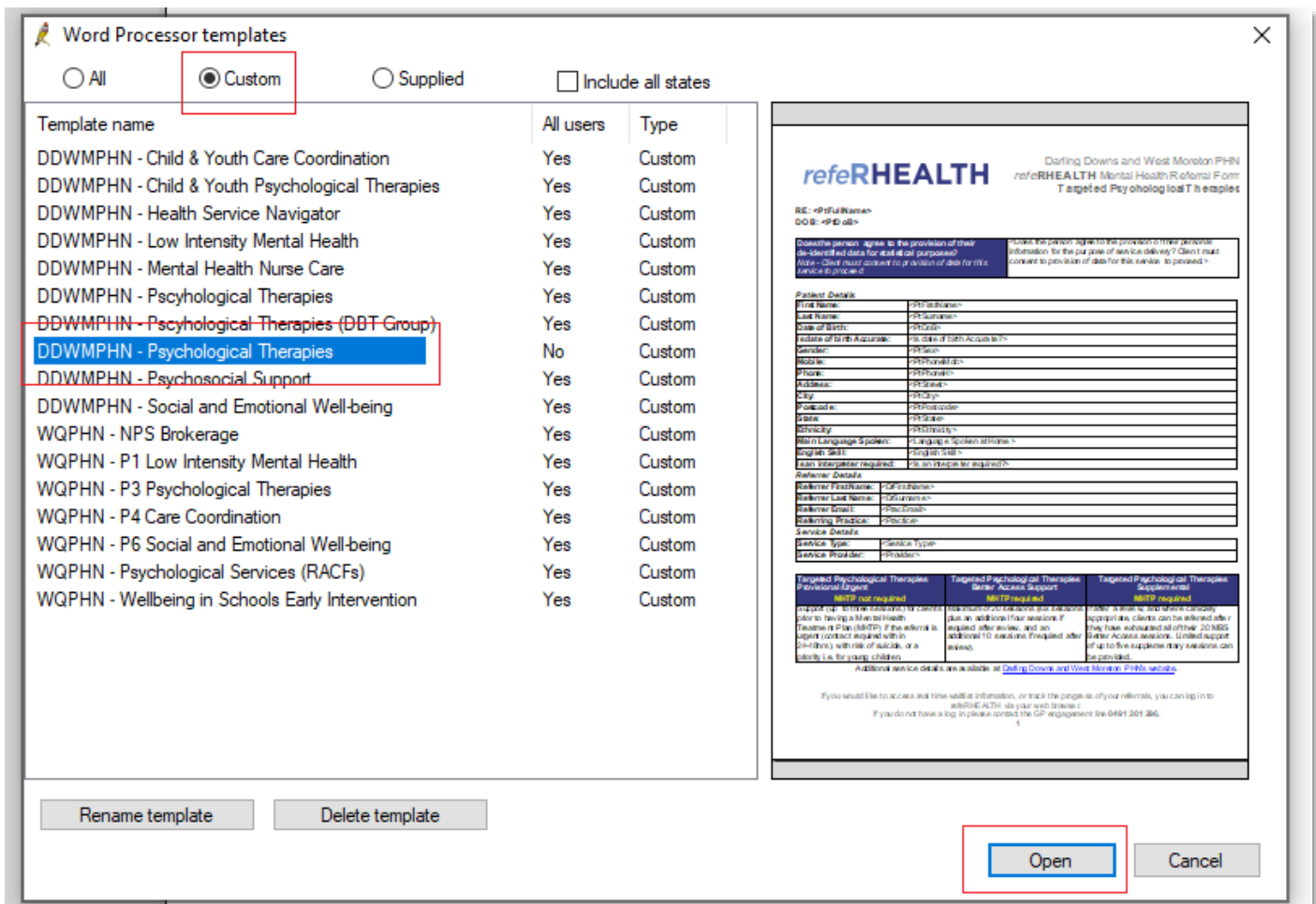# refeRHEALTH

Using refeRHEALTH templates in Best Practice

1. Open the Word Processor while in a patient file.
2. Once in the Letter Writer, click 'Templates', 'Use Template':

3. Select 'Custom', then click the template for the service you wish to use, then click 'Open':

4. You will be prompted to complete some custom fields, of particular importance is the 'Service Type' – which is where you select the specific service you wish to refer to, and 'Provider', the provider who will deliver the service, then click 'Insert':

5. The template will auto complete with the inserted fields and patient details:

6. **(Optional – if you would like to add files/a Mental health care plan to the template)** Place your cursor below the section marked 'Insert Mental Health Care Plan':
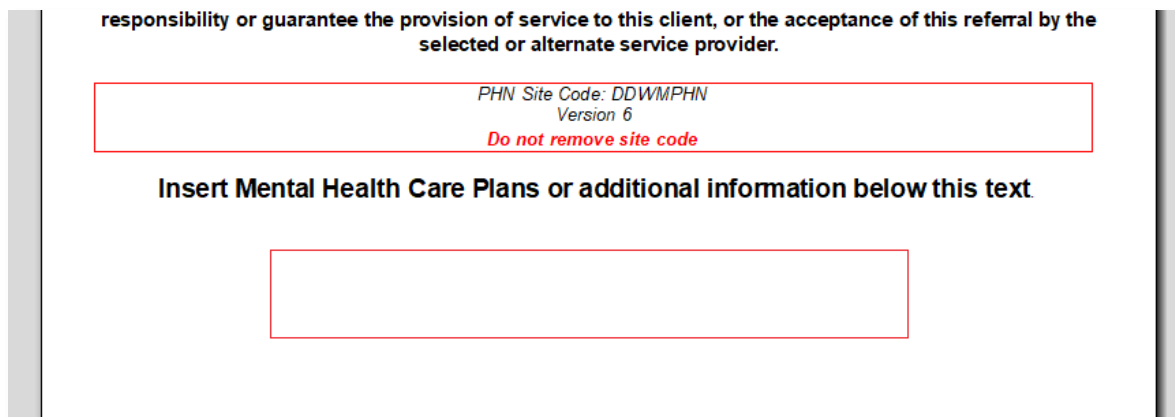
7. **(Optional – if you would like to add files/a Mental health care plan to the template)** – Click 'Insert', then 'File':
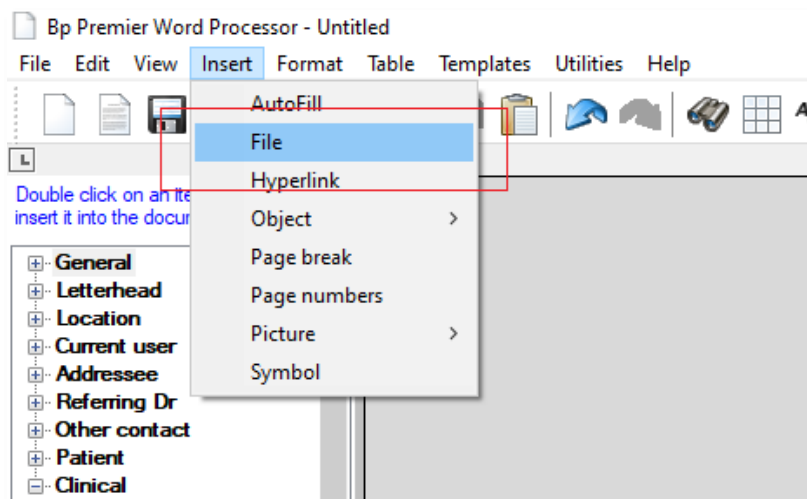
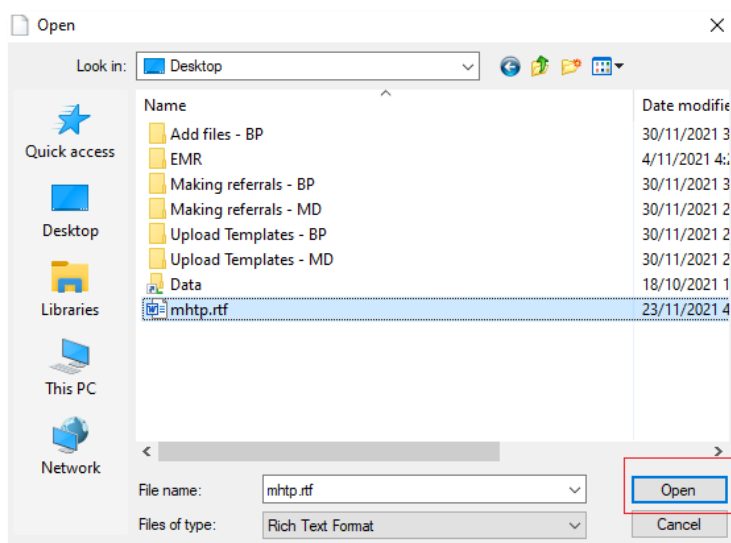8. **(Optional – if you would like to add files/a Mental health care plan to the template)** – Navigate to where you saved the file (**this requires exporting the file you have completed such as a mental health care plan to your desktop**), then click 'Open'. The contents of the file you insert will then append to the back of the referral, and be sent with the referral form:

9. Press 'CTRL+A' and 'CTRL+C', this will prompt the Medical Objects icon to appear, when it appears, double click the icon:
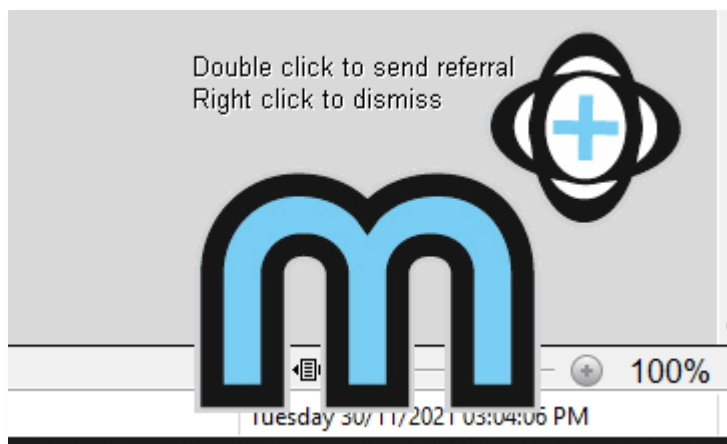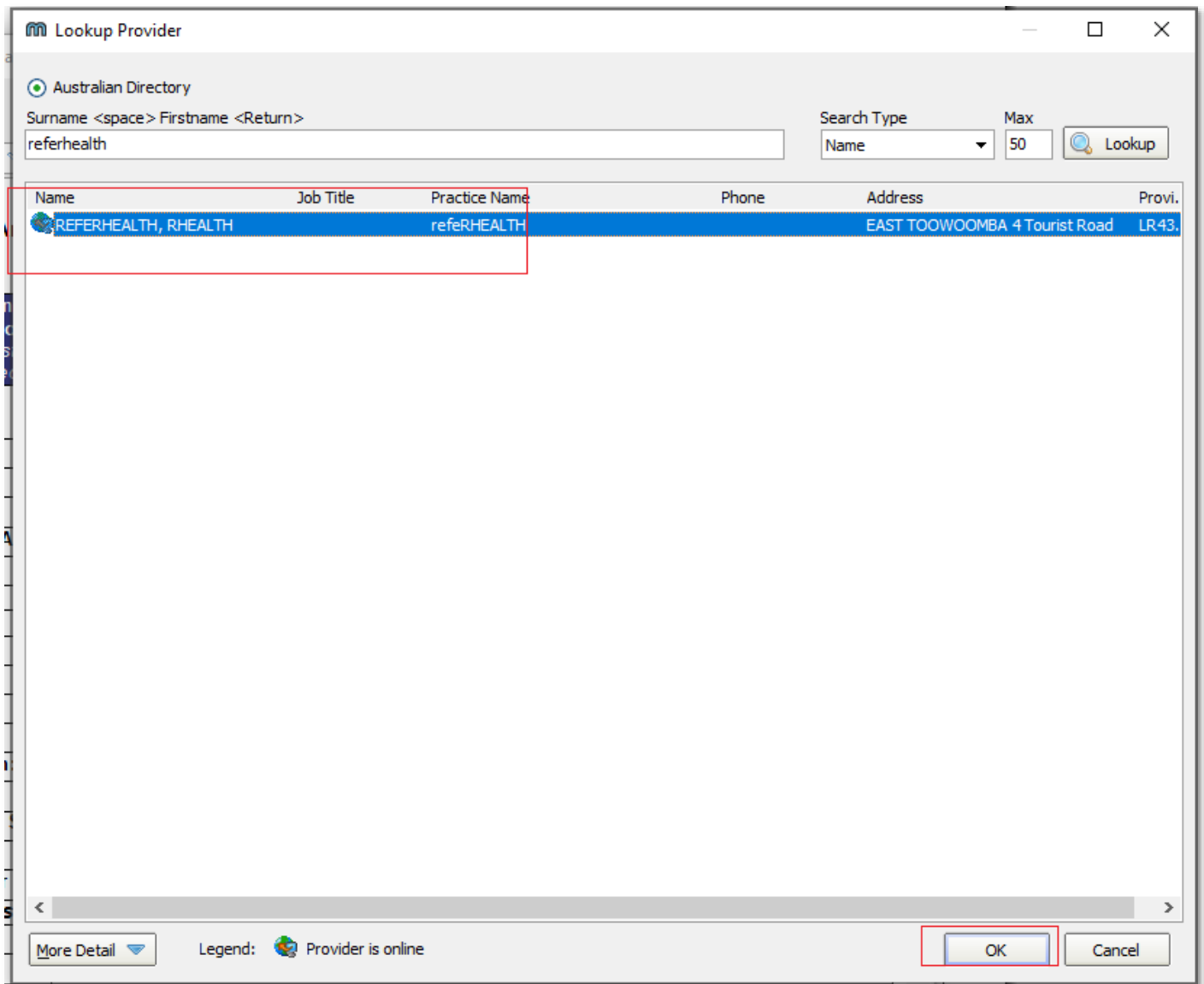

10. The referral will then populate within Medical Objects, under the 'Referral to:' field, enter 'REFERHEALTH' (lowercase will also work):

refeRHEALTH

11. A popup will appear, you will need to click 'REFERHEALTH, RHEALTH' then click 'Ok':

12. A message preview will appear, click 'Ok' – you will then receive a prompt indicating the message has been sent. At this point you can close/save the referral form. The referral will be sent to refeRHEALTH (note that it may take up to 20 minutes for the referral to appear in refeRHEALTH).
13. The provider you chose on the 'Service Provider' drop down will receive a notification that the referral is waiting for them in refeRHEALTH.