Quick Start Guide: Submitting a Referral

To submit a referral for your patient, please click on the link “submit referral” and follow the set of instructions provided below.

If at any time you have any technical issues and/or inquiries, please contact PHRI at bariatricreferral.techsupport@phri.ca.

PLEASE NOTE: This email is meant to facilitate communication about technical issues and/or inquiries only. Do not send any personal health information via email or other unsecured means.

Overview

Patients who are residents of Ontario and who have healthcare coverage (OHIP or other recognized provincial/federal funding) can be referred to the Ontario Bariatric Programs.

Eligibility to each program is based on a combination of factors, determined by a series of questions about your patient’s:

- Age,
- Body mass index (BMI),
- Relevant medical history (e.g. obesity-related co-morbid conditions, previous history of bariatric surgery), and
- Lifestyle choices as well as any health-compromising behaviours.

Referral Worksheet

To streamline the process further, a referral worksheet is available under the “Support” tab on the top right hand side of the screen.
This referral worksheet is to help physicians and their staff to submit a referral using the new bariatric online referral portal. By utilizing this worksheet, physicians are able to fill in the clinical information and then hand over the referral for entry into the online system by one of their employees at the clinic.
This is beneficial for physician offices who do not have computers in their exam rooms or for clinics that have a high patient volume.

**PLEASE NOTE:** This worksheet has been provided for reference purposes only and is not a valid referral form. Any referral worksheets faxed into the old bariatric referral fax number will not be processed and returned to sender.

The last page of the referral form worksheet collects the information necessary to register for a physician account. This must only be done one time by the physician.

## The Referral Form

The referral form is a series of clinical questions that are used to assess patient eligibility to one or more of the bariatric treatment programs currently offered in Ontario.

The referral form is comprised of five separate pages of information: Health card number and date of birth, body mass index (BMI), and eligibility questions.

**PLEASE NOTE:** The symbol indicates that there is additional information available. The information pages open up in a new tab so you do not lose your place within the referral process.

For example, if you click on the symbol next to the title “Bariatric Referral Form”:

### Bariatric Referral Form

A page with a description of the bariatric referral process will open in a new browser tab.

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### The Referral Process

The Bariatric Referral Web Portal is a centralized referral process that will enable doctors, nurses, other healthcare practitioners and/or administrators to enter standard referral data for their patients into a database. Once referred, those patients who have met the referral criterion are assessed at a Bariatric Centre of Excellence (BCoE) or a Regional Assessment and Treatment Centre (RATC), which are assigned based on patients’ postal codes, ensuring that patients receive bariatric treatment as close to home as possible.

Once the referral is submitted, eligible patients will be contacted by the Bariatric Centre and invited to attend an orientation session where each will be given a comprehensive screening and assessment to ensure the appropriateness of their selected bariatric program.

For eligible patients, intensive education and nutritional counseling is provided and post-program follow-up is routinely scheduled for a period determined by the type of Bariatric Program the patient receives.

The Bariatric Referral Web Portal will replace the current fax-based referral process and will streamline the referral process with the ultimate goal of improving care of the obese patient, reducing wait times, and increasing the effectiveness of healthcare dollars spent.

The Bariatric Referral Web Portal is part of the Bariatric Registry, which is a centralized observational, multi-centre, database registry designed to collect standardized information on patients undergoing bariatric treatments at clinical BCoEs and RATCs across Ontario including: patient characteristics, surgical procedures, non-surgical treatments, medical and psychosocial outcomes, and economic factors. The data collected will also help to identify new risks and assist in developing strategies to address them, inform decision makers, ensure patients’ safety, and identify practices and health services areas that require optimization and improvement. This information will be used to achieve the goals of increasing the effectiveness (and efficiency) of care for obese patients, helping to reduce costs associated with the duplication of treatment as well as the need to send patients out-of-country for their bariatric care. Ultimately, this data and information will lead to the development of specific Canadian guidelines and recommendations for optimal bariatric care.

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Additional instances of this symbol across the referral process link to descriptions of the Ontario Bariatric Programs offered.
Health Card and Date of Birth

The first page of the referral form asks for three pieces of information, your patient’s

- Ontario Health Card number or information about other recognized provincial/federal healthcare funding,
- Date of birth, and
- Biological sex.

Patients must be over the age of 18 to be referred using this system. If your patient is under 17.5 years of age, a pop-up warning message will appear directing you to alternative treatment options for pediatric patients.

Duplicate Referrals

Before moving past the first page of the referral form, the system will check for duplicate referrals using both the patient’s health card number and date of birth. If your patient has already has an active referral in the system, you will be alerted to this by pop-up:
If you have any clinical questions about the patient or questions about the patient’s clinical status, you will be directed to contact the bariatric centre to which this referral was submitted.

Contact information for centres can be found under the Centres tab on the top banner to the left hand side of the page.

If this referral was previously submitted by your office and you wish to link it to your new referral portal account, you will be directed to fax PHRI directly at 905-577-8258. In the body of the fax, please provide enough information for PHRI to determine that you are authorized, as referring healthcare provider, to view this referral. PHRI will only link referrals to physician accounts were definitive linkages can be proven.

**Re-Referrals or Subsequent Referrals**

Physicians can re-refer, or submit a subsequent referral, for patients whose previous referrals are inactive (e.g. have been discharged out of the system).

When Physician enters a health card number and date of birth that matches a “discharged” referral, the following message is displayed:
When Physician selects continue and submits the re-referral, (if the same Physician as first “discharged” referral), they will see both “discharged” and “submitted” referrals in their list.

When Physician selects continue and submits the re-referral, (if it is the same Physician as first “discharged” referral), they will see both “discharged” and “submitted” referrals in their list. Upon submission the re-referral will be assigned a new ID number and the patient’s previous referral history will be linked to the referral re-submitted into the system.

When the centre user selects referral history on the new re-referral, they have the option to view past referral and past referral history:
Body Mass Index (BMI)

The next page of the referral form asks you to input your patient’s height and weight. You have the option to submit this information using metric or imperial units of measurement, or a combination of the two. In the case of using a combination of the two, enter the first measurement using the metric unit of measurement. Once the first is entered, switch over to imperial and enter the second.

When both height and weight are inputted into the system, your patient’s body mass index (BMI) will be automatically calculated by the system.

BMI thresholds for the programs are as follows:

**Surgical Program**

To be eligible for the Surgical Program, your patient must either have a BMI of ≥35 as well as the existence of at least one obesity-related co-morbid condition or have a BMI of ≥40 without a co-morbid condition.

**Medical Program**

To be eligible for the Medical Program, your patient must either have a BMI of ≥30 as well as the existence of at least one obesity-related co-morbid condition or have a BMI of ≥35 without a co-morbid condition.

**Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton**

To be eligible for the Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton, your patient must have a BMI ≥28 and ≤35 in addition to complicated type 2 diabetes mellitus.
Eligibility Questions

The final three pages of the referral form are a series of questions to assess eligibility to one or more of the bariatric programs currently offered.

These questions will ask about your patient’s

- Relevant medical history,
- Current clinical assessment,
- Lifestyle choices,
- Health compromising behaviours (e.g. smoking), and
- Previous history of bariatric surgery.
The answers to these questions will be used to assess eligibility to one or more of the bariatric programs currently offered.
Error Messages

There are two types of error messages in the new online bariatric referral system: ineligible messages and warning messages.

Ineligible Messages

The first is an ineligibility message which signals that your patient is ineligible to all bariatric programs currently offered. When an ineligibility message is triggered, you have two options, to go back and edit the referral (if you’ve mistakenly entered an incorrect answer) or to end the referral process completely.

Ineligible

Your patient is currently ineligible for all Ontario Bariatric Programs. Please re-refer after your patient has been adequately treated for alcohol and/or drug dependency for more than 6 months.

After you click away from the pop-up with the warning message, this message is displayed on-screen for further reference.
If you continue with the referral after receiving an ineligibility message, your patient will be deemed ineligible for all bariatric programs.

Warning Messages

The second type of error message is a warning message. Unlike ineligibility alerts, which signal the end of the referral process, a warning message will enable you to continue with the referral process but limits your patient’s eligibility to certain programs.

Save and Exit

At any time during the referral process, you have the option to save the in progress referral, exit the referral system, and then return to that referral at a later date.
The referral can be accessed again either via the “Action Items” table on the main landing page of the physician dashboard (see above) or via “My Referrals” (see below).

To reopen the referral and continue where you left off, click the option to “Edit”.

Selecting a Program

At the end of the referral process, you will select the option to check eligibility, which will be assessed based on the information from the referral questions. In certain cases, your patient will be deemed ineligible for all Ontario Bariatric Programs currently offered:

In this case, physicians and other referring healthcare providers are encouraged to seek out appropriate treatment programs within the community to help treat your patient’s obesity.

If your patient meets the eligibility criteria and requirements for one (or more) of the three Ontario Bariatric Programs offered, you will be asked to select which program you would like your patient to be referred to. These programs include:

- Bariatric Surgical Program
• Bariatric Medical Program
• Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton

For an overview of eligibility rules for each program, please refer to the Ontario Bariatric Network’s website:

• Surgical Program: http://www.ontariobariatricnetwork.ca/our-programs/surgical-program
• Medical Program: http://www.ontariobariatricnetwork.ca/our-programs/medical-program

In consultation with your patient, you will select the program that best suits your patient’s wants and needs. Here are some brief descriptions of each program.

**Surgical Program**

The Surgical Program is offered at all 9 of the bariatric treatment centres. This program provides pre- and post-surgical care of morbidly obese patients. Patients attend an orientation session and are comprehensively screened and assessed by the Centre’s interdisciplinary team to assess appropriateness for surgery. Intensive education and nutritional counselling is also provided. Post-surgical follow-up is routinely scheduled for a period of 5 years.

Funded procedures include: Roux-en-Y gastric bypass, vertical sleeve gastrectomy, and biliopancreatic diversion. The type of surgical procedure undertaken depends on existing conditions and surgeon assessment as well as in discussion with the patient.

Patients who have met the referral criteria are assessed at their assigned Bariatric Centre of Excellence (BCoE) or Regional Assessment and Treatment Centre (RATC); Centre assignment depends on patient postal code and Centre volume.
Medical Program

Of the 9 bariatric treatment centres in Ontario, 8 offer a non-surgical treatment options and is classified as the Medical Program. This program provides comprehensive services led by a multidisciplinary team for obese adults focusing on the identification and treatment of obesity-related health conditions, safe weight management, and healthy lifestyle changes.

Patients attend an intake or orientation session followed by a medical appointment and baseline investigation. The program consists of different streams including behavioural modification with or without partial or total meal replacement. Duration of follow-up varies depending on the treatment plan, to a period of up to 2 years.

The streams in the medical program offer standardized treatments that meet the patient’s needs:

- Total and partial meal replacement plans,
- Lifestyle program/behavioural therapy,
- One-to-one program, and
- Anti-obesity medication.

Patients who have met the referral criteria are assessed at their assigned Bariatric Centre of Excellence (BCoE) or Regional Assessment and Treatment Centre (RATC); Centre assignment depends on patient postal code and Centre volume.

Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton (SJHH)
Some patients who do not meet the eligibility requirements for the Surgical Program may be eligible for the Pilot Metabolic Surgical Program offered only at St. Joseph’s Healthcare Hamilton (SJHH). This program offers bariatric surgery for patients with a BMI between 28 v kg/m\(^2\) and 35 kg/m\(^2\) who also have complicated type 2 diabetes mellitus.

Current evidence suggests that, when compared with non-surgical treatments, bariatric surgery for non-morbidly obese patients who also have complicated type 2 diabetes is associated with greater weight loss and better intermediate glucose outcomes.

The Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton (SJHH) aims to confirm the evidence for and analyse the long-term results of diabetes resolution and weight loss post-procedure for these patients, with the ultimate goal of providing improved and expanded services for this population. Patients who have met the referral criteria will be assessed at St. Joseph’s Healthcare Hamilton for Bariatric Surgery. Post-surgical follow-up is routinely scheduled for a period of 5 years.

Patients across the Province of Ontario can be referred to this program; however patients will be responsible for their own travel arrangements and expenses. Residents of Northern Ontario may be eligible for the Northern Health Travel Grant (NHTG) Program to help with travel-related costs.

After you have selected the bariatric program that you want to refer your patient to, you will be directed to a new page

**Patient Information for Centre Allocation**

After you have selected the bariatric program that you want to refer your patient to, you will be directed to a new page where you will be asked to provide some patient information to aid in assigning your patient to a bariatric treatment centre.
EOSS Score

You will be asked to calculate your patient’s Edmonton Obesity Staging System (EOSS) score.

Developed by Dr. Arya M. Sharma and Dr. Robert Kushner this 5-stage system enables clinicians to rank their patient’s underlying health and functional status as well as the presence and severity of underlying obesity-related comorbid conditions. The score is based on a series of simple criteria, including your patient’s medical history, physical examination, and the results of standard diagnostic tests.

Patient Allocation

After assigning an EOSS score for your patient, you will be asked to enter your patient’s contact information into the system. The required fields include:

- Full name,
- Address (including city and postal code), and
- Telephone number and type.
Optional fields include:

- A secondary telephone number and type for your patient,
- Your patient’s email address, and
- Any additional comments that you might have.

The additional comments field is for short messages about your patient that will be forwarded as information only to the bariatric centre where your patient is assigned.

Based on your patient’s postal code, he/she will be allocated to the closest bariatric treatment centre to him/her. This is to ensure that your patient will receive bariatric treatment as close to home as possible.

Currently, there are 9 bariatric treatment centres and 3 surgical only sites in the Province of Ontario. For a description of the different types of bariatric treatment centres, please refer to the Ontario Bariatric Network’s website at http://www.ontariobariatricnetwork.ca/our-centres.

**Patient Consent**

Once you have entered in all of your patient’s contact information and your patient has been allocated to a bariatric centre (based on your patient’s postal code), you will be asked to check a box that affirms that your patient consents to be referred to the selected bariatric program.

![My patient consents to be referred to the [Bariatric Surgical Program](http://www.ontariobariatricnetwork.ca/our-centres).]

**PLEASE NOTE:** Patients who are being referred to the Pilot Metabolic Surgical Program at St. Joseph’s Healthcare Hamilton (SJHH) must also consent to the following:

![My patient is aware that he/she will need to assume the cost of travel and accommodation arrangements and expenses.](http://www.ontariobariatricnetwork.ca/our-centres).

Information on additional funding programs for patients from Northern Ontario is available by clicking on the symbol at the end of this secondary consent, which triggers the following pop-up:

![Northern Health Travel Grant (NHTG) Program.](http://www.ontariobariatricnetwork.ca/our-centres)
Submit Referral

Once complete, you will select the **Submit Referral** button at the bottom of the page.

This will direct you to the following confirmation page:

![Bariatric Referral Form](image)

You have successfully submitted the referral.

- Referral ID #: 002100043
- Bariatric Program Type: Surgical Program
- Centre Assignment: St. Joseph's Healthcare Hamilton
- Date Referral Submitted (yyyy-mm-dd): 2015-03-17
- Patient Name: No CHP Number
- Date of Birth (yyyy-mm-dd): 1982-01-01

From here, you have the option to:

- Save or print the entire referral,
- Save or print the referral confirmation page,
- To view the entire referral, or
- To navigate to “My Referrals”, which is a list of all the physician user’s referrals.