SWIM – eRequest
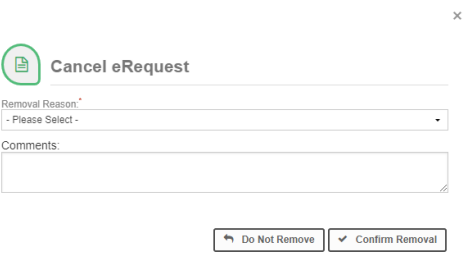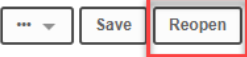## Accept, Cancel, or Re-open a Referral

Quick Reference Guide

Change the status of a referral record using Accept, Cancel or re-open

Modify referral status	

1. Find Referral record	• Use the **search** field to find the patient using Last Name, PHIN, or eRequest number
	
	OR
	
	• On the **Receiver Dashboard**
	    ○ click the **Awaiting Acceptance** bucket; this will open the list of patients who have this status
	    ○ Find your patient in this list

2. Accept Referral	• Fill out the **Surgical Triage** accordion with the date of surgeon triage, triage priority, and any triage instructions • Click **Accept**
3. Cancel Referral	• Click the **Cancel** button and fill out the **Cancel eRequest** pop up • Select a **Removal Reason** and add additional **Comments** as required • Click **Confirm Removal**
4. Re-open Referral	• Consults can be re-opened by clicking the **Reopen** button. • The consult will open in the last known status prior to closing (i.e., **Awaiting Scheduling**, **Awaiting Acceptance**, etc.) 💡 **This action is available up to 90 days after the referral is canceled or completed**