Alberta Netcare
ELECTRONIC HEALTH RECORD

Alberta Netcare Portal
eReferral
User Guide

4.8
Updated: December 2023

eReferral

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For eReferral training support, please contact the eHealth Services team by email (ehealthsupport@cgi.com) or telephone: 1-855-643-8649 (Monday - Friday; 8:15 a.m. – 4:30 p.m.).

If you are a community user and need Alberta Netcare Portal support, contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638. *Important note*: The Alberta Netcare Provincial Help Desk is only for Alberta Netcare Portal technical support and password resets.

If you are an Alberta Health Services (AHS) user, contact the AHS IT Service Desk at 1-877-311-4300.

For general eReferral inquiries, please contact the AHS Access Improvement team by email (access.ereferral@ahs.ca).

Are we missing something in this user guide? Email access.ereferral@ahs.ca with your suggestions for future additions.

Important note: *All patient information included in this User Guide is fictional and for example purposes only.*

Anything accessed under YOUR Alberta Netcare Portal user name and password is your responsibility. Remember that it is important to ONLY access the patient data you need to complete your job; you should not access your family, friends, neighbours, coworkers or even your own data.

1.0 Welcome to eReferral

Alberta Netcare eReferral (eReferral) is a paperless referral management system within the Alberta Netcare Portal that allows physicians and their support staff to create, submit, track, and manage referral requests electronically. eReferral started in 2014 with three early adopter groups and has grown to more than 40 specialty areas across Alberta.

With eReferral, referring providers can:

- Create Advice Requests – Non-urgent requests for advice responded to by specialists within five calendar days.
- Create Consult Requests – Non-urgent requests for an in-person specialist appointment. These are also sometimes referred to as referrals.
- Provide Clerical and Clinical Triage – Ensure referral is complete and all required patient information is contained within the referral.
- Manage Appointment – Track booked, attended, and missed appointments.

For more information about eReferral, go to the eReferral website.

RESOURCES	• eReferral Program Features • eReferral User Benefits • List of specialties accepting Advice Requests & Consult Requests

1.1 Accessing eReferral - Alberta Netcare Portal Basics

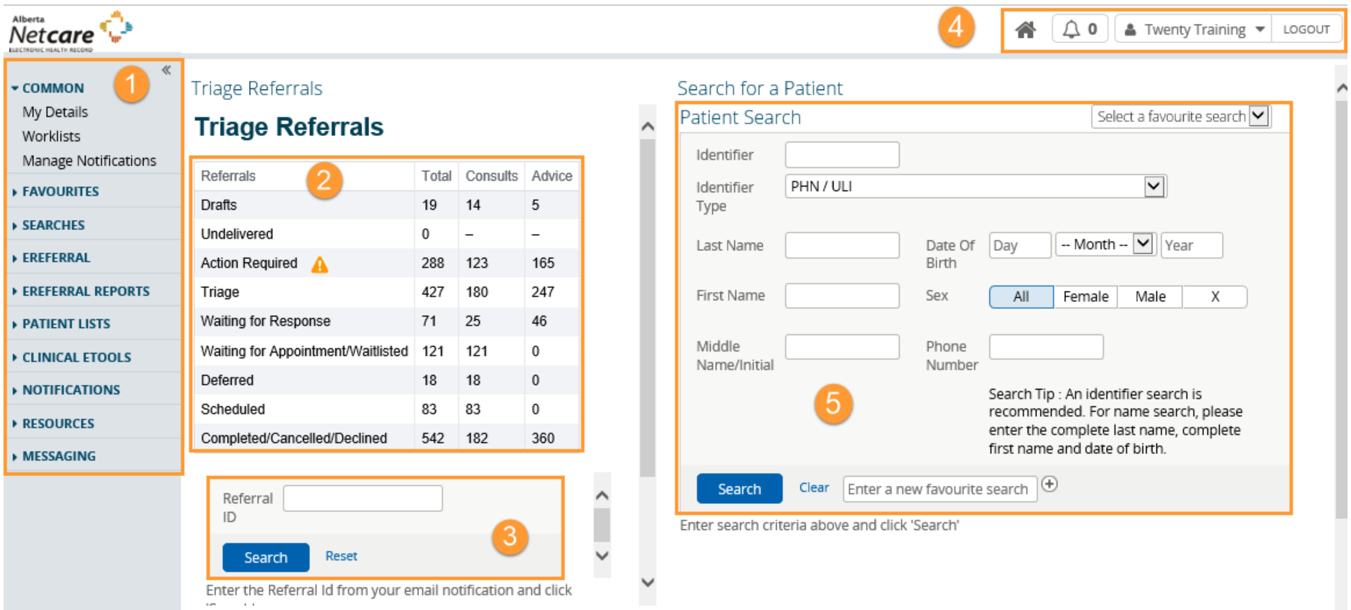
- To login to the Alberta Netcare Portal from an Alberta Health Services (AHS) facility, go to: https://portal.albertanetcare.ca/cha/NetcareLogin.htm. Enter your username and password and click ***Login***.

TIP	For additional Alberta Netcare Portal instructions, visit the Learning Centre.

- To login from a remote site using a fob, go to: https://aaa.albertanetcare.ca/logon/LogonPoint/tmindex-anc.html. Enter your username and passcode (PIN+Tokencode) and press ***Logon***.

2.0 Getting Started with eReferral

The eReferral homepage is displayed when you login to the Alberta Netcare Portal.

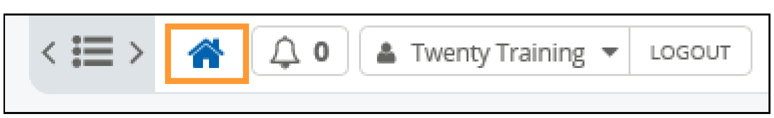


1. ***Clinical Portal Menu*** – Access information like ***My Details***, patient searches and eReferral.
2. Referral dashboards – Shows a running total of eReferral requests by state.
3. ***Referral ID*** Search – Search for a specific eReferral request.
4. Login/Logout Information and ***Homepage*** through the ***Global Menu*** – Including login name, notifications, ***Homepage*** link, ***Global Menu***.
5. ***Patient Search*** – Search for a patient using their name, Unique Lifetime Identifier (ULI) or Personal Health Number.

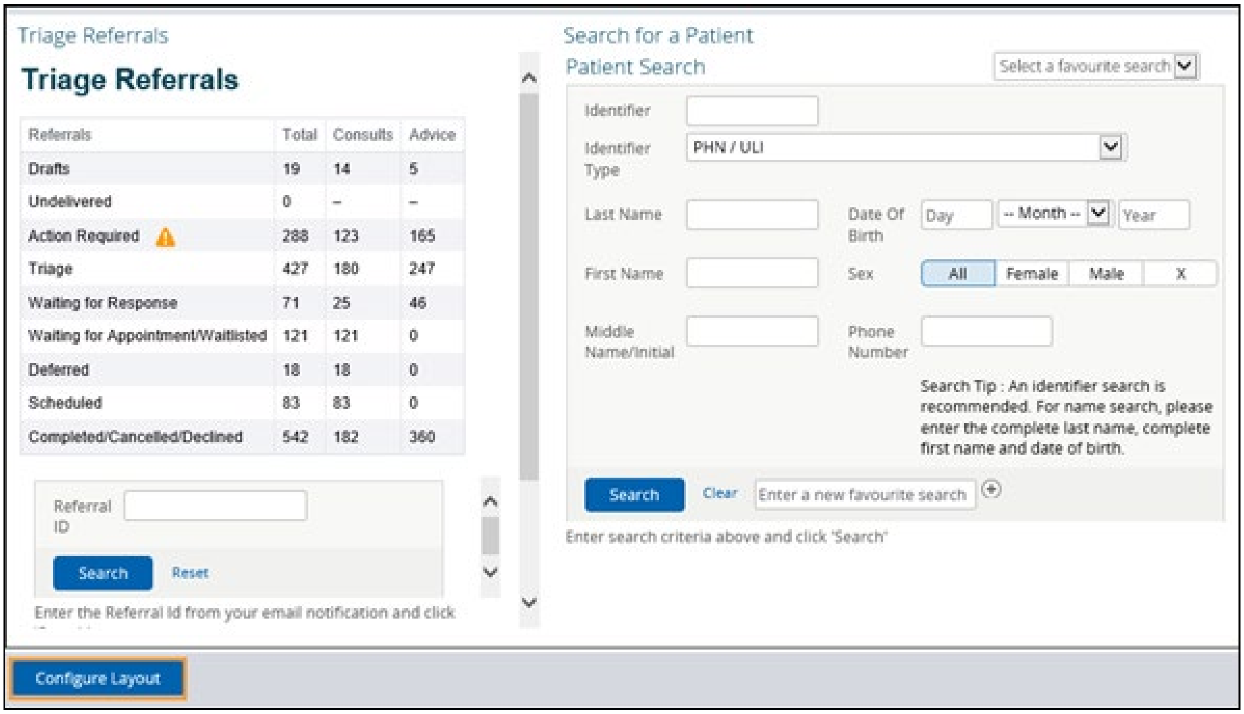
2.1 Customizing the Homepage

Your ***Homepage*** can be customized to view your most frequently used dashboards immediately when you log into the Alberta Netcare Portal:

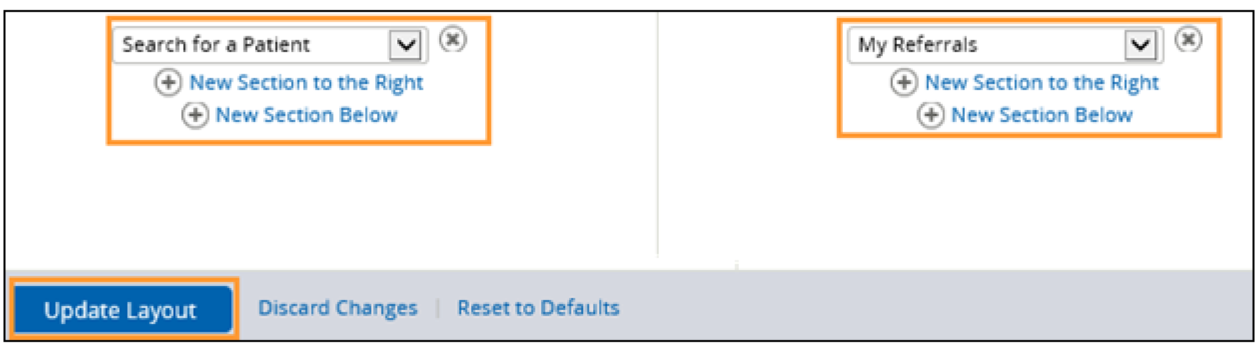
a. Click the ***Home*** icon in the ***Global Menu***.



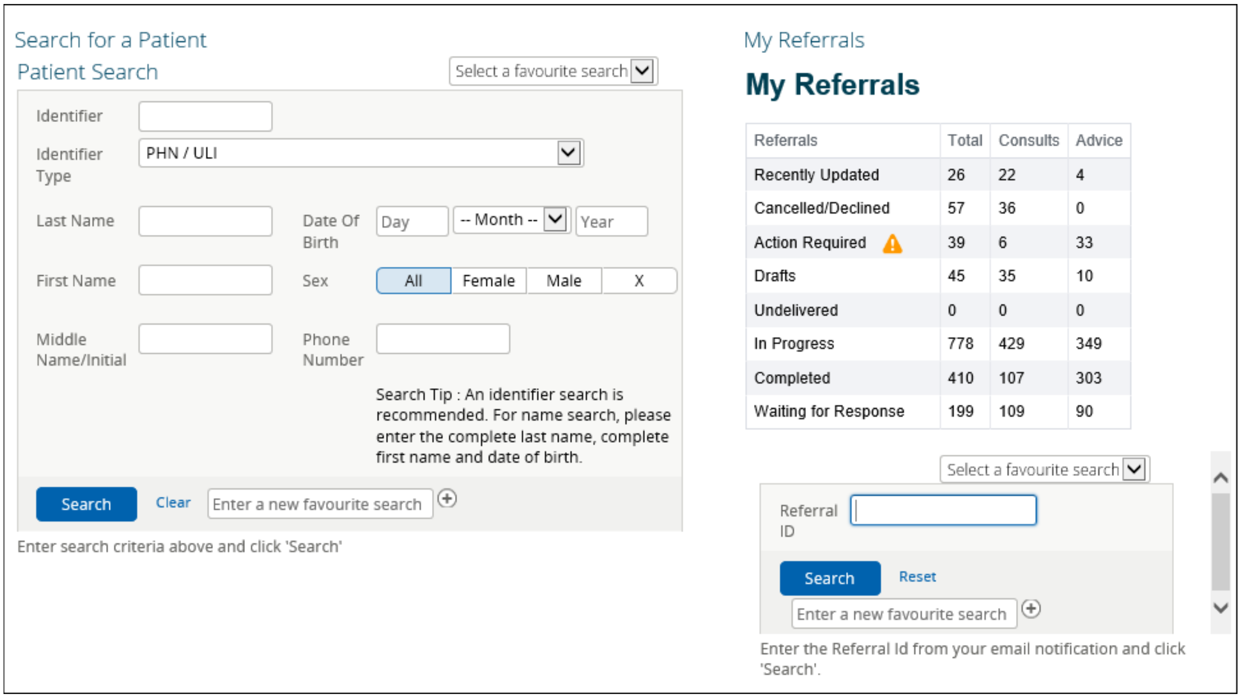
b. Scroll to the bottom of the ***Homepage*** and click ***Configure Layout***.



c. Divide the ***Homepage*** into the desired sections. Add a new section to the right or below. For example, you can select ***Search for Patient*** and ***My Referrals***.



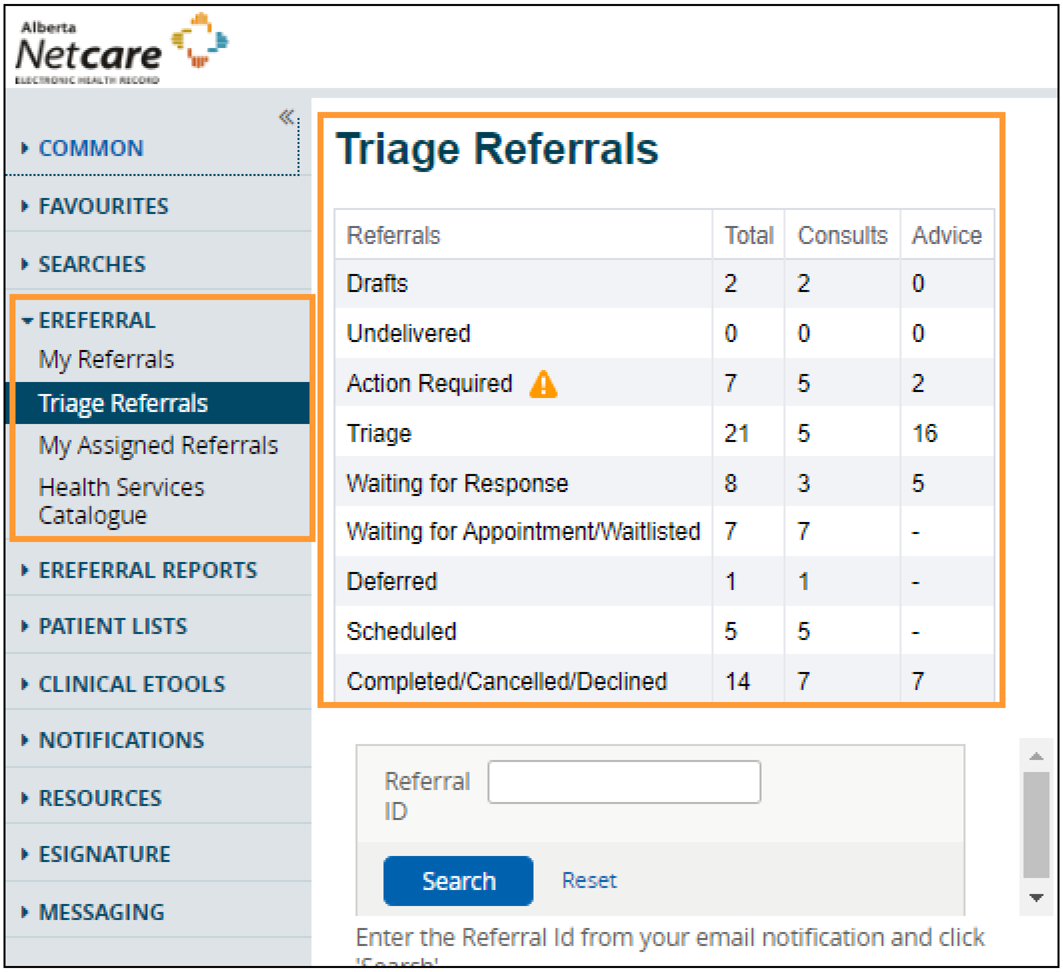
d. Scroll to the bottom of the page and click ***Update Layout*** to save the configuration. Then confirm that the ***Homepage*** appears with the new configuration by clicking on the ***Home*** icon from the ***Global Menu***. A sample layout is shown below:


Search for a Patient
Patient Search
Select a favourite search
Identifier
Identifier Type
PHN / ULI
Last Name
Date Of Birth
Day
-- Month --
Year
First Name
Sex
All
Female
Male
X
Middle Name/Initial
Phone Number
Search Tip : An identifier search is recommended. For name search, please enter the complete last name, complete first name and date of birth.
Search
Clear
Enter a new favourite search
Enter search criteria above and click 'Search'
My Referrals
My Referrals
Referrals
Total
Consults
Advice
Recently Updated 26 22 4
Cancelled/Declined 57 36 0
Action Required 39 6 33
Drafts 45 35 10
Undelivered 0 0 0
In Progress 778 429 349
Completed 410 107 303
Waiting for Response 199 109 90
Select a favourite search
Referral ID
Search
Reset
Enter a new favourite search
Enter the Referral Id from your email notification and click 'Search'.

2.2 eReferral Menu and Dashboards

eReferral functions are listed in the ***Clinical Portal Menu*** on the left-hand side of your screen. Items listed vary depending on your user role; you may see some or all of the following items.

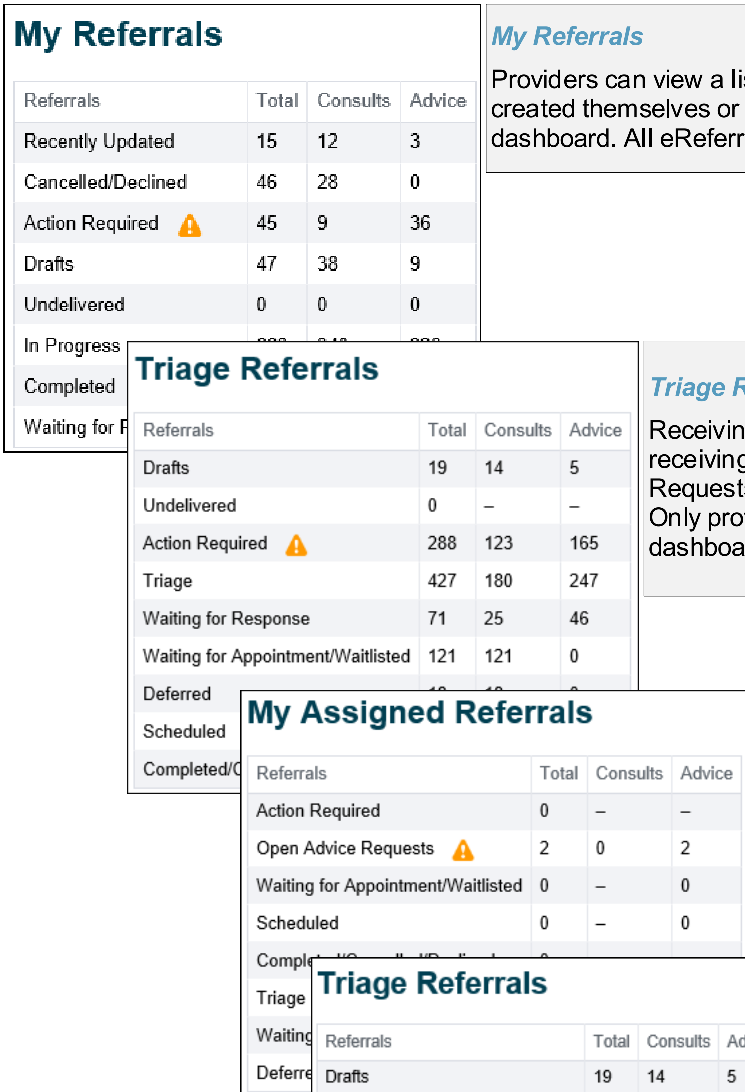
Providers can view a list of Advice and/or Consult Requests they have created themselves or on behalf of another provider through the dashboards within eReferral. The ***Triage Referrals*** dashboard shown below is an example. Triage users can view all eReferral requests in all the dashboards.



Referrals	Total	Consults	Advice
Drafts	2	2	0
Undelivered	0	0	0
Action Required	7	5	2
Triage	21	5	16
Waiting for Response	8	3	5
Waiting for Appointment/Waitlisted	7	7	-
Deferred	1	1	-
Scheduled	5	5	-
Completed/Cancelled/Declined	14	7	7

Within each dashboard, there are worklists that can be used to view or add more referral details, see status, assigned to, etc.

2.3 Types of eReferral Dashboards



My Referrals

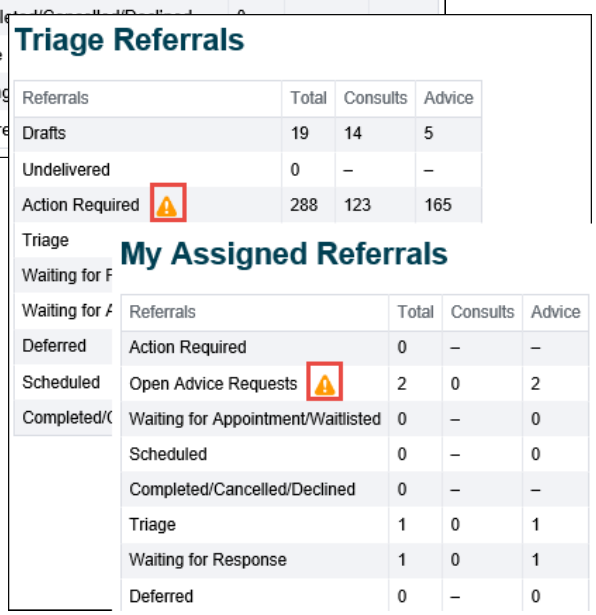
Providers can view a list of Advice and/or Consult Requests they have created themselves or on behalf of another provider through this dashboard. All eReferral providers have access to this dashboard.

Triage Referral

Receiving providers and those working on behalf of receiving providers can view all the Advice and/or Consult Requests submitted to their site using this dashboard. Only providers set up with triage access can see this dashboard.

My Assigned Referrals

Providers who need to respond to an Advice and/or Consult Request that has been specifically assigned to them can view a list through this dashboard. Only receiving or receiving on behalf of providers can access this dashboard.



If there is an Advice Request that is still open or needs attention, then both the *Action Required* and *Open Advice Requests* will show warning signs as a reminder.

2.4 Referral Worklists

Each dashboard is broken down into worklists based on the status of each request. Each worklist has the same headings (e.g., Total, Consults and Advice Requests), but the items found in each list will vary.

My Referrals

Referrals	Total	Consults	Advice
Recently Updated	15	12	3
Cancelled/Declined	46	28	0
Action Required	45	9	36
Drafts	47	38	9
Undelivered	0	0	0
In Progress	663	340	323
Completed	334	77	257
Waiting for Response	179	94	85

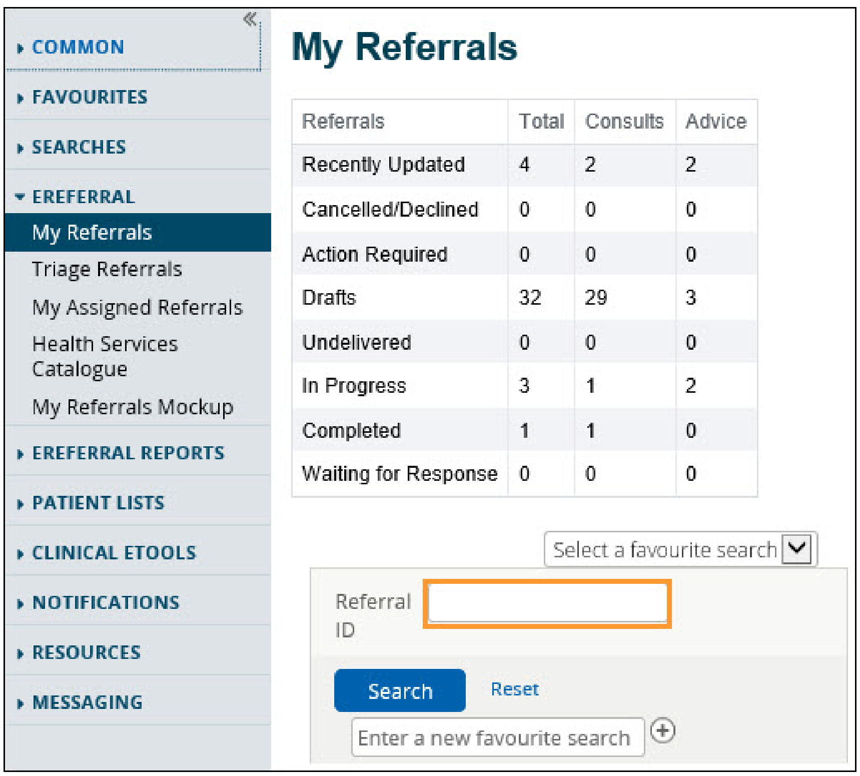
Triage Referrals

Referrals	Total	Consults	Advice
Drafts	19	14	5
Undelivered	0	–	–
Action Required	288	123	165
Triage	427	180	247
Waiting for Response	71	25	46
Waiting for Appointment/Waitlisted	121	121	0
Deferred	18	18	0
Scheduled	83	83	0
Completed/Cancelled/Declined	542	182	360

My Assigned Referrals

Referrals	Total	Consults	Advice
Action Required	0	–	–
Open Advice Requests	2	0	2
Waiting for Appointment/Waitlisted	0	–	0
Scheduled	0	–	0
Completed/Cancelled/Declined	0	–	–
Triage	1	0	1
Waiting for Response	1	0	1
Deferred	0	–	0

Each worklist has a ***Referral ID*** feature:



Each referral request submitted is given a unique 12 letter/number identifier (e.g., RFS-AAB-000000) which is helpful when looking for a specific Advice or Consult Request for a patient or when using your eReferral Provider Notifications.

To use this feature, enter the 12 letter/number ***Referral ID*** into the search box and click ***Search***. The referral will open in a new window.

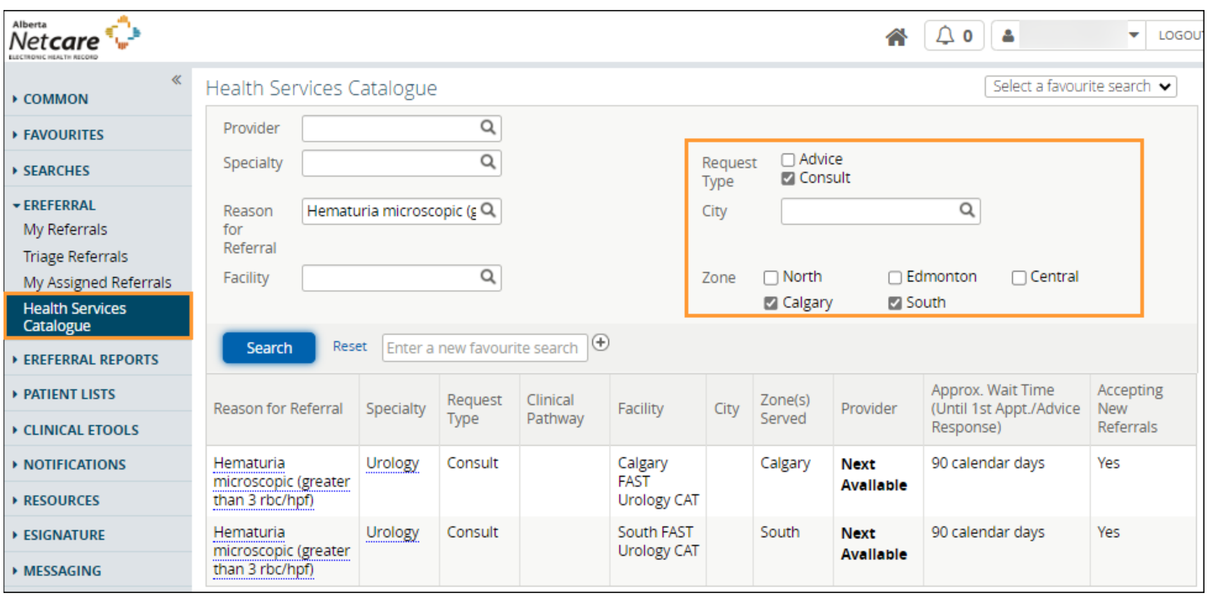
2.5 Health Services Catalogue

The ***Health Services Catalogue*** is a repository of eReferral information that can be used anytime you need more detail on reasons for referral, referral requirements, specialty names, facilities, clinical pathways, and providers. Estimated wait times can be viewed here if available. To open the ***Health Services Catalogue***, follow these instructions:

a. Open the ***Clinical Portal Menu.*** Click on ***eReferral*** then ***Health Services Catalogue***.

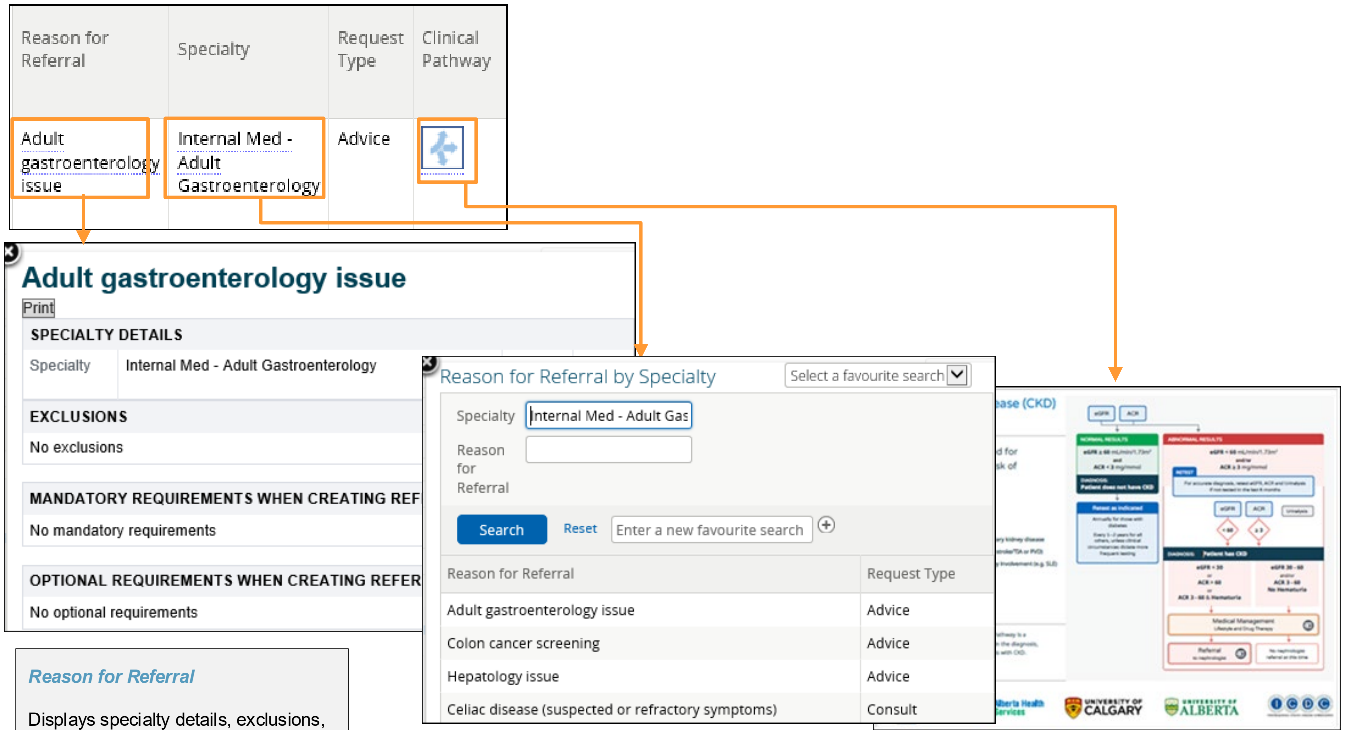
b. Search or use the filter options as per the example below or when creating an Advice and/or Consult Request. To search, enter three (3) or more characters and choose an option from the drop-down list.

c. Selecting or entering more search criteria will narrow down the results you receive.



d. Click on the ***Health Services Catalogue*** headings to sort if needed.

e. Click on any of the highlighted fields to display the related information.



Reason for Referral

Displays specialty details, exclusions, mandatory optional requirements when creating a Consult Request.

Specialty

Displays the available reasons for referral for Advice and Consult Requests within that specialty.

Clinical Pathways icon

Displays interdisciplinary care documents for more information on how to manage clinical issues.

NOTE: Go to albertapathways.ca for a list of clinical pathways.

2.6 Additional Referral Information

The referral may or may not have a provider listed. If a patient is being referred to a Next Available Provider that will be listed under ***Provider***.

Some triage facilities are set up to receive referrals from multiple Zones, as seen in the ***Zone(s) Served*** column. This allows users to search for what Advice and Consult Request options are available in their Zone.

- View ***City*** (if available) for information on what city the reason for referral is located in.
- View ***Zone*** for information on what Zone in Alberta the reason for referral is located in.

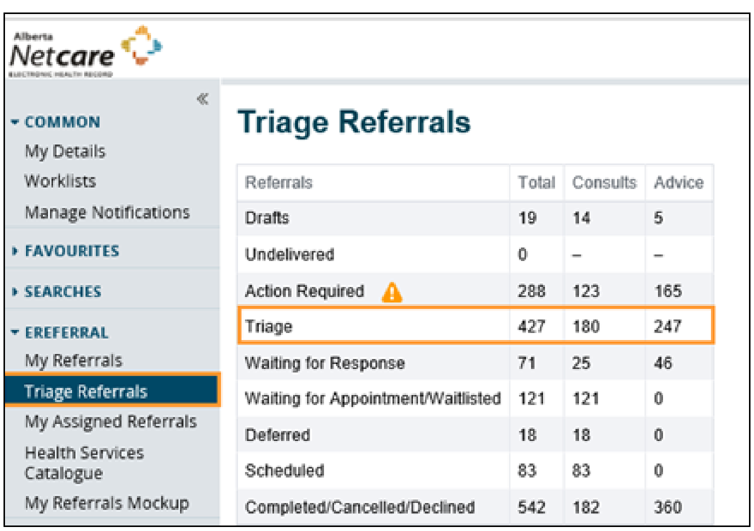
Reason for Referral	Specialty	Request Type	Clinical Pathway	Facility ▲	City	Zone(s) Served	Provider	Approx. Wait Time (Until 1st Appt./Advice Response)	Accepting New Referrals
Adult gastroenterology issue	Internal Med - Adult Gastroenterology	Advice		Internal Med - Adult Gastroenterology - Edmonton Zone		Edmonton	**Next Available**	5 calendar days	Yes
Acute nephrotic syndrome	Nephrology	Consult		Kingsway Nephrology Associates - Nephrology	Edmonton	Edmonton	Dr D	15 calendar days	Yes

- Click the ***Provider*** – (If available) to open a new window with provider details including spoken language(s), consultations offered and contact numbers. ***Reason for Referral*** is not linked to a specific provider, but rather Next Available Provider so specific provider information may not be available.
- View ***Approximate Wait Time*** *(if available)* for when an appointment or Advice Request's first response is to be expected by. For Advice Requests, this is within five (5) calendar days. For Consult Requests, this date is self-reported by the specialist and/or service and will vary by specialty and reason for referral.
- View ***Accepting New Referrals*** for information on whether that reason for referral is accepting new referrals for Advice and/or Consult Requests.

2.7 Setting a Favourite Search

When using the Alberta Netcare Portal and eReferral, you can save a favourite search to access information quickly. For example, if you are a triage user and triaging Consult Requests, you can set up the following favourite search:

a. Open the ***Triage*** worklist from the ***Triage Referrals*** dashboard.



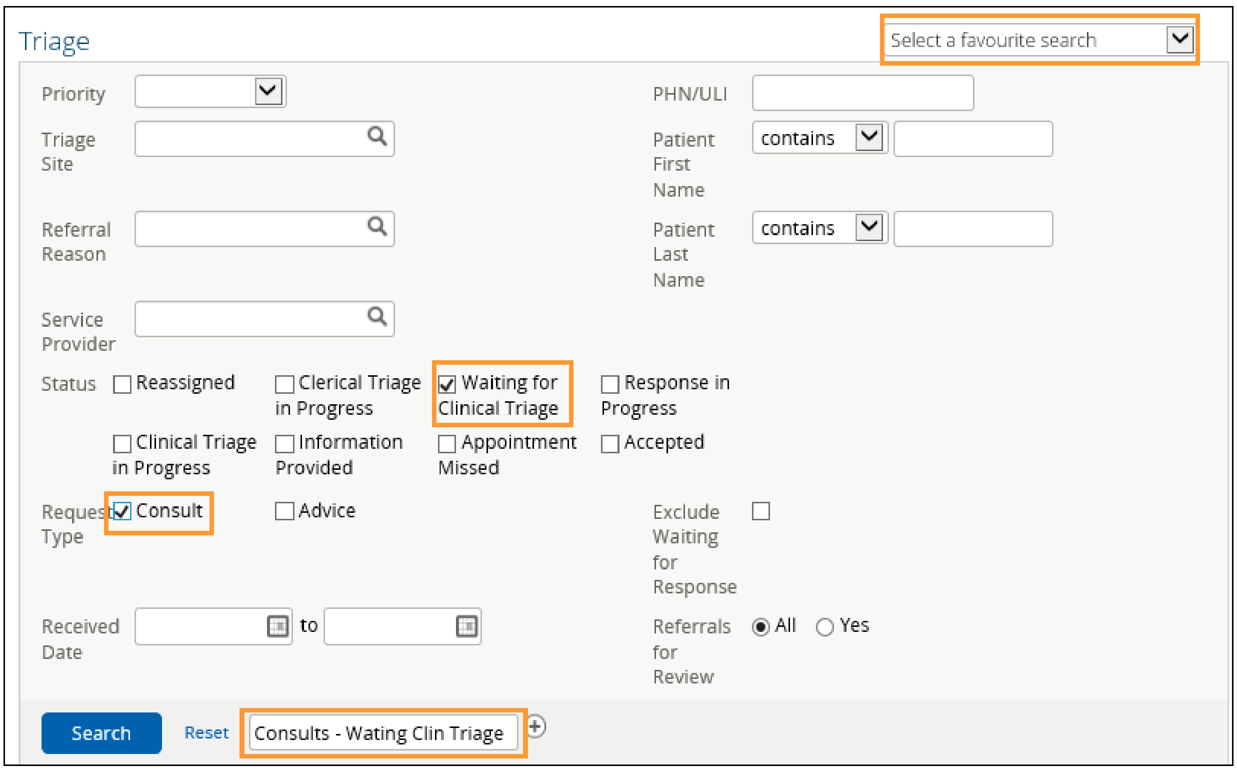
Referrals	Total	Consults	Advice
Drafts	19	14	5
Undelivered	0	–	–
Action Required ⚠	288	123	165
Triage	427	180	247
Waiting for Response	71	25	46
Waiting for Appointment/Waitlisted	121	121	0
Deferred	18	18	0
Scheduled	83	83	0
Completed/Cancelled/Declined	542	182	360

b. Click the checkbox beside ***Status*** to ***Waiting for Clinical Triage*** and the checkbox beside ***Request Type*** to ***Consult***. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

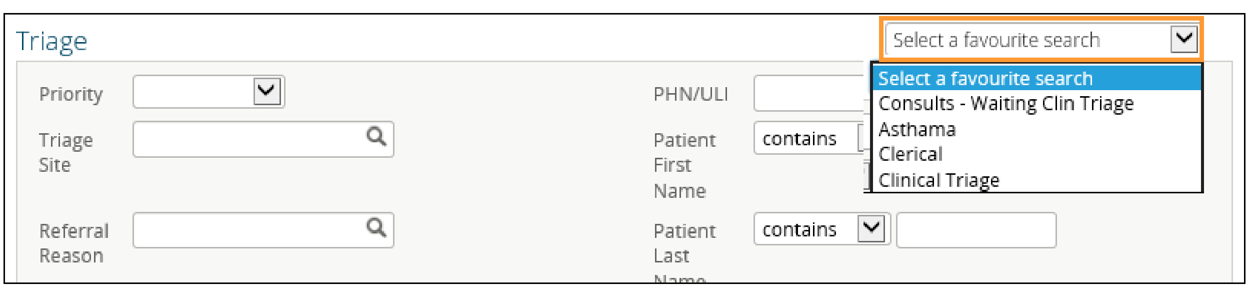
c. Click ***Search***.

d. In the ***Enter a new favourite search*** field, use the text box to give the search a name (i.e., Waiting for Clinical Triage search).

e. Click the ⊕ icon to save your favourite. Now, when you open your ***Triage*** worklist you can select your favourite search from the drop-down menu in the top right-hand corner to execute a search with that criteria.



f. Click the drop-down menu in the top right-hand corner to execute a search with that criteria.



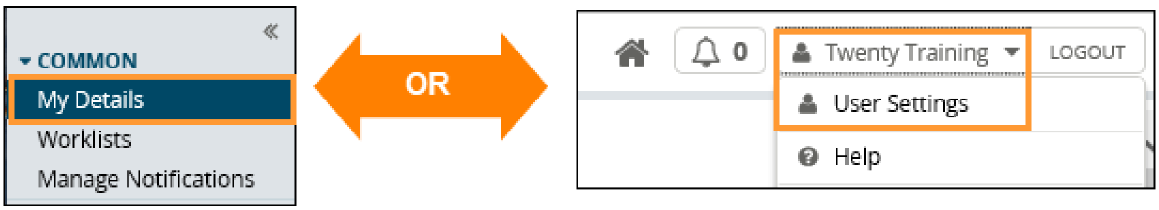
3.0 Setting Up My Details (For Referring and Referring On Behalf Of Providers)

Alberta Netcare Portal providers with Clinical 1, Clinical 2, Clinical 5, Clinical 10, and Clinical 12 user roles will have access to ***eReferral*** within the ***Clinical Portal Menu***. However, not all user roles can access all the eReferral dashboards.

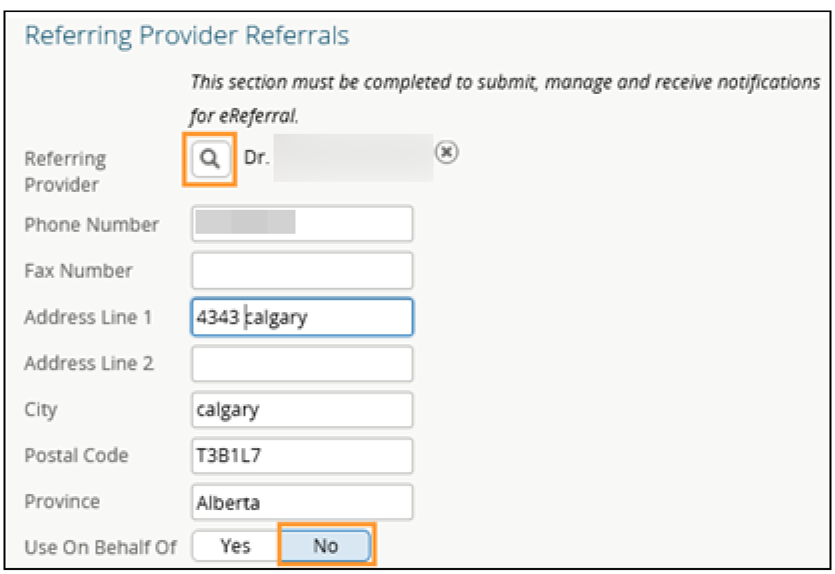
3.1 Providers Submitting Referrals Themselves

If you have access to the ***eReferral*** menu from the ***Clinical Portal Menu*** and the ***My Referrals*** dashboard, you will be able to create Advice and/or Consult Requests. Before you can submit a request, however, you will need to update your provider information in ***My Details***.

a. From the ***Clinical Portal Menu*** select ***Common***, then ***My Details*** or click ***User Settings*** from the ***Global Menu***.



b. Scroll down to the ***Referring Provider Referrals*** section. Click the magnifying glass and search for your full name as per your health profession college registration. **(Optional)** Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created Advice or Consult Request. If the provider works at multiple sites, the clinic details (e.g., address, phone, and fax number) can be left blank in ***My Details*** and then added manually on each request. You can also manually change the default demographics within a request as needed.



Entering clinic demographics (e.g., phone number, address, etc.) is optional but could help the responding clinic to send patient materials to you.

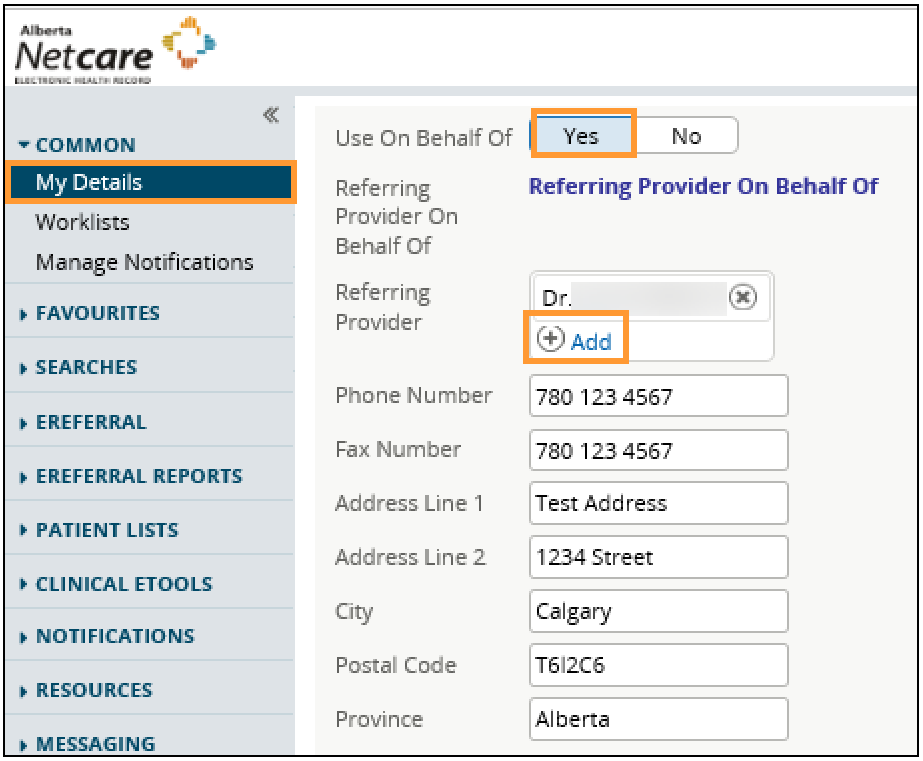
c. Click ***Update Preferences*** located at the bottom at the page to save your changes.

3.2 Submitting a Referral on Behalf of a Provider

If you are creating/submitting referrals on behalf of a provider, you will need to set up your ***My Details*** with the provider's information.

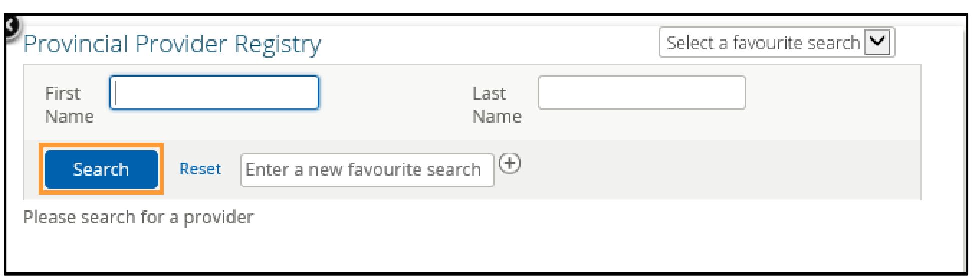
a. Click ***My Details*** from the ***Clinical Portal Menu*** and scroll down to the ***Referring Provider On Behalf Of*** section.

b. Click ***Yes*** next to ***Use on Behalf Of***.



c. Click the ***Add*** button.

d. Enter ***First Name*** and ***Last Name*** of the provider (as per their college registration), then click ***Search***. The search will return selections that include ***Name***, ***Provider Type***, ***City***, and ***Status***.



e. Click on the appropriate provider from the list. This information will automatically populate the ***Referring Provider*** field.

f. **(Optional)** Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created Advice or Consult Request. If the provider works at multiple sites, the clinic details (e.g., address, phone, and fax number) can be left blank in ***My Details*** and then added manually on each request. You can also manually change the default demographics within a request as needed.

g. Repeat this process for each provider you submit requests on behalf of. The first provider you have inputted in your ***My Details*** will be the default in any future Advice or Consult Requests. If you have multiple providers entered in ***My Details***, you can specify the appropriate provider during the request creation process.

h. Click ***Update Preferences*** to save your changes.

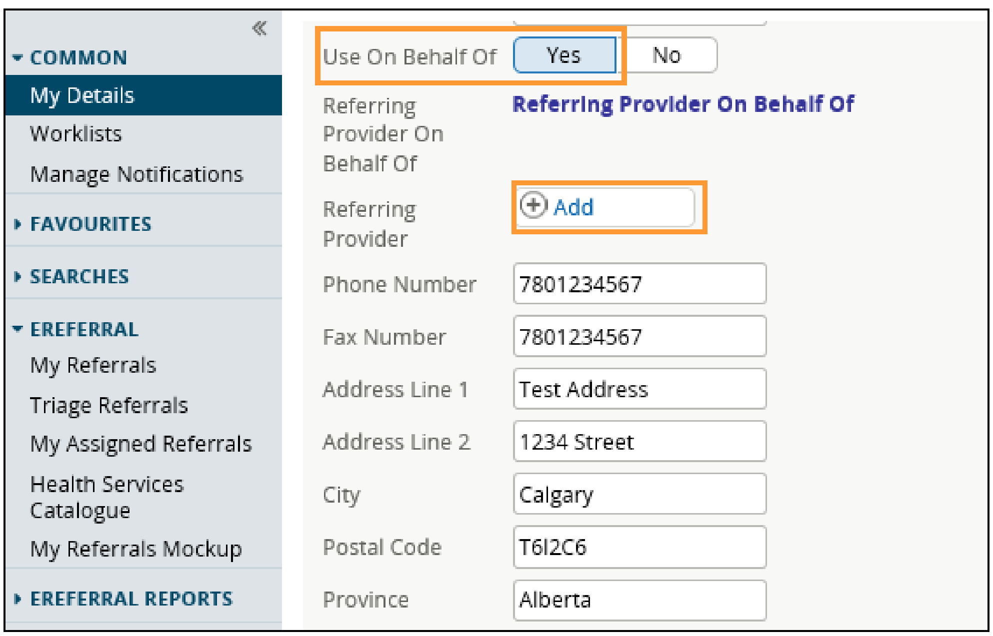
3.3 Submitting On Behalf of Another Provider

If you are a referring provider submitting requests on behalf of another provider (e.g., another physician) complete the steps below.

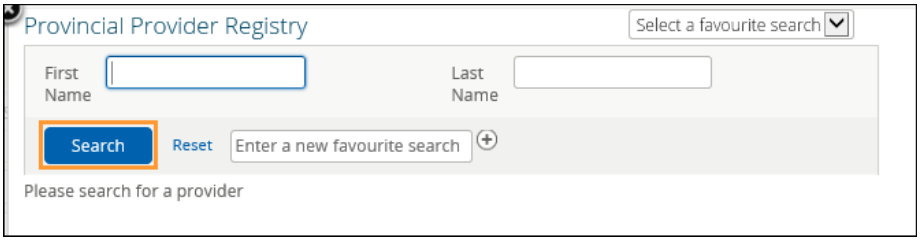
a. Click ***My Details*** from the ***Clinical Portal Menu*** and scroll down to the ***Referring Provider On Behalf Of*** section.

b. Go down to the ***Referring Provider Referrals*** section. Select ***Yes*** for ***Referring Provider On Behalf Of.***

c. Click the ***Add*** button to bring up the Provincial Provider Registry search. Add the name of the referring provider and the location and contact information.



d. Enter the provider's name and click ***Search***. The search results will display all results that match. Shortened names will also appear – e.g., Chris will also display Christopher.



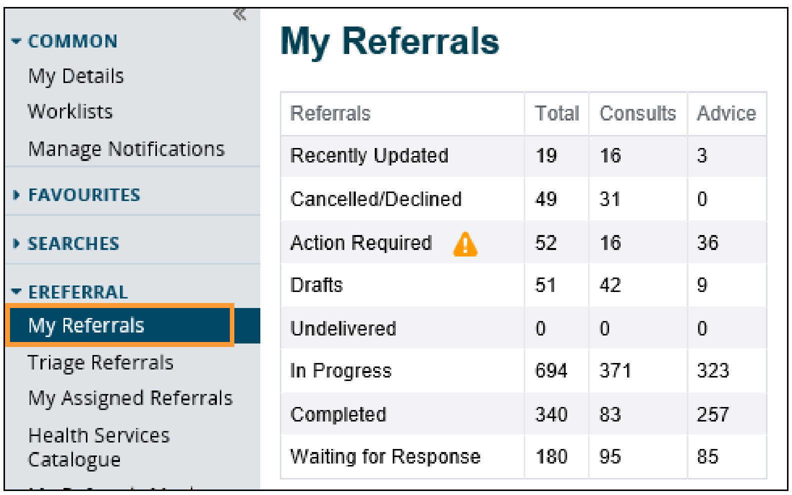
e. Click ***Update Preferences*** to save your changes.

3.4 Viewing Worklists from the My Referrals Dashboard

The ***My Referrals*** dashboard has worklists with Advice and Consult Request information that has been created.

> **NOTE:** This dashboard is viewable by anyone with the same providers entered in their ***My Details***.

a. Select ***eReferral*** from the ***Clinical Portal Menu*** then ***My Referrals*** to display the dashboard.



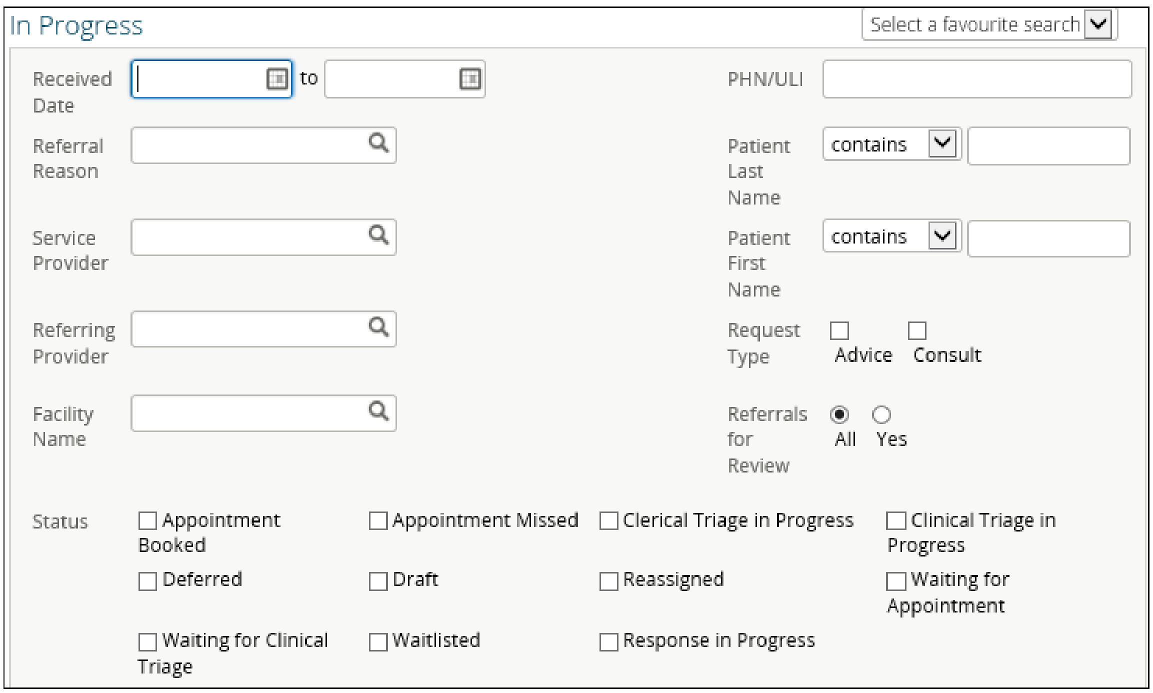
b. From there, click to access any of the following worklists:

- ***Recently Updated*** – These are requests that have had recent activity. You can set the date ranges you wish to filter on for ***Recently Updated***. You can also set the ***Show Recently Updated*** timeframe in ***My Details – Referring Provider Referrals*** and ***Referring Provider Referrals On Behalf Of.***
- ***Cancelled/Declined*** – These are requests that were not accepted by the specialty.
- ***Action Required*** – These are requests requiring information. This information can be requested by triage or by the receiving provider. If you are a triage user, this can also indicate that the referring provider has added new information to a request or asked for additional information.
- ***Drafts*** – These are incomplete requests (i.e., not submitted) that are a work in progress and may be shared with other members of a team who can also work on them.
- ***Undelivered*** – These are referrals that failed to send because of a technical problem. eReferral requests are normally delivered instantaneously. If you see a request on this list, you should contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638 if you are a

community user or the AHS IT Service Desk at 1-877-311-4300 if you are an AHS employee to investigate.

- ***In Progress*** – These are requests that have been submitted and are being processed by the specialty.
- ***Completed*** – These are requests that the specialty has finished processing and has marked as complete.
- ***Waiting for Response*** – These are requests that are waiting for a response. If you have sent an Advice Request or a request for additional information to the specialty, the request will stay on the ***Waiting for Response*** worklist until it has been replied to.

c. Sort or search a worklist to find specific referrals. This includes by ***Referral Reason***, ***Service Provider***, ***Referring Provider***, ***Facility Name***, and the patient's name and/or their ***PHN/ULI***.



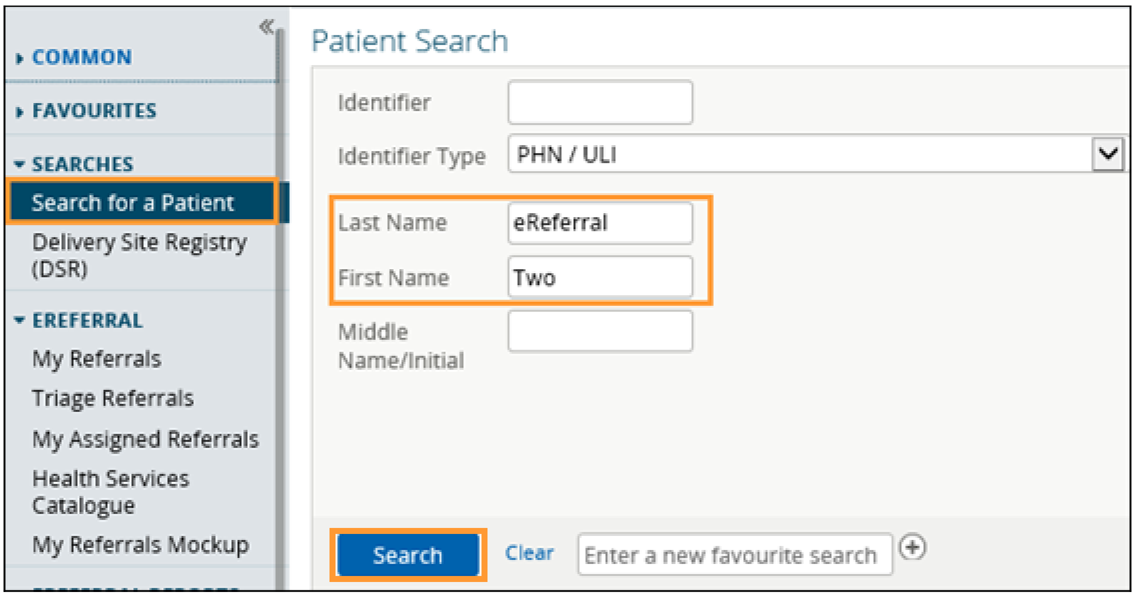
4.0 Advice Request Actions (For Referring & Referring On Behalf Of Providers)

4.1 Creating Advice Requests

An Advice Request can be used when clinicians seek specialty advice for a non-urgent question or if they are unsure if a referral would be appropriate. In many cases, an Advice Request may be all you need to manage your patient in their medical home.

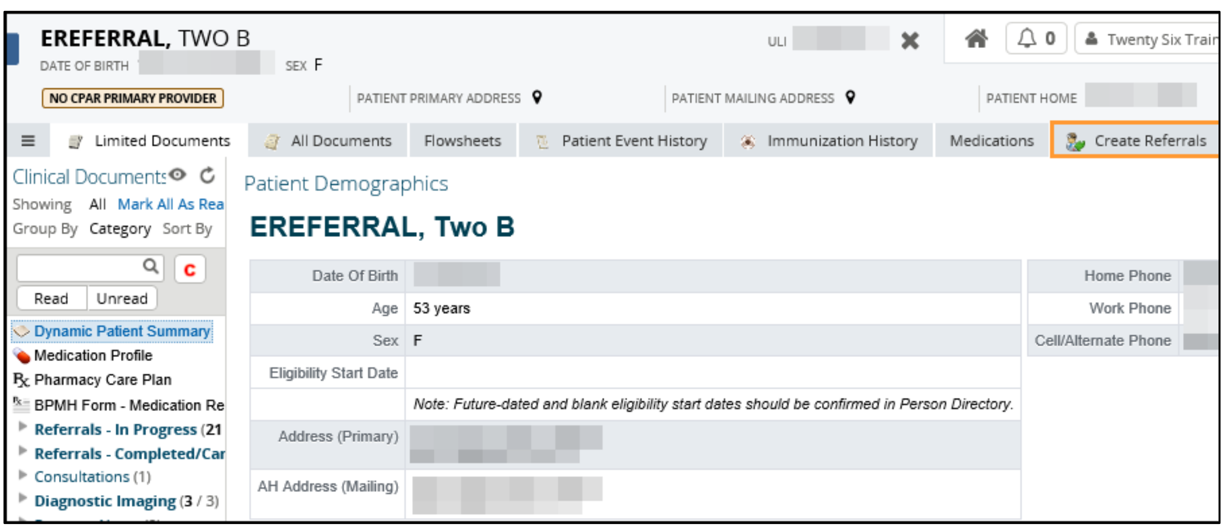
a. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI).

b. Press ***Search*** to bring up a list.

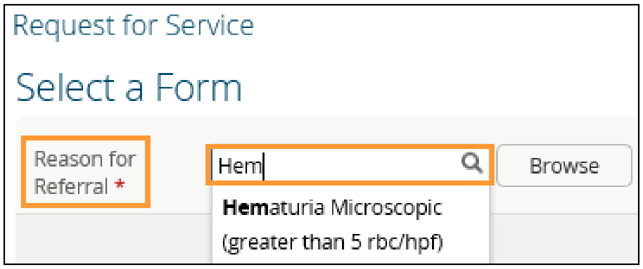


c. Click the patient from the populated list to open the patient's Electronic Health Record (EHR).

d. Once open, click ***Create Referrals*** from the ***Context Menu***.

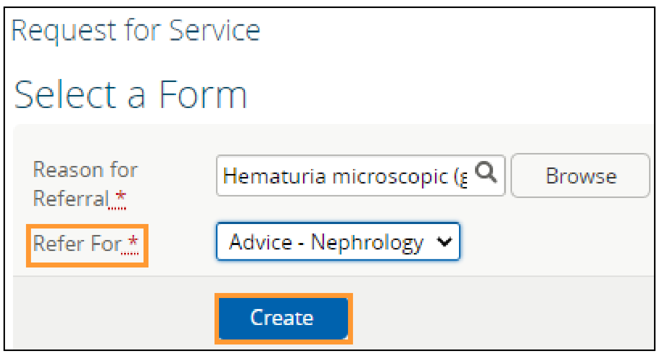


e. Enter a reason in the ***Reason for Referral*** field. You can start typing to see what reasons are listed or click ***Browse*** and the ***Health Services Catalogue*** will open.



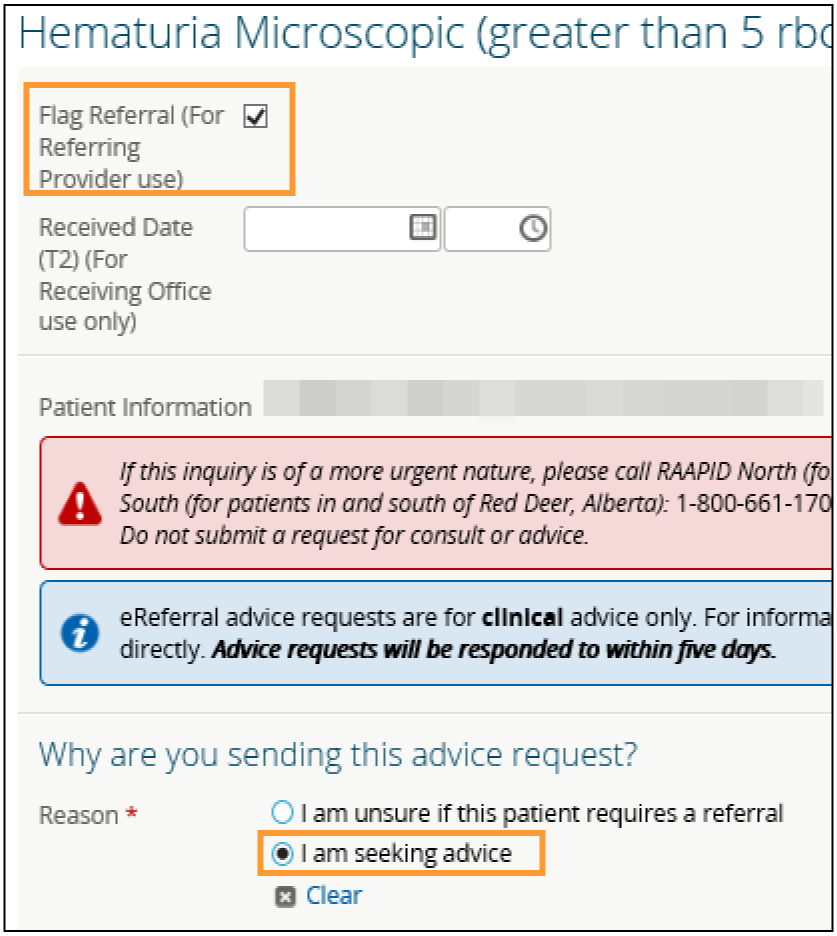
f. Click the appropriate reason for referral. Ensure that the ***Refer For*** field indicates ***Advice***.

g. Click ***Create*** to open the Advice Request form. If the ***Reason for Referral*** is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the reason for referral list – use Radiculopathy). The exact reason can be entered later in this process in the ***Referral Details*** section in the ***Reason for sending this referral*** field.

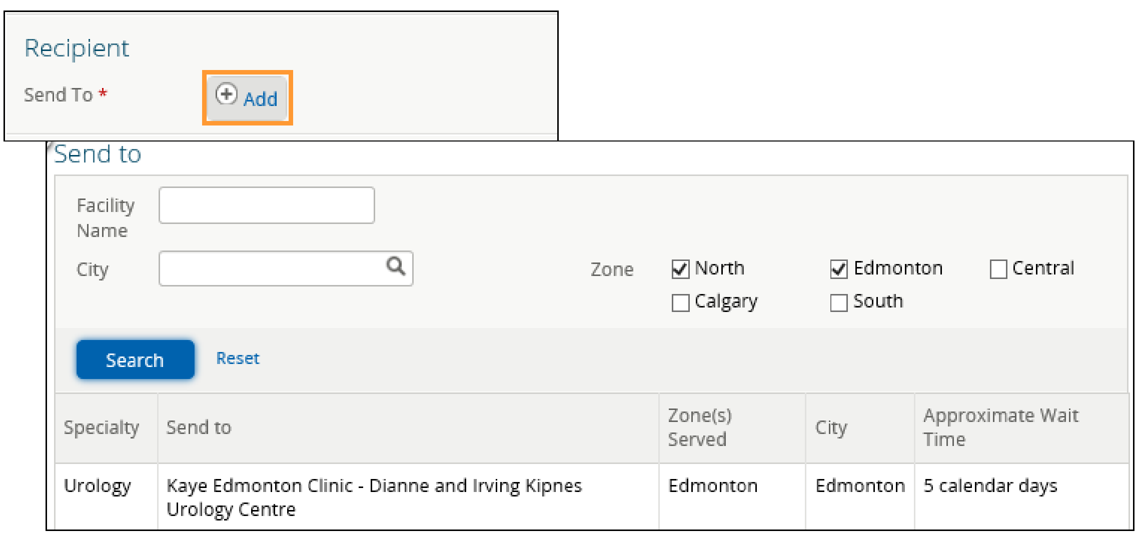


h. Select ***Flag Referral (For Referring Provider use)*** if you want the referral to appear in the receiving providers'/clinics' ***Action Required*** worklist.

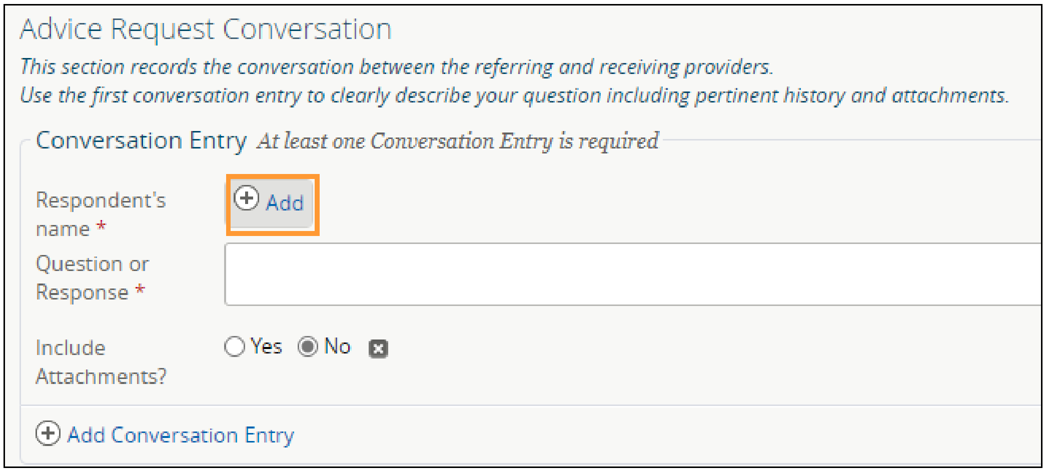
i. Select the reason why you are sending this Advice Request. All fields marked with a red asterisk (*) are mandatory and must be completed to successfully submit an Advice Request.



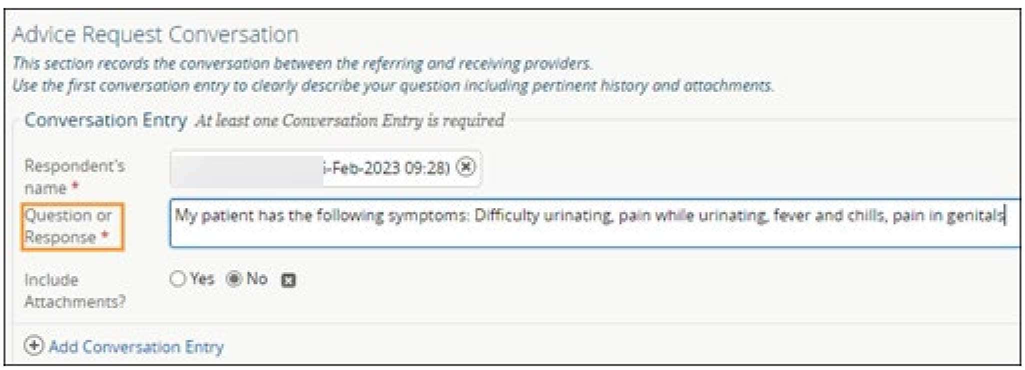
j. Click ***Add*** beside ***Send To*** in the ***Recipient*** section to identify where you want the Advice Request sent. Choose from one of the facilities listed for the specialty.



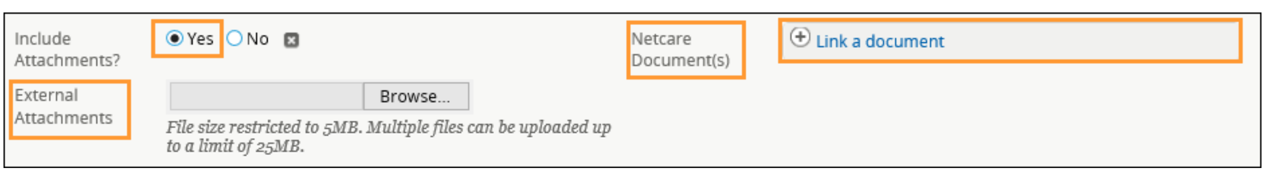
k. In the ***Conversation Entry*** section, click ***Add*** beside ***Respondent's name*** to add yourself (the referring provider) or the name of the referring provider you are referring on behalf of. The referring provider's name must be entered in ***My Details*** to populate this information.



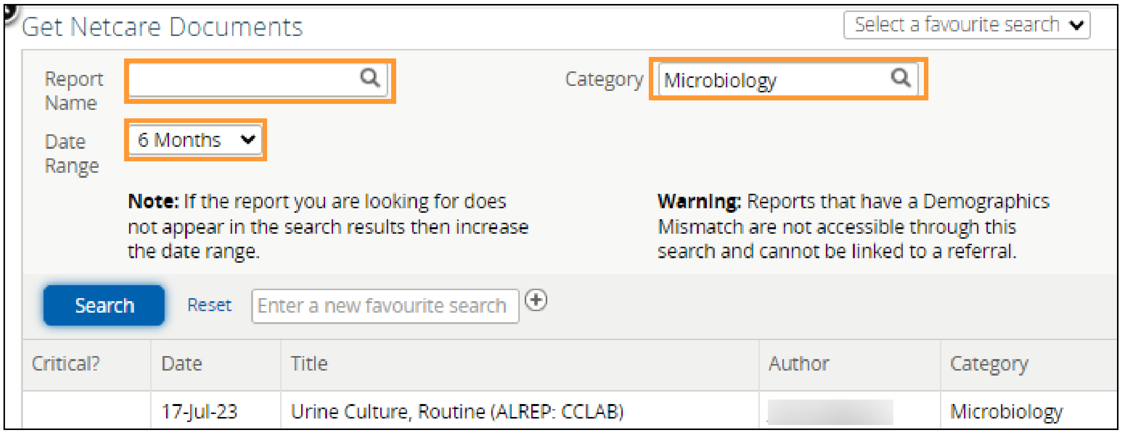
l. Use the first conversation entry box to clearly describe your question including pertinent history and attachments.



m. If you want to add an attachment, click ***Yes*** to include files. To include reports and lab results available in the Alberta Netcare Portal on the Advice Request, select ***Link a document***.

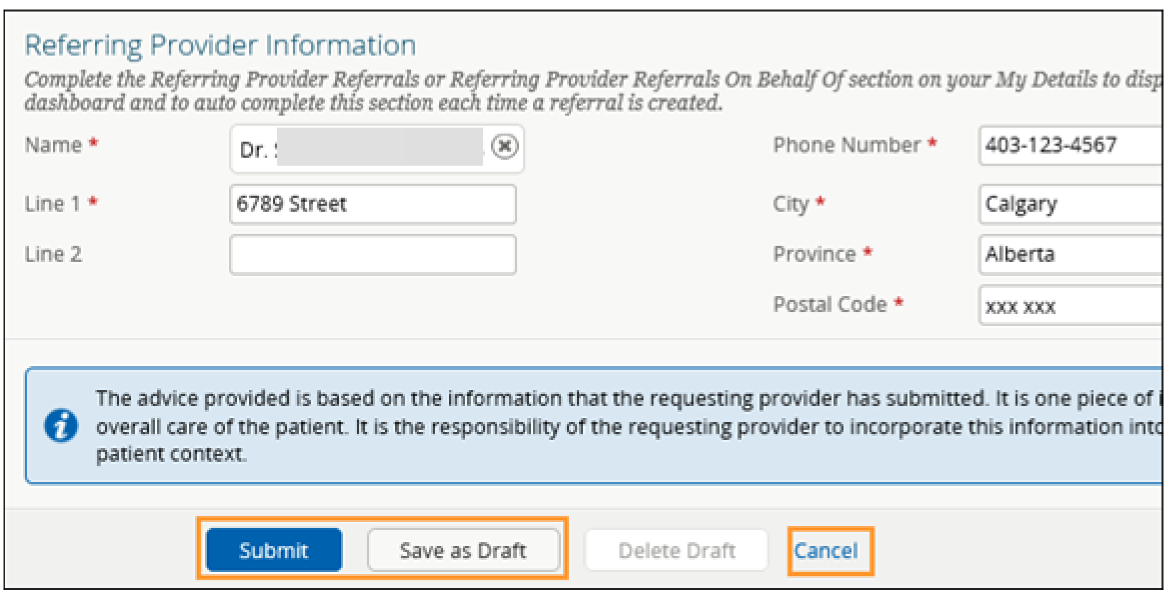


- A pop-up will open that will allow you to search for the document you want to attach. You can search by ***Report Name*** or ***Category*** and dictate the date range to search within.



- To include a document from your computer, select ***Browse*** for external attachments. Single files no larger than 5MB can be attached, and multiple files not exceeding 25MB in total can added.

n. Confirm the ***Referring Provider Information*** section is complete with the referring provider's name. The clinic's details will auto-populate from ***My Details*** (if added) and can be changed if needed. Scroll to the bottom of the page and click ***Submit*** to send the Advice Request. Select ***Save as Draft*** if the Advice Request is not complete or you want to come back to it later. Press ***Cancel*** if you want to stop completing the Advice Request.

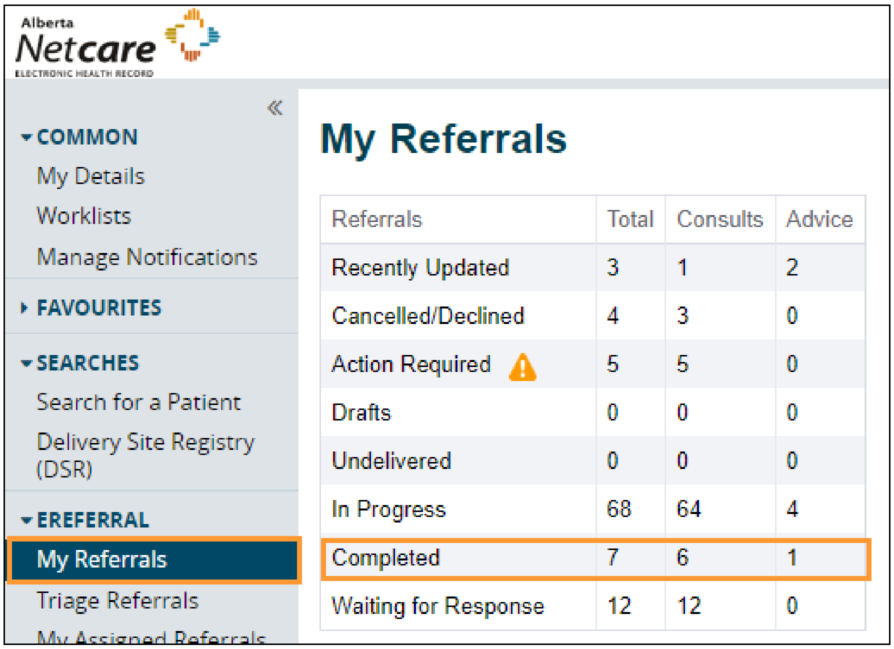


4.2 Reviewing a Response from the Specialty

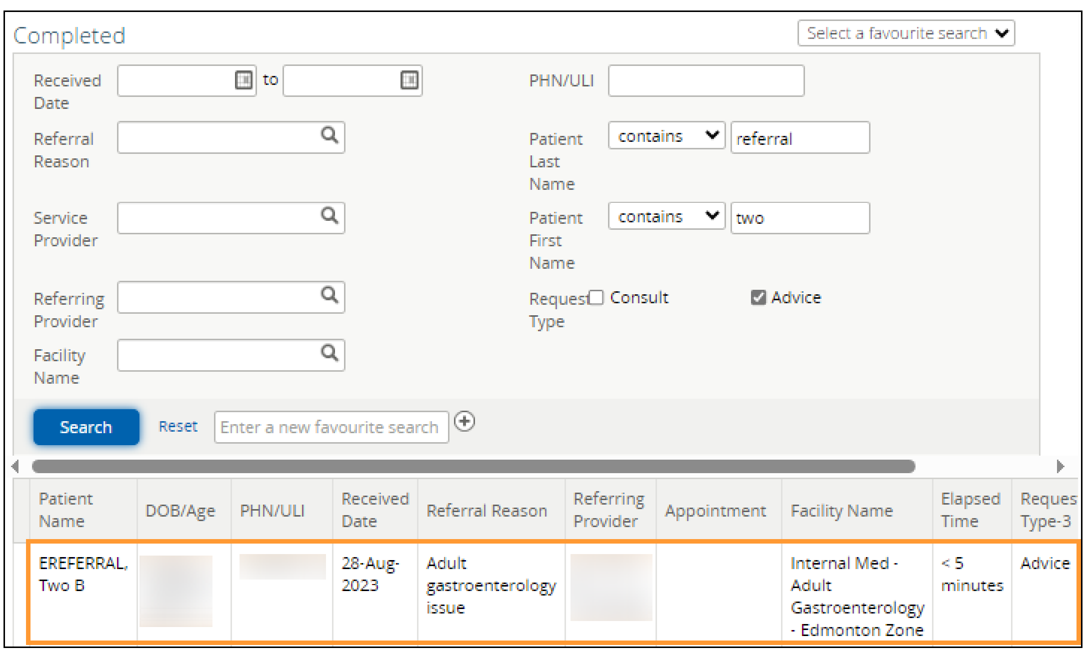
When a specialty responds to an Advice Request, you can open it in the ***My Referrals*** dashboard. The response will appear in the ***Activity*** section of the Advice Request.

a. From the ***Clinical Portal Menu***, click ***My Referrals***.

b. Click the ***Completed*** worklist and select the applicable Advice Request.

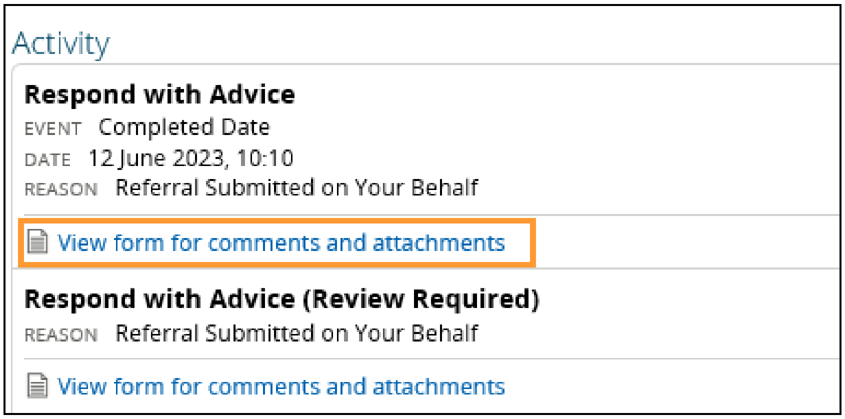


c. Scroll through the list or search for the patient.



d. To open the response, navigate to the ***Activity*** section at the bottom of the Advice Request. Click ***View form for comments and attachments*** under ***Respond with Advice*** to see the content.

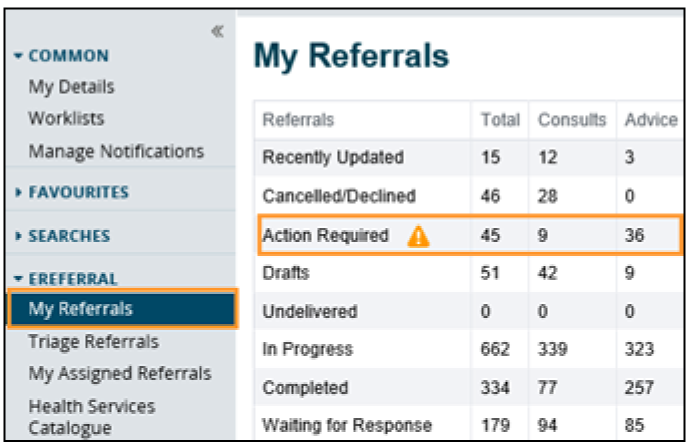
e. Review the advice/response provided and any attachments.



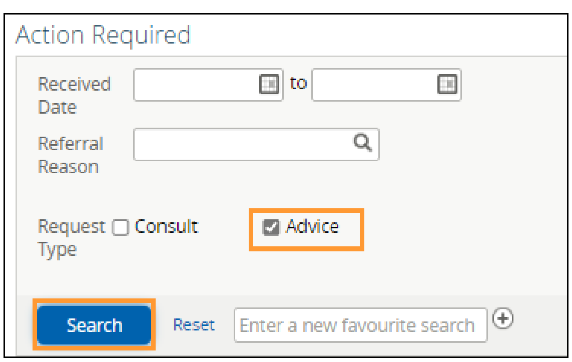
4.3 Responding to a Request for Additional Information/Action Required

A triage centre or receiving provider may require additional information from you (the referring provider) before they can complete the Advice Request. Follow these instructions to add information:

a. From the ***Clinical Portal Menu***, go to ***My Referrals***. Then open the ***Action Required*** worklist.

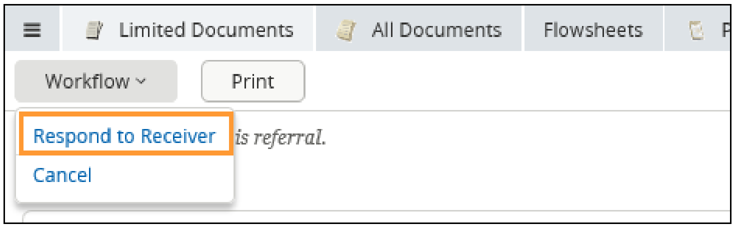


b. Select ***Advice*** for ***Request Type*** and then press ***Search***. Click the appropriate Advice Request from the list.

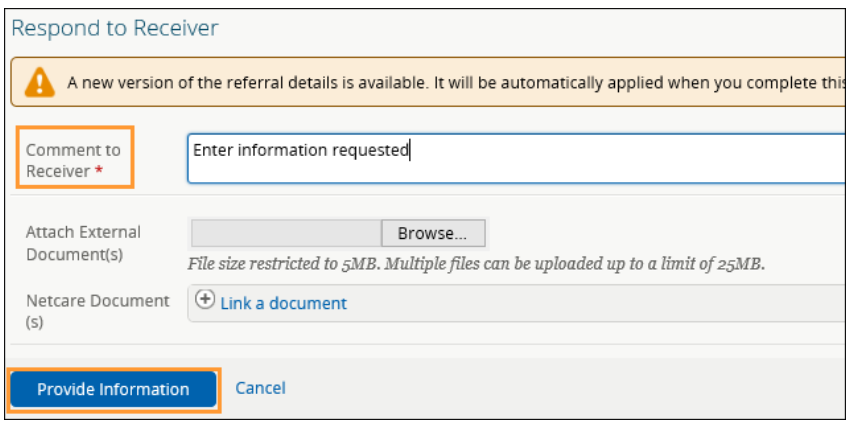


b. Scroll to the bottom of the Advice Request to view the ***Activity Feed*** and read the question from the specialist.

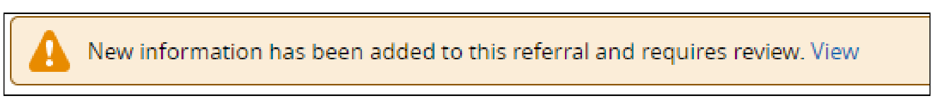
c. When you are ready to respond, click ***Workflow*** and then click ***Respond to Receiver.***



d. Type your response/additional information into the comment box, add any attachments, and click ***Provide Information***.



The Advice Request will then be removed from your ***Action Required*** worklist within the ***My Referrals*** dashboard. For the receiving provider, a panel is displayed at the top of the referral with a note identifying that new information is present for the specialty.



4.4 Print a Copy of an Advice Request

a. Locate the Advice Request on the ***My Referrals*** dashboard or ***Triage*** dashboard and open it.

b. Click ***Print*** from the task bar at the top of your screen. You will have the option to print a hard copy of the referral, or to save it as a PDF file.

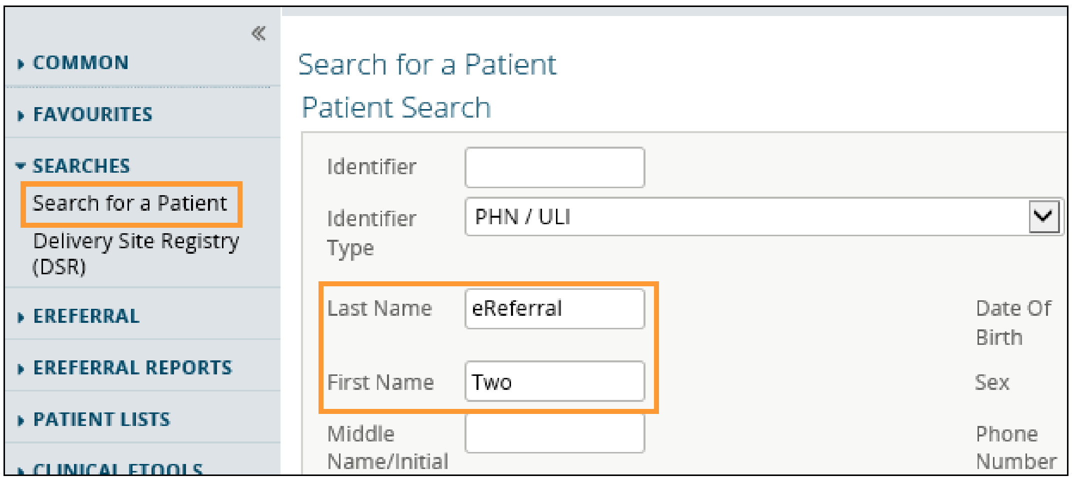
5.0 Consult Request Actions (For Referring & Referring On Behalf Of Providers)

5.1 Viewing Referrals from the Context Menu

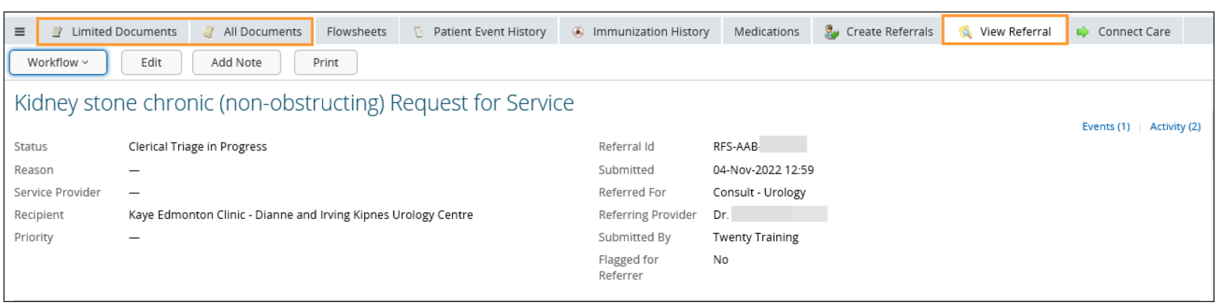
A Consult Request is a request for an in-person specialist appointment. It may also be called a referral. A standard consult form is used for most specialties to create a consistent referral experience.

Before submitting a Consult Request, check to see if a similar request has already been submitted. All referrals in eReferral are visible to all authorized users within the Alberta Netcare Portal.

a. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name, their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Click ***Search*** to bring up a list.



b. Select the patient from the populated list. Once the patient's Electronic Health Record (EHR) opens, you will see the ***Context Menu*** running along the top of the screen.

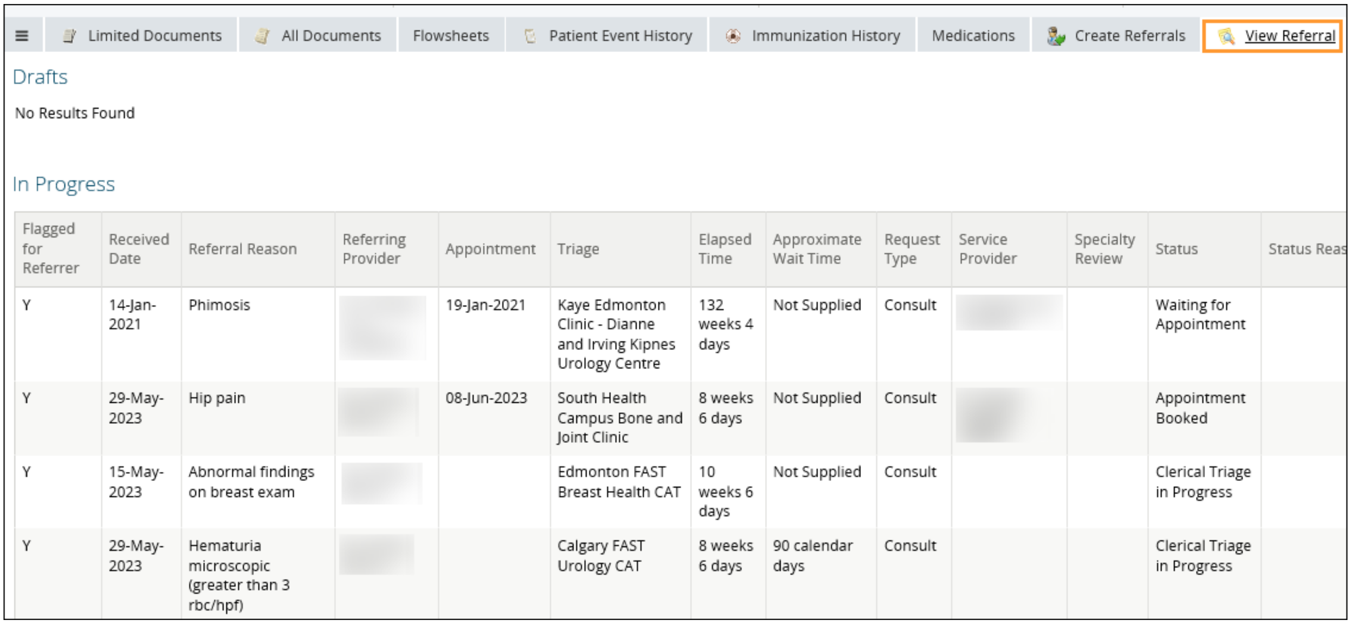


There are two ways to view referrals from the ***Context Menu***:

- ***View Referral*** tab (Consult Requests only).
- ***Clinical Document Viewer (CDV) Tree*** located in the ***Limited*** or ***All Documents*** folders.

View Referral Tab

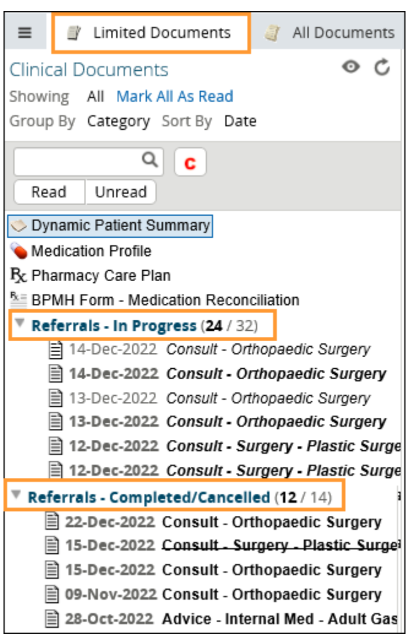
Click ***View Referral***. This displays a list of the patient's ***In Progress*** and ***Completed/Cancelled/Declined*** Consult Requests. These are editable by referring providers and referring providers on behalf of that created them and are read-only for all other Alberta Netcare Portal users. Draft requests are also visible, but only to those who created them.



Flagged for Referrer	Received Date	Referral Reason	Referring Provider	Appointment	Triage	Elapsed Time	Approximate Wait Time	Request Type	Service Provider	Specialty Review	Status	Status Reas
Y	14-Jan-2021	Phimosis		19-Jan-2021	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	132 weeks 4 days	Not Supplied	Consult			Waiting for Appointment	
Y	29-May-2023	Hip pain		08-Jun-2023	South Health Campus Bone and Joint Clinic	8 weeks 6 days	Not Supplied	Consult			Appointment Booked	
Y	15-May-2023	Abnormal findings on breast exam			Edmonton FAST Breast Health CAT	10 weeks 6 days	Not Supplied	Consult			Clerical Triage in Progress	
Y	29-May-2023	Hematuria microscopic (greater than 3 rbc/hpf)			Calgary FAST Urology CAT	8 weeks 6 days	90 calendar days	Consult			Clerical Triage in Progress	

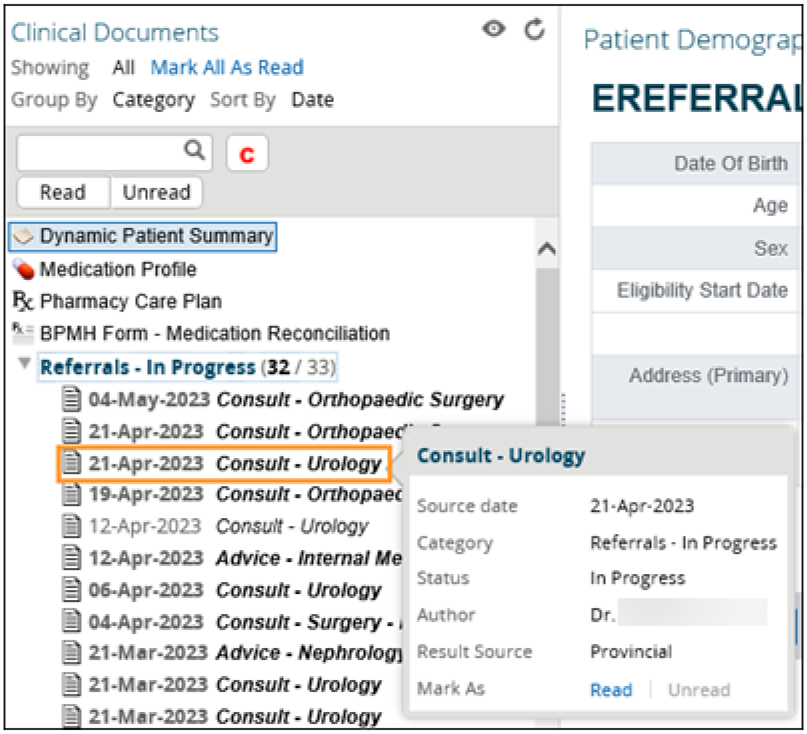
Clinical Document Viewer (CDV) Tree

a. Click either ***Limited Documents*** or ***All Documents*** to view the ***Clinical Document Viewer (CDV) Tree***. You can find referrals that are ***In Progress*** or have been ***Completed/Cancelled*** from the menu here.



Click on the column title to sort.
Double click to reverse the sort.

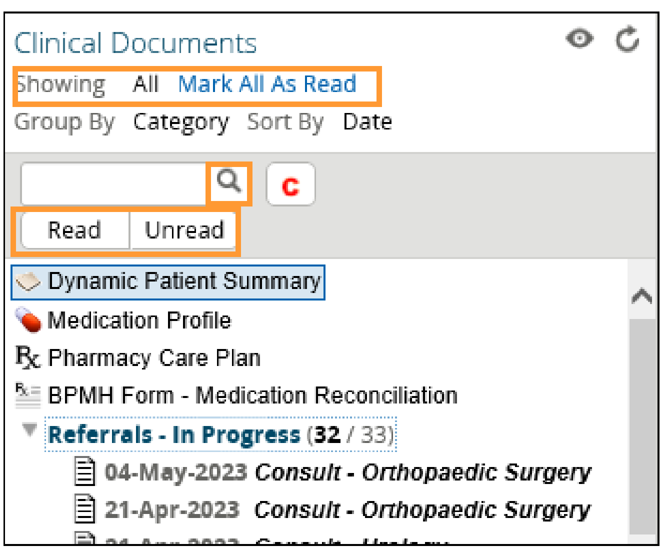
Each folder contains links to the patient's Consult and Advice Requests. Any Consult or Advice Request that has been ***Cancelled/Declined*** will have a strike through the middle of the text. Any Consult or Advice Request ***In Progress*** will have its text italicized – Bold means the referral is unread. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. You can also view a short summary by hovering your mouse over the referral link for Consult and/or Advice Request.



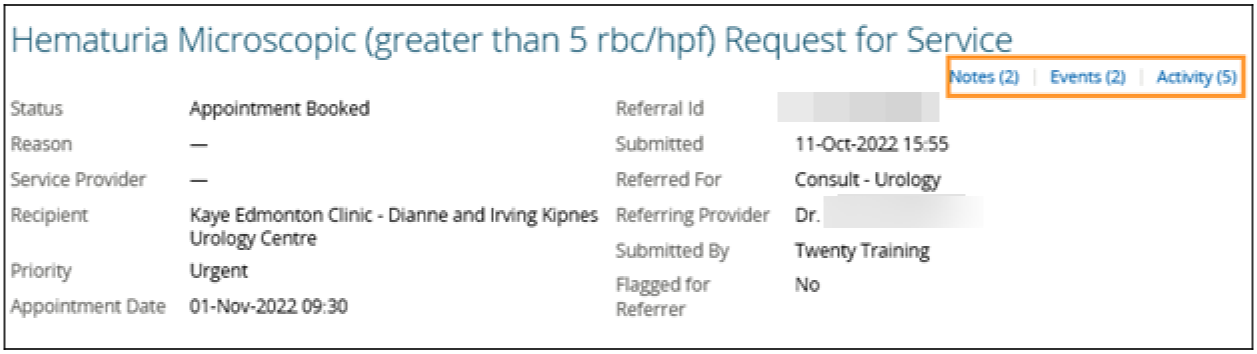
b. Click ***Read*** to open and read the referral or click on the referral to open it.

Other ***Clinical Document Viewer (CDV) Tree*** functionality relating to Consult Requests includes:

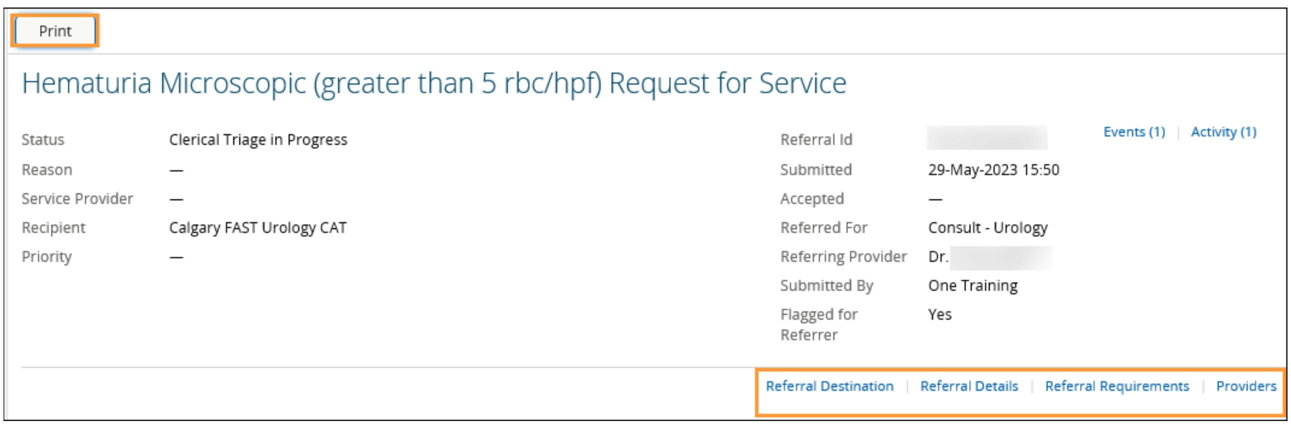
- Click the magnify button (🔍), then enter text in the text box. Press ***Enter*** to search for a document in the ***Clinical Document Viewer (CDV) Tree***.



- Select ***Referrals - In Progress*** to view Advice and Consult Requests in progress. You can also review the ***Status***, ***Notes***, ***Events*** and ***Activities*** occurring on the Consult and/or Advice Request to track its life cycle.

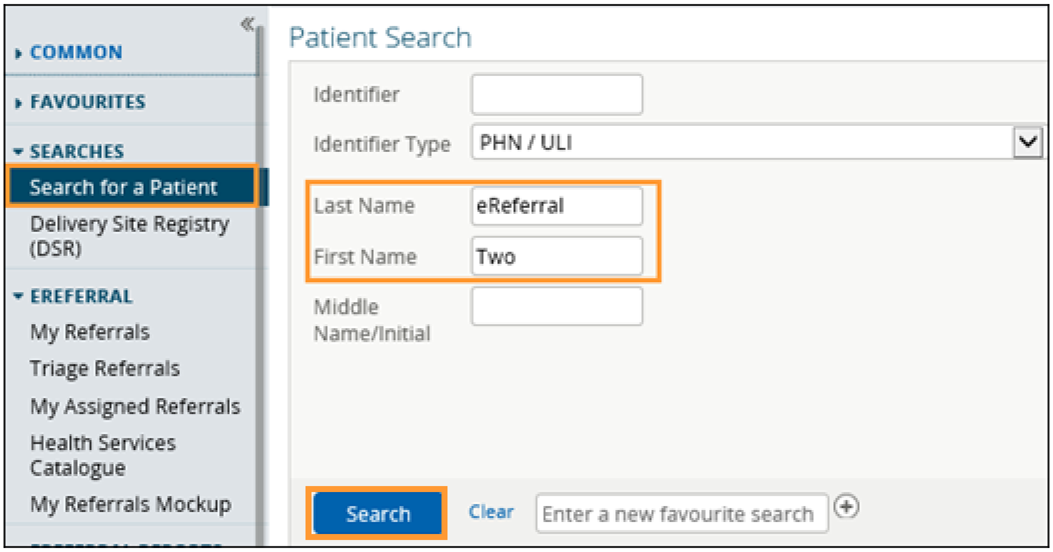


- Scroll down or click a navigation link to advance to a specific section in the Advice or Consult Request.
- Click the ***Print*** button at the top of the page. Provided the appropriate software is installed on your computer, this action generates a PDF, which can then be printed or saved.



5.2 Creating a Consult Request

a. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Click ***Search*** to bring up a list.



b. Select the patient from the populated list.

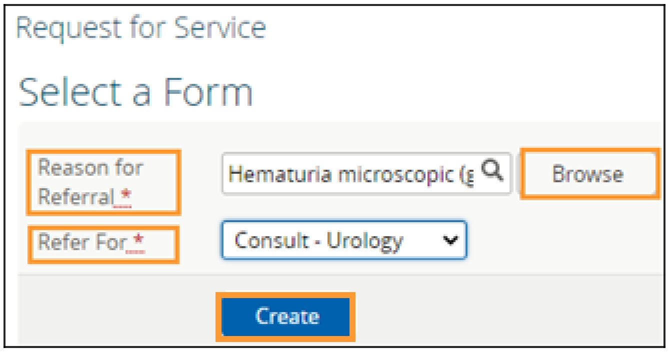
c. Open the patient's Electronic Health Record (EHR) and click ***Create Referrals***. Review the alert and information messages under ***Information*** at the top of the screen.

d. Review the patient's existing ***Drafts***, ***In Progress*** and ***Recently Completed*** lists below the ***Select a Form*** section to ensure you are not about to create a duplicate referral.

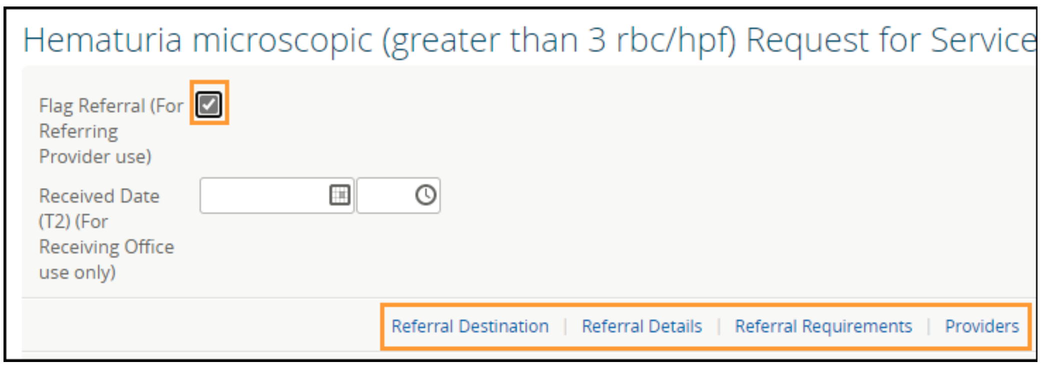
e. Enter a reason in the ***Reason for Referral*** field. You can start entering the reason to see what selections are available. If you don't know the reason for referral or would like to see what options are available, click ***Browse*** to open the ***Health Services Catalogue***.

f. If the reason for referral is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the reason for referral list – use Radiculopathy). The exact reason can be entered later in this process in the ***Referral Details*** section – ***Reason for sending this referral*** field.

g. For example, click ***Consult – Urology*** for ***Refer For***. Click ***Create***.



h. There may be an Advice Request option for the same reason for referral. If so, this option will appear on the ***Refer For*** drop-down menu. Select the ***Consult*** option and click ***Create*** to open the standard Consult Request form. Mandatory fields are denoted by (*) and must be completed to submit the Consult Request.

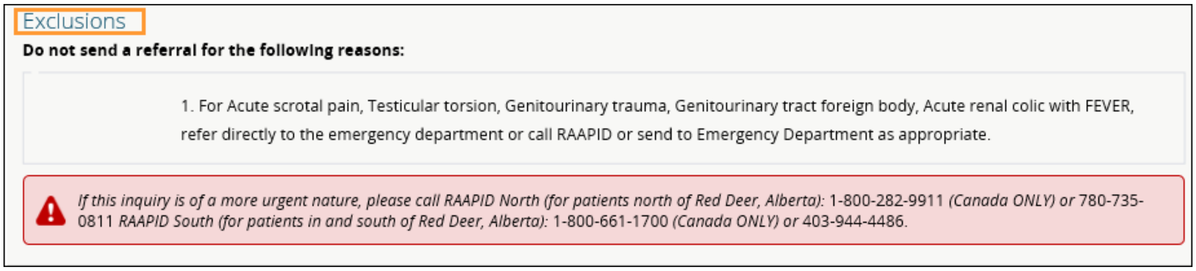


i. Click ***Flag Referral (For Referring Provider use)*** if you want the Consult Request to be flagged on your ***My Referrals*** dashboard worklists. *Example of the flag that will appear on your worklists:*

Flagged for Referrer	Received Date	Referral Reason	Referring Provider	Appointment	Triage	Elapsed Time
Y	29-May-2023	Hematuria microscopic (greater than 3 rbc/hpf)			Calgary FAST Urology CAT	8 weeks 6 days
Y	29-May-2023	Hip pain		08-Jun-2023	South Health Campus Bone and Joint Clinic	8 weeks 6 days

- The ***Received Date (T2) (For Receiving Office use only)*** field is used at a triage centre to record this information when a faxed or mailed referral is received. As a referring provider, you can ignore this.

j. Review the ***Exclusions*** which are specialty and/or reason for referral specific to ensure that this Consult Request is appropriate.

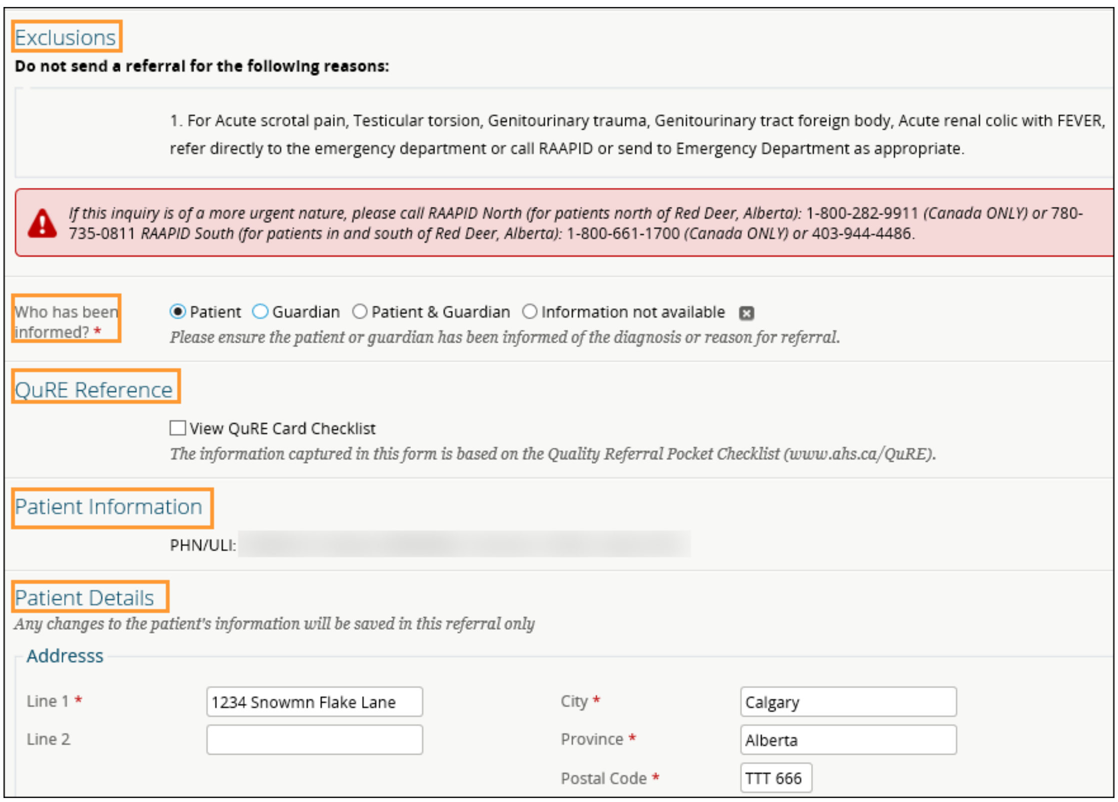


k. Use the radio buttons to indicate who has been informed of the referral being made.

l. For helpful information to complete your Consult Request, refer to the ***QuRE Card Checklist*** by clicking on the button under ***QuRE Reference***.

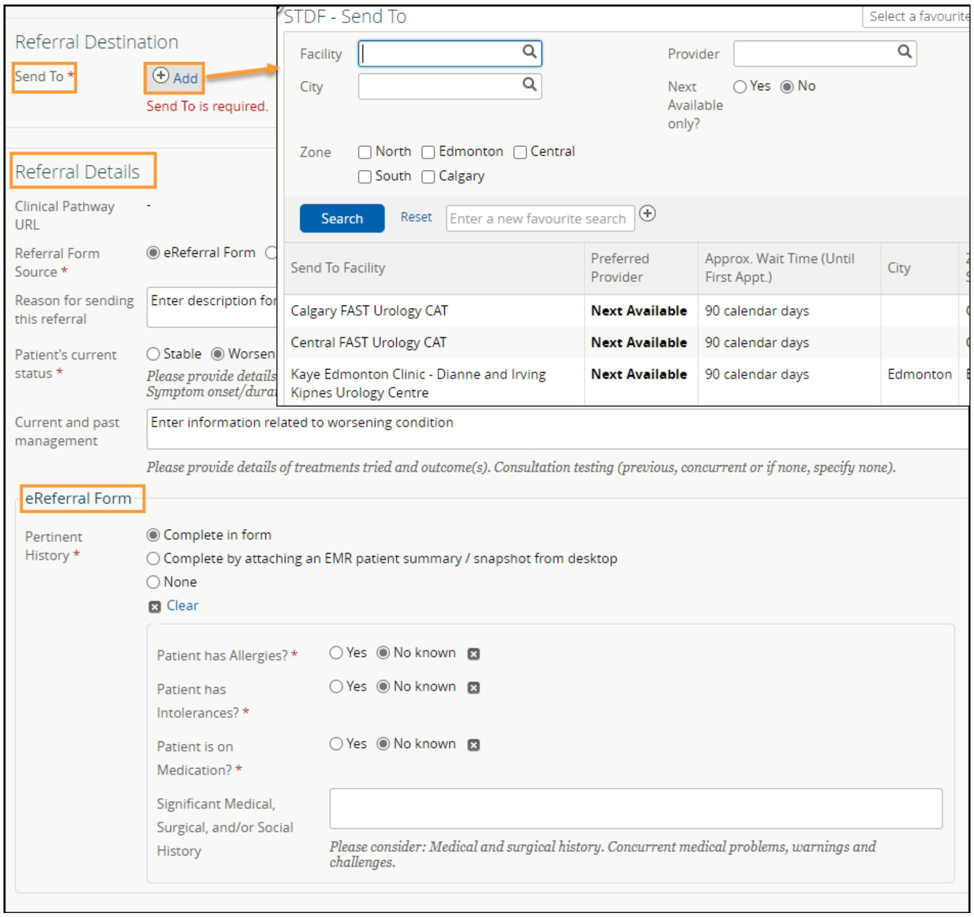
m. Scroll down to ***Patient Details***. The patient's address and phone number will be auto-populated from the patient's Electronic Health Record (EHR) and you can modify it if needed. Use the options to indicate if there is a preferred number.

NOTE:	Updating the patient's contact information does not update it in the Alberta Netcare Portal; it only updates the address on the specific referral that the change was made.



n. Continue filling out ***Additional Info*** *and* ***Special Considerations and Preferences*** (e.g., patient's physical, psychological, social and/or economic situation, physician, or location preferences).

o. Click ***Add*** for the ***Send To*** field. A pop-up will open that will show you all the facilities that can accept this Consult Request. Choose the appropriate facility from the list. Some specialties provide the option of sending directly to a specific physician, but most do not. If it is available, you can select a specific specialist. If it is not available and a specific physician is desired, please include their name in the ***Special Considerations*** and ***Preferences*** field.

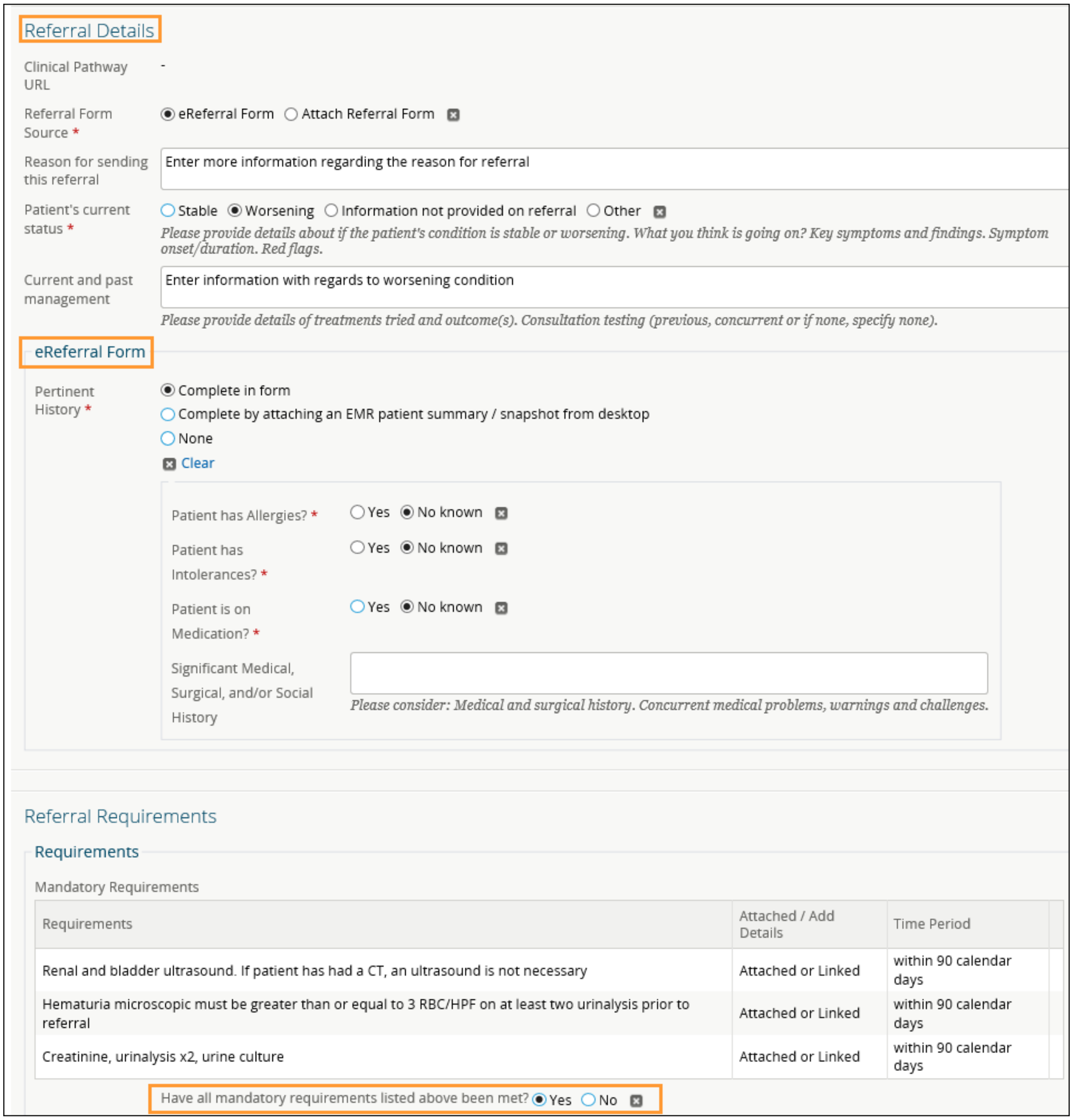


p. Complete the ***Referral Details*** section. There are two options: You can either use the eReferral form built into eReferral or attach an external referral form from your electronic medical record (EMR) by clicking ***Choose File*** beside ***Attach Referral Form***.

q. If the exact reason for referral was not available (e.g., Sciatica is not on the reason for referral list – use Radiculopathy), make sure to enter this in the ***Referral Details*** section – ***Reason for sending this referral*** field.

r. Complete the ***Referral Requirements*** section. Review the mandatory and optional requirements. Attach or link all mandatory requirements and additional information. Referrals that are incomplete for an extended period of time may be declined by the specialty.

s. Attach or link the required investigations or images and check the ***Have all mandatory requirements listed above been met?*** box. Additional comments, if any, can be added to the ***Notes*** field.


Referral Details

Clinical Pathway URL -

Referral Form Source * ◉ eReferral Form ○ Attach Referral Form

Reason for sending this referral: Enter more information regarding the reason for referral

Patient's current status * ○ Stable ◉ Worsening ○ Information not provided on referral ○ Other

Please provide details about if the patient's condition is stable or worsening. What you think is going on? Key symptoms and findings. Symptom onset/duration. Red flags.

Current and past management: Enter information with regards to worsening condition

Please provide details of treatments tried and outcome(s). Consultation testing (previous, concurrent or if none, specify none).

eReferral Form

Pertinent History * ◉ Complete in form ○ Complete by attaching an EMR patient summary / snapshot from desktop ○ None Clear

Patient has Allergies? * ○ Yes ◉ No known

Patient has Intolerances? * ○ Yes ◉ No known

Patient is on Medication? * ○ Yes ◉ No known

Significant Medical, Surgical, and/or Social History

Please consider: Medical and surgical history. Concurrent medical problems, warnings and challenges.

Referral Requirements

Requirements

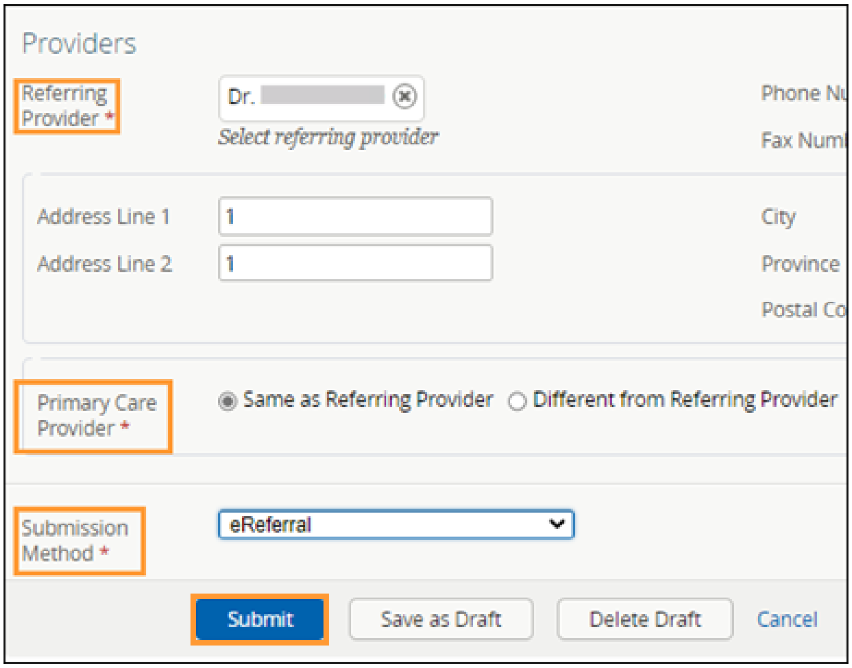
Mandatory Requirements

Requirements	Attached / Add Details	Time Period
Renal and bladder ultrasound. If patient has had a CT, an ultrasound is not necessary	Attached or Linked	within 90 calendar days
Hematuria microscopic must be greater than or equal to 3 RBC/HPF on at least two urinalysis prior to referral	Attached or Linked	within 90 calendar days
Creatinine, urinalysis x2, urine culture	Attached or Linked	within 90 calendar days

Have all mandatory requirements listed above been met? ◉ Yes ○ No

- The ***Additional Information*** section is available for any additional documents or notes you think would be helpful to the receiving provider when they triage the referral and see the patient.

t. Confirm the ***Referring Provider*** section is complete with your (or the referring provider you're referring on behalf of) name and the clinic's details. The clinic's details will auto-populate from ***My Details*** if added and can be changed on the request if needed.

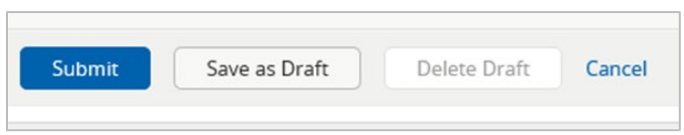


u. Select the ***Submission Method***: ***eReferral***, ***Fax rerouted from non FAST Office***, ***Connect Care***, ***Phone***, ***Fax*** or ***Mail***.

v. Click ***Submit*** to send the Consult Request to the specialty. If you did not complete all mandatory fields (marked by a *), you will receive an error message. Review the referral to locate any blank fields.

w. Once you click ***Submit***, the Consult Request will appear on your ***My Referrals*** dashboard on the ***In Progress*** and ***Recently Updated*** worklists with ***Clerical Triage in Progress*** as the status.

- If you want to save a draft of the referral before submitting, you can save it by clicking ***Save as Draft***. You can access the draft at any time in the ***Drafts*** worklist on the ***My Referrals*** dashboard. You can click ***Cancel*** if you want to stop completing the Consult Request.

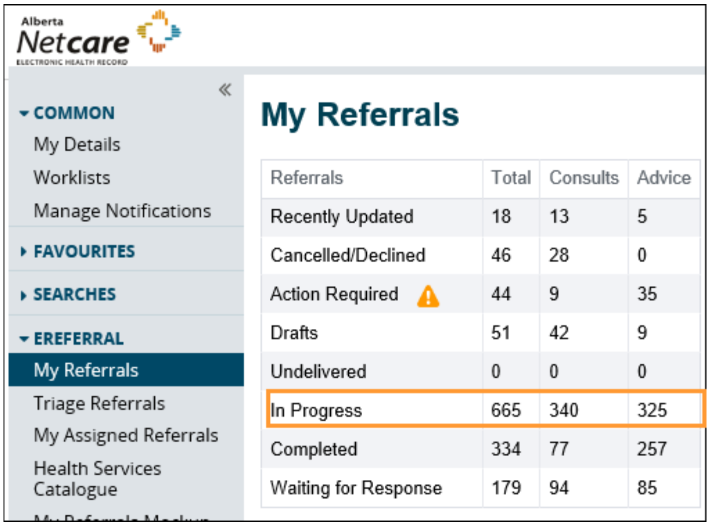


NOTE:	If a Consult Request has been declined because it did not meet the criteria appropriateness, do not edit the referral to include more information or attachments. Please create a new Consult Request with the correct information.

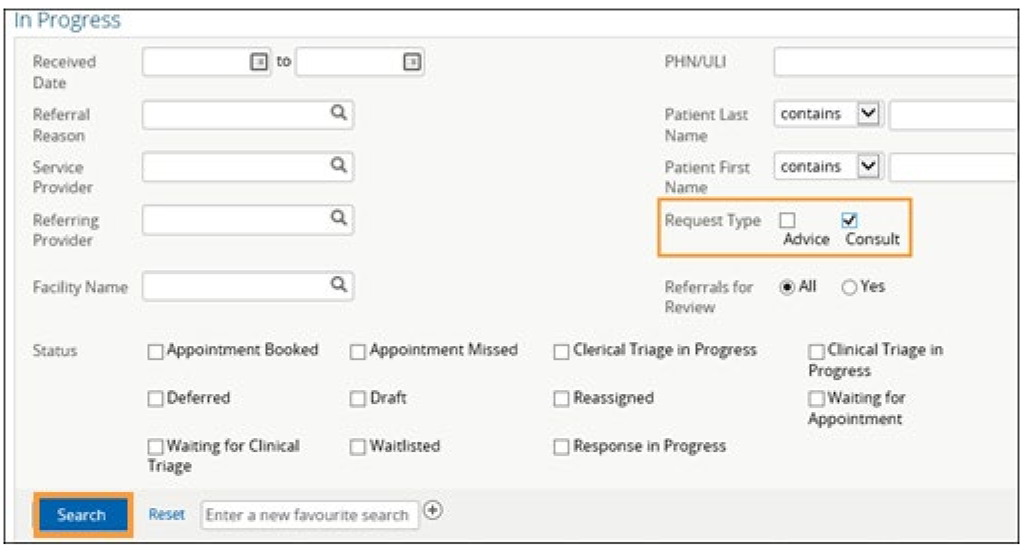
5.3 Reviewing a Submitted Consult Request

At any point, you can review the status of a submitted Consult Request from the ***My Referrals*** dashboard.

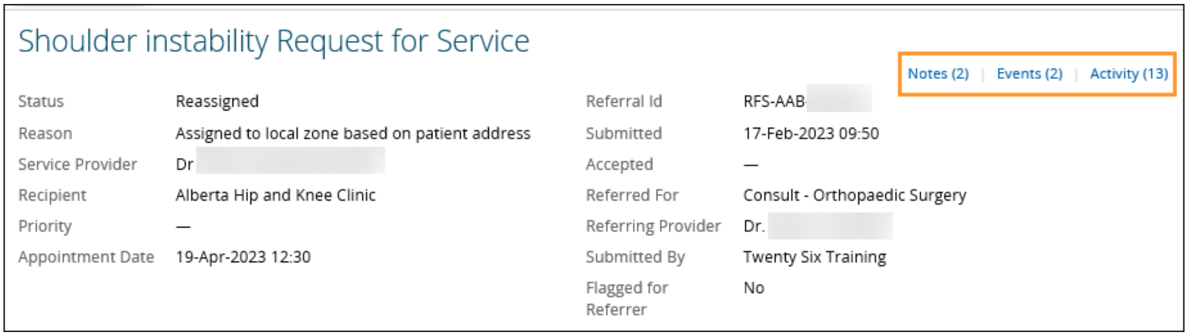
a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and then the ***In Progress*** worklist.



b. Select ***Consult*** for ***Request Type*** and then click ***Search*** to generate a list of Consult Requests. You can further define the search by ***PHN/ULI***, ***Referral Reason***, or ***Status.***



c. Select the appropriate Consult Request from the list. Review the ***Status***, ***Notes***, ***Events***, and ***Activities*** occurring in the Consult Request to track its life cycle.



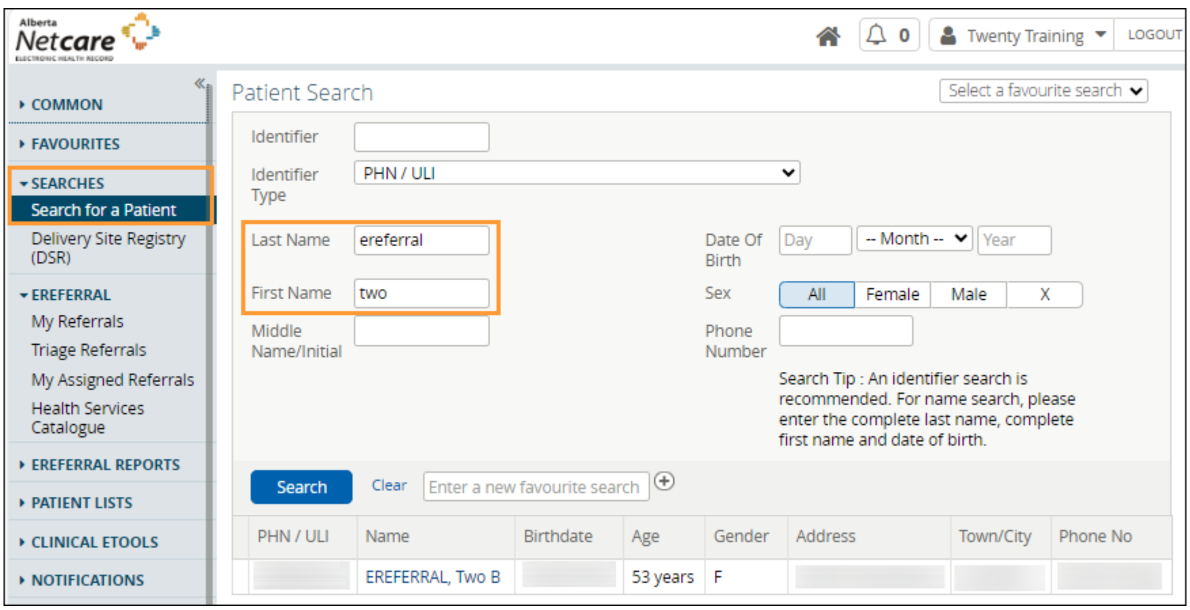
5.4 Referring & Referring on Behalf of Providers – Find a Referral Status

a. Click ***Searches*** from the ***Clinical Portal Menu***.

b. Click ***Search for a Patient***. Enter the patient's name or identifier.

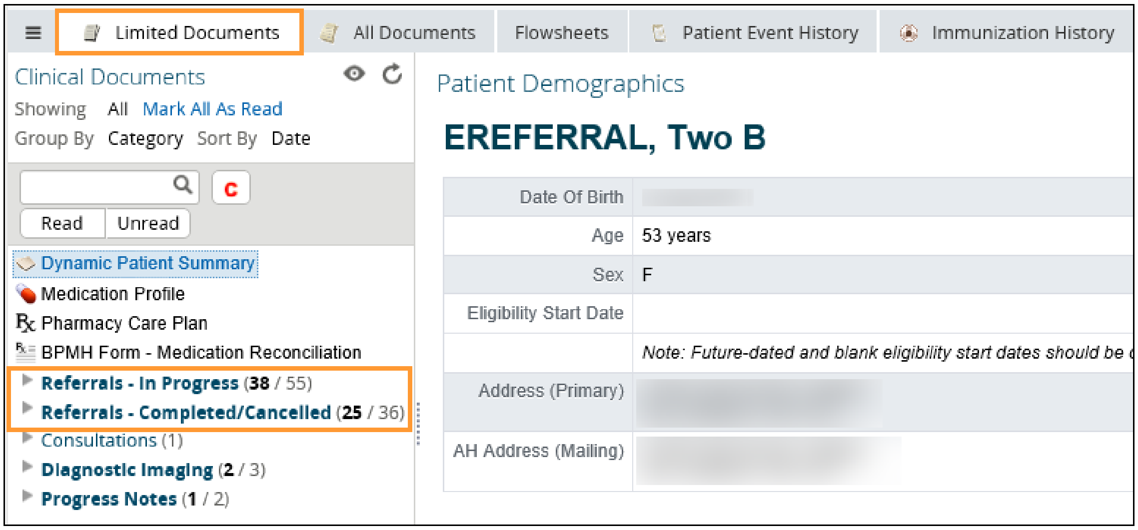
c. Click ***Search*** to locate your patient.

d. Click on the patient's name to open the patient's Electronic Health Record (EHR).

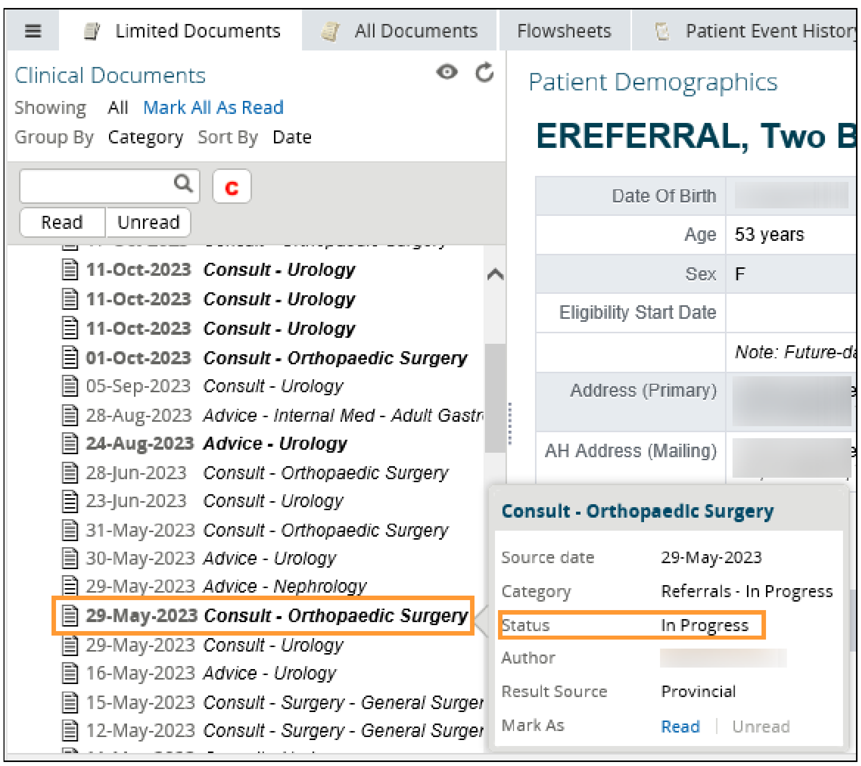


e. Click the ***Clinical Document Viewer (CDV Tree)*** located on the left-hand side of the screen. The ***Clinical Document Viewer (CDV tree)*** has two folders for eReferral activity:

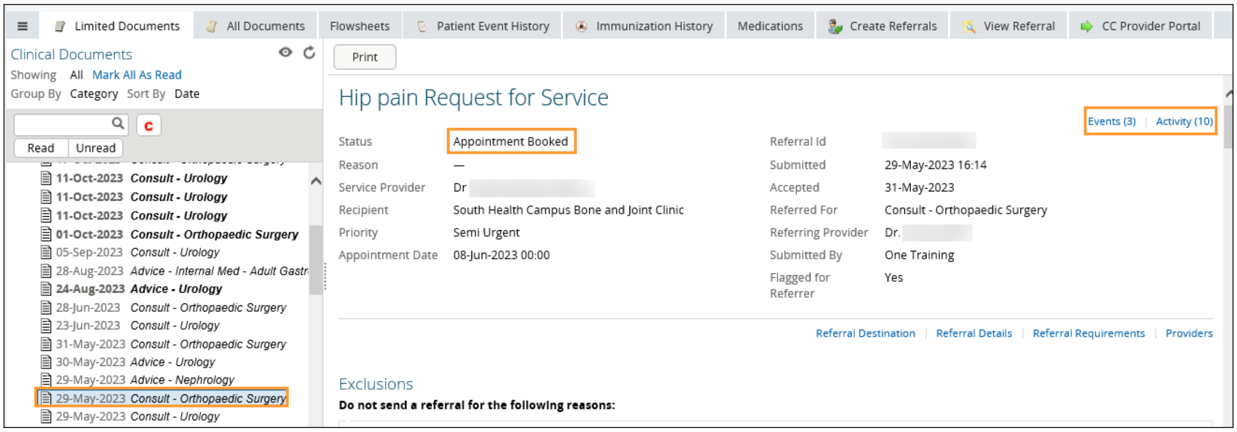
- ***Referrals – In Progress***
- ***Referrals – Completed/Cancelled***



Each folder contains links to the patient's Consult and Advice Requests. Any Consult or Advice Request that has been cancelled/declined will have a strike through the middle of the text. Any Consult or Advice Request in progress will have its text italicized. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. The status will show up beside the ***Status*** field.



f. Click the referral to see more detail including the ***Status***. You can also see all the activity that has taken place with this referral by clicking ***Events*** and/or ***Activity***.

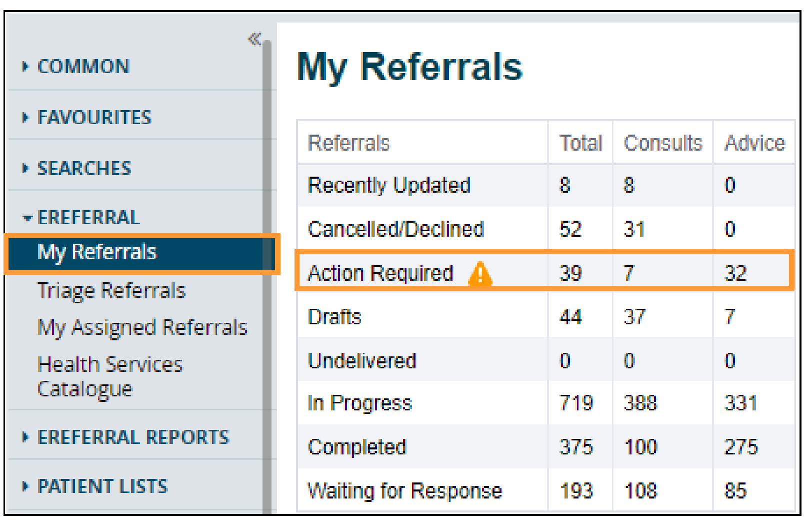


g. If you are the referring provider and would like to see all your referrals in one place, you must complete the ***Referring Provider Referrals*** section in ***My Details*** to see your submitted referrals on your ***My Referrals*** worklist. Instructions on how do to can be found here.

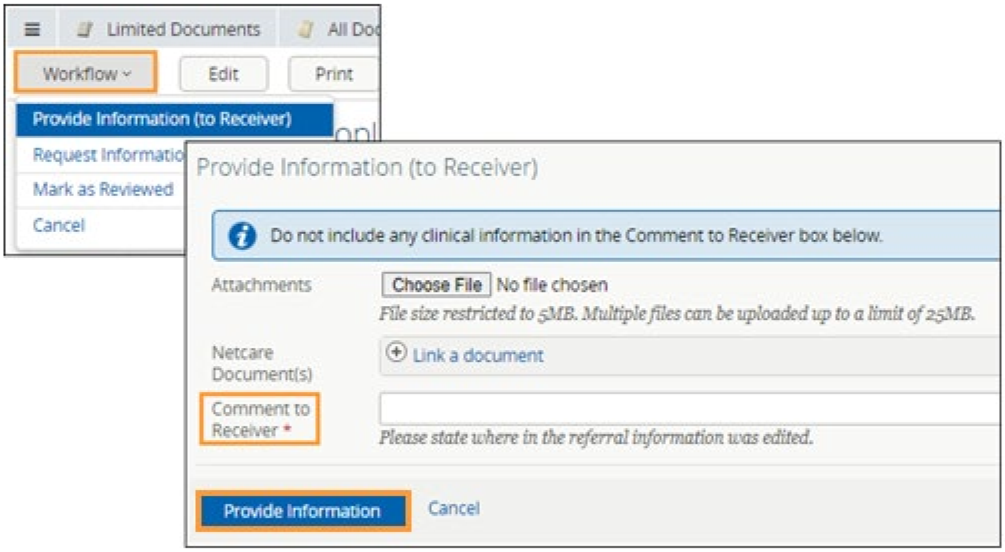
5.5 Responding to a Request for Additional Information

On occasion, the triage centre or responding provider may require additional information from you, the referrer. Follow these instructions to add more information.

a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and select ***Action Required***. Choose the appropriate Consult Request.



b. Click ***Provide Information (to Receiver)*** from the ***Workflow*** menu. Attach or link the requested information if required and enter a ***Comment to Receiver*** (e.g., Requested x-rays attached). Click ***Provide Information***. Single files no larger than 5MB can be attached. Multiple files not exceeding 25MB in total can be added.

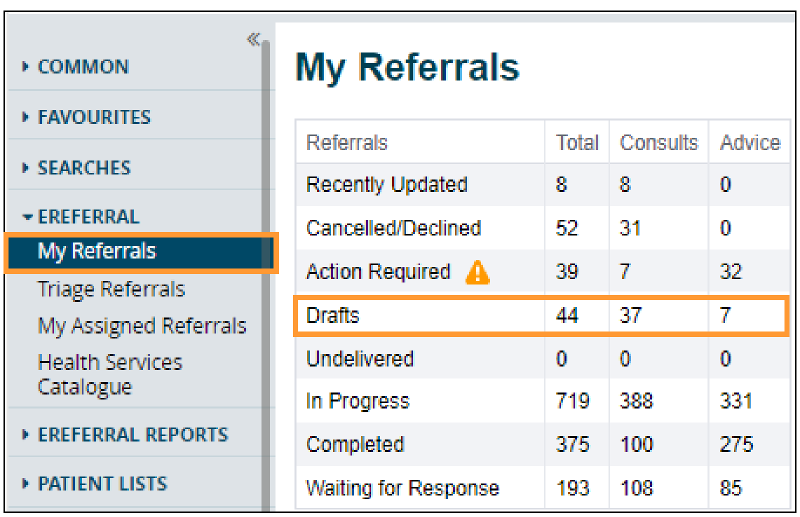


c. The Consult Request will then be removed from the ***Action Required*** worklist and moved to the ***In Progress*** and ***Recently Updated*** worklists.

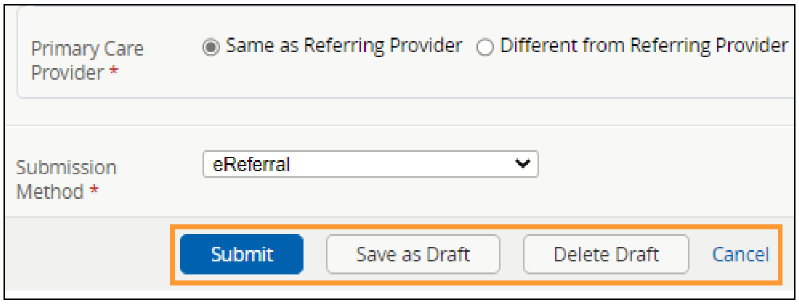
5.6 Opening a Draft Consult Request

A Consult Request can be saved as a draft for completion later. There is no expiry period for a draft Consult Request. Drafts are accessible to the user who created them or to the staff members who create referrals on their behalf. Drafts can also be viewable by anyone who has the same providers added to their ***My Details***. Draft referrals are not listed in a patient's ***Clinical Document Viewer (CDV tree)***.

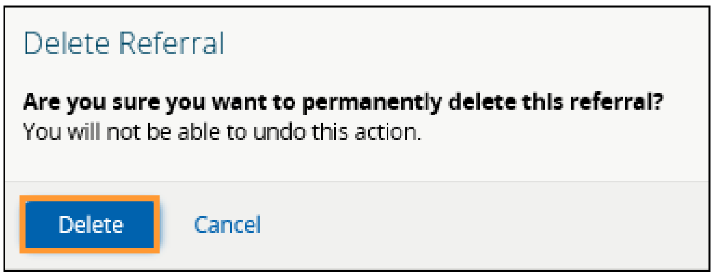
a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and select ***Drafts***. Drafts can also be seen from the ***Context Menu*** under ***View Referrals***.



b. Select the appropriate referral to review or continue filling out the Consult Request form. A referral can be saved in draft format multiple times at any stage during the creation process.



c. Click ***Delete Draft*** at the bottom of the referral to permanently remove it from the patient's Electronic Health Record (EHR). This action must be confirmed.



6.0 Triage Types and Roles

Triage is the process of checking a request to ensure that all required information is present and that an appointment can be booked according to the patient's clinical needs. There are three (3) types of triage - Clerical, Clinical and Booking, and may, depending on the size of clinic, be performed by the same person or different people.

eReferral users tasked with triaging requests must have a Clinical 1, Clinical 2 or Clinical 5 Alberta Netcare Portal user role and belong to the ***Triage Referrals*** group with receiving or receiving on behalf of permissions. These users can view all requests on the ***Triage Referrals*** dashboard. If the ***My Assigned Referrals*** dashboard is needed as well, then users must add the specific provider name(s) to ***My Details***. Requests assigned to the providers listed in ***My Details*** will populate onto the ***My Assigned Referrals*** dashboard.

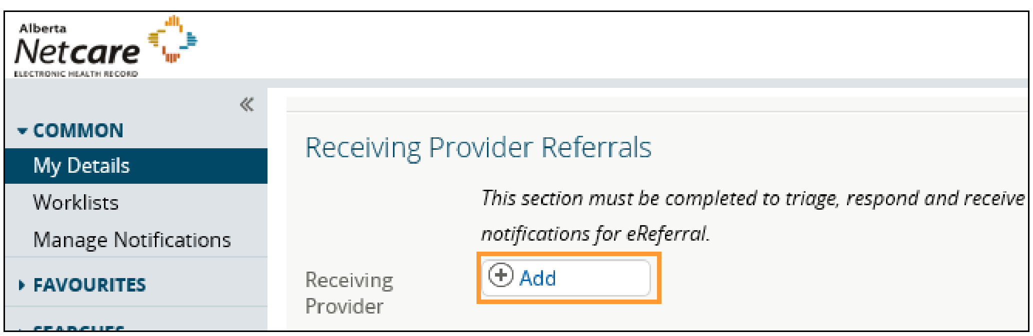
TIP	Not sure what access level you have? Go to ***My Details*** from the ***Clinical Portal Menu***. Underneath your username, your assigned role will be listed. If it's not a Clinical 1, Clinical 2 or Clinical 5, ask your manager to contact the eHealth Services team to have this changed. Once this has been changed to the appropriate Alberta Netcare Portal user role (i.e., Clinical 1, Clinical 2, or Clinical 5), please ask your manager to email the AHS Access Improvement team at access.ereferral@ahs.ca to request triage access.

6.1 Customizing My Details – Triage Receiving Providers

If you are a receiving provider, such as a specialist, your Alberta Netcare Portal user role must be Clinical 1 to receive eReferral requests and your ***My Details*** needs to be set up as per the instructions below:

a. Click ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll down to the ***Receiving Provider Referrals*** section and click ***Add***.



c. Type your full name in the box (as per your health profession college registration) and then click to display a list of names. Select your name.

d. Look at the ***Receiving Provider Referrals*** section and confirm that your full name has been added.

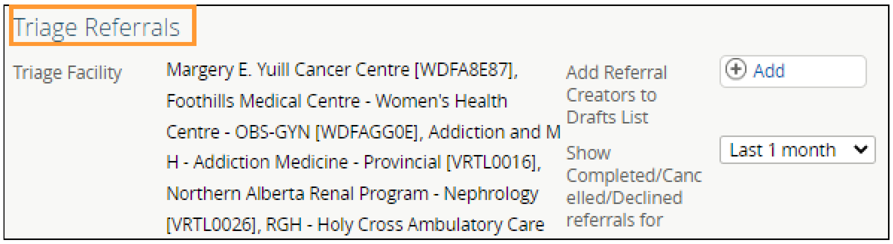
e. Click ***Update Preferences*** to save your updates.

6.2 Staff Triaging Referrals from the Triage Referrals Dashboard

The ***Triage Referrals*** dashboard is accessible to any staff member who has an Alberta Netcare Portal user role of either Clinical 2 or Clinical 5, and a triage access request approved by Alberta Netcare.

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll down to the ***Triage Referral*** section.



6.3 Managing Referrals on Behalf of a Provider

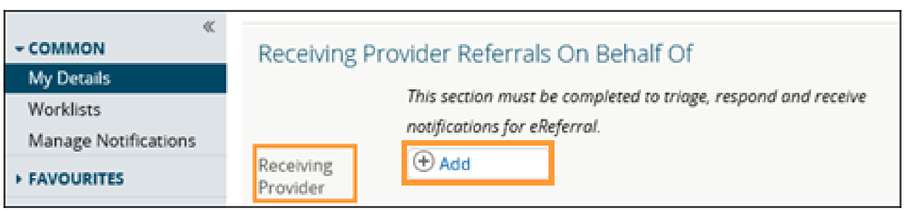
If you are managing requests on behalf of a provider, you will need an Alberta Netcare Portal user role of Clinical 2 or Clinical 5.

Adding the receiving provider's name to your ***My Details*** is only necessary if you need to:

- Use the ***My Assigned Referrals*** dashboard.
- Respond to an eReferral request on behalf of a provider.

a. Click on ***My Details*** from the ***Clinical Portal Menu*** to add the receiving provider's name.

b. Scroll down to the ***Receiving Provider Referrals On Behalf Of*** section and click ***Add***.



c. Type the receiving provider's full name in the box and then click ***Search***.

d. Once the list displays, click on the receiving provider's name.

e. Confirm the ***Receiving Provider Referrals On Behalf Of*** section and confirm that the provider's full name has been added. You can add multiple providers if necessary.

f. Click ***Update Preferences*** to save your changes.

6.4 Saving and Sharing eReferral Requests

Triage centres continue to receive faxes after adopting eReferral, and some opt to enter those faxes into the Alberta Netcare Portal. If you are creating Consult Requests from faxes received at your triage centre, you can add users who you want to view your draft referrals.

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll down to the ***Triage Referrals*** section.

c. Click on the ***Add*** button next to ***Add Referral Creators to Drafts List***.

d. Enter the name of any Alberta Netcare Portal user.

NOTE:	The referring provider who originally created the request will be able to see this request in their ***My Referrals*** dashboard.

e. Click ***Update Preferences*** to save your updates.

7.0 Responding to Advice & Consult Requests

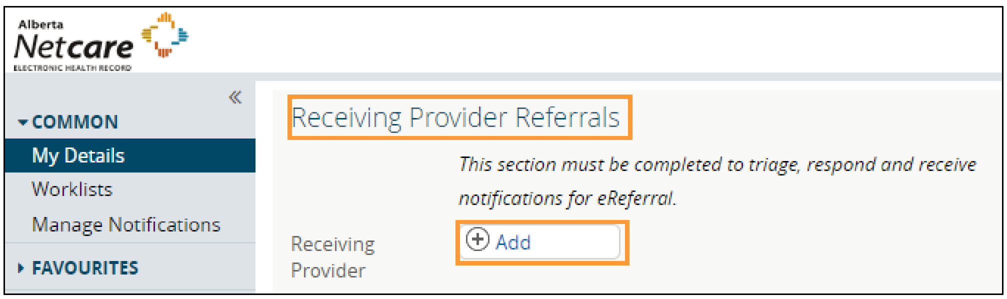
This section is for receiving providers who are responding to Advice Requests or managing Consult Requests.

7.1 Setting up your My Details as a Receiving Provider

By adding yourself as a receiving provider, you can see referrals in the ***My Assigned Referrals*** dashboard.

a. Click on ***My Details***.

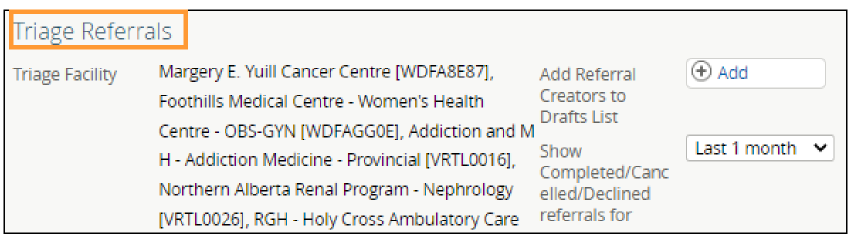
b. Scroll down to the ***Receiving Provider Referrals*** section. Click ***Add***.



c. Type your full name in the box and click ***Search***.

d. Click on your name.

e. Scroll to the bottom of the page to the ***Triage Referrals*** section and confirm that the correct ***Triage Facility*** is listed.

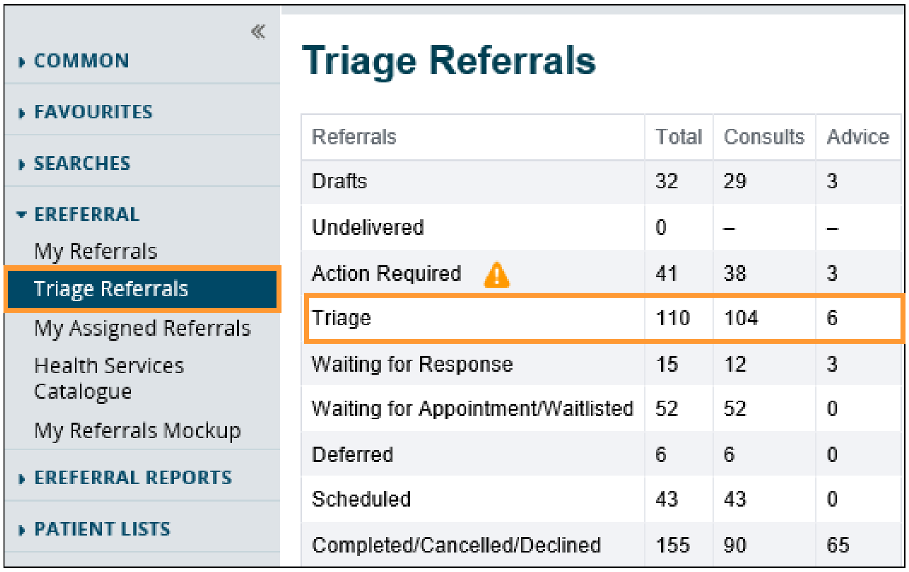


f. Click the ***Update Preferences*** button to save your updates.

7.2 Responding to Advice Requests

There are two ways you can find and respond to a new Advice Request:

- **Triage Users** - Click ***eReferral*** from the ***Clinical Portal Menu***. Go to the ***Triage*** worklist on the ***Triage Referrals*** dashboard.



Referrals	Total	Consults	Advice
Drafts	32	29	3
Undelivered	0	–	–
Action Required	41	38	3
Triage	110	104	6
Waiting for Response	15	12	3
Waiting for Appointment/Waitlisted	52	52	0
Deferred	6	6	0
Scheduled	43	43	0
Completed/Cancelled/Declined	155	90	65

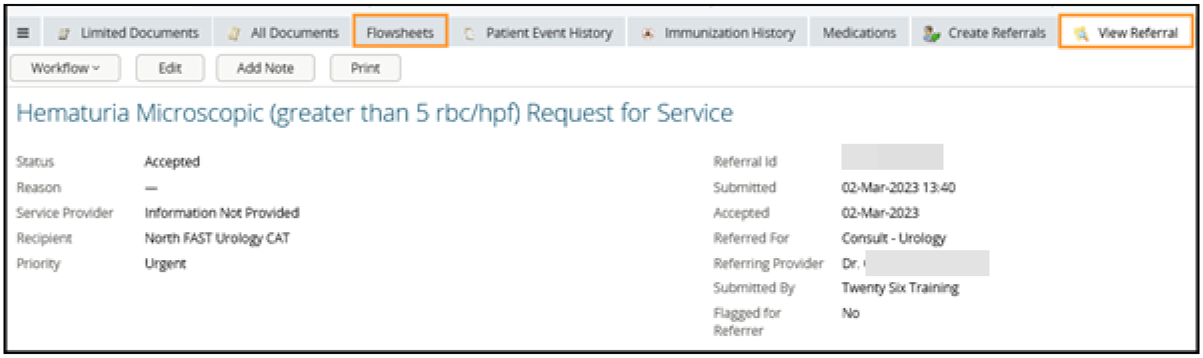
- **Non Triage Users –** If you only respond to Advice Requests, you may not have access to the ***Triage Referrals*** dashboard. In this case, you can view requests on the ***My Assigned Referrals*** dashboard after they have been assigned to you as the provider by a triage user.

Referrals	Total	Consults	Advice
Action Required	31	8	23
Open Advice Requests	35	0	35
Waiting for Appointment/Waitlisted	2	2	0
Scheduled	7	7	0
Completed/Cancelled/Declined	116	19	97
Triage	13	4	9
Waiting for Response	16	2	14
Deferred	1	1	0

a. Open or search for the Advice Request.

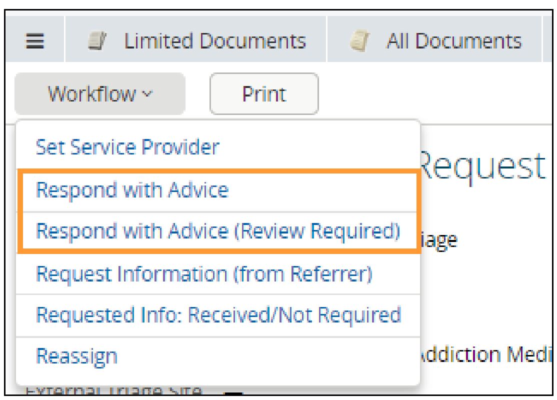
b. **(If required)** Reference back to the patient's Electronic Health Record (EHR) by clicking on the selection in the ***Context Menu*** such as ***Flowsheets***.

c. Return to the Advice Request and select ***View Referral***.



d. Click ***Respond with Advice*** from the ***Workflow*** menu if the Advice Request is appropriate. Select ***Respond with Advice (Review Required)*** if there is a need for a specialist to review the advice before it is provided to the referrer (i.e., if a fellow or other staff member composes the response).

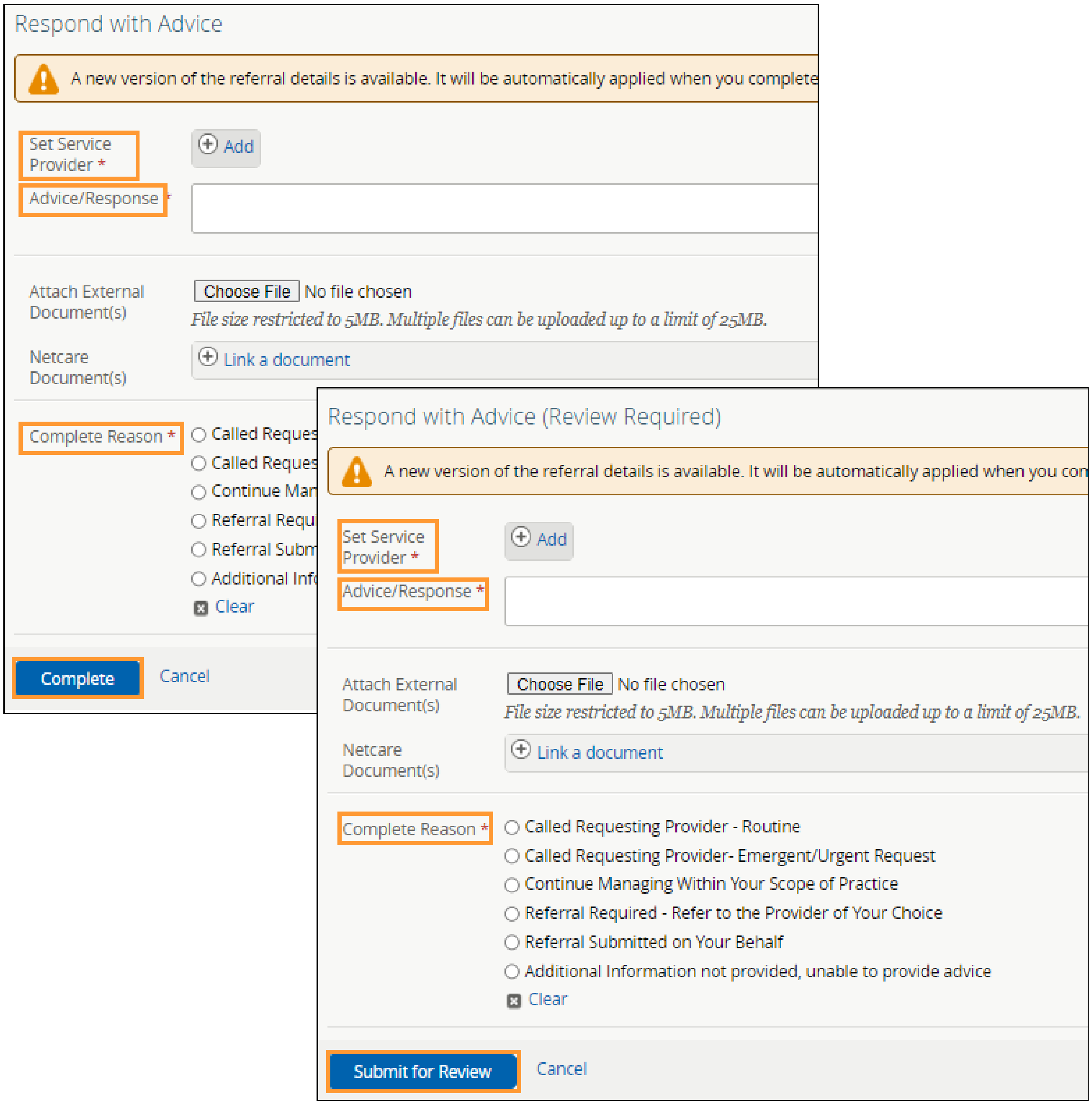
- If ***Respond with Advice (Review Required)*** is selected, then set the supervising specialist as the ***Service Provider***. Enter your response and add any attachments.
- Choose a ***Complete Reason*** from the list provided and click ***Submit for Review*** to finish. The referral is now awaiting specialist review and will appear on the ***Action Required*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.



e. Set yourself as the ***Service Provider***. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments.

f. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.

g. If ***Respond with Advice (Review Required)*** was selected, click ***Submit for Review***.

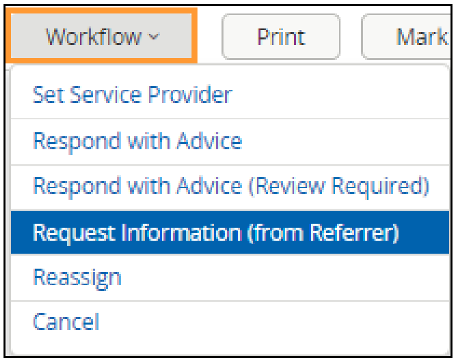


The Advice Request will now appear on your ***Complete*** worklist on the ***My Assigned Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and the request will appear in their ***Completed*** worklist on the ***My Referrals*** dashboard.

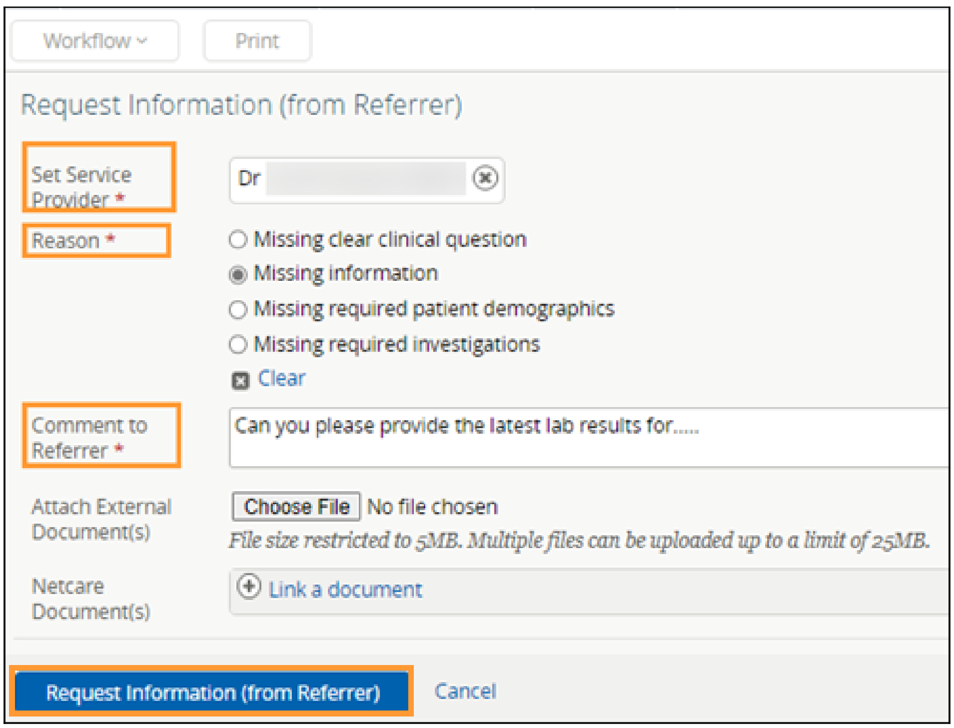
7.3 Requesting Additional Information from Referring Provider

On occasion, the FAST Program or receiving provider may require additional information from you, the referring provider. To respond to a request for additional information use the process below:

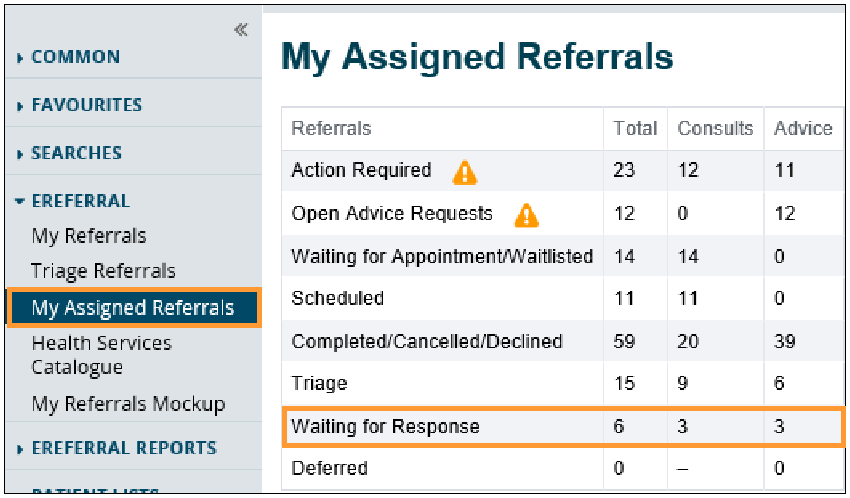
a. Go to the ***Workflow*** menu and select ***Request Information (from Referrer)***.



b. Click ***Add*** to set the ***Service Provider***. Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click ***Request Information (from Referrer).***



c) The Advice Request will now appear on your ***Waiting for Response*** worklist on your ***My Assigned Referrals*** dashboard and ***Triage Referrals*** dashboard (if you have access to triage). If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have requested information, and the request will appear in their ***Action Required*** worklist on the ***My Referrals*** dashboard.

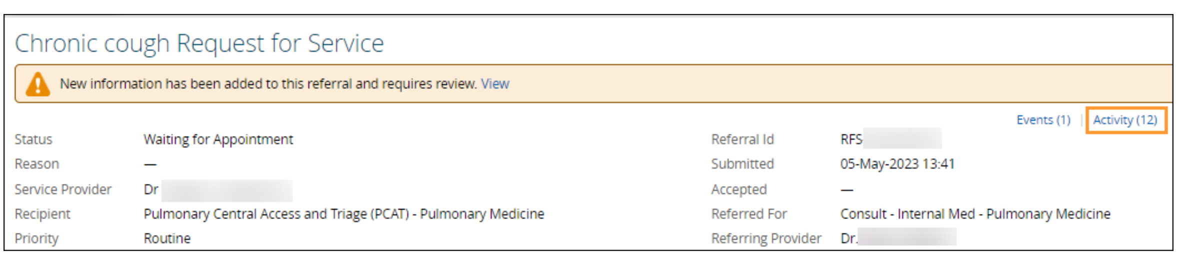


7.4 Reviewing Additional Information Provided by a Referring Provider

If a referring provider adds new information to an Advice Request and it requires your review, the request will appear on your ***Action Required*** worklist.

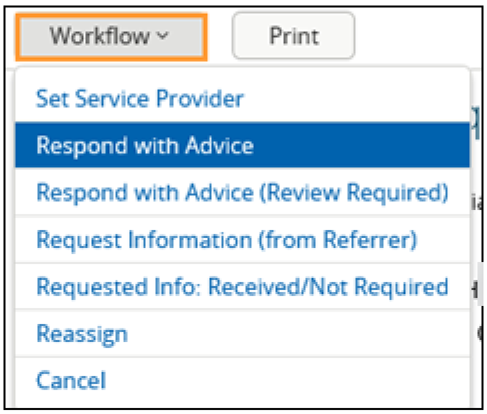
a. Click ***Action Required*** within the ***My Assigned Referrals*** dashboard and select the applicable Advice Request. The referral will have a panel indicating that new information has been added to the referral and requires review.

b. Click ***Activity***.

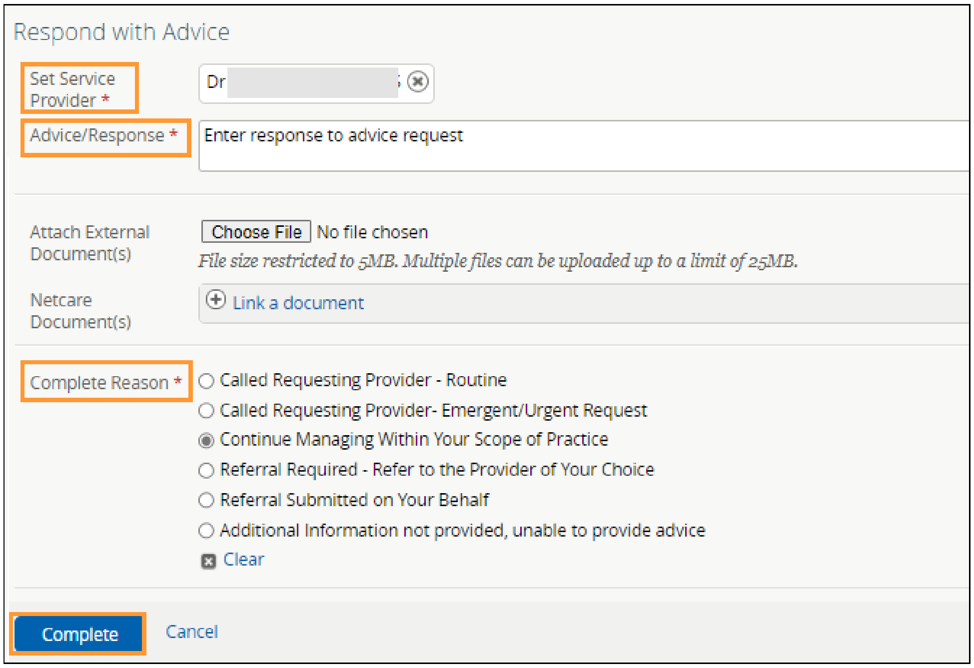


c. Scroll down to ***Provide Information (to Referrer)*** in the ***Activity*** section and click ***View form for comments and attachments*** to see the content.

d. If you choose to respond after reviewing the information, click ***Respond with Advice*** from the ***Workflow*** menu.

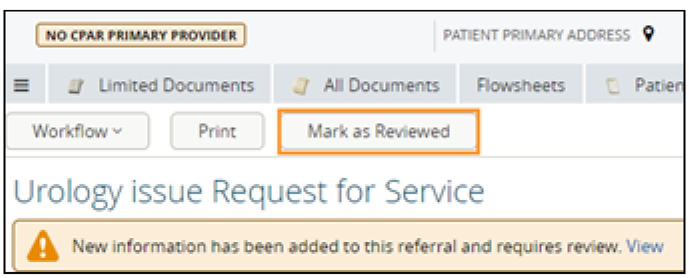


e. Set yourself as the ***Service Provider***. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.



f. The Advice Request now appears on the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** and ***My Assigned Referrals*** dashboards, and the ***Completed*** worklist on the ***My Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded.

g. Once done, click ***Mark as Reviewed*** on the top task bar. Enter a comment, if desired, and select the blue ***Mark as Reviewed*** button to finish. The panel indicating that new information was added to the referral will now be removed.

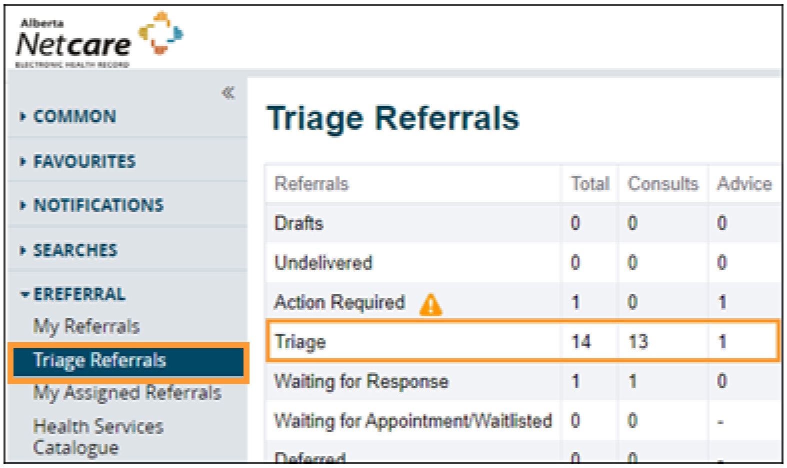


7.5 Triaging Advice Requests

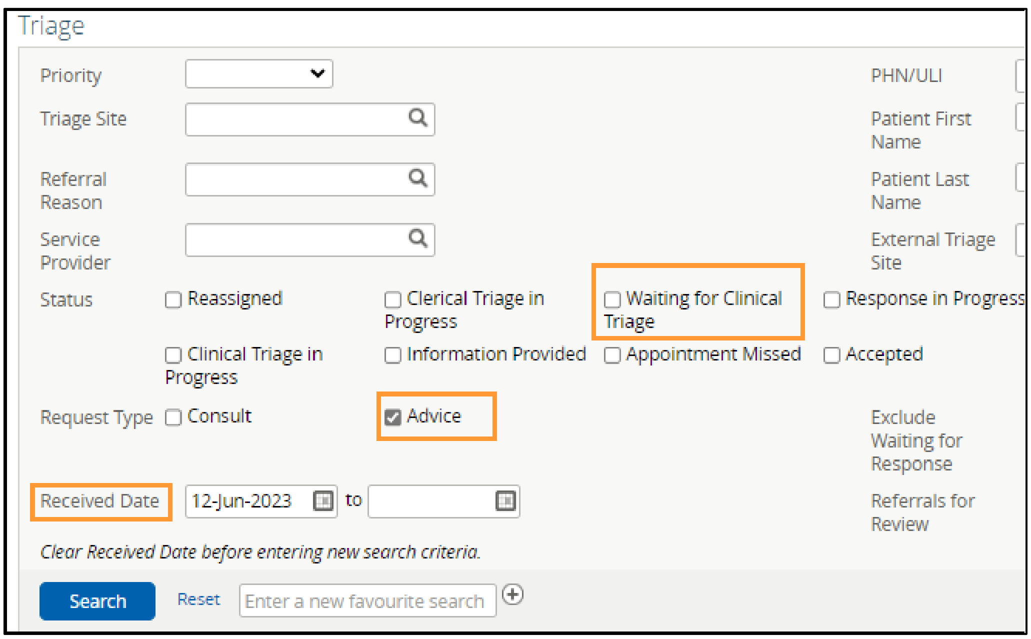
If you have triage access, use the process below to triage Advice Requests.

a. Select ***eReferral*** from the ***Clinical Portal Menu***, then ***Triage Referrals***.

b. Click on ***Triage***.



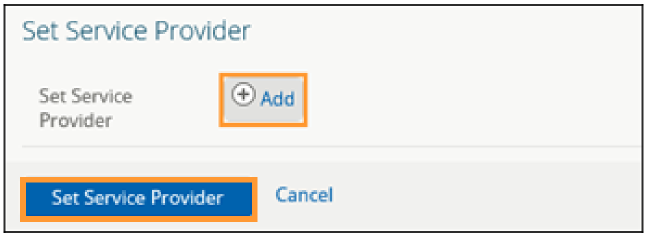
c. Filter on ***Advice*** in the ***Request Type*** section and click ***Search***. When you receive a new Advice Request, the status will be ***Waiting for Clinical Triage***. ***Waiting for Clinical Triage*** status indicates that the referral is waiting for a specialist to review the referral. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s). You can also search for that status by using the ***Status*** check box.



d. Click ***Search*** to filter the list and then click on an Advice Request to view it. Sort by ***Received Date*** to list the most recent referrals first.

e. Open the referral and click ***Workflow***. Select ***Set Service Provider***.

f. Click the ***Add*** button. In the pop-up, type your name (or receiving provider's name) and select it from the list. Then click ***Set Service Provider*** to finish.



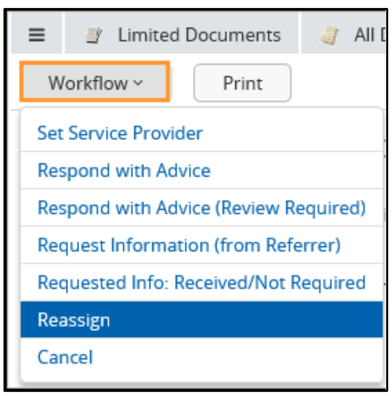
g. The request will now show up in the receiving provider's ***My Assigned Referrals*** dashboard provided the receiving provider added their name in their ***My Details***. If they have configured their eReferral Provider Notifications, they will receive an email telling them a request is in eReferral for them.

7.6 Reassign an Advice Request

An Advice Request can be reassigned to another facility if it is not appropriate based on the requested Zone or if the assigned facility is not available to respond to the request within an acceptable timeframe.

a. Search for and open the Advice Request.

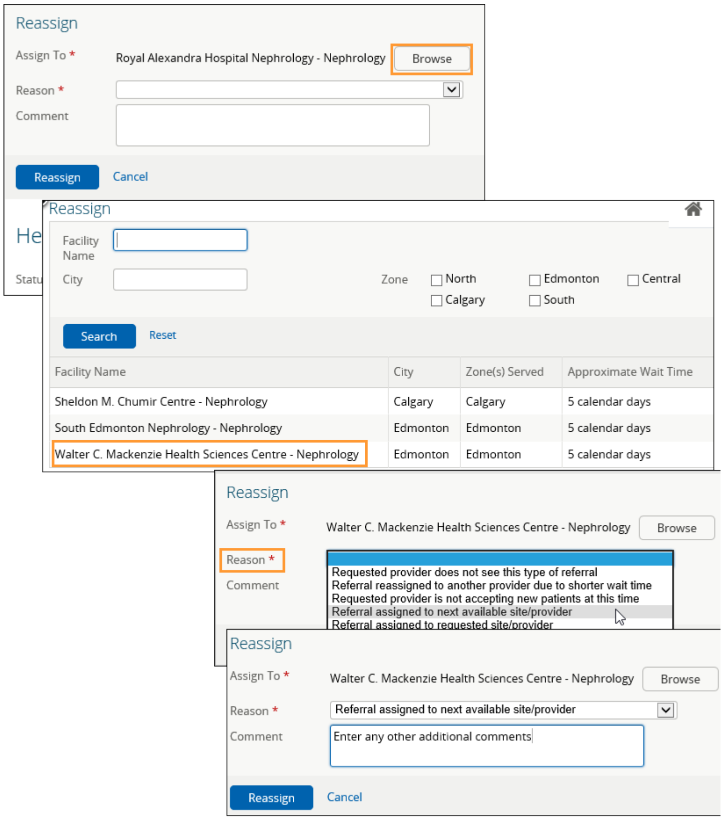
b. Click ***Workflow*** and select ***Reassign***.



c. Beside ***Assign To***, click ***Browse*** to open the list of facilities accepting the same reason for referral. Click on the appropriate facility.

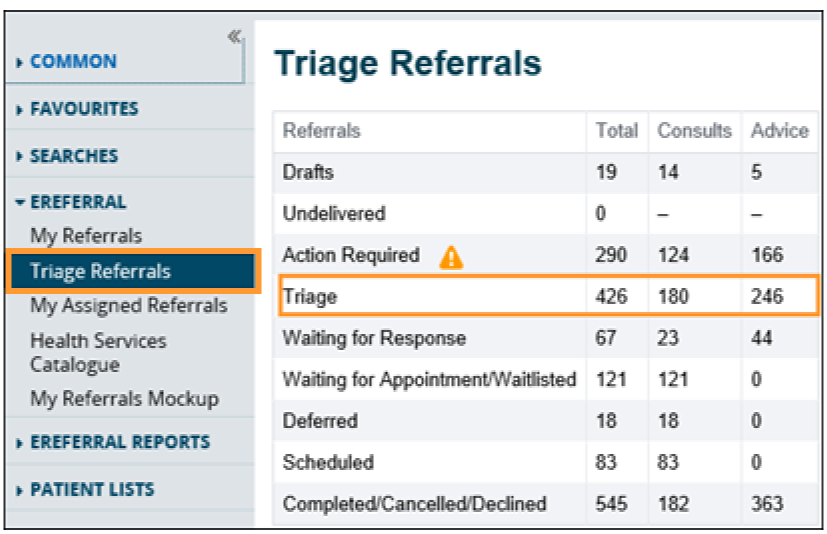
d. Select the ***Reason*** for reassigning the Advice Request and enter any comments if necessary.

e. Click ***Reassign***. The request will now appear on the chosen service provider's ***Triage Referrals*** dashboard and will be removed from the original receiving provider's dashboard.



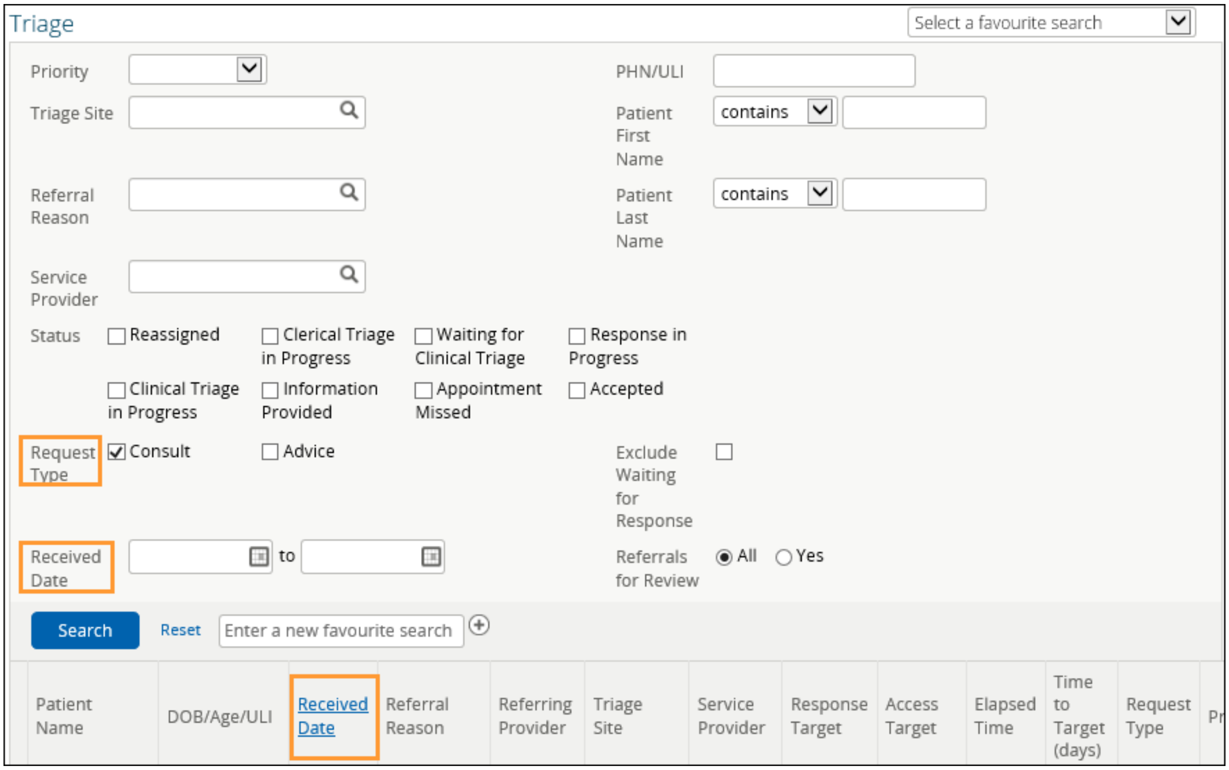
7.7 Managing Consult Requests

a. Click ***Triage Referrals*** – ***Triage*** from the ***Clinical Portal Menu***.



b. If you wish, narrow the search further by selecting ***Consult*** for ***Request Type*** and other filters. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

c. Click ***Search***. You can click ***Received Date*** to sort the requests by the newest or oldest received date.



d. Select a Consult Request from this list. Notice the options at the top of the screen: ***Workflow***, ***Edit***, ***Add Note*** and ***Print***.

- ***Workflow***: Used to change the referral status (see workflow actions below).
- ***Edit***: Used to make changes to the referral such as update address or add documents/attachments.
- ***Add Note***: Used to add notes (i.e., general, clinical, or clerical).
- ***Print***: Used to print from a local printer or save as a document.

7.8 Consult Requests – Workflow Options

CONSULT REQUEST WORKFLOW OPTIONS	WHEN TO USE?
Update Received Date (T2) (For Receiving Office use only)	Select to update the received date of the referral. Used if you entered the wrong received date for a faxed referral that you created in eReferral and want to change the date afterwards.
Complete Clerical Triage	Select to identify the completion of clerical triage. This will change the status to ***Waiting for Clinical Triage***.
Start Clinical Triage	Select to start clinical triage. This will change the status to ***Clinical Triage in Progress***.
Request Information (from Referrer)	Select to ask for more information from the referring provider. This will appear on the receiving provider's ***Triage Referrals*** dashboard on the ***Waiting for Response*** worklist, and on the referring provider's ***Action Required*** worklist.
Create and Attach Letter	Used only by the FAST Program to send referral letters to referring/receiving providers. Letters include: ***Accepted, Received, Reassigned, Incomplete, Pending, Updated, Declined, Cancelled.***
Request Info: Received/Not Required	Select to indicate the information has been provided, is not required or the request for more information was made in error. This will remove the referral from the ***Triage Dashboard*** - ***Waiting for Response*** worklist, and on the referring provider's ***Action Required*** worklist.
Provide Information (to Referrer)	Select to provide information to the referring provider. If selected, the Consult Request will then appear on the ***Action Required*** worklist of the ***My Referrals*** dashboard of the referring provider.
Respond with Advice	Select if the referral is more appropriate for advice than for a consult with the patient. Provide the advice in the comment box, attach relevant files if required and click ***Complete***. The referral is now complete and will appear on the ***Completed*** worklist on the ***My Referrals*** dashboard of the referring provider as well as the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.
Respond with Advice (Review Required)	Select if there is a need for a specialist to review the advice before it is provided to the referrer (e.g., if a fellow or other staff member composes the response). Provide the advice in the comment box, then click ***Submit for Review***. The referral is now awaiting specialist review and will appear on the ***Action Required*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.
Set Priority and Booking Instructions	Select to set the priority of the Consult Request (based on the request's clinical content). There may also be a situation where a referring provider contacts the triage centre and states the patient's condition has worsened and the priority needs to be changed. It can also be used if the previously set acuity may be lessened. Select priority: ***Routine***, ***Semi Urgent***, or ***Urgent***.
Set Service Provider	Select to enter the service provider's name.

Accept (T3)	Select to enter the accepted date of the referral. The status of the Consult Request will change to ***Accepted***. The referral stays on the receiving provider's ***Triage*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.
Reassign	Select to assign the Consult Request to another triage facility. The status of the Consult Request will change to ***Reassigned*** and will appear on the newly assigned facility's ***Triage Referrals*** dashboard.
Ready for Booking	Select to change the status of the Consult Request to ***Waiting for Appointment***. This action can be used by facilities and specialties that do not have a wait list and an appointment can be scheduled as soon as triage is complete. It can also move a referral from the ***Waitlist*** to the ***Waiting for Appointment*** worklist.
Defer	Select to show that a request is not ready to be triaged or booked. This option could be used if a patient needs to lose weight before their surgery, or an Oncology patient who has had a mastectomy needs to heal prior to getting radiation. The Consult Request will move to the ***Deferred*** worklist on the ***My Assigned Referrals*** dashboard and you need to check this list regularly as no alerts are associated with it.
Waitlist	Select this option to change the status of the Consult Request to ***Waitlisted***. As a comment box is not available for changing the status to ***Waitlisted***, select ***Add Note*** and choose ***Clerical*** to enter a note regarding the patient's waitlist status if required.
Appointment Booked	Select this option to enter the appointment date and details.
Appointment Missed	Select to change the status of the Consult Request to ***Appointment Missed***. If the referring provider has their eReferral Provider Notifications set up with the default options, this will trigger an email to them.
Complete (T5)	Select to change the status of the Consult Request to ***Completed***. The request will now move to the ***Completed*** worklist for both the referring and receiving providers. There is an option to enter the ***Accepted Date (T3)*** of the referral if it was not entered previously. There is also the option enter the ***Priority*** and ***Service Provider***.
Decline	Select to change the status of the Consult Request to ***Declined***. The request will now move to the ***Declined*** worklist for both referring and receiving providers.
Cancel	Select to change the status of the Consult Request to ***Cancelled***.

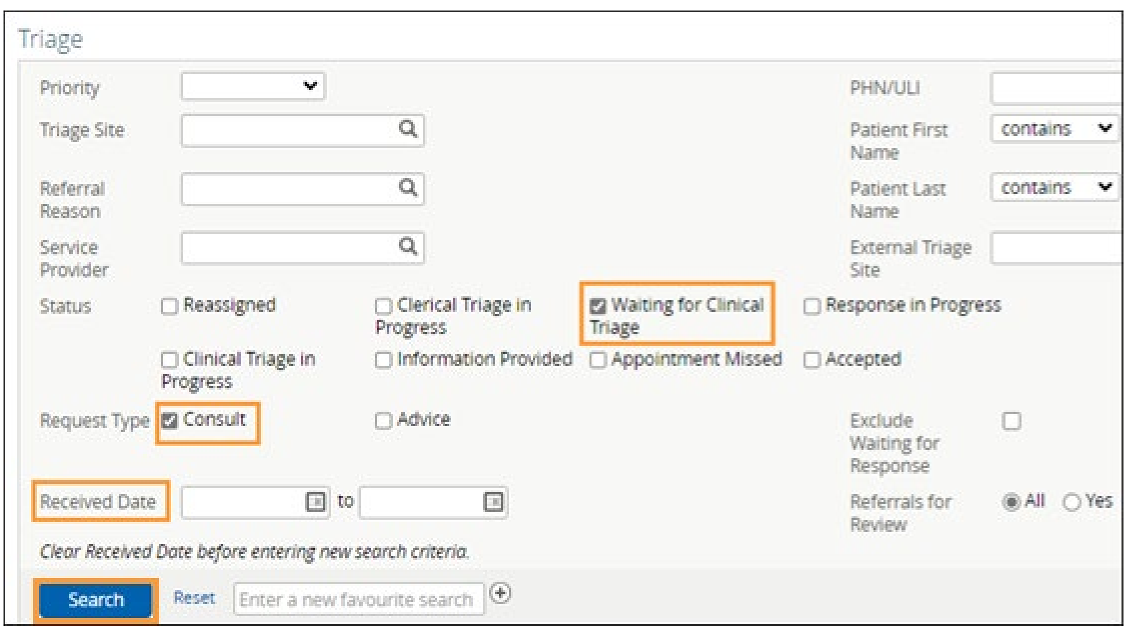
8.0 Appointment Management and Completion

During the clinical triage process when the referral status is in ***Waiting for Clinical Triage*** or ***Clinical Triage in Progress***, the receiving physician (if they have triage access) or clinic triage staff can waitlist or book appointments.

8.1 Change Referral Status to Waitlisted

a. Click ***eReferral*** from the ***Clinical Portal Menu*** then the ***Triage*** worklist.

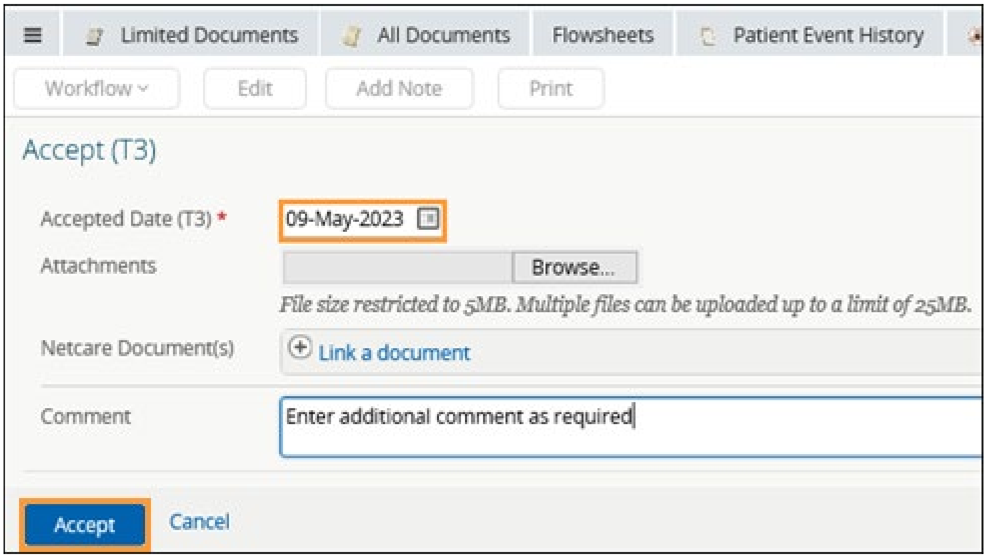
b. Filter on ***Waiting for Clinical Triage*** (and/or ***Clinical Triage in Progress***) and ***Consult*** beside ***Request Type*** or search for a specific patient. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).



c. Open and review the referral to ensure it is complete. Also check for duplicate referrals.

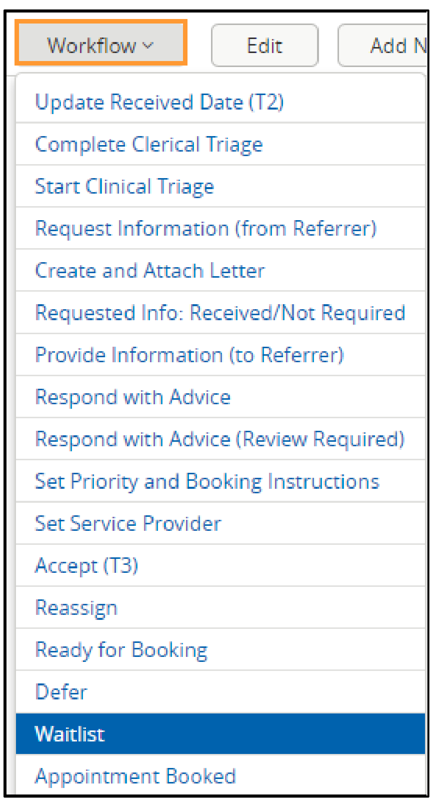
d. Click ***Workflow*** and select ***Accept (T3).***

e. Enter the date and add attachments. Link Alberta Netcare Portal documents and add comments as required.



f. Click ***Accept.***

g. (**Optional**) Click ***Workflow*** and select ***Waitlist***. Depending on who is doing this work, they will need to notify the referring provider that the patient has been added to the waitlist.

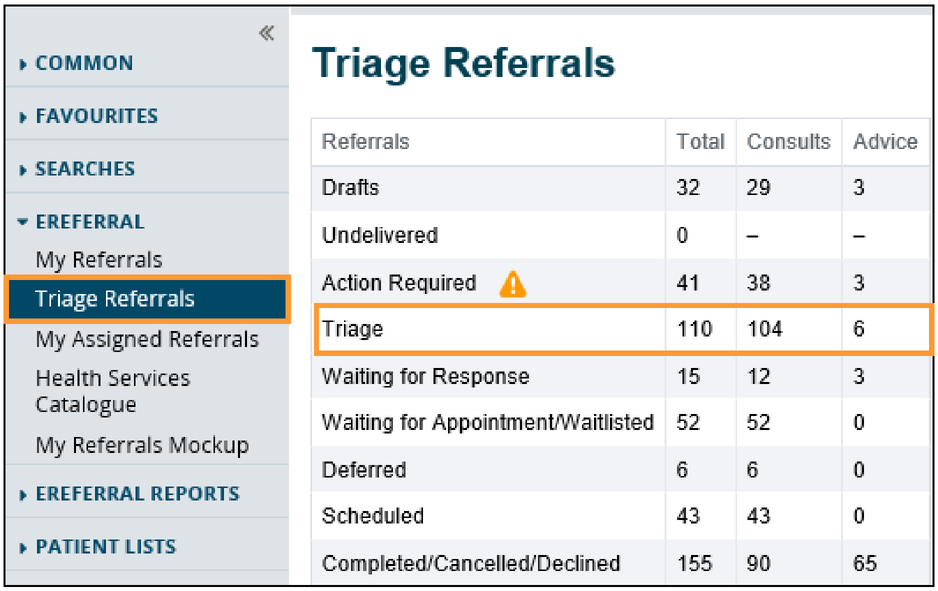


8.2 Appointment Management – Booking

Now that the patient has been waitlisted, it's time to start booking an appointment. Once the appointment is booked the status of the referral will change to ***Appointment Booked***. The referral will appear on the ***Triage Referrals*** dashboard ***– Scheduled*** worklist.

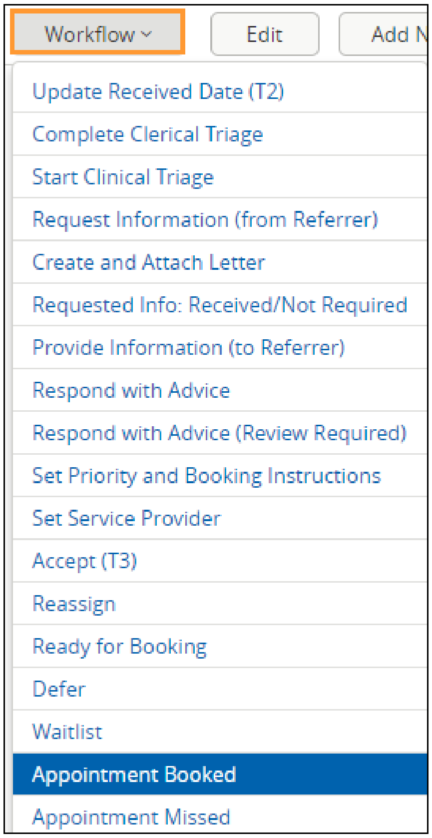
a. Click ***Triage Referrals*** from the ***Clinical Portal Menu***

b. Click the ***Triage*** worklist.



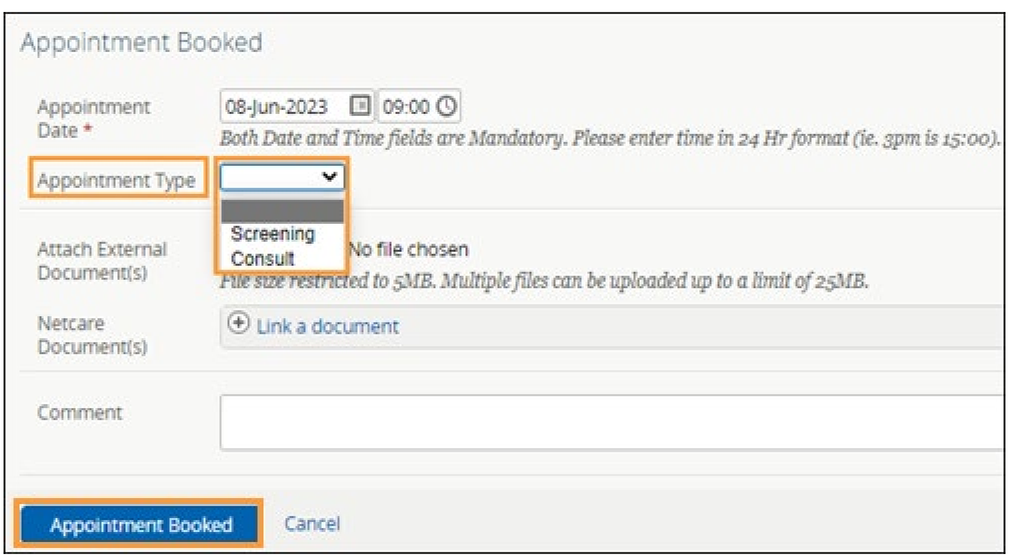
c. Search for the patient and click on the referral.

d. Click ***Workflow*** and select ***Appointment Booked***. Update referral with the information from the clinic/specialist/surgeon.



e. Enter the date and time. Select either ***Screening*** or ***Consult***, attach any required documents, and click ***Appointment Booked***.

- ***Screening***: Choose this option if pre-screening is required before the patient is scheduled to see the surgeon.
- ***Consult***: Choose this option if it's an in-person appointment with the surgeon to assess the patient's condition.



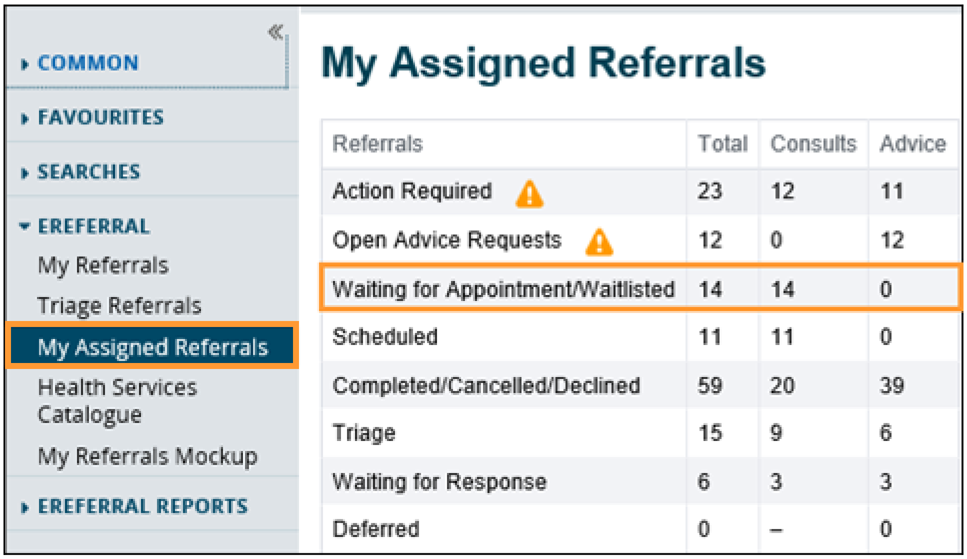
8.3 Appointment Management – Attended and Missed Appointments

Once the appointment has been booked, there are two possible scenarios: Attended or missed. The scenarios require different actions.

Appointment Attended – Complete (T5) Referral

a. Click ***eReferral*** from the ***Clinical Portal Menu***.

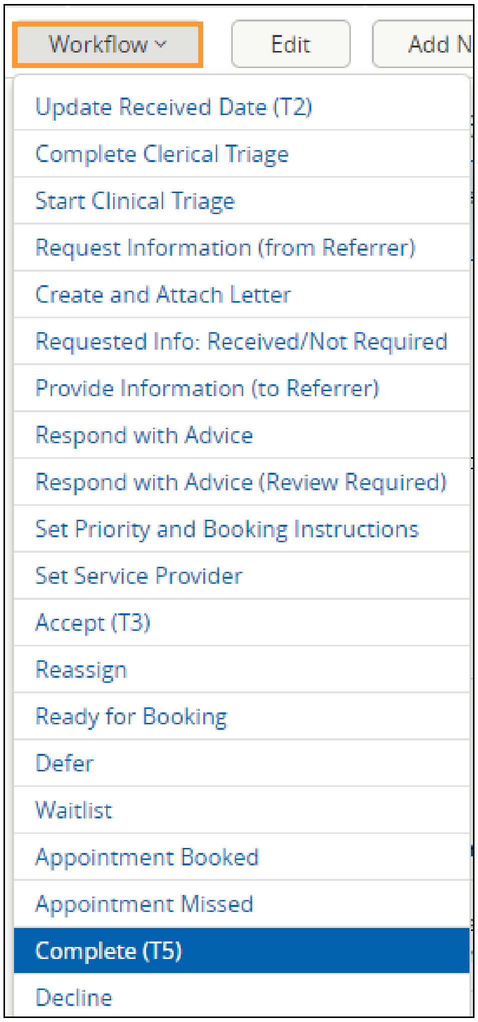
b. Click ***My Assigned Referrals***, then ***Waiting for Appointment/Waitlisted***. If the appointment date has been entered, the referral can be found in the ***Scheduled*** worklist.



Referrals	Total	Consults	Advice
Action Required	23	12	11
Open Advice Requests	12	0	12
Waiting for Appointment/Waitlisted	14	14	0
Scheduled	11	11	0
Completed/Cancelled/Declined	59	20	39
Triage	15	9	6
Waiting for Response	6	3	3
Deferred	0	–	0

c. Search for and open the referral.

d. Click ***Workflow*** and set the appointment status to ***Complete (T5)***.

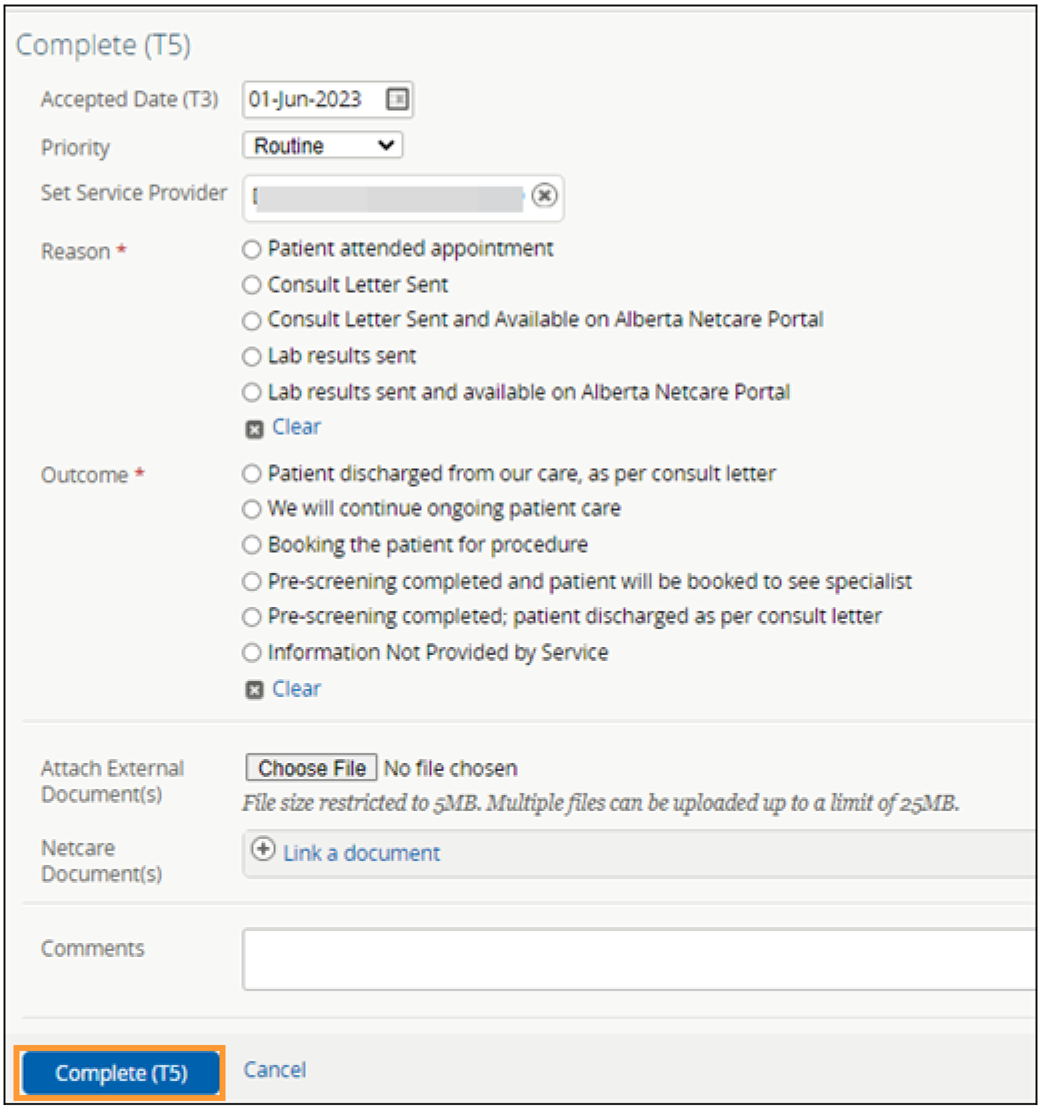


e. Set ***Service Provider*** to who the patient saw for their appointment if known or is incorrect.

f. Select ***Patient attended appointment*** as the ***Reason***. This will cause the ***Date Appointment Attended (T5)*** to appear below. Choosing any of the other reasons does not cause this option to appear.

g. Enter in the ***Date Appointment Attended (T5)***. This will be used along with the ***Received Date (T2)*** and ***Accepted Date (T3)*** to calculate the patient's referral wait time.

h. Choose an ***Outcome***. The first three (3) outcomes are for surgical consult appointments. The screening outcomes are related to screening clinic appointments only. The last option - ***Information Not Provided by Service*** - is used by the FAST Program to complete referrals when they have not been provided with a specific outcome.

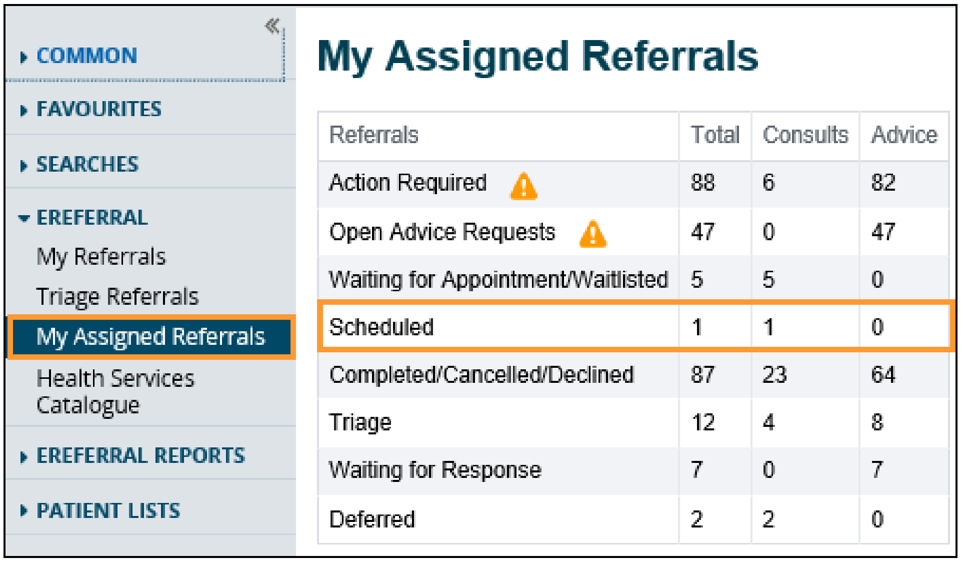


Appointment Missed

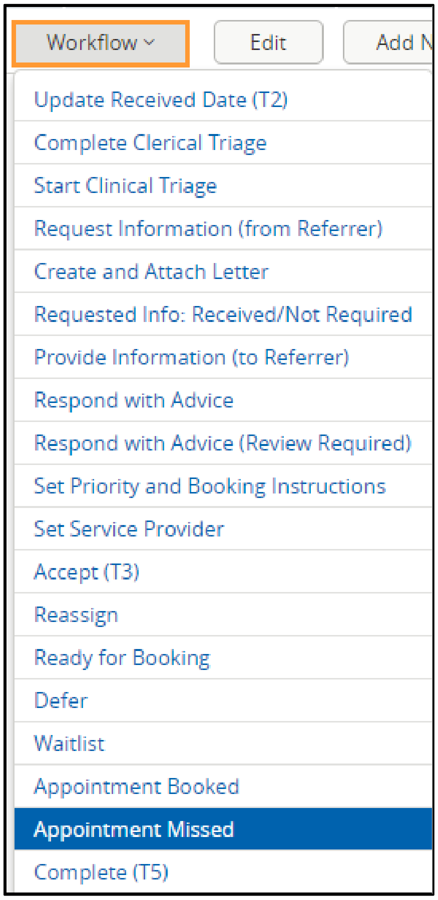
Specialties may rebook or cancel a referral when an appointment is missed based on their clinic policy.

a. Click ***eReferral*** from the ***Clinical Portal Menu***.

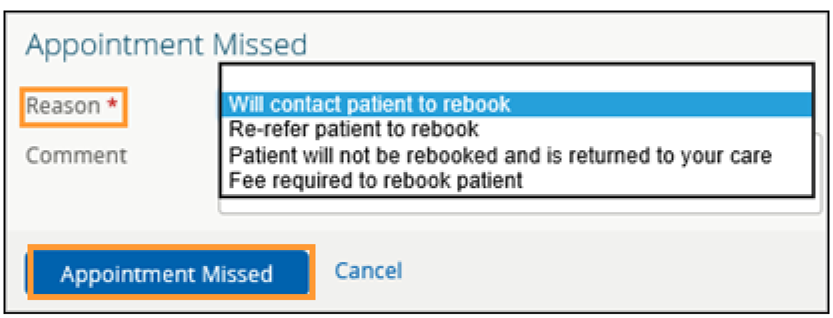
b. Click ***My Assigned Referrals***, then ***Scheduled***.



c. Set the ***Workflow*** status to ***Appointment Missed***.



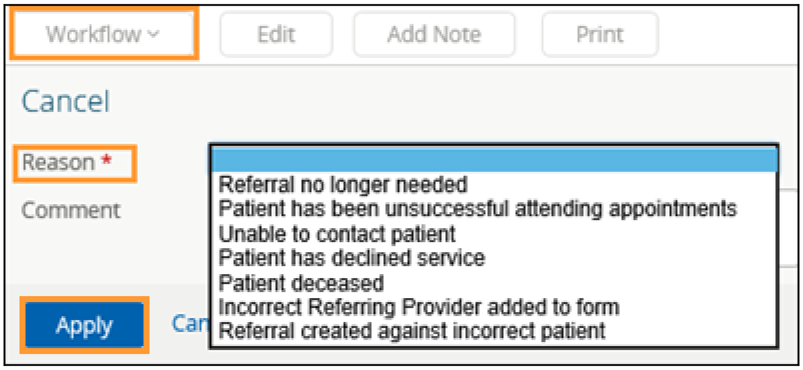
d. Select the ***Reason*** and click ***Appointment Missed***.



e. Click ***Workflow*** again.

f. If applicable, set the appointment status to ***Cancel***.

g. Select reason, and if required, enter a comment.



h. Click ***Apply***.

9.0 eReferral Provider Notifications

eReferral Provider Notifications provides users a way to track referrals through an immediate or daily summary email. Provider Notifications are subscription-based and managed by the user. There is no patient identifiable information in any Provider Notification email. All eReferral users can customize what type of notification they would like to receive.

Important note: Notifications are sent to the email entered in your ***My Details***, based on the system's default settings.

TIP	For more information about eReferral Provider Notifications, go the Provider Notifications Portal.

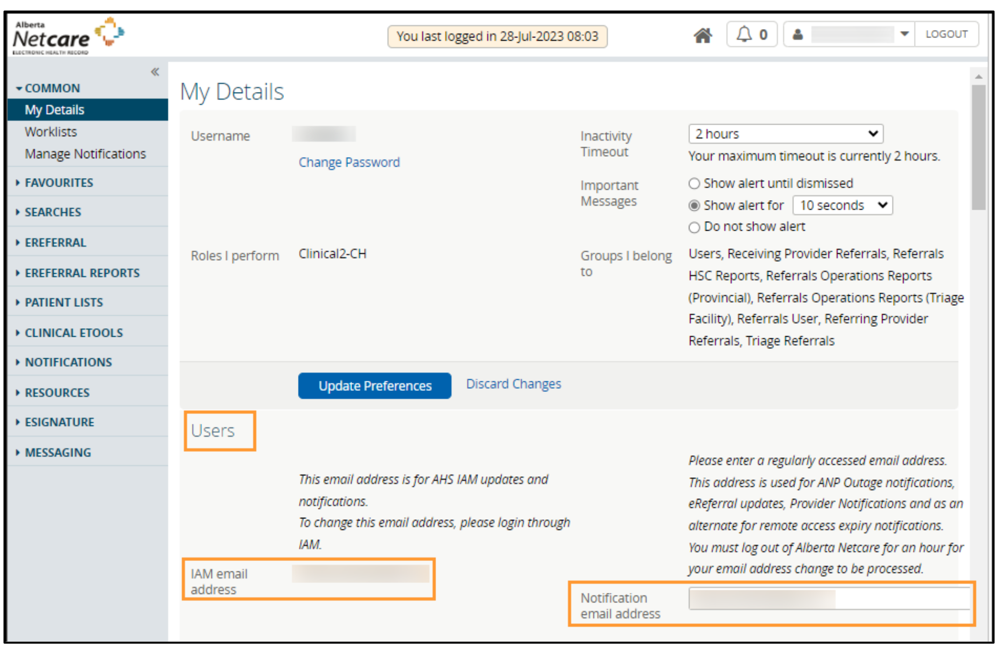
9.1 Referring Provider & Referring On Behalf Of Notifications

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll to the section titled ***Users***. Beside ***Notification email address***, enter your preferred email address that you use and check regularly (this can be an AHS email or another email address external to AHS). If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

c. You will also notice an AHS IAM (Identify Access Management) email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

d. Click the ***Update Preferences*** button to save your changes.



9.2 Managing Notifications Subscriptions – Referring Providers & Referring Providers on Behalf of

Below is a list of **default** notifications that all referring providers or referring provider on behalf of users will automatically receive when an activity occurs on an Advice or Consult Request. All these notifications send emails but can be customized to meet your needs.

NOTIFICATION – EREFERRAL REFERRER	WHEN WILL THE EMAIL BE SENT?
Advice: Action Required	Notify Immediately by Email
Advice: Advice Completed	Notify Immediately by Email
Advice: Service Provider Set	Notify Overnight in Daily Summary Email
Consult: Action Required	Notify Immediately by Email
Consult: Appointment Missed	Notify Overnight in Daily Summary Email
Consult: Declined	Notify Immediately by Email
Consult: Completed	Notify Immediately by Email
Consult: Deferred	Notify Overnight in Daily Summary Email
Consult: Waitlisted	Notify Overnight in Daily Summary Email
Consult: Appointment Booked	Notify Overnight in Daily Summary Email
Consult: Cancelled	Notify Immediately by Email
Consult: Reassigned	Notify Overnight in Daily Summary Email
Consult: Service Provider Ser	Notify Overnight in Daily Summary Email

NOTE: While providers are auto-subscribed by default to thirteen (13) ***Referrer*** notifications (seen above), there are other notifications that can be subscribed to.

A user can customize their notifications and method of delivery:

a. Click on ***Manage Notifications***.

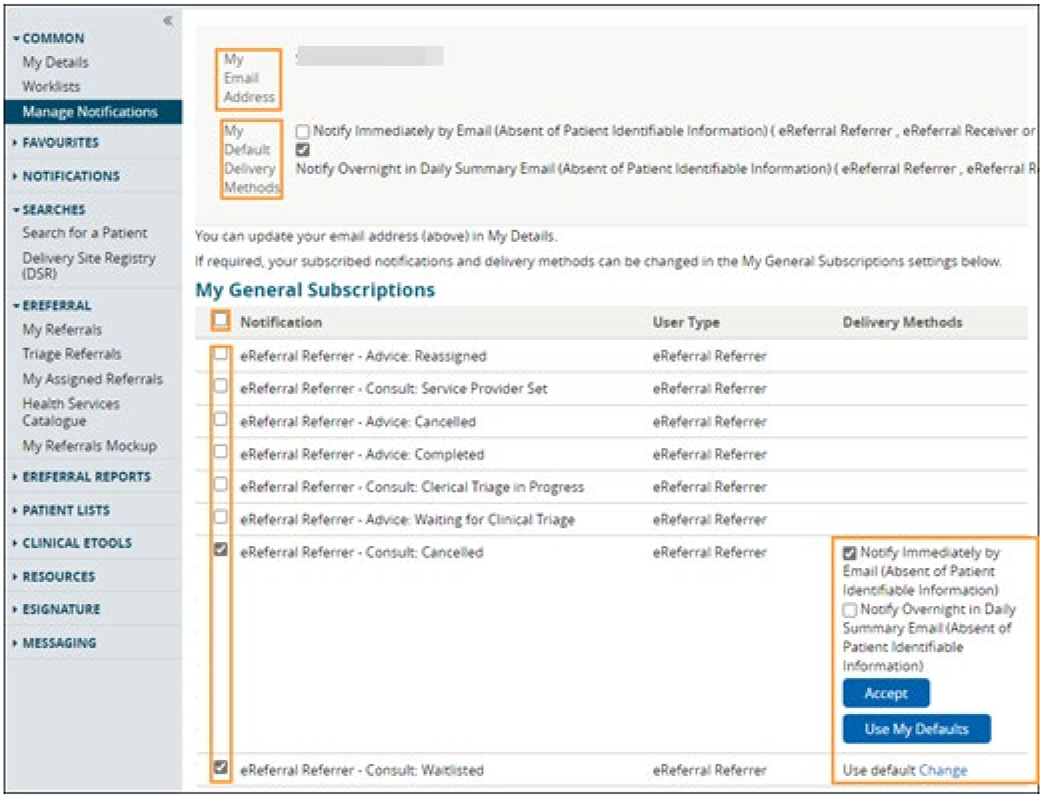
b. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

c. Choose your ***Default Delivery Method.***

d. In the ***My General Subscriptions*** section as a referring provider or referring provider on behalf of user, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.

e. Click ***Change*** in the delivery method column and select the desired method of delivery.

f. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you and you will no longer receive that notification.

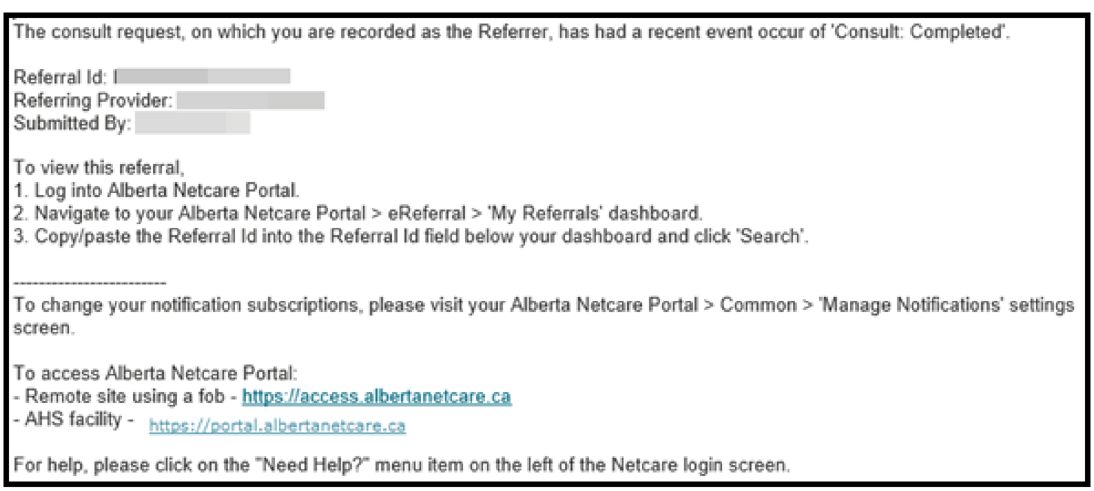


g. To unsubscribe to <u>ALL</u> Provider Notifications from eReferral, click the box in front of ***Notification*** in the header until all boxes below are unchecked.

h. Scroll to the bottom of the page and click ***Save***.

Notification Emails

As a referring provider or referring provider on behalf of, you will receive emails notifying you that an activity has occurred on an Advice or Consult Request that has been submitted. See example of email sent immediately after an activity occurs:



The consult request, on which you are recorded as the Referrer, has had a recent event occur of 'Consult: Completed'.

Referral Id:
Referring Provider:
Submitted By:

To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Steps to review a referral update received through Provider Notifications:

a. Login to the Alberta Netcare Portal and click ***My Referrals***.

b. Copy the complete ***Referral ID*** (including RFS-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. ***Referral ID*** is only available on emails sent as 'Notify Immediately by Email.'

c. Click ***Search*** and the specific referral will display. Daily summary emails do not contain the ***Referral ID***, only a brief activity summary.

Example of a Daily Summary Email:

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team
- [1 occurrence] Advice: Action Required (check your 'Action Required' worklist)
- [13 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' worklist)
- [4 occurrences] Consult: Completed (check your 'Completed/Cancelled/Declined' worklist)
- [7 occurrences] Consult: Clerical Triage in Progress (check your 'Triage' worklist)
- [2 occurrences] Consult: Action Required (check your 'Action Required' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer
- [5 occurrences] Consult: Appointment Booked
- [2 occurrences] Advice: Reassigned
- [3 occurrences] Consult: Service Provider Set
- [1 occurrence] Consult: Waitlisted
- [1 occurrence] Advice: Service Provider Set (check your 'Triage' worklist)
- [1 occurrence] Consult: Deferred

To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' worklist.

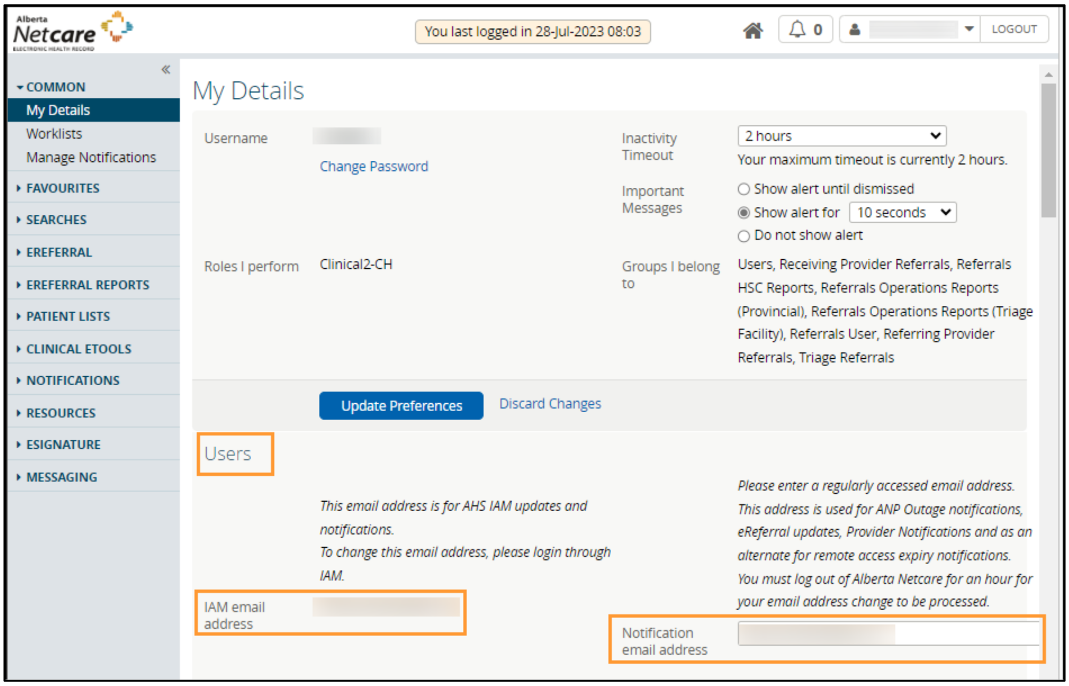
9.3 Managing Notifications Subscriptions - Receiving & Receiving On Behalf Of Providers

Following is a list of **default** notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an Advice or Consult Request. These notifications can be customized to meet your needs.

NOTIFICATION – EREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
Advice: Action Required	Notify Immediately by Email
Advice: Clinical Triage in Progress	Notify Immediately by Email
Advice: Service Provider Set	Notify Overnight in Daily Summary Email
Consult: Waiting for Clerical Triage	Notify Overnight in Daily Summary Email
Consult: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Consult: Action Required	Notify Immediately by Email
Consult: Reassigned	Notify Overnight in Daily Summary Email
Consult: Service Provider Set	Notify Overnight in Daily Summary Email

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll to the section titled ***Users***. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the ***Notification email address*** field. If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

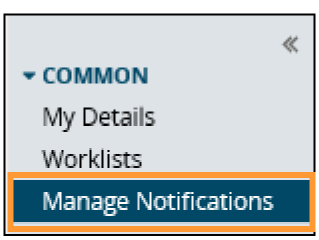


c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

d. Click the ***Update Preferences*** button to save your changes.

NOTE:	While providers are auto-subscribed by default to eight (8) ***Receiver*** notifications (see above), there are other notifications that can be subscribed to.

e. Click on ***Manage Notifications***.



f. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

g. Choose your ***Default Delivery Method***. You can be notified immediately or to receive an overnight summary. Immediate notifications via email contain a ***Referral ID*** that can be used to find the referral, whereas summary emails overnight do not contain any ***Referral IDs***. Example emails are shown below:

The consult request, on which you are recorded as the assigned Receiver, has had a recent event occur of 'Consult: Appointment Missed'.

Referral Id: RFS-XXX-000000
Referring Provider: Dr. XXX
Submitted By: Dr. XXX
To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Assigned Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

To change your notification subscriptions,
Common > 'Manage Notifications' settings

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.
- AHS facility - https://portal.albertanetcare

For help, please click on the "Need Help?"
screen

Sample email from a notification with a delivery method of: Notify Immediately by Email.

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as the assigned Receiver
- [20 occurrences] Consult: Service Provider Set (check your 'Triage' worklist)
- [10 occurrences] Advice: Clinical Triage in Progress
- [10 occurrences] Consult: Waiting for Clerical Triage (check your 'Triage' worklist)
- [6 occurrences] Advice: Completed (check your 'Completed/Cancelled/Declined' worklist)
- [5 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' worklist)
- [6 occurrences] Consult: Waitlisted (check your 'Waiting for Appointment/Waitlisted' worklist)
- [4 occurrences] Consult: Cancelled (check your 'Completed/Cancelled/Declined' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'My Assigned Referrals' dashboard.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

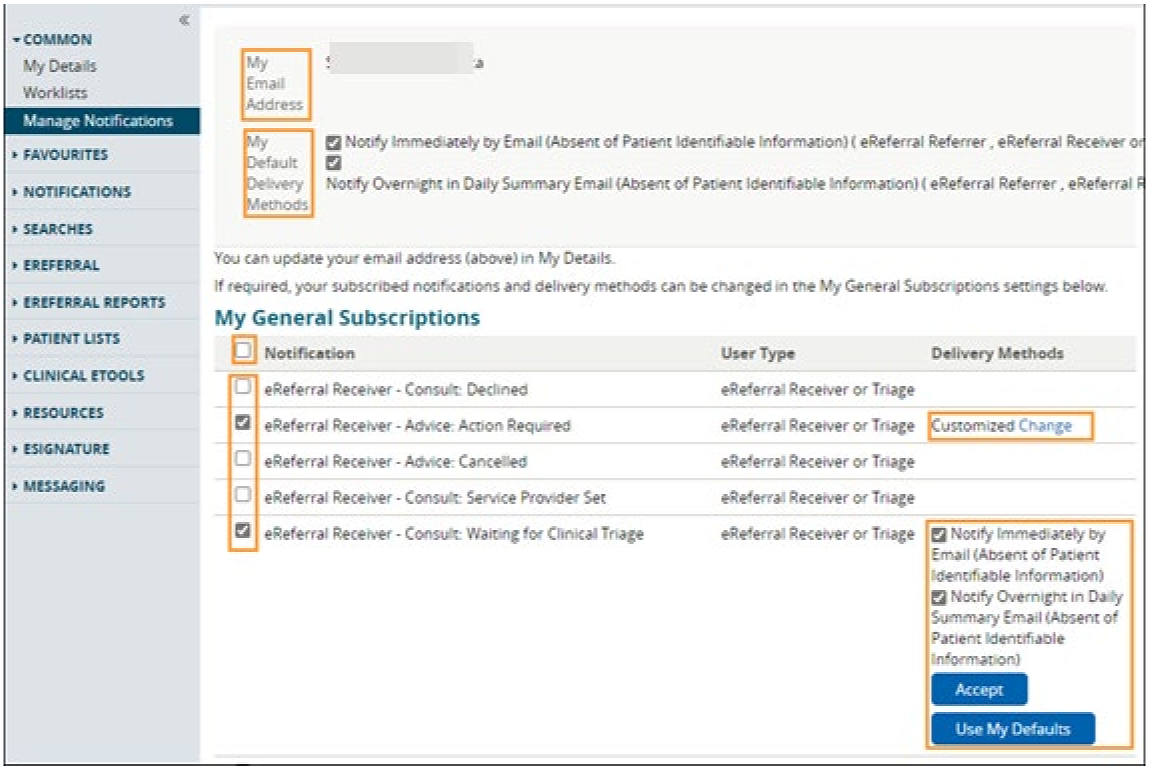
For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email.

h. In the ***My General Subscriptions*** section as a receiving provider or receiving provider on behalf of user, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.

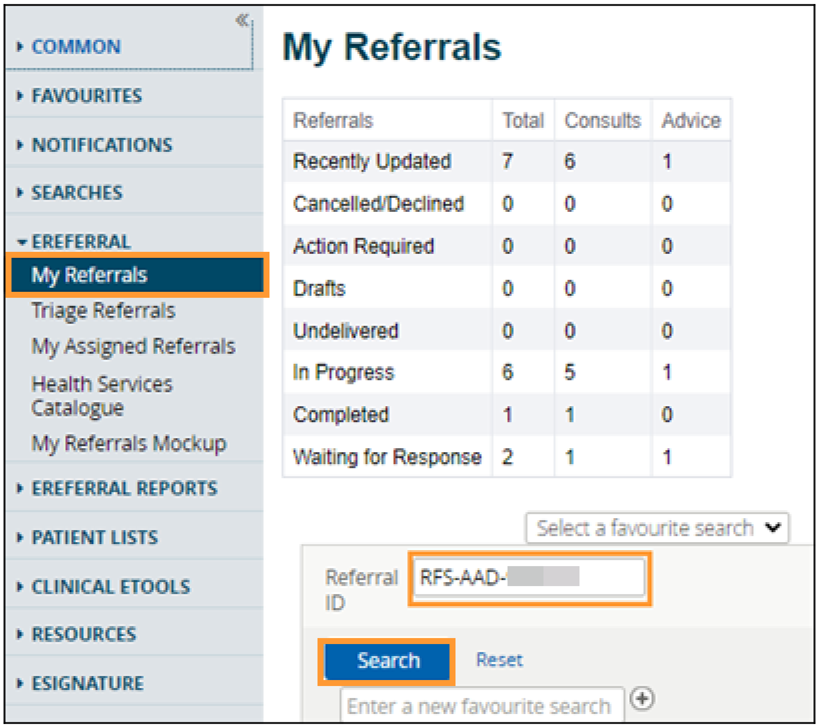
i. Click ***Change*** in the delivery method column and select the desired method of delivery.

j. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you and you will no longer receive that notification.



k. Click the ***Save*** button to save your changes.

l. To find a referral, copy the complete ***Referral ID*** (including RFS-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. Referral ID is only available on emails sent as ‘Notify Immediately by Email.’ Daily summary emails <u>do not</u> include Referral IDs.



m. Click ***Search*** and the specific referral will display.

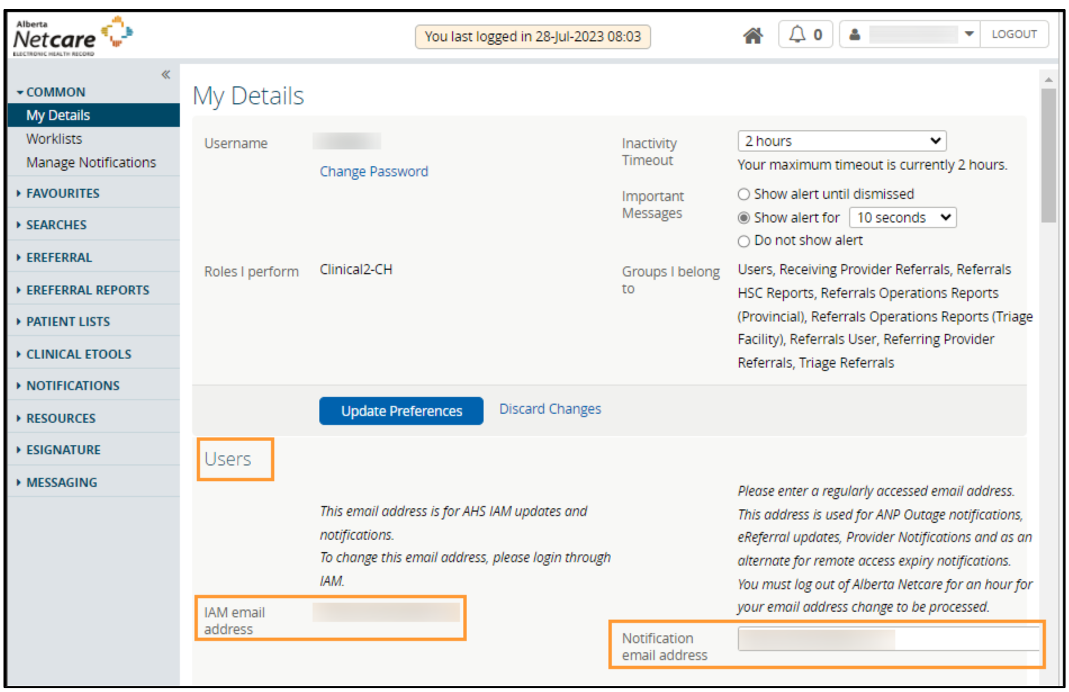
9.4 Managing Notifications Subscriptions - Triage User

Following is a list of **default** notifications that all triage users will automatically receive when an activity occurs on an Advice or Consult Request. These notifications can be customized to meet your needs. There are several other options that triage users can subscribe to.

NOTIFICATION – EREFERRAL TRIAGE	WHEN WILL IT BE SENT?
Advice: Action Required	Notify Overnight in Daily Summary Email
Advice: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Consult: Waiting for Clerical Triage	Notify Overnight in Daily Summary Email
Consult: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Consult: Action Required	Notify Overnight in Daily Summary Email
Consult: Completed	Notify Overnight in Daily Summary Email

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

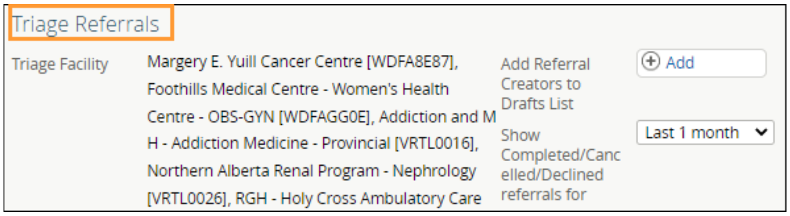
b. Scroll to the section titled ***Users***. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the ***Notification email address*** field. If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.



c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

d. Click the ***Update Preferences*** button to save your changes.

e. To manage your triage settings, scroll down to ***Triage Referrals***. Validate your ***Triage Facilities***.

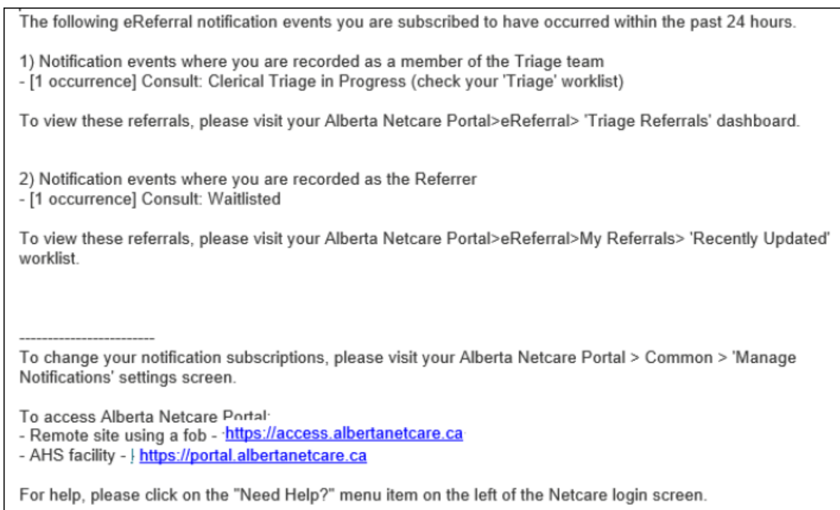


A triage user can customize their notifications and method of delivery:

a. Click on ***Manage Notifications***.

b. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

c. Choose your ***Default Delivery Method***. You can be notified immediately or can receive an overnight summary. Immediate notifications via email contain a ***Referral ID*** that can be used to find the referral, whereas summary emails do not contain any ***Referral IDs***. The sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email is shown below.



The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team
- [1 occurrence] Consult: Clerical Triage in Progress (check your 'Triage' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer
- [1 occurrence] Consult: Waitlisted

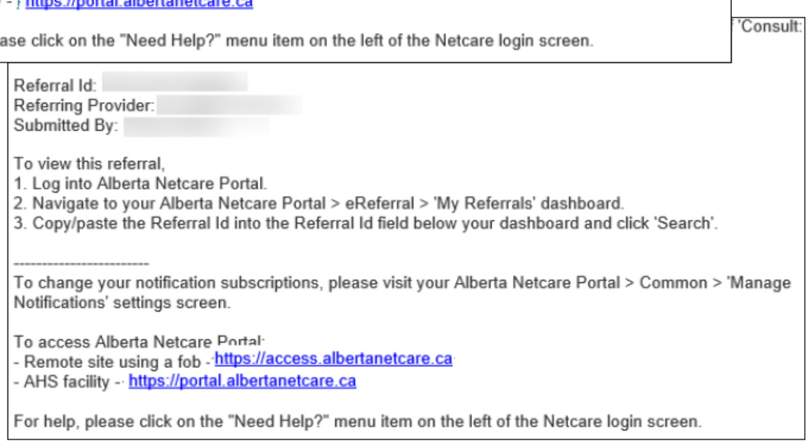
To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' worklist.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email



'Consult:

Referral Id: [redacted]
Referring Provider: [redacted]
Submitted By: [redacted]

To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

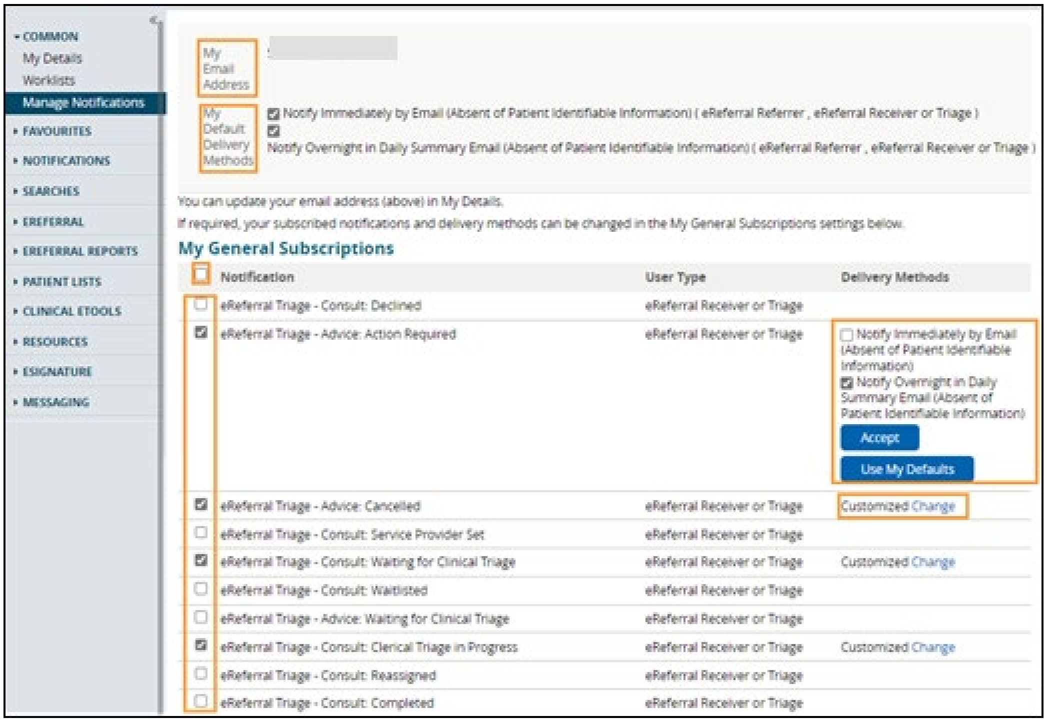
To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Immediately by Email.

d. From the ***My General Subscriptions*** section, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.

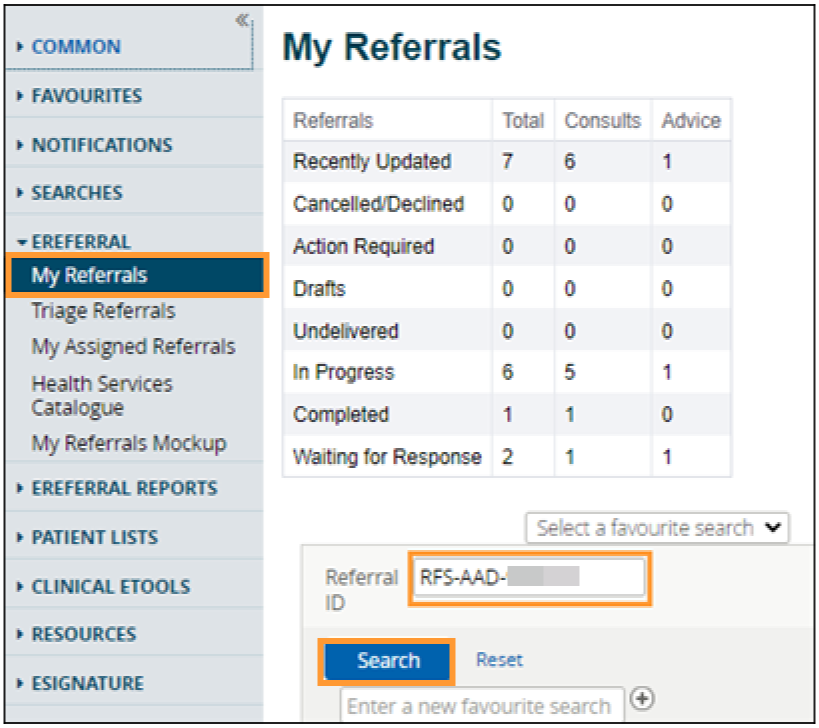


e. Click ***Change*** in the delivery method column and select the desired method of delivery.

f. Click the box next to a specific triage notification to uncheck it. This will unsubscribe you and you will no longer receive that notification.

g. Click the ***Save*** button to save your changes.

h. To find a referral, copy the complete ***Referral ID*** (including RFS-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. Referral ID is only available on emails sent as ‘Notify Immediately by Email.’ Daily summary emails do not include Referral IDs.



i. Click ***Search*** and the specific referral will display.

10.0 eReferral Reports

The Alberta Netcare Portal eReferral application includes a number of reports that extract and record selected data from the system. Providers accessing these reports must belong to one (or both) of the following groups:

- **Referrals Operations Reports (Provincial)** – Returns province-wide data; intended for the eReferral project team.
- **Referrals Operations Reports (Triage Facility)** – Returns data relating to a specific facility only; intended for staff at that facility.

These reports are subject to change as new reporting requirements are identified and implemented. To gain access to these reports, email access.ereferral@ahs.ca to get started.

The reports are accessed from the ***Clinical Portal Menu* – *eReferral Reports***. These reports are available to users with Clinical 1, Clinical 2, or Clinical 5 access, with an additional two reports available to those with Clinical 1 access.

Reports Available to Clinical 1, Clinical 2 and Clinical 5 Users:

- ***Consult Request Referrals*** – Provides the total number of Consult Requests submitted.
- ***Consult Request Referrals by Status*** – Reports the number of Consult Requests by status. Total number of ***Completed***, ***Cancelled*** and ***Declined*** referrals can be seen, as well as total referrals with additional information requested. Reports can also be run for specific time periods.
- ***Consult Request Referrals by Reason for Referral*** – Provides the number of Consult Requests submitted under each reason for referral.
- ***Consult Request Referrals by Referring Provider*** – Gives the number of Consult Requests submitted by each user.
- ***Consult Request Referrals by Referring Provider and Reason for Referral*** – Generates a list of referring providers for any specific reason for referral along with the number of Consult Requests the provider submitted using that reason.
- ***Advice Requests*** – Provides the total number of Advice Requests submitted, and the total number of times each ***Complete Reason*** was used on the ***Complete Form***. For example, the total number of times that ***Continue Managing Within Your Scope of Practice*** is reported.
- ***Health Services Catalogue (HSC) Facility Listing*** *(Provincial user group only)* – Generates a list of all of the facilities in the ***Health Services Catalogue***, along with their contact information.
- ***Health Services Catalogue (HSC) Provider Listing*** *(Provincial user group only)* – Lists all of the providers in the ***Health Services Catalogue***, along with their provider identification number.

Additional Reports Available to Clinical 1 Users:

These two reports are available to Clinical 1 users if they add the triage facility in ***My Details***:

- ***Receiving Providers On Behalf Of Report*** – Lists the names of all Alberta Netcare Portal users that have received a request on your behalf by adding your name to their ***My Details***.

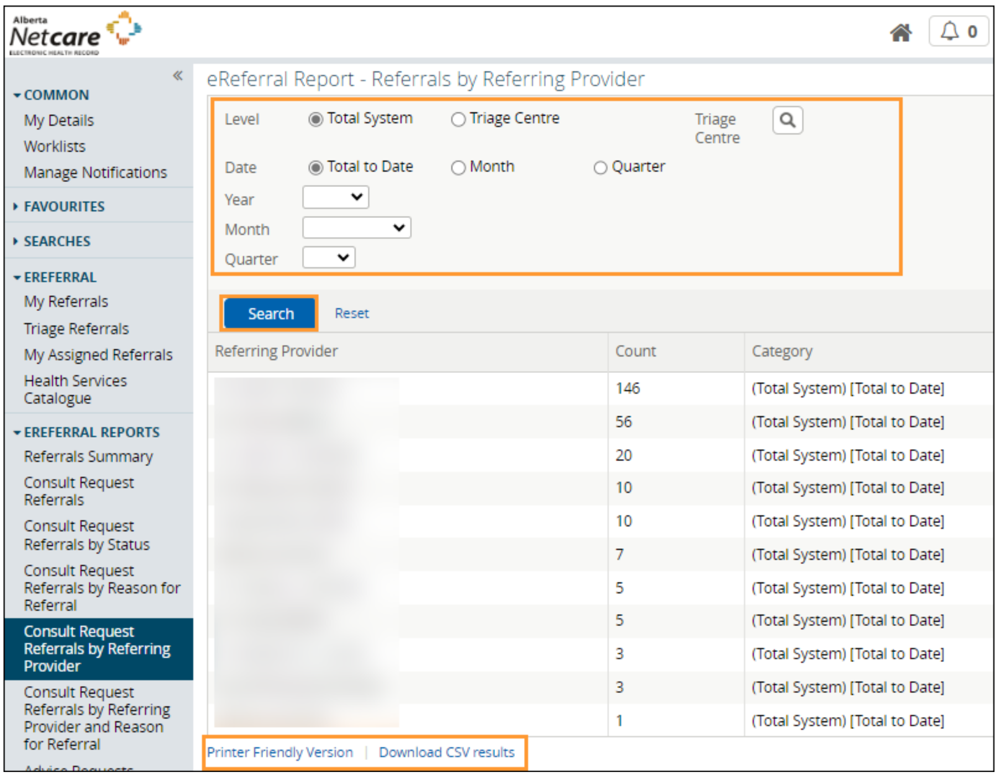
- ***Referring Providers On Behalf Of Report*** - Lists the names of all Alberta Netcare Portal users that have submitted a request on your behalf by adding your name to their ***My Details***.

10.1 Running a Report

a. Click ***eReferral Reports*** from the ***Clinical Portal Menu***.

b. Select the report you wish to generate.

c. Enter selection criteria and click the ***Search*** button. The wider the selected criteria, the longer the report will take to generate and display.

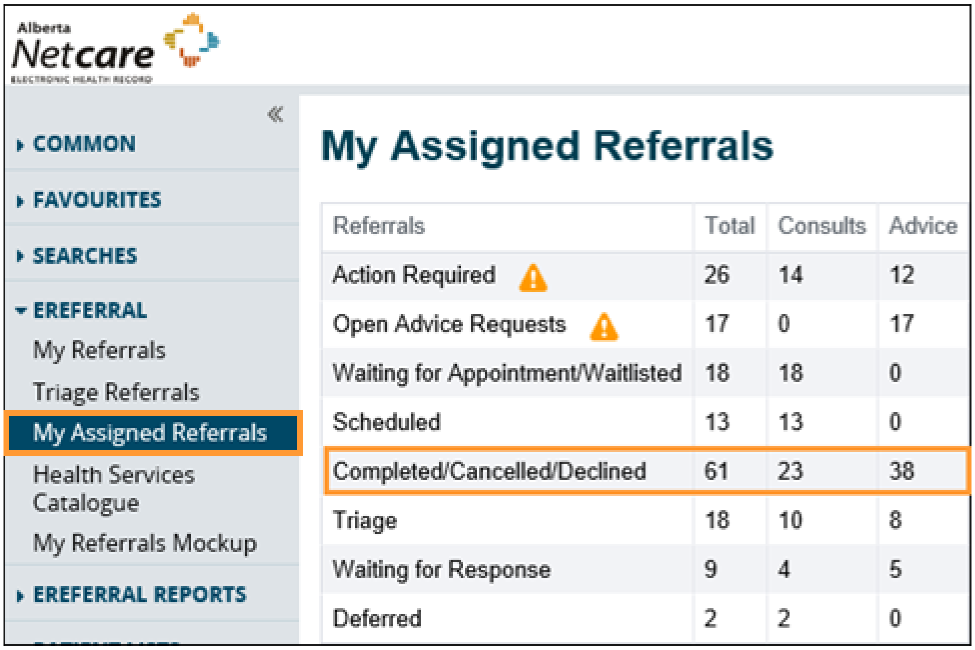


a) Click on ***Download CSV results*** for analysis in Microsoft Excel. Click on ***Printer Friendly Version*** to save the report as a PDF or print.

10.2 Advice Request Billing for Receiving Providers

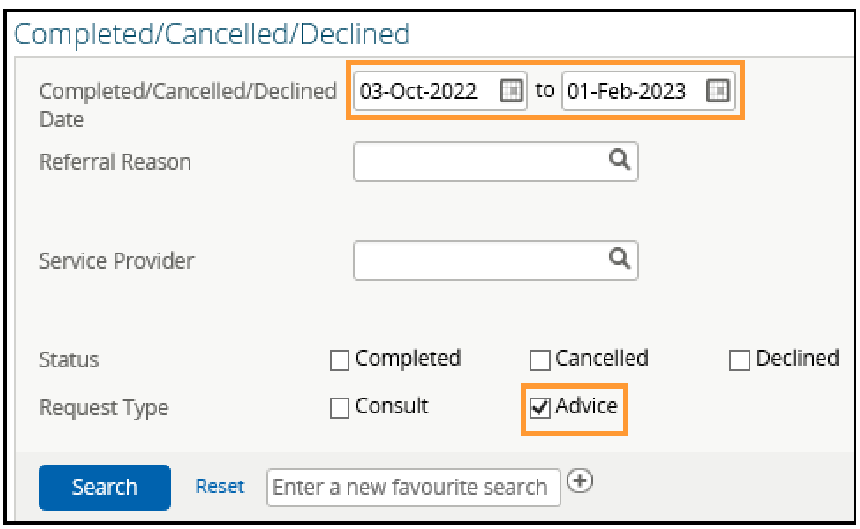
eReferral Advice Requests are billable using eConsult 03.01O**.** Below is the process to gather the information you require for billing.

a. View your ***My Assigned Referrals*** dashboard and go to your ***Completed/Cancelled/Declined*** requests.



b. In the ***Completed/Cancelled/Declined Date*** fields, enter a date range for your search.

c. Select ***Advice*** for ***Request Type*** and click ***Search***.



The results that appear are the Advice Requests you have received in the date range you selected. For example, for billing purposes you may search the last calendar month to see how many Advice Requests you received.

Patient Name	DOB/Age/ULI	Received Date (T2)	Referral Reason	Referring Provider	Accepted Date (T3)	Appointment Scheduled	Appointment Attended (T5)	Priority	Access Target	Request Type	Service Provide
PATHFINDER, Test Id		27-Oct-2017	Hip pain						5 Calendar days	Advice	
EREFERRAL, Two B		13-Apr-2018	Hip pain						5 Calendar days	Advice	

Results 1-2 Printer Friendly Version | Download CSV results

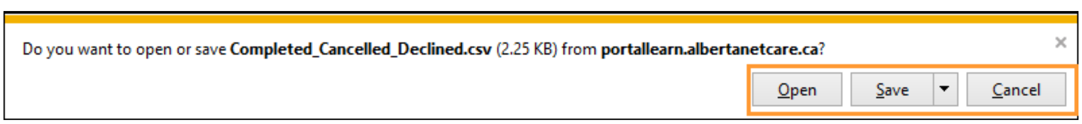
d. Click either ***Printer Friendly Version*** or ***Download CSV results*** on the bottom of the page to view these results in a more printer friendly version or to save them on your computer. You can share these documents with your team and complete billing as normal.

- The ***Printer Friendly Version*** is a PDF document that can be printed.

My Assigned Referrals - Completed/Cancelled/Declined

Patient	Received Date	Referral Reason	Referring Provider	Appt.	Access Target	Elapsed Time	Time to Target (days)	Request Type	Service Provider	Status	Status Reason	Completed/ Cancelled/ Declined
EREFERRAL, Five A	07-Nov-2017	Urology Issue			5 business days	23 minutes	6	Advice		Completed	Continue Managing Within Your Scope of Practice	2 weeks ago

- The ***Download CSV results*** opens in Microsoft Excel spreadsheet. You can open and/or save it.



NOTE:	Since this information contains identifiable patient information, please ensure that it is transmitted over secure email only.

e. To complete your billing process, you can download the Prac ID of the other physician. Go to https://www.alberta.ca/fees-health-professionals.aspx for more information.