

Alberta Netcare Portal

eReferral

User Guide

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For eReferral training support, please contact the eHealth Services team by email (<u>eHealthProviderSupport@gov.ab.ca</u>) 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 <u>access.ereferral@ahs.ca</u> 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, known as eReferral for short, 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 eConsults (previously called Advice Requests), which are non-urgent requests for advice answered by specialists within five calendar days.
- Create Referrals (previously called Consult Requests), which are non-urgent requests for an in-person specialist appointment.
- Provide Clerical and Clinical Triage to ensure the referral is complete and all required patient information is contained within the referral.
- Manage Appointments and track booked, attended, and missed appointments.

For more information about eReferral, go to the <u>eReferral website</u>.

	eReferral Program Features
RESOURCES	eReferral User Benefits
	 List of specialties accepting eConsults & Referrals

1.1 Accessing eReferral - Alberta Netcare Portal Basics

 To login to the Alberta Netcare Portal from an Alberta Health Services (AHS) facility, go to: <u>https://portal.albertanetcare.ca/cha/NetcareLogin.htm</u>. 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: <u>https://access.albertanetcare.ca</u>. Enter your username and passcode (PIN+Tokencode) and press *Logon*.



2.0 Getting Started with eReferral

Login to the Alberta Netcare Portal to access the eReferral homepage from the menu on the left side.

COMMON My Details Worklists Manage Notifications	Triage Referrals Triage Referrals						
FAVOURITES SEARCHES	Requests 2 Drafts 2	Total 2 0	Referrals 1	eConsults 1 0			
✓ EREFERRAL My Referrals Triage Referrals	Action Required A	2 16	1 12	1			
My Assigned Referrals Health Services Catalogue	Waiting for Response Waiting for Appointment/Waitlisted Deferred	3 6 2	2 6 2	1 - -			
EREFERRAL REPORTS PATIENT LISTS	Scheduled Completed/Cancelled/Declined	3 22	3 18	- 4			
NOTIFICATIONS CLINICAL ETOOLS RESOURCES	Referral ID		3				
ESIGNATURE MESSAGING	Enter the Referral Id from your e 'Search'.	mail n	otification a	and click			

The elements below are visible on the eReferral homepage:

- 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.



Triage Referrals Requests Drafts C	Total 0	Referrals	eConsults	Patient Sea	arch				S	elect a fav	ourite sean
Requests 1 Drafts 0	Total 0	Referrals	eConsults	Identifier							
Drafts C	0	-		identifier							
		0	0	Type	PHN7	ULI				•	
Undelivered (0	0	0	Last Name			Date Of	Day	Mont	h v V	opr
Action Required 🛕 🛛 💈	2	1	1	Last Name			Birth	Day			- Cil
Triage	13	9	4	First Name			Sex	All	Female	Male	X
Waiting for Response	4	1	3								
Waiting for Appointment/Waitlisted	5	5	-	Middle Name/Initia			Phone Number				
Deferred (0	0	-					Search Ti	p : An ider	tifier sear	ch is
Scheduled 3	3	3	-					recomme	ended. For	name sea	rch, please
Completed/Cancelled/Declined	14	12	2					first nam	e and date	of birth.	, comprete
	_			Search	Clear	Enter a ne	ew favourite	search	÷		
Referral ID				Enter search o	riteria abo	ve and click	'Search'				
Search											
Enter the Referral Id from your em- 'Search'.	nail no	tification a	nd 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*.

Search for a Patient	My Referrals (*)
New Section to the Right	(+) New Section to the Right
New Section Below	(+) New Section Below
Update Layout Discard Changes Reset to Defaults	

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	a Patient				My Referrals			
Patient Sea	rch		Select a favou	rite search 🗸	My Referrals			
Identifier					-			
Identifier	PHN / ULI		~		Requests	Total	Referrals	eConsults
Туре					Recently Updated	6	5	1
Last Name		Date Of Day	Month 🖌 Yea	r	Cancelled/Declined	13	7	6
		Birth			Action Required 🔒	3	1	2
First Name		Sex All	Female Male	x	Drafts	0	0	0
					Undelivered	0	0	0
Middle Name/Initial		Phone			In Progress	43	31	12
Name/million	1	Search	Tin · An identifier search	identifier search is . For name search, please	Completed	2	1	1
		recom	mended. For name search		Waiting for Response	3	3	0
		enter t first na	he complete last name, (me and date of birth.	complete				
_			0			Selec	t a favourit	e search 🗙
Search	Clear Enter a ne	w favourite search	(+)		Referral			
nter search cr	iteria above and click '	'Search'			ID			
					Search Rese	t		
					Enter a new favou	rite sear	ch 🕀	
					Enter the Referral Id fro	m vour	email notif	ication and clic
					'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 the following items.

Providers can view a list of eConsults and Referrals 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.

≪ ► COMMON	Triage Referrals							
► FAVOURITES	Requests	Total	Referrals	eConsults				
▶ SEARCHES	Drafts	0	0	0				
▼EREFERRAL	Undelivered	0						
My Referrals	Action Required	1						
Triage Referrals								
My Assigned Referrals	mage 15 9 4							
Health Services	Waiting for Response	4	1	3				
Catalogue	Waiting for Appointment/Waitlisted	5	5	-				
EREFERRAL REPORTS	Deferred 0 0 -							
PATIENT LISTS	Scheduled 3 3 -							
► NOTIFICATIONS	Completed/Cancelled/Declined 14 12 2							
► CLINICAL ETOOLS								
• RESOURCES	Referral ID							
► ESIGNATURE								
► MESSAGING	Search Reset							
	Enter the Referral ld from your email notification and click 'Search'.							

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						My Re	fer	ral	s					
RequestsTotalRecently Updated23Cancelled/Declined21			Referrals	eCon	sults		Provid	ers	s can view a list of eConsult and/or Referrals they have					
			19	19 4 11 10			dashbo	u in Daro	d. A	All eRef	ferral pro	en ovi	iders ha	ive access to this
			11				dashbo	bar	d.					
Action R	lequired 🛕	1	1	0										
Drafts		1	0	1										
Undeliv	Triage	Refer	rals			1								
In Prog	mage		ulo							Triage	Referra	1		
Comple	Requests			Total	Refe	rrals	eConsu	lts		Receivi	ing prov	ide	ers and	those working on behalf o
Waiting	Drafts			1	0		1			receivir Referra	ng provi als subm	de litte	rs can v ed to th	eir site using this
	Undelivered	Undelivered			0		0			dashboard. Only providers set up with			rs set up with triage acces	
	Action Requ		5	4		1		0	can see	e this da	sh	board.		
	Triage		14	10		4								
	Waiting for	Response		2	1		1							
	Waiting for	My As	signe	d R	efei	rra	IS				My A	ls	signed	Referrals
	Deferred	Doquests				Tota	Dofor	ale	~C	onculto	Prov	ide	ers who	need to respond to an
	Scheduled	Action Do	Action Dogwined				1	ais	1	eCons		ารเ	ult and/o	or Referrals that has been
	Completed	Action Rec							4		list through this dashboard. Only receiv			
		Waiting for	Appointme	annointment/Waitlisted				1 1			or receiving on behalf of p			behalf of providers can
		Schodulor	i I	ointment/watcisted			2		0	access this dashboard.			shboard.	
		Completer	، ۱/۱ ۰ ۰۰۰۰		-	-					_	1		
		Triage	Triag	Referrals										
		Waiting for									0			re is an eConsult that is s
		Deferred	Reques	ts				TOT	ali	Referrals	eConsult	s	both	the Action Required and
		Deletioned	Dratts					1		0	1		Oper	n Advice Requests will she
			Undeliv	ered				0		0	0		warn	ing signs as a reminder.
			Action F	kequire				5	4	4	1			
			Triage	Mv		eic	hon	14 D	ofe	arrale	4]
			vvaiting	IVIY	AS	SIL	Jileu	N		FITAIS	,			
			Deferre	Req	uests					Total	Referrals	e	Consults	
			Schodu	Acti	on Req	uired	A			2	1	1		
			Comple	Оре	en eCor	nsults	6			4	0	4		
			Comple	Wait	ting for	Арро	pintment/\	Naitl	isteo	d 1	1	0		
		Scheduled					eduled				2	-		
				Con	npleted	/Can	celled/De	cline	d	5	3	2		
				Tria	ge					4	1	3		
				Wait	ting for	Resp	ponse			1	1	0		
				Defe	erred					0	0	-		



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, Referrals and eConsults) but the items found in each list will vary.

My Referrals									
Requests	Total	Referrals	eConsults						
Recently Updated	6	5	1						
Cancelled/Declined	13	7	6						
Action Required 🔺	3	1	2						
Drafts	0	0	0						
Undelivered	0	0	0						
In Progress	43	31	12						
Completed	2	1	1						
Waiting for Response	3	3	0						

Triage Referrals								
Requests	Total	Referrals	eConsults					
Drafts	0	0	0					
Undelivered	0	0	0					
Action Required 🔒	2	1	1					
Triage	13	9	4					
Waiting for Response	4	1	3					
Waiting for Appointment/Waitlisted	5	5	-					
Deferred	0	0	-					
Scheduled	3	3	-					
Completed/Cancelled/Declined	14	12	2					

My Assigned	Referrals
-------------	-----------

Requests	Total	Referrals	eConsults
Action Required 🔒	1	0	1
Open eConsults	1	0	1
Waiting for Appointment/Waitlisted	1	1	0
Scheduled	2	2	-
Completed/Cancelled/Declined	1	1	0
Triage	2	1	1
Waiting for Response	1	1	0
Deferred	0	0	-

Each worklist has a *Referral ID* feature:

COMMON	My Referrals			
FAVOURITES		7-1-1	D. C	
SEARCHES	Requests	Total	Reterrals	eConsults
	Recently Updated	6	5	1
· EREFERRAL	Cancelled/Declined	13	7	6
My Referrals	Action Required	3	1	2
Iriage Referrals My Assigned Referrals	Drafts	0	0	0
Health Services	Undelivered	0	0	0
Catalogue	In Progress	43	31	12
EREFERRAL REPORTS	Completed	2	1	1
PATIENT LISTS	Waiting for Response	3	3	0
OTIFICATIONS		-		
LINICAL ETOOLS		Selec	t a favourit	e search 👻
RESOURCES	Referral D			
ESIGNATURE	Search Res	et		
MESSAGING	Enter a new favou	urite sear	ch 🕀	
	Enter the Referral ld fr 'Search'.	om your	email notif	fication and

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 eConsult or Referral 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.

Appointment Book Triage Site Edmonton eReferral ID RFS-AAD-	ed Referral Arthritis of hip Orthopaedic Surgery ¥ FAST Orthopaedics CAT Submitted 13-Mar-2024 10:41 AM 938541	People Referrer LOut of Province Provider		
Orthopaedic	Surgery Request for Service	Service Provider 🛔 Dr		
	Patient Details Referral Details Referral Requirements Providers	Linked Referrals		
Exclusions	1. Infection 2. Dislocation	RFS-AAD-938029 Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre		
Patient Information	PHN/ULI: 97425-3514 Name: EREFERRAL, Two b Sex: F DOB: 12-Jan- 1970	REDIRECTED		
Request Created For	Arthritis of hip - Edmonton FAST Orthopaedics CAT	Show this patient's other referrais V		
Clinical Pathway URL		Referral Attachments There are no attachments for this referral.		
Who has been informed?	Patient	Choose a file		
QuRE Reference	The information cantured in this form is based on the Quality Referral	Referral Notes There are no notes for this referral.		
	Pocket checklist. (www.ahs.ca/QuRE)	Activity Show Notes Only		
Patient Details		Appointment Booked		
Patient Preferences N	ext Available Provider	Appointment Date 25-Apr-2024 09:00		

2.5 Health Services Catalogue

The *Health Services Catalogue* (HSC) provides detailed information about available eReferral specialties and their accepted *Referral Reason*. A customized clinical pathway may also be available for each specialty/referral reason. You can search the HSC when creating an eConsult or a Referral. Approximate wait times can be viewed here if available.

- a. Open the Clinical Portal Menu. Click eReferral then Health Services Catalogue.
- b. Search or use the filter options as per the example below or when creating an eConsult and/or a Referral. To search, enter three (3) or more characters and choose an option from the drop-down list.
- c. You can browse the HSC to select a *Referral Reason* when creating a referral. You can further refine your search by *Request Type*, *Specialty*, *Referral Reason*, *Triage Site* and Zone(s) Served. Click

next to the Zone(s) Served to ensure options displayed are for the correct zone.

Zone(s)	Edmonton	Q (+)
Served		

d. Approximate Wait Time (if available) is displayed. For eConsults, this is within five (5) calendar days. For Referrals, this date is self-reported by the specialist and/or service and will vary by specialty and referral reason.



✓ COMMON	Health Serv	ices Catalo	gue					Select a favour	ite search 🗸
FAVOURITES	Referral Reason	Hematuria gro	DSS	٩	Specialty	Urology		Q	
SEARCHES	Request	Referral 🗸			Zone(s)	Edmont	on 🛞		
✓ EREFERRAL My Referrals	Type				Serveu			Q 🕀	
Triage Referrals	Triage Site			Q	City			Q	
My Assigned Referrals Health Services									
Catalogue									
EREFERRAL REPORTS	Search	Reset En	iter a new fa	vourite search					
PATIENT LISTS	Referral Reason	Request Type	Specialty	Triage Site		City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
CLINICAL ETOOLS	Hematuria	Referral	Urology	Kaye Edmonton Clinic - Dianr	ne and	Edmonton	F	14 Calendar Days	Edmonton
	gross			Irving Kipnes Urology Centre			Y		

- e. Click the *Clinical Pathway* icon. Clinical Pathways are trusted, evidence-informed clinical, patient and referral pathways. These pathways are co-designed by patients, primary care, and specialty care providers.
- f. Scroll down to the Select a Topic section.

Select a Topic		
All Resources	Addiction & Mental Health	Cardiology
COVID-19	Infectious Disease	Gastroenterology
General Surgery	Gynecology	Endocrinology
Hepatology	Multimorbidity	Nephrology
Neurology	Oncology	Oral Maxillofacial
Orthopedics	Otolaryngology	Respirology
Rheumatology	Urology	Vascular
New Pathways		

- g. Scroll through the results to locate the pathway you require.
- h. Click the button located on the right to view the pathway.

Urology, Adult Referral Pathway		
Zone: Provincial	Specialty(ies): Urology	
Pathway Type: Referral Pathway		>
Last Reviewed: 2023-05 Provide Feedback		

i. Note that many pathways contain multiple *Referral Reasons*. You may need to scroll through the pathway to find the *Referral Reason* you require.



j. Clinical Pathway links that have not been updated for specific *Referral Reasons* will display a popup window with a link to access the Clinical Pathway.

Clinical Pathways Have Moved!

Clinical pathways help provide a set of actions for primary care providers to manage care options in the community. To find a clinical pathway, go to Alberta's Pathway Hub at albertapathways.ca.

If you have any questions, or need support, please email access.ereferral@ahs.ca.

NOTE: Go to <u>albertapathways.ca</u> for a list of clinical pathways.



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 who triages Referrals, you can set up the following favourite search:

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

Triage Referrals				
Requests	Total	Referrals	eConsults	
Drafts	0	0	0	
Undelivered	0	0	0	
Action Required 🛕	2	1	1	
Triage	13	9	4	
Waiting for Response	4	1	3	
Waiting for Appointment/Waitlisted	5	5	-	
Deferred	0	0	-	
Scheduled	3	3	-	
Completed/Cancelled/Declined	14	12	2	

b. Click the status types you do not want to be included in your search.

Status	Clinical Triage in Progress 🛞
	Waiting for Clinical Triage 🛞
	⊕ Add

- C. Select Waiting for Clinical Triage as the status and Referral as the Request Type. 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).
- d. Click Search.
- e. 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).
- f. Click the fixed 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 using those criteria.



Triage: Triage			Select a favourite search 🗸
Received Date	03-Feb-2024	PHN/ULI	
Referral Reason	Q	Patient First Name	
Specialty	٩	Patient Last Name	
Triage Site	Q	Request Type	Referral 🗸
Service Provider	٩	Referral ID	
External Triage Site	٩	Priority	~
Status	Waiting for Clinical Triage 🛞	Exclude Waiting for Response	
		Show Referrals for Review	
Clear Received Da	te before entering new search criteria.		
Search	Reset Referrals - Waiting Clin Triage 🕒		

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

Triage: Triage			Clerical Triage In Progress 🗸 🕷
Received Date	03-Feb-2024	PHN/ULI	Select a favourite search Clerical Triage In Progress
Referral Reason	Q,	Patient First Name	Referrals - Waiting Clin Triage
Specialty	Q,	Patient Last Name	
Triage Site	Q	Request Type Referral 🗸	

h. Click *Reset* to all filters.

Status	Accepted 🛞 Appointment Missed 🛞
	Clerical Triage in Progress 🛞
	Clinical Triage in Progress 🛞 Redirected 🛞
	Response in Progress 🛞
	Waiting for Clinical Triage 🛞
	(+) Add
Clear Receive	ed Date before entering new search criteria.
Search	Reset Enter a new favourite search 🕀

2.8 Accessing Netcare from Connect Care

Connect Care users accessing Netcare through Connect Care have full use of their assigned Netcare user role permissions. Access via Connect Care is no longer restricted to view-only. This new function allows for full access to the patient's record in Netcare, including referrals.

- a. Login to Connect Care.
- b. Access your Patient List.
- c. Double click on the patient's name to open the chart.



d. Hover over Other Clinical Systems located on the Storyboard (left hand panel) and click Launch Netcare.

TIPS	• You can also access Netcare by clicking <i>More</i> located on the main toolbar and selecting <i>Launch Netcare</i> then click on the patient's name displayed.
	Your screen view may vary depending on your Netcare configuration.

e. Click View Referral to see the patient's referrals (Draft, In Progress, Completed/Cancelled/ Declined.



f. Click on an eConsult or a Referral to open it to access the workflow. This example is using an eConsult (previously called an Advice Request).

	EREFERRAL,	TWO B	n) sev F				ULI 10	0008114	X 🐔	() O	Same Twenty S	Six Training	LOGOUT
	NO CPAR PRIMARY PRO	VIDER	PATIE	NT PRIMARY AD	DRESS 💡	P	ATIENT MAILING	ADDRESS 💡		PATIENT HON	ие 403 475	-1685	e
=	🗐 Limited Docu	uments	🧳 All Docume	nts Flows	heets	Patient Ever	nt History	Immuniz	ation History	Medicatio	ons 🗸 i	More	
D	rafts												
N	o Results Found												
In	Progress												
	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target (days)	Approx Wait Time
	eConsult RFS-AAB-067500	08-Apr- 2024	Request Additional Information Missing information	Shoulder issue		Orthopaedic Surgery - Provincial		Receiving Provider I				36 / 31	5 Calendar Days
	Referral RFS-AAB-067659	25-Apr- 2024	Clerical Triage in Progress	Bladder stone		Calgary FAST Urology CAT						19 / -71	90 Calendar Days
	Referral RFS-AAB-067640	25-Apr- 2024	Cierical Triage in Progress	Hematuria gross		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre						19/ 5	14 Calendar Days

The workflow is available as soon as the eConsult is opened making it easy to action an eConsult without logging into Netcare.



+	EREFERRAL, TWO B	}			ULI 97425	3514 🗙	< ≣≣ >	A (<u>.</u>	▼ LOGOUT
	NO CPAR PRIMARY PROVIDER	PATIENT PR	IMARY ADDRESS	Ŷ	PATIENT MAIL	ING ADDRESS		PATIENT HOME		0
≡	Limited Documents	🧳 All Documents	Flowsheets	📵 Patient E	vent History	🖲 Immuniz	ation History	Medications	✓ More	
					Cancel	Print Print	All Advice ~	Communication	∽ ∣ Intake ∽	Mark as Reviewed

To protect patient records, Netcare will display the following warning if you navigate away from the patient accessed via Connect Care: "You have navigated away from the patient currently open in your EMR. Click Return to the patient opened in your EMR". To clear the warning, click Return to the patient opened in your EMR. To clear the patient and return to their EMR.

	🔒 You ha	ave navig	ated away fro	m the patient cu	rently opened in your EMR. Return to the patient opened i
* COMMON	Triage Referrals				
FAVOURITES	Paquasta	Total	Deferrale	oConculto	
- SEARCHES	Requests	TULAI	Releffais	econsuits	
Search for a Patient Delivery Site Registry (DSR)	Drafts	0	0	0	
	Undelivered	0	0	0	
	Action Required 🔒	2	2	0	
▼ EREFERRAL	Triage	12	12	0	
My Referrals	Waiting for Response	3	3	0	
Triage Referrals	Waiting for Appointment/Waitlisted	3	3	-	
My Assigned Referrals	Deferred	0	0	-	
Catalogue	Scheduled	0	0	-	
• EREFERRAL REPORTS	Completed/Cancelled/Declined	1	1	0	

• If you choose not to return to your EMR there is a risk of losing information entered in Netcare.

RISKS

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Opening another patient in Netcare with the original patient open in Connect Care creates an opportunity for error. Close your Netcare session when you are finished working on the patient before accessing another patient in Connect Care and launching Netcare.



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 eReferral dashboards.

3.1 **Providers Submitting Referrals Themselves**

If you have access to the *eReferral* menu and the *My Referrals* dashboard from the *Clinical Portal Menu*, you can create/submit Referrals (previously called Consults) and eConsults (previously called Advice Requests). Before you submit a Referral or an eConsult, your provider information must be completed in your *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 eConsult or Referral. 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.

Referring Pro	vider Referrals		
Referring Provider Phone Number Fax Number Address Line 1	This section must be comp for eReferral. Dr. 4343 kalgary	leted to submit, manage and receive notifications	Entering clinic demographics (e.g., phone number, address, etc.) is optional but could help the responding clinic to send patient
Address Line 2			materials to you.
City	calgary		
Postal Code	T3B1L7		
Province	Alberta		
Use On Behalf Of	Yes No		

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 (e.g., another physician), you must 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.

≪ ▼ COMMON	Use On Behalf Of	Yes No
My Details	Referring	Referring Provider On Behalf Of
Worklists	Provider On	
Manage Notifications	Behalf Of	
+ FAVOURITES	Referring Provider	Dr. 🛞
SEARCHES		
▶ EREFERRAL	Phone Number	780 123 4567
EREFERRAL REPORTS	Fax Number	780 123 4567
PATIENT LISTS	Address Line 1	Test Address
	Address Line 2	1234 Street
CLINICAL ETOOLS	City	Calgary
NOTIFICATIONS		
► RESOURCES	Postal Code	1612C6
MESSAGING	Province	Alberta

- 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*.

Provincial Provid	er Registry	Select a favourite search 🔽
First Name	Last Name	
Search Res	et Enter a new favourite search 🕀	
Please search for a pr	ovider	

- e. Select 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 eConsult or Referral. 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 eConsults or Referrals. If you have multiple providers entered in *My Details*, you can specify the appropriate provider during the request creation process.

NOTE: The first provider you enter will be the default when you create a Referral or eConsult.

h. Click Update Preferences to save your changes.

3.4 Viewing Worklists from the My Referrals Dashboard

The *My Referrals* dashboard has worklists with eConsults and Referrals that have been created by a referring provider or referring provider on behalf of.

NOTE: This dashboard is visible to 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.

≪ ▼ COMMON My Details	My Referrals			
Worklists	Requests	Total	Referrals	eConsults
Manage Notifications	Recently Updated	8	5	3
► FAVOURITES	Cancelled/Declined	13	7	6
SEARCHES	Action Required 🔒	2	1	1
+ EREFERRAL	Drafts	0	0	0
My Referrals	Undelivered	0	0	0
Triage Referrals	In Progress	44	32	12
My Assigned Referrals	Completed	3	1	2
Catalogue	Waiting for Response	3	3	0

- 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 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.
 - o *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 be sent 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 eConsult or a Referral requesting additional information from the specialty, the request will
 stay on the Waiting for Response worklist until it has been replied to. The request will also
 appear on the receiving providers Waiting for Response worklist.
- c. Sort or search a worklist to find specific referrals. This includes by *Referral Reason*, *Specialty, Triage Site, Service Provider, Referring Provider, Priority*, and the patient's name and/or their *PHN/ULI*.

Referrer: In Pro	ogress	
Received Date	to III	PHN/ULI
Referral Reason	Q	Patient First
Specialty	Q	Patient Last Name
Triage Site	Q	Request Type
Service Provider	Q	Referral ID
Referring Provider	Q	External Triage Q Site
Priority	~	Show Referrals D for Review
Status	Accepted 🛞 Appointment Booked 🛞 Appointment Missed 🛞	
	Cancelled 🛞 Clerical Triage in Progress 🛞	
Specialty Triage Site Service Provider Referring Provider Priority Status Ca Ci De Re Wi	Clinical Triage in Progress 🛞 Completed 🛞 Declined 🛞	
	Deferred 🛞 Redirected 🛞 Request Additional Information 🛞	
	Response in Progress 🛞 Waiting for Appointment 🛞	
	Waiting for Clinical Triage 🛞 🛛 Waitlisted 🛞	
	(Add	



4.0 eConsult Actions (For Referring & Referring On Behalf Of Providers)

4.1 Create an eConsult

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a nonurgent question or if they are unsure if a referral would be appropriate. In many cases, an eConsult may be all you need to manage your patient in their medical home. Before you submit a request, your <u>Referring/Referring on</u> <u>Behalf of</u> information must be completed in your My Details.

- 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.

≪ ▶ COMMON	Patient Searc	:h					Select a favou
FAVOURITES	Identifier	974253514					
✓ SEARCHES	Identifier (PHN / ULI		~			
Search for a Patient	type						
Delivery Site Registry (DSR)	Last Name	ereferral		Date 0 Birth	Of D)ay Month 🗸	Year
► EREFERRAL	First Name	two		Sex		All Female Ma	le X
• EREFERRAL REPORTS	Middle Name/Initial			Phone	e [
PATIENT LISTS	Nume/million				Se	earch Tip : An identifier se	earch is
► NOTIFICATIONS					re er	commended. For name s nter the complete last nai	earch, please me, complete
CLINICAL ETOOLS					fir	rst name and date of birtl	n.
RESOURCES	Search	Clear Enter a nev	v favourite search 🕀				
► ESIGNATURE	PHN / ULI	Name	Date Of Birth	Age	Sex	Address	Town/City
► MESSAGING	97425-3514	EREFERRAL, Two I	B 12-Jan-1970	54 years	F		Calgary

- c. Click the patient from the populated list to open the patient's Electronic Health Record (EHR).
- d. Click Create Referrals from the Context Menu.

EREFERRAL, Two B DATE OF BIRTH 12-Jan-1970 (54y) St	ex F				ULI 9742535	14 🗙	*	🕽 0 🛔 Shauna F
NO CPAR PRIMARY PROVIDER	PATIEN	F PRIMARY AD	DRESS 🖗	PATIENT MAILING ADDRESS		PATIE	NT HOME	
≡ 📑 Limited Documents 🧃 /	All Documents Fl	owsheets	Patient Event History	Immunization History	Medications	🧞 Creat	e Referrals	🔍 View Referral
Clinical Documents	Patient Demogr	aphics						
Group By Category Sort By Date	EREFERR	AL, Tw	οВ					
Q C	Date Of Bir	h 12-Jan-1	970				Home Phone	e
Read Unread	Ag	e 54 years					Work Phone	3
Dynamic Patient Summary	Se	×F		Cell/Alte	Cell/Alternate Phone			
 Medication Profile Br Pharmacy Care Plan 	Eligibility Start Dat	e						
Be BPMH Form - Medication Reconcilia		Note: Fu	ture-dated and blank eligibility	start dates should be confirmed i	in Person Directory	ζ.		
Referrals - In Progress (10 / 19)	Address (Primar	1)						
Referrals - Completed/Cancelled	AH Address (Mailing)	Ave Nw Calgary					

e. Enter a reason in the *Referral Reason* field. You can start typing the reason to see what selections are available.



- f. Select eConsult as the Request Type.
- g. Enter the Specialty. You can start typing the name of the specialty to see a list.
- h. Enter the *Zone(s) Served*. This is the Zone(s) that the specialty provides services to. Some specialties offer services to multiple Zones.
- i. Enter the *City* if necessary.
- j. Click Search for Options to see a list matching your Referral Reason criteria. A list of Drafts, In Progress and Completed/Cancelled/Declined eConsults and Referrals are also shown.

reate keque	194						-						Connecta	and under Se	(*)	Î
Referral Reason	Shoulder issue	۹			l	Specia	RV (Orthopae	edic 1	Surgery	Q					
Request	eConsult 👻				[Zonet	. (Calgary			۹. 🛞					
Triage Site	-	Q				City	- 7				Q.					
and a set						225.5										
	-															
Search for (Docions Pr	Set Enter a new	favourite p	narch 🕑												
leferral	Request Type	Specialty	Triage	Ste		City	Clinical		Å.	pproximate	Walt	Zo	ne(s) Serv	ed		
Doubler House	af and its	Orthopadate	0ma	and the firms	440 C		Con l	dia .		Colorador D		- 0	Inter Car	tral Edmon	the North	1
NUMBER OF STREET	e eConsuit Orthopaedic Orthopaedic Surgery - Surgery Provincial		.,.	S Calendar Days					50	South						
SURS 1-3						-			-							-
afts																
Results Found	£															
Prodroce																
riogress																
Request	Received Date	Status/Status	Referral	Priority	Triage Site		External Triage	Service		Appointme	int Ac	cepted	Referrie	g Elapsed	me Walt	1
Type/Referral	1D (T2)	Reason	Reason				Site	Provid	NUT.	Date/Time	0	ate (13)	Provide	To Targ	et. Time	18
Referral	10-jan-	Redirected	Dyspepsia	ROUTINE	Single Hu	6					05	-jan-	-	2 days	90	Y
KPS-AAB	67.04	next available			Referral						-	104				
		service			(SHARP) -											
					Adult GI											
REFERANCE	08-jan- 2024	Redirected Assigned to	Bladder stone		Kaye Edmontol					27-Mar-20 09:00	24 10 20)-jan- 124		4 days	90	Y
		local service			Clinic - Di	anne										
		patient			Kipnes											
		address			Centre											
Referral	10-jan-	Walting for	Instability		Calgary F	AST		Receiv	ing		10	-jan-		2 days		Y
RFS-AAB-	2024	Appointment	ofknee		Orthopae CAT	dics		Provid	ler		25	24				
Referral	05-ten-	Clerical	Hip		South FA	ST								1 week		Y
RFS-AAB	2024	Triage in	dysplasia		Orthopa	edics										
		Progress			CAT											
SURS 1-4									_				_			
and the set of the	an collect (Pla	right														
ompreced/c	ancelled/De	clined														
Request	Received	Status/Status	Referral	Desiverity	Triana Gra	Ett	ernal 5	ervice	App	portment	Accep	ted Re	eterring	Elapsed Tome/Time	LOIL	
Type/Referral	ID Date (T2	Reason	Reason	. in the	and and	50	P	rovider	Dat	te/Time	Date (T3) P	ovider	To Target	Modified 0	Ŋ
Referral	08-jan-	Cancelled	Instability		Calgary FAST		R	eceiving						4 days	10-jan-202	4/
RFS-AAB-	2024	Referral no	ofknee		Orthopaedic: CAT	5	P	rovider							Training	
		. Qu.														

If the eConsult is a duplicate, the *Check for duplicate referral(s)* icon is shown. Hover over the symbol to see the duplicate eConsult.





- k. Click the *Clinical Pathway* icon to view detailed information to help support care decisions. If no *Clinical Pathway* icon is showing, it indicates a pathway is currently not available.
- [Click the appropriate Referral Reason. Ensure that the Request Type field indicates eConsult.
- m. Select *Flag Referral (For Referring Provider use)* if you want the referring provider to be notified of the eConsult.
- n. Select the *Received Date (T2) (For Receiving Office use only)*. If you are a not receiving office, leave this blank. It will default to the current date and time. All fields marked with a red asterisk (*) are mandatory and must be completed to submit an eConsult.

Orthopaedic Surgery Request for Service
Flag Referral (For Referring Provider use) Received Date
(T2) (For Receiving Office use only)
For urgent/time-sensitive help, DO NOT submit a Referral or eConsult. Instead, please call: RAAPID North @ 1-800-282-9911 / 780-735-0811 @ 1-800-661-1700 / 403-944-4486 (Red Deer, and south).
eConsult requests are for clinical advice only. For information on an eConsult's status or a patient's appointment please contact the eConsult requests will be responded to within five days.

- o. Enter your *Clinical Question*.
- p. Select the *Reason*.
- q. Enter any *Pertinent Information* that may help the specialist answer your clinical question.
- r. Attach any *Relevant Documentation* if applicable (e.g., diagnostic imaging/labs) or link documents that are already available in Alberta Netcare in the *Clinical Document Viewer (CDV) Tree*.



Request Details	5		
Clinical Question *	Enter the clinical question you wish to have addressed		
Reason *	 I am unsure if this patient requires a referral I am seeking advice Clear 		
Pertinent Information			
Relevant Documentation	Choose a file File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.	Get Netcare Documents	Link a document Link to document(s) in the patient's clinical document tree

- To include a document from your computer, select *Choose a file* for external attachments. This will allow you to search on your computer. *Note that the maximum file size is 100MB per file*.
- To include a document available in Alberta Netcare, 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.

Get Net	care Documents		Select a favourite search
Report Name	Q	Category	Q
Date Range	1 month V		
	Note: If the report you are looking for does not appear in the search results then increase the date range.		Warning: Reports that have a Demographics Mismatch are not accessible through this search and cannot be linked to a referral.
Sear	ch Reset Enter a new favourite search 🕀)	
Enter searc	ch criteria above and click 'Search'		

- S. Confirm that 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.
- t. Scroll to the bottom of the page and click *Submit* to send the eConsult. Select *Save as Draft* if the eConsult is incomplete or you want to return to it later. Press *Cancel* if you want to stop completing the eConsult.



Referring Provid Complete the Referrin referrals on the My R	der Information ng Provider Referrals or Referri Referrals dashboard and to auto	ng Provider complete thi	Referrals On Beha is section each time	lf Of section on your My Details to display e a referral is created.
Referring Provider *	Dr.			
Phone Number *	555 555 Test		Address	
Fax Number	555 000 Test		Line 1	Testing
			Line 2	
			City	Calgary
			Province	Alberta
			Postal Code	XXX XXX
	Submit Save as Draf	ft D	elete Draft	Cancel

4.2 Reviewing a Response from the Specialty

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

a. From the *Clinical Portal Menu*, click *My Referrals*. Click on the *Completed* worklist and filter on *eConsult* as the *Request Type*

≪ ▼ COMMON My Details	My Referrals								
Worklists	Requests	Requests Total Referrals eConsult							
Manage Notifications	Recently Updated	8	5	3					
► FAVOURITES	Cancelled/Declined	13	7	6					
► SEARCHES	Action Required 🛕	2	1	1					
+ EREFERRAL	Drafts	0	0	0					
My Referrals	Undelivered	0	0	0					
Triage Referrals	In Progress	44	32	12					
My Assigned Referrals	Completed	3	1	2					
Catalogue	Waiting for Response	3	3	0					

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



c. To view the response, navigate to the *Activity* section on the *Right Panel* of the eConsult. The response can also be viewed at the bottom of the eConsult. The arrow located on the *Summary Bar* can be used to expand/collapse the referral header to see more details.

Completed	eConsult Urology issue	Urology			People	
Triage Site Kaye E	dmonton Clinic - Dianne and Irvi	ng Kipnes Urology Ce	entre		Referrer	
Submitted 06-Fet	5-2024 12:52 PM exeleration	RF5-AAD-955054			🛎 Dr.	
Contra D	Construct Managine Mitching	Defensed Fee	Garante		Service Provider	
Status Reason	Your Scope of Practice	Referred For	econsult		🛎 Dr :	
		Submitted By				
		Flagged for Referrer	Yes		Linked Referrals There are no linked re	ferrals for this referral.
Urology Re	equest for Service				Hide this pa	tient's other referrals 🔺
					RFS-AAD-938002	Hinton Orthopedic
Patient Information	n PHN/ULI: 97425-3514 Name: E	REFERRAL, Two b Se	x: F DOB: 12-Jan-1970		Surgical Program	
Request Created	Urology issue - Kave Edmonto	n Clinic - Dianne and	I Irving Kipnes Urology Cer	ntre	CLERICAL TR	IAGE IN PROGRESS 6 10
For			0.1		RFS-AAD-935348 Clinic	Alberta Hip and Knee
Request Detai	ls				CLERICAL TR	IAGE IN PROGRESS 🛛 🖉 %
Clinical Question	Testing				RFS-AAD-935062	Calgary FAST
Reason	l am seeking advice				Orthopaedics CAI	
Pertinent	_				CLERICAL IR	IAGE IN PROGRESS 🖸 🕤
Information					RFS-AAD-936131 Orthonaedics CAT	Calgary FAST
Relevant	No Files	Get Netcare	No documents		or mopaedics chi	CANCELLED
Documentation		Documents				
					CAT	Calgary PAST Orology
The advice	provided is based on the information that contributes	ation that the reques	ting provider has submitte	ed. lt	CLERICAL TR	IAGE IN PROGRESS 🛛 🖉 🗞
responsibil	ity of the requesting provider to i	ncorporate this infor	mation into the broader		Activity	Show Notes Only
knowledge	of the patient context.				Respond with A	dvice
					REASON Continue Ma	anaging Within Your
Referring Prov	ider Information				Scope of Practice	
Referring Provider	Dr.				Set Service Provider	Dr
					Advice/Response	Testing
Phone Number	1	Address			Advicemesponse	resting
Fax Number	1	Line 1	1		Attach External	No Files
		Line 1	1		Document(s)	
		Line Z	1		Netcare	No documents
		City			Document(s)	
		Province	1		Complete Reason	Continue
		Postal Code	1		complete reason	Managing Within
						Your Scope of
						Fractice
Respon	d with Advice				Last updated by	on 05-Mar-2024
REASON C	ontinue Managing Within Your So	ope of Practice				
Set Servic	e Provider Dr				Set Service Prov	ider
Advice/Pr	asponso Testing				Set Service Provider	Dr
Advice/R	coporise results					
Attach Ex Documer	tternal No Files ht(s)				Last updated by AM	on 20-Feb-2024 9:29
Netcare	No documents				Request Informa	ation (from
Documer	nt(s)				Referrer)	a dinical avention
					Hide Form	r cinical question
Complete	e Reason Continue Managing	Within Your Scope of	f Practice		Set Service Provider	

d. 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 eConsult. Follow these instructions to add information:

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

COMMON ≪	My Referrals								
FAVOURITES	Requests	Total	Referrals	eConsults					
SEARCHES	Recently Updated	30	23	7					
✓ EREFERRAL	Cancelled/Declined	2	2	0					
Triage Referrals	Action Required 🔒	4	3	1					
My Assigned Referrals	Drafts	1	0	1					
Health Services	Undelivered	0	0	0					
Catalogue	In Progress	28	21	7					
EREFERRAL REPORTS	Completed	0	0	0					
PATIENT LISTS	Waiting for Response	3	2	1					

- b. Select eConsult for Request Type and press Search. Click the appropriate eConsult from the list.
- c. Review the *Activity* section located on the *Right Panel* of the eConsult and read the question/request from the specialist.
- d. When you are ready to respond click Respond to Receiver.



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

Respond to Rec	zeiver	
Comment to Receiver *		
Attach External Document(s)	Choose a file File size restricted to 100MB. Multiple files can be uploaded up to a limit of 3	ooMB.
Netcare Document(s)	⊕ Link a document	
Provide Informati	ion Cancel	

 The eConsult 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 *Right Panel* with a note identifying that new information has been added.

New information has been added to this referral and requires review.

4.4 Print a Copy of an eConsult

- a. Locate the eConsult on the My Referrals dashboard or Triage dashboard and open it.
- b. Click Print or Print All. You can also save the PDF file.



Print All: Generates a print-out of the following sections in the following order:

- eConsult Contents The entire eConsult form will print except for free text fields that are blank.
- Support Documents This section lists the titles of all the attached documents. This includes external
 documents attached in the *Right Panel* or within the eConsult. It does not include linked Alberta
 Netcare documents.
- Notes and Activity All the notes (General, Clinical or Clerical) and activity that appear in the Right Panel.
- Referral Attachments This section displays copies of all the attached documents. This includes
 external documents attached in the *Right Panel* or the eConsult. It does not include linked Alberta
 Netcare documents.

Print: Generates a print-out of the following sections in the following order:

- eConsult Contents See above.
- Support Documents See above.
- Notes All the notes (General, Clinical or Clerical) that appear in the Right Panel.



5.0 Referral Actions (For Referring & Referring On Behalf Of Providers)

5.1 Viewing Referrals

A Referral is a request for an in-person specialist appointment. A Referral form is used for most specialties to create a consistent referral experience.

Before submitting a referral, check to see if a similar request has already been submitted. All referrals in eReferral are visible to 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.

≪ ► COMMON	Patient Searc	ch					Select a favour
FAVOURITES	Identifier	974253514					
- SEARCHES	Identifier	PHN / ULI		~			
Search for a Patient	Last Name	oroforral		Date (l Nf D	av	Vear
(DSR)	Last Name	erererrar		Birth			
▶ EREFERRAL	First Name	two		Sex		All Female	Male X
EREFERRAL REPORTS	Middle Name/Initial			Phone Numb	er 🗌		
PATIENT LISTS					Se	arch Tip : An identi	fier search is
NOTIFICATIONS					en	iter the complete la	st name, complete
CLINICAL ETOOLS				-	TIN	st name and date o	f birth.
RESOURCES	Search	Clear Enter a ne	ew favourite search	!)			
► ESIGNATURE	PHN / ULI	Name	Date Of Birth	Age	Sex	Address	Town/City
MESSAGING	97425-3514	EREFERRAL, Two	B 12-Jan-1970	54 years	F		Calgary

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.

EREFERRAL, TWO B	sex F				uu 974253514	× 🏦	(¢ 0)	LOGOUT
NO CPAR PRIMARY PROVIDER	P	ATIENT PRIMARY ADDRESS	PATIENT MAILING AD	DDRESS 💡	PA	TIENT HOME		•
😑 📲 Limited Documents 🧃	All Documents Flo	wsheets 🛛 💆 Patient Event History	Immunization History	Medications	🦢 Create Referrals 🔤	🔍 View Referral	📫 Connect Care	
Clinical Documents 🔹 🖒	Patient Demogra	phics						<u>.</u>
Showing All Mark All As Read Group By Category Sort By Date	EREFERRA	L, Two B						
Q C	Date Of Birth	12-Jan-1970			Home Phone			
Read Unread	Age	54 years			Work Phone			
Dynamic Patient Summary Medication Profile	Sex	F			Cell/Alternate Phone			
B. Pharmacy Care Plan	Eligibility Start Date							
BE BPMH Form - Medication Reconcilia		Note: Future-dated and blank eligibility	start dates should be confirmed in i	Person Directory.				
Referrals - In Progress (10 / 15)	Address (Primary)							
Referrals - Completed/Cancelled	AH Address (Mailing)							

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

- View Referral tab (Referrals 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 patients *In Progress* and *Completed/Cancelled/Declined* Referrals. 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.

D)rafts														
N	Io Results Found														
Ir	n Progress														
	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target(day	e Approx Walt Time	Flagged for Referrer	Spec Revie
	eConsult RFS-AAD-938070	05-Mar- 2024	Walting for Clinical Triage	Urology Issue		Urology - Central Zone						20 hours	5 Calendar Days	Y	
	Referral RFS-AAD-938037	05-Mar- 2024	Accepted	Knee pain		Edmonton FAST Orthopaedics CAT				05-Mar- 2024		23 hours	Not Supplied	Y	
	eConsult RFS-AAD-938010	28-Feb- 2024	Response in Progress Called Requesting Provider - Routine	Metabolic genetic Issue		Clinical and Metabolic Genetic Services - Southern Alberta						1 week	5 Calendar Days	Y	
C	ompleted/Cancel	lled/Decl	ined												
	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	Extern Triage Site	al Servio Provio	e Appoint ler Date/Tir	ment Aco ne Da	cepted Re te (T3) Pr	eferring ovider	Elapsed Time/Time To Target(days)	Last Modified/I Modified B	Last By
	eConsult RFS-AAD-935054	08-Feb- 2024	Completed Continue Managing Wit Your Scope of Practice	Urology Issue hin		Kaye Edmonton Clinic - Dianne and Irving Kipne Urology Centre	25					3	3 weeks 5 days	05-Mar-20	24 /
	eConsult RFS-AAD-935658	20-Feb- 2024	Completed Continue Managing Within Your Scope of Practice	Urology Issue		Kaye Edmonto Clinic - Dianne and Irving Kipnes Urology Centre	n 7					1	2 weeks	20-Feb-20	24 /
	eConsult RFS-AAD-935011	08-Feb- 2024	Cancelled Referral no	Urology Issue		Urology - Calgar Zone	У					3	3 weeks 6 days	20-Feb-20	24 /

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.





Each folder contains links to the patient's eConsults and Referrals. Any eConsult or Referral that has been *Cancelled/Declined* will have a strike through the middle of the text. Any eConsult or Referral *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 eConsult and/or Referral.



Clinical Documents	0 C	Patient Demog	graphics
Snowing All Mark All As Read			
Group By Category Sort By Date		EREFERR	AL, IWO B
Q C		Data Of Dith	12 100 1070
Read Unread		Date Of Birth	12-Jan-1970
		Age	54 years
Dynamic Patient Summary		Sex	F
Medication Profile		Elizibility Start	
P _x Pharmacy Care Plan		Date	
BPMH Form - Medication Reconciliation			Note: Euture-dated
Referrals - Completed/Cancelled (15 / 16)			confirmed in Perso
09-Jul-2024 eConsult - Internal Med - Adult Ga	stroenterolog	Address	
03-Jul-2024 eConsult - Internal Med - Adult Ga	stroenterolo	(Primary)	
03-Jul-2024 eConsult - Urology			
02-Jul-2024 eConsult - Urology		(Mailing)	ľ.
10-Apr-2024 Referral - Urology			
09-Apr-2024 Referral - Orthopaedic Surgery	Referral - Or	thopaedic Surgery	
02-Apr-2024 Referral - Orthopaedic Surgery	Source date	09-Apr-2024	
26-Mar-2024 Referral - Orthopaedic Surgery	Category	Referrals - Com	nleted/Cancelled
05-Mar-2024 Referral - Orthopaedic Surgery	Ctatus	Completed	preced/concenced
04-Mar-2024 Referral - Urology	Status	Completed	_
28-Feb-2024 eConsult - Clinical and Metabolic	Author	Dr.	
22-Feb-2024 Referral - Orthopaedic Surgery	Result Source	e Provincial	
21-Feb-2024 Referral - Orthopaedic Surgery	Mark As	Read Unread	

b. Click *Read* to mark as the referral as read or click the referral to open it and access the workflows (depending on your eReferral access permissions).



Other Clinical Document Viewer (CDV) Tree functionality relating to Referrals includes:

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



- b. Select *Referrals In Progress* to view eConsults and Referrals in progress. In the *Right Panel* you can review the *Status*, *Notes* and *Activities* occurring on the eConsult and/or Referral to track its life cycle.
- c. Click on the Referral/eConsult to display it with the associated workflow actions. Workflow options available depends on your eReferral permissions. Triage user permissions allow for all workflow actions to be visible.





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	Add Note Edit Ref	ferral Print Print All Advice ~ Closi	ng ~ Communicat	ion	eduling ~ Triage	
Completed F Triage Site Edmontol eReferral ID RFS-AAE	People Referrer					
Orthopaedic	: Surgery Requ	lest for Service		Service Provider		
	Patient Detail	s Referral Details Referral Requiremer	ts Providers	▲ Dr		
Exclusions	1. Infection 2. Dislocation			Linked Referrals There are no linked referrals for this referral.		
Patient Information	PHN/ULI: 97425-351	4 Name: EREFERRAL, Two b Sex: F DOB: 1	2-Jan-1970	Show this patient's other referrals		
Clinical Pathway URL	-	comonitori PAST Orthopaedics CAI			~	
Who has been	Information pot ava	ilabla		Referral Attachr	ments 🧳	
informed?	formed?			✓ AHC0562 (1).pdf (1185.94 kB)		
				97425-3514 FR	6 MONTHS AGO	
				B.pdf (66.79 kB)	LI ENIVE, TWO	
	Pocket checklist. (w	itured in this form is based on the Quality ww.ahs.ca/QuRE)	Referral	✓ test.pdf (54.44 kg)	6 MONTHS AGC	
					6 MONTHS AGO	
Patient Details					Choose a file	
Patient Preferences	Next Available Provider			Referral Notes	· ·	
Contact				Clerical		
Information	Phone Number Type	Phone Number		Testing Added by	on 06-Mar-2024	
	Home	111		10:40 AM	01100-10181-2024	
	Preferred Contact?	_				
				Activity si	now Notes Only 🕇	
	Line 1 140 AVE NW			Respond with A	dvice	
	Line 2	_		Your Behalf	integer off	
	City	CALGARY		Hide Form	Dr Aminu	
	Province	AB		Set Set vice Provider	Bello	
	Postal Code	T1Y 1C7		Advice/Response	Testing	
Additional Info				Attach External Document(s)	No Files	
Enocial				Netcare Document(s)	No document s	
Considerations				Complete Reason	Referral Submitted on Your	
Referral Details					beriali	
Referral Form Source	Attach Referral Doci	uments		Last updated by 2024 1:10 PM	t on 12-Mar-	
referral	iis —			Request Inform	ation	
Patient's current statu	is worsening			(from Receiver)		
Current and past management	_			O Do you have an date?	appointment	
				Ouestion to	Do vou	
	Referral Form	✓ test.pdf (54.44 kB) 6 MONTHS AGO		Receiver	have an appointm ent date?	
Referral Require	ments			Last updated by 2024 10:32 AM	on 12-Mar-	
Mandatory	Requirement		Time Period	Mark as Review	ed	
	Weight bearing hip view (Lauenstein)	- routine x-rays: AP pelvis, AP hip, lateral	180	Last updated by 5 2024 11:55 AM	on 11-Mar-	
Optional	Have all mandatory requirements listed above been met? Yes			Provide Informa Referrer)	tion (to	


d. Click the *Print* or *Print All* 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.

Add Note Edit Referral	Print Print All	Advice ~ Closing ~	Commu	inicati	ion ~ Intake ~ Scheduling ~
Completed Referral Hip Impingemen Triage Site Edmonton FAST Orthopaedics CAT Si eReferral ID RFS-AAD-936123	t Orthopaedio ubmitted 22-Feb-2	t Surgery 2024 1:32 PM	~	Î	People Referrer

Print All: Generates a print-out of the following sections in the following order:

- eConsult Contents The entire eConsult form will print except for free text fields that are blank.
- Support Documents This section lists the titles of all the attached documents. This includes external
 documents attached in the *Right Panel* or within the eConsult. It does not include linked Alberta
 Netcare documents.
- Notes and Activity All the notes (General, Clinical or Clerical) and activity that appear in the Right Panel.
- Referral Attachments This section displays copies of all the attached documents. This includes
 external documents attached in the *Right Panel* or the eConsult. It does not include linked Alberta
 Netcare documents.

Print: Generates a print-out of the following sections in the following order:

- eConsult Contents See above.
- Support Documents See above.
- Notes All the notes (General, Clinical or Clerical) that appear in the Right Panel.

5.2 Create a Referral

A Referral (previously called a Consult Request) is a request for an in-person specialist appointment. A standard referral form is used for most specialties to create a consistent referral experience and to identify a specific *Referral Reason.*

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.



≪ ► COMMON	Patient Search
FAVOURITES	Identifier 974253514
- SEARCHES	Identifier PHN / ULI
Search for a Patient	Туре
Delivery Site Registry (DSR)	Last Name ereferral
+ EREFERRAL	First Name two
My Referrals	Middle
Triage Referrals	Name/Initial
My Assigned Referrals	
Health Services Catalogue	
• EREFERRAL REPORTS	
PATIENT LISTS	Search Clear Enter a new favourite search 🐨

b. 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.

E 2 Limited Documents 2 All Documents		Flowsheets	😨 Patien	t Event History	Immunization History	Medications	🐉 Create Referrals
Clinical Documents Showing All Mark All As Read Group By Category Sort By Date	¢	Patient EREF	Demograp FERRA	ohics L, Two B			
Q C Read Unread			Date Of Birth				
S Dynamic Patient Summary	^		Age Sex	53 years F			
Medication Profile Rc Pharmacy Care Plan		Eligibil	ty Start Date				
BPMH Form - Medication Reconciliation				Note: Future-dat	led and blank eligibility start date	s should be confi	rmed in Person Directory.

- c. Enter a reason in the *Referral Reason* 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*.
- d. Enter a reason in the *Referral Reason* field. You can start typing the reason to see what selections are available
 - If you don't know the reason or want to see what options are available, enter the *Request Type* and the *Specialty* to show what *Referral Reasons* are available by zone/city.
 - If the *Referral Reason* is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the list – use Radiculopathy). The exact reason can be entered later in this process in the *Referral Details* section – *Reason for sending this referral* field.
- e. Select Referral beside Request Type.
- f. Select the Specialty and Zone(s) Served and/or City. You can start typing the Specialty, Zone(s) Served, and City to show what is available (e.g. Ortho). These are not mandatory but will help narrow down the options you can select.
- g. Click Search for Options and click on the appropriate option based on your search selections.
- h. If the referral is a duplicate, the *Check for duplicate referral(s)* icon is shown. Hover over the symbol to see the duplicate referral. Check for duplicates in the *Drafts*, *In Progress* and



Completed/Cancelled/Declined list as well to ensure that a duplicate Referral doesn't exist in another Zone or a similar Referral such as Knee Issue - Right vs Knee Issue – Left..



i. Click the *Clinical Pathway* icon to view detailed information to help support care decisions. You can also view existing referral(s) for the patient. If the *Clinical Pathway* icon is showing, it indicates the pathway currently not available.

Create Request														54	ect à favou	rite search	۲
Referral Reason	stability of kr	nee Q					Specia	RY.	0	тори	edic Surg	eγ 0	9				
Request Type	eferral 👻						Zone) Served	Q.	¢	Nigery		9,	۲				
Triage Site		٩					City					C	<u>i</u>				
Search for Opti	oni Rei	at. (enter a ce	e faviourite s	earch (G	0												
Referral Reason	Reque	st Type Sp	ecially		Triage	site			1	TT.	ctivical (acheays.	Approx	imate Walt 1	ine	Zone(s) S	erved
sostability of knee	Referra	ei or	thopaedic Su	gery	Chigar	y PAST Criticop	aedics CA	π			•		Not Su	ppiled		Ceigary	
n Progress Request TyperReferral ID	Received Date (72)	Status/Status Reason	Referral Rescon	Priori	ų i	riage Site	Externa Triage Site	Serv Prov	ice Ider	Appo Date/	otment Time	Accepter Date (13	1 Referring Provider	Elapsed Time/Tim To Target	e Xooroi Viait Time	Flagged for Referre	Sp Rg
eConsult RF5-AAB	26-jan- 2024	Waiting for Clinical Triage	Urology Issue		A R R R R R R R R R R R R	aye dmonton linic - Dianne ind inving liphes inology entre								3 days	5		
eConsult RFS-AAB	26-jan- 2024	Waiting for Clinical Triage	Shoulder Issue		0.000	vrhopaedic vrgery - rrovincial								3 days	5		
eConsult RFS-AAB	26-jan- 2024	Watting for Clinical Triage	Shoulder Issue		0.00	orthopaedic lurgery - vrovincial								3 days	3		
Referral RF5-AAB	16-jan- 2024	Clerical Triage in Progress	Hematuri gross		0.0	algary FAST Irology CAT								1 week 6 days	14		
Completed/Cano	elled/Dec	tlined															
Request Type/Referral 10	Received Date (72	Status/Stat	us Refe Rea	erali Ion	Priority	Triage Site	6x1 111 525	ernal ge	Serv	ice Ider	Apport Date/T	tmerit Ine	Accepted Date (T3)	Referring Provider	Elapsed Time/Tie To Targe	LAS No t Mo	i Sfied a
eConsult RPS-AAB	28-Dec- 2023	Completed Continue Managing V Your Scope	sno Idsu of	uder t		Orthopaedi Surgery - Provincial	¢.		Rece Prov	elving rder i					a weeks days	4 12-j Tao	an-202 se Trai

j. Select the Received Date (T2) (For Receiving Office use only). Note: If you are not a receiving office, leave this blank. The field will default to the current date and time. All fields marked with a red asterisk (*) are mandatory and must be completed to submit a Referral.



Orth	opaedi	ic Surger	y Reques	st for Se	ervice
Flag Re Referri Provide	eferral (For ing er use)	Z			
Received Date	08-Jan-2024	07:00 🕓			
Receivi use on	ng Office ly)				

- Review the *Exclusions* to ensure that this referral is appropriate. Exclusions are specialty and/or *Referral Reason* specific.
- I. Select Who has been informed.
- m. For helpful information on completing the Referral, refer to the *QuRE Card Checklist* by clicking on the box beside *View QuRE Card Checklist*.

Who has been informed? *	○ Patient ○ Guardian ○ Patient & Guardian ○ Information not available 🛛 Please ensure the patient or guardian has been informed of the diagnosis or reason for referral.
QuRE Reference	
	View QuRE Card Checklist The information captured in this form is based on the Quality Referral Pocket Checklist (www.ahs.ca/QuRE).

n. Scroll down to *Patient Details* and select the *Patient Preference* if indicated. Select *Preferred Provider* and/or *Preferred Location* if indicated by the patient.

Patient Det Any changes to	ails the patient's information will be saved in this referral only.					
Patient Preferences Next Available Provider Preferred Provider Preferred Location						
Patient Details Any changes to the pa Patient Preferences	tient's information will be saved in this referral only. O Next Available Provider Preferred Provider R					
	Preferred Provider * If a preferred provider is selected instead of next available, the patient's wait time may be longer Preferred Location * If a preferred location is selected instead of next available, the patient's wait time may be longer					

 The patient's address and phone number will be auto populated from the patient's Electronic Health Record (EHR). You can modify it if needed. Use the option to indicate if there is a *Preferred Contact*. Continue filling out *Additional Info and Special Considerations* (e.g., patient's physical, psychological, social and/or economic situation) sections.



Patient Details Any changes to the p Patient Preferences	atient's information will be saved in this re Next Available Provider O Preferred	ferral only. Provider 🛛 🗆 Preferred Loc	tation
Contact Information	Phone Number Type *	Phone Number *	
	🗄 🖲 Home 🔿 Mobile 🔿 Work 🔳	000 999 0000	
	(Add Row At least one row is require	red.	
	Preferred Contact? O Home	e 🔿 Mobile 🔿 Work 🛛	
	Line 1 * XXX Test Stre	et City *	LETHBRIDGE
	Line 2	Province *	AB
		Postal Code *	XXX XXX
Additional Info	 Patient Has Guardian Patient Has Alternate Contact 		
	Patient unable to communicate adeq	uately in English	
	Patient has hearing or vision requirer	nents	
	UWCB Claim		
Special Considerations	Diana musi in dataile akan tika anti-artis		
	rieuse provide deidits about the patient's	physical, psychological, social o	

p. Complete the *Referral Details* section. There are two options: If the exact *Referral Reason* was not available (e.g., Sciatica), make sure to enter this in the *Referral Details* section – *Reason for sending this referral* field. If you are attaching an external referral form, locate the referral form by clicking *Choose File* beside *Attach Referral Form*.

q. Complete the *Referral Requirements* section. Review the mandatory requirements. 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.

NOTE: Note: To learn more about adding an external document to eReferral from your computer or EMR, visit the <u>Helpful Resources</u> page.



Referral Details							
Referral Form Source *	⊛ eReferral Form 🔿 Attach Referral Documents 🛛						
Reason for sending this referral							
Patient's current status *	○ Stable Condition worsening ○ Unknown - status not provided						
Current and past	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.						
Pertinent History *	Please provide details of treatments tried and outcome(s). Consultation testing (previous, concurrent or if none, specify none). Complete in form Complete by attaching an EMR patient summary / snapshot from desktop None Clear						
Referral Require	nents						
Mandatory	Requirement Time Period						
	Weight bearing hip - routine x-rays: AP pelvis, AP hip, lateral view (Lauenstein) 180						
	Have all mandatory requirements listed above been met? Yes O No 🛛						
Optional	-						
Additional Information	Attach External Choose a file Document(s) File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB. Netcare ① Link a document						

r. Confirm that the *Referring Provider* section is complete with the referring provider's name and clinic details. The clinic details will auto-populate from *My Details* (if available) and can be changed on this request if needed. Note: Click *Add* if the Referral is being created on behalf of another provider or the referring provider is from out of province.

Referring Provider Information Complete the Referring Provider Referrals or Referring Provider Referrals On Behalf Of section on your My Details to display refer	als on
Referrals dashboard and to auto complete this section each time a referral is created.	

- s. Search First Name Out, Last Name Province.
- t. Select *Out of Province Provider*. Enter the name of the referring provider and the phone number; these fields are mandatory.



Provincial Provider Registry		Select a favourite search \checkmark	
First Out Name	Last Province Name		
Search Reset Enter a new favourite search	ch 🕀		
Name	Provider Type	City Status	
Out of Province Provider			
Referring Provider * Out of Province Dr. Test Testing Indicate name of	e Provider 🛞		
Fax Number	Line 1 Line 2 City Province Postal Co	6789 St Sparwood BC xxxx	

u. Click the appropriate option under Primary Care Provider.

Primary Care Provider *	Same as Referring Provider	O Different from Referring Provider	O Patient does not have a Primary Care P	rovider
	🔾 Unknown 🛛			

v. Select the Submission Method.

Primary Care Provider *	eReferral Fax rerouted from non-FAST Office Connect Care Phone Fax Mail
Submission Method *	eReferral

- w. Click *Submit* to send the Referral to the specialty. If you did not complete all mandatory fields marked by an asterisk (*), you will receive an error message. Review the Referral to locate any blank fields.
- If you want to save a draft of the Referral before submitting it, you can save it by clicking Save as Draft. You can access the

Submit	Save as Draft	Delete Draft	Cancel

draft at any time in the *Drafts* worklist on the *My Referrals* dashboard. You can click *Cancel* if you want to stop completing the Referral.

 Once you click Submit, the Referral will appear on your My Referrals dashboard on the In Progress and Recently Updated worklists with a status of Clerical Triage in Progress.

NOTE: If a referral 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 referral with the correct information.



5.3 Reviewing a Submitted Referral

At any point, you can review a submitted Referral from the My Referrals dashboard.

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

≪ ▼COMMON My Details	My Referrals			
Worklists	Requests	Total	Referrals	eConsults
Manage Notifications	Recently Updated	8	5	3
► FAVOURITES	Cancelled/Declined	13	7	6
▶ SEARCHES	Action Required 🔒	2	1	1
+ EREFERRAL	Drafts	0	0	0
My Referrals	Undelivered	0	0	0
Triage Referrals	In Progress	44	32	12
My Assigned Referrals	Completed	3	1	2
Catalogue	Waiting for Response	3	3	0

b. Select *Referral* for *Request Type* and click *Search* to generate a list of referrals. You can further define the search by choosing options like *PHN/ULI*, *Referral Reason*, or *Status*. To remove a status, click the X to the right of the status; to add a status, click the *Add* button. Note that the status selections are "sticky", meaning that if you access this dashboard and worklist during your eReferral working session (have not logged out) the same items will be selected.



Referrer: In Pr	ogress			
Received Date	to 📰		PHN/ULI	
Referral Reason	Q		Patient First Name	
Specialty	Q		Patient Last Name	
Triage Site	Q		Request Type	Referral 🗸
Service Provider	Q		Referral ID	
Referring Provider	Q		External Triage Site	Q Q
Priority	~		Show Referral for Review	5 🗆
Status	Accepted 🛞 Appointment Booked 🛞	Appointment Missed 🛞		
	Clerical Triage in Progress 🛞 Clinical Triag	ge in Progress 🛞		
	Deferred 🛞 Redirected 🛞 Request Ad	lditional Information 🛞		
	Response in Progress 🛞 Waiting for App	ointment 🛞		
	Waiting for Clinical Triage 🛞 Waitlisted 🤅	8		
	⊕ Add			
Search	Reset Enter a new favourite search) 🕀			

- c. Select the appropriate Referral from the list. Click the arrow located on the Summary Bar to expand the referral header. The Status Reason field may be populated or blank. Only specific changes to the Referral will result in this field being populated (Redirect, Complete/Cancelled/Declined, Missed Appointments, Provide Information to Receiver).
- d. View the activity that has occurred on the Referral in the *Right Panel* in the *Activity* and *Notes* sections.
- e. Click *Show this patient's other referrals* to view all referrals for this patient. All referrals are listed here regardless of the status. This is helpful if a screening Referral or eConsult needs to be linked to the procedural referral. Only receiving providers can link Referrals/eConsults.



Alberta Netcare Portal eReferral User Guide

Waiting for Appo	Intment Referral	Instability of kn	ee Ortho	opaedic Surgery	<u>^</u>	People	
Triage Site Calgary F	AST Orthopaedics CAT	Submitted 5 week	s ago еке	Terral ID RFS-AAB-		Referrer	
Status Reason	_	Extern	al Triage Site	_		🛔 Dr.	
Accepted (T3)	10-lan-2024	Referr	ed For	Referral		Service Provider	
		Submi	tted By	Three TRAINING		Receiving Provider	
		Flagge Referr	d for er	Yes		Linked Referrals	^
Orthopaedi	c Surgery Req	uest for Ser	vice			RFS-AAB- Dianne and Irving Kip	Kaye Edmonton Clinic - ones Urology Centre COMPLETED
		Patient Details	Referral De	etails Referral Requirer	nents Providers	Show this p	oatient's other referrals 🗸
Exclusions	1. Dislocation 2. Infection					Referral Attachme	ents 🔨
Patient Information	PHN/ULI: 10000-	Name:	Sex: F D	OB: 15-Mar-1974		✓ AHC0562 (1).pdf	(1185.94 kB) 4 WEEKS AGO
Request Created For	Instability of knee -	Calgary FAST Orthop	aedics CAT				
Clinical Pathway URL	https://www.alberta	ahealthservices.ca/ap	ph/page1823	6.aspx			Choose a file
Who has been	Patient					Referral Notes	^
morned?						Clerical	been attached
QuRE Reference	2					Added by Three Tr	aining on 12-Jan-2024 12:44 PM
	The information ca (www.ahs.ca/QuRE)	ptured in this form is	based on the	e Quality Referral Pocket	t checklist.	Activity	Show Notes Only 🝸
						A link between this ret	ferral and RES-AAB-
Patient Details						was added	
Patient Preferences	Next Available Provider					Last updated by Three TR	0 AINING on 30-Jan-2024 10:04
Information	Phone Number Type	Phone Number				Clerical Note	
	Home	000 999 0000				Latest lab results h	ave been attached
	Preferred Contact?	Home				PM	Anning off 12-jan-2024 12.44
	Line 1	XXX Faraway Stree	t			Waiting for Appoi	ntment
	Line 2	_				Last updated by Three TR	AINING on 10-Jan-2024 12:58
	City	LETHBRIDGE					
	Province	AB				Set Service Provid	er
	Postal Code					Set Service Provider	Receiving Provider II
Additional Info						Last updated by Three TR PM	AINING on 10-Jan-2024 12:58 -
						Accept (T3)	
Constal.						Accepted Date (T3)	10-Jan-2024
Special Considerations	_					Attachments	No Files
						Netcare Document(s)	No documents

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).



COMMON	Patient Sear	ch					Select a favour
► FAVOURITES	Identifier	974253514					
- SEARCHES	Identifier Type	PHN / ULI		~			
Search for a Patient Delivery Site Registry (DSR)	Last Name	ereferral		Date C Birth	Df 🛛	ay Month 🔪	Year
► EREFERRAL	First Name	two		Sex		All Female M	lale X
EREFERRAL REPORTS	Middle Name/Initial			Phone			
PATIENT LISTS	Name/mittai			Numb	Se	earch Tip : An identifier	search is
► NOTIFICATIONS					re	commended. For name nter the complete last n	e search, please ame, complete
CLINICAL ETOOLS					fir	st name and date of bi	rth.
RESOURCES	Search	Clear Enter a new favo	urite search 🕀				
► ESIGNATURE	PHN / ULI	Name	Date Of Birth	Age	Sex	Address	Town/City
MESSAGING	97425-3514	EREFERRAL, Two B	12-Jan-1970	54 years	F		Calgary

- 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

≡ 📑 Limited Documents 🧃 All Docum	nents Flowsheets	😳 Patient Event History	Immunization History
Clinical Documents Showing All Mark All As Read Group By Category Sort By Date	Patient Demogra	^{phics} L. Two B	
Read Unread	Date Of Birth	53 years	
Dynamic Patient Summary	Sex	F	
R _c Pharmacy Care Plan	Eligibility Start Date		
BPMH Form - Medication Reconciliation		Note: Future-dated and blank	eligibility start dates should be o
 Referrals - In Progress (38 / 55) Referrals - Completed/Cancelled (25 / 36) 	Address (Primary)		
 Consultations (1) Diagnostic imaging (2 / 3) Progress Notes (1 / 2) 	AH Address (Mailing)		

Each folder contains links to the patient's eConsults and Referrals. Any eConsult or Referral that has been complete/cancelled will have a strike through the middle of the text. Any eConsult or Referral 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.



Dynamic Patient Summary Madiantics Deptils			Sex	F
Medication Profile				
Px Pharmacy Care Plan		Eligi	bility Start	
BPMH Form - Medication Reconciliation			Dato	
Referrals - In Progress (7 / 14)				Note: Future-dat
🖹 13-Mar-2024 Referral - Orthopaedic Surgery	Refer	ral - Ortho	paedic Sur	gery
12-Mar-2024 eConsult - Clinical and Metabolic	Source	e date	13-Mar-2	024
05-Mar-2024 eConsult - Urology	Cator		Deferrels	In Drogross
04-Mar-2024 Referral - Urology	Categ	ory	Referrals	- In Progress
29-Feb-2024 Referral - Orthopaedic Surgery	Status	5	In Progre	2SS
22-Feb-2024 Referral - Orthopaedic Surgery	Autho	r		
20-Feb-2024 Referral - Urology	Result	Source	Provincia	d.
14-Feb-2024 Referral - Orthopaedic Surgery	Mark	As	Read	Unread

f. Navigate to the Activity section on the Right Panel of the eConsult. The response can also be viewed at the bottom of the eConsult. The arrow located on the Summary Bar can be used to expand/collapse the referral header to see more details.

Appointment Bo	oked Referral	Hip Impingement Orthopaedic Surgery	People
Triage Site Edmonto eReferral ID RFS-AA	on FAST Orthopaedics CA D-936123	T Submitted 22-Feb-2024 1:32 PM	Referrer 🔺 Dr.
			Service Provider 🔺 Dr
Orthopaedi	c Surgery Req	uest for Service	
		Patient Details Referral Details Referral Requirements Provide	ers Linked Referrals There are no linked referrals for this referral.
Exclusions	1. Infection 2. Dislocation		Show this patient's other referrals 🗸
Patient Information	PHN/ULI: 97425-35	14 Name: EREFERRAL, Two b Sex: F DOB: 12-Jan-1970	Referral Attachments
Request Created For	Hip impingement -	Edmonton FAST Orthopaedics CAT	✓ AHC0562 (1).pdf (1185.94 kB) 5 DAYS AGO
Clinical Pathway URL	-		 97425-3514 EREFERRAL TWO B.pdf (66.79 kB)
Who has been informed?	Information not av	ailable	✓ test.pdf (54.44 kB) 13 DAYS AGO 5 DAYS AGO
QuRE Reference	2		Choose a file
	The information ca	ptured in this form is based on the Quality Referral Pocket checklist	Referral Notes
	(www.ahs.ca/QuRE)	Clerical
			Testing
Patient Details			Added by Pon 06-Mar-2024 10:40 AM
Patient Preferences	Next Available Provider		Activity Show Notes Only T
Contact Information	Phone Number Type	Phone Number	Clerical Note ACTION Add Note
	Home	111	C Testing Last updated by : on 06-Mar-2024 10:40 AM
	Preferred Contact?	_	Appointment Booked
	Line 1	ANT MAN	Hide Form
	Line 2	AVEINW	Appointment Type Consult
	City	— CALGARY	
	Province	AB	Attach External No Files
	Postal Code		Netcare No documents Document(s)
Additional Info			
			Comment —
			Last updated by on 01-Mar-2024 11:34 AM
English			Mark as Reviewed
Considerations	-		Last updated by on 01-Mar-2024 11:33 AM
			Start Clinical Triage
Referral Details			Last updated by n 01-Mar-2024 11:33 AM
Referral Form Source	Attach Referral Do	tuments	Waiting for Appointment
Reason for sending the referral	his —		STATUS Waiting for Appointment Last updated by on 01-Mar-2024 11:33 AM
Patient's current stat	us worsening		Set Service Provider
Current and past management	-		Set Service Provider Dr
	Referral Form	v test pdf (54.44 kB) 13 pays ago	Last updated by on 01-Mar-2024 11:33 AM
		Conciputing (2014) 12 DATS AGU	Start Clinical Triage STATUS Clinical Triage in Progress
			Last updated by on UT-Mar-2024 11:32 AM



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 <u>here</u>.

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 Referral.

≪ ▶ COMMON	My Referrals			
► FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES	Recently Updated	8	7	1
✓ EREFERRAL	Cancelled/Declined	2	2	0
My Referrals	Action Required 💧	4	3	1
My Assigned Referrals	Drafts	1	0	1
Health Services	Undelivered	0	0	0
Catalogue	In Progress	54	44	10
EREFERRAL REPORTS	Completed	5	1	4
PATIENT LISTS	Waiting for Response	5	5	0

b. Select Referral for Request Type and click Search. You will notice Request Additional Information in the Status/Status Reason column. Click on the referral to view it. The Action Required notice is shown in the referral header.



c. View the Activity section located on the Right Panel to see what information is being requested.



Cierical Triage in P	rogress Referral Hip dy	splasia Orthopae	dic Surgery	^	People	
Triage Site South FAST	Orthopaedics CAT Submitted	5 weeks ago eRefe	erral ID RFS-AAB-		Referrer	
Status Reason	_	External Triage Site	_		🛔 Dr	
Accepted (T3)	_	Referred For	Referral		Service Provider	
Action Required		Submitted By	Twenty TRAINING		_	
Action Requ	uired	Flagged for Referrer	Yes		Linked Referra There are no linked	IS referrals for this referral.
Action	Referrer to provide information				Shov	w this patient's other referrals 🗸
Details See Activity Section j	Missing required investigations for additional information.				Referral Attach	nments ^
					✓ AHC0562.pdf	(1185.94 kB) 5 WEEKS AGO
Orthopaedic	Surgery Request fo	r Service				Choose a file
	Patier	nt Details Referral D	etails Referral Requirements	Providers		Choose a me
Exclusions	1. Dislocation 2. Infection				Referral Notes There are no notes j	for this referral.
Patient Information	PHN/ULI: 10000- Name:	Sex: F D	OB: 15-Mar-1974		Activity	Show Notes Only 🕇
Request Created For	Hip dysplasia - South FAST Orth	iopaedics CAT			Request Inform	nation (from Referrer)
Clinical Pathway URL	https://www.albertahealthservi	ces.ca/aph/page1823	6.aspx		REASON Missing re	quired investigations
Who has been informed?	Patient				Reason	Missing required investigations
OuRE Reference					Attachments	No Files
					Netcare	No documents
	The information captured in thi (www.ahs.ca/QuRE)	is form is based on th	e Quality Referral Pocket check	list.	Document(s)	no documento
Patient Details	The information captured in thi (www.ahs.ca/QuRE)	is form is based on th	e Quality Referral Pocket check	list.	Document(s) Comment to Referrer	Please provide the latest lab results

c. Click Provide Information (to Receiver) from the Workflow Bar.

Print Print All Provide Information (to Receiver)	Request Information (from Receiver)	
---	-------------------------------------	--

d. 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 100MB can be attached. Multiple files not exceeding 300MB in total can be added.

Provide Information (to Receiver)				
🚺 Do not inclu	ude any clinical information in the Comment to Receiver box below.			
Attachments	Choose a file File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.			
Netcare Document(s)	① Link a document			
Comment to Receiver *	Please state where in the referral information was edited.			
Provide Informati	on Cancel			

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



5.6 Opening a Draft Referral

A Referral can be saved as a draft for later completion. There is no expiry period for a draft Referral. Drafts are accessible to the user who created them or to the staff members who create referrals on their behalf. Drafts are also 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 viewed from the *Context Menu* under *View Referrals*.

COMMON ≪	My Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES	Recently Updated	7	3	4
✓ EREFERRAL My Deferrals	Cancelled/Declined	13	7	6
Triage Referrals	Action Required 🔒	3	2	1
My Assigned Referrals	Drafts	2	1	1
Health Services	Undelivered	0	0	0
Catalogue	In Progress	45	32	13
EREFERRAL REPORTS	Completed	3	1	2
PATIENT LISTS	Waiting for Response	3	3	0

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

Primary Care Provider *	● Same as Referring Provider ○ Different from Referring Provider
Submission Method *	eReferral
	Submit Save as Draft Delete Draft Cancel

c. Click *Delete* 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 Referral or an eConsult to ensure that all required information is present and that an appointment can be booked (if required) according to the patient's clinical needs. There are three (3) types of triages: Clerical, Clinical and Booking. Depending on the size of clinic, triages may 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's name(s) to *My Details*. Referrals or eConsults assigned to the providers listed in *My Details* will populate onto the *My Assigned Referrals* dashboard.

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 <u>access.ereferral@ahs.ca</u> to request triage access.

6.1 Customizing My Details – Receiving Providers Triage

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.

Update Preferences Discard Changes

TIP



6.2 Managing Referrals on Behalf of a Provider

If you are managing referrals 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:

- o 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.

≪ ▼COMMON	Receiving Provider Referrals On Behalf Of		
My Details	This section must be completed to triage, respond		
Worklists	and receive notifications for eReferral		
Manage Notifications			
+ FAVOURITES	Receiving Add Provider		

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

Receiving Pr	ovider	Select a favourite search
Name		
Search	Reset	Enter a new favourite search
Name		

- 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.



6.3 Saving and Sharing eReferral

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 Referrals 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.



≪ ► COMMON My Details	Triage Referrals
Worklists Manage Notifications • FAVOURITES	iage Facility Central FAST Urology CAT [VRTL0078], Calgary FAST Orthopaedics Add Referral CAT [VRTL0084], Central FAST Orthopaedics CAT [VRTL0083], North Creators to FAST Orthopaedics CAT [VRTL0082], Edmonton FAST Plastics CAT Drafts List VRTI 00751 Edmonton FAST General Surgery CAT [VRTI 0063] Show
 SEARCHES EREFERRAL 	OBS-GYN STH Colposcopy Clinic [VRTL0070], Edmonton Bone and Joint Centre [WDFAGBOY], Alberta Hip and Knee Clinic referrals for [WDFAG5AL], Alberta Hip and Knee Clinic [WDFAGBOX], Chinook

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

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

e. Click Update Preferences to save your updates.



7.0 Responding to eConsults & Referrals

This section is for receiving providers who are responding to eConsults or managing Referrals.

7.1 Setting up your My Details as a Receiving Provider

You can see referrals in your My Assigned Referrals dashboard by adding yourself as a receiving provider.

- a. Click on My Details.
- b. Scroll down to the Receiving Provider Referrals section. Click Add.

≪ ▼COMMON	Receiving Provider Referrals
My Details	This section must be completed to triage, respond and receive
Worklists	notifications for eReferral.
Manage Notifications	
+ FAVOURITES	Provider

- 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.

Triage Referrals			
Triage Facility N	largery E. Yuill Cancer Centre [WDFA8E87],	Add Referral	(Add
F	oothills Medical Centre - Women's Health	Creators to	
C	entre - OBS-GYN [WDFAGG0E], Addiction and M		
н	- Addiction Medicine - Provincial [VRTL0016],	Show Completed/Canc	Last 1 month 🗸
N	orthern Alberta Renal Program - Nephrology	elled/Declined	
[N	RTL0026], RGH - Holy Cross Ambulatory Care	referrals for	

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



7.2 Referral – Workflow Options

Workflow actions are accessed using the mini menus located on the right side of the Referral. Actions are listed alphabetically.





REFERRAL MENUS & WORKFLOW OPTIONS	WHEN TO USE?			
Advice				
Respond with Advice	Select if the Referral is more appropriate for an eConsult than a Referral. Provide the advice in the comment box, attach relevant files if required and click <i>Complete</i> . The referral is now complete and will appear on the <i>Completed</i> worklist on the <i>My Referrals</i> dashboard of the referring provider as well as the <i>Completed/Cancelled/Declined</i> worklist on the <i>Triage Referrals</i> dashboard and <i>My Assigned Referrals</i> 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 <i>Submit for Review</i> . The referral is now awaiting specialist review and will appear on the <i>Action Required</i> worklist on the <i>Triage Referrals</i> dashboard and <i>My Assigned Referrals</i> dashboard.			
Closing				
Cancel	Select to change the status of the Referral to Cancelled.			
Complete (T5)	Select to change the status of the Referral to <i>Completed</i> . The request will now move to the <i>Completed</i> worklist for referring and receiving providers. There is an option to enter the <i>Accepted Date (T3)</i> of the referral if it was not entered previously. There is also the option to enter the <i>Priority</i> and <i>Service Provider</i> .			
Decline	Select to change the status of the Referral to <i>Declined</i> . The request will now move to the <i>Declined</i> worklist for referring and receiving providers.			
Communication				
Create and Attach Letter	Used only by the FAST Program to send referral letters to referring/receiving providers. Letters include: <i>Accepted, Received, Reassigned, Incomplete, Pending, Updated, Declined, Cancelled.</i>			
<i>Provide Information (to Referrer)</i>	Select to provide information to the referring provider. If selected, the Referral will then appear on the <i>Action Required</i> worklist of the <i>My Referrals</i> dashboard of the referring provider.			
Request Information (from Referrer)	Select to ask for more information from the referring provider. This will appear on the receiving provider's <i>Triage Referrals</i> dashboard on the <i>Waiting for Response</i> worklist, and on the referring provider's <i>Action Required</i> worklist.			
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 <i>Triage Dashboard</i> - <i>Waiting for Response</i> worklist, and on the referring provider's <i>Action Required</i> worklist.			
Intake				
Change Reason for Referral	Select this to enter a more specific <i>Referral Reason</i> or correct a <i>Referral Reason</i> that may have been entered incorrectly (for both Referrals and eConsults). Only users who have access to the <i>Triage</i> dashboard or the <i>My Assigned Referrals</i> dashboard have access to this function.			



Complete Clerical Triage	Select to identify the completion of clerical triage. This will change the status to <i>Waiting for Clinical Triage</i> .	
Redirect	Select to redirect the Referral to another triage facility. The Referral status will change to Redirected and appear on the newly assigned facility's <i>Triage Referrals</i> dashboard.	
Set Service Provider	Select to enter the service provider's name.	
Update Received Date (T2) (For Receiving Office use only)	Select to update the received date of the Referral. Used if an incorrect received date was entered for a faxed referral that you created in eReferral and need to change the date.	
Scheduling		
Appointment Booked	Select this option to enter the appointment date and details.	
Appointment Missed	Select to change the status of the Referral to <i>Appointment Missed</i> . If the referring provider has their eReferral Provider Notifications set up with the default options, this will trigger an email to them.	
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 Referral will move to the <i>Deferred</i> worklist on the <i>My Assigned Referrals</i> 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 Referral to <i>Waitlisted</i> . As a comment box is not available for changing the status to <i>Waitlisted</i> , select <i>Add Note</i> and choose <i>Clerical</i> to enter a note regarding the patient's waitlist status if required.	
Triage		
Accept (T3)	Select to enter the accepted date of the referral. The status of the Referral will change to <i>Accepted</i> . The referral stays on the receiving provider's <i>Triage</i> worklist on the <i>Triage Referrals</i> dashboard and <i>My Assigned Referrals</i> dashboard.	
Ready for Booking	Select to change the status of the Referral to <i>Waiting for Appointment</i> . This action can be used by facilities and specialties that do not have a waitlist, and an appointment can be scheduled as soon as triage is complete. It can also move a referral from the <i>Waitlist</i> to the <i>Waiting for</i> <i>Appointment</i> worklist.	
Set Priority and Booking Instructions	Select to set the priority of the Referral (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: <i>Routine</i> , <i>Semi Urgent</i> , or <i>Urgent</i> .	
Start Clinical Triage	Select to start clinical triage. This will change the status to <i>Clinical Triage in Progress</i> .	

7.3 Managing Referrals

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



≪ ► COMMON	Triage Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
► SEARCHES	Drafts	2	1	1
- EREFERRAL	Undelivered	0	0	0
Triage Referrals	Action Required 🛕	5	4	1
My Assigned Referrals	Triage	15	12	3
Health Services	Waiting for Response	4	2	2
Catalogue	Waiting for Appointment/Waitlisted	6	6	-
EREFERRAL REPORTS	Deferred	2	2	-
PATIENT LISTS	Scheduled	3	3	-
► NOTIFICATIONS	Completed/Cancelled/Declined	17	13	4

- b. If you wish, narrow the search further by selecting *Referral* 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.



Triage: Triag	ge	Select a favourite search
Received Date	to H	PHN/ULI
Referral Reason	Q	Patient First Name
Specialty	Q	Patient Last Name
Triage Site	Q	Request Referral 🗸
Service Provider	Q	Referral ID
External Triage Site	Q	Priority
Status	Accepted Appointment Missed Accepted Appointment Missed Clerical Triage in Progress Redirected Response in Progress Waiting for Clinical Triage Add	Exclude Waiting for Response
Clear Receive	ed Date before entering new search criteria.	Show Referrals for Review
Search	Reset Enter a new favourite search 🕀	
Patient	Request Type/Referra	ID Received Status/Status Referral Reason Priority Triage Site (12) Click to sort ascending

- d. Select a Referral from this list. When the referral is opened, the *Workflow Bar* and other actions are located at the top right of the referral.
 - Add Note: Used to add notes (i.e., General, Clinical or Clerical).
 - *Edit Referral*: Used to make changes to the referral, such as to add/modify an address or phone/fax number.
 - Print and Print All: Used to print to a local printer or save as a PDF document.
 - (*Print All & Print*) Referral Contents The entire Referral form will print except for free text fields that are blank.
 - (*Print All & Print*) Support Documents This section lists the titles of all the attached documents. This includes external documents attached in the *Right Panel* or within the Referral. It does not include linked Alberta Netcare documents.
 - (Print All) Notes and Activity All the notes (General, Clinical or Clerical) and activity that appear in the Right Panel.
 - (*Print All*) *Referral Attachments* This section displays copies of all the attached documents. This includes external documents attached in the *Right Panel* of the Referral. It does not include linked Alberta Netcare documents.
 - (Print) Notes All the notes (General, Clinical or Clerical) that appear in the Right Panel.
 - Workflow Bar: Used to change the referral status. Each of these items has options that can be accessed by clicking the drop-down arrow. The Workflow Bar is selected to identify the progress of the request, which begins with Update Received Date (T2) through to Cancel.



The items displayed on the *Workflow Bar* are dictated by the user role you have been assigned in eReferral.



7.4 Responding to eConsults

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

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

► COMMON	Triage Referrals			
► FAVOURITES	Requests	Total	Referrals	eConsults
► SEARCHES	Drafts	2	1	1
	Undelivered	0	0	0
Triage Referrals	Action Required 🛕	5	3	2
My Assigned Referrals	Triage	17	12	5
Health Services	Waiting for Response	4	2	2
Catalogue	Waiting for Appointment/Waitlisted	6	6	-
EREFERRAL REPORTS	Deferred	2	2	-
PATIENT LISTS	Scheduled	3	3	-
► NOTIFICATIONS	Completed/Cancelled/Declined	16	13	3

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



★ COMMON	My Assigned Refe	rrals	6	
FAVOURITES SEARCHES	Requests	Total	Referrals	eConsults
▼EREFERRAL My Referrals	Open eConsults	2	0	3
Triage Referrals	Waiting for Appointment/Waitlisted Scheduled	1	1	0
Health Services Catalogue	Completed/Cancelled/Declined	1	1	0
• EREFERRAL REPORTS	Triage Waiting for Response	2	1	1
PATIENT LISTS	Deferred	0	0	-

- a. Open or search for the eConsult.
- 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 eConsult and select View Referral.

+	EREFERRAL, TWO B				ULI 974	4253514 🗙	< ≣≣ >	*	<u>د</u> ا
	NO CPAR PRIMARY PROVIDER		PATIENT PRIMARY AD	DRESS 💡	PATIENT MAILING ADDRESS		PATIEN	IT HOME	
≡	Limited Documents	🧃 All Documents	Flowsheets	🛯 Patient Event History	Immunization History	Medications	🧞 Create	Referrals	🔍 View Referral

- d. Click Advice, then Respond with Advice from the Workflow Bar menu if the eConsult 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.

ets	Patient Event History	🖲 Imn	nunization History	✔ More
	Cancel Print Print All	<u>Advice</u> ~	Communication ~	Intake 🗸 🛛
R	espond with Advice			
R	espond with Advice (Review Re	quired)		

- 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.



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

Respond with Advice			
A new version of the refer	ral details is available. It will b	e automatically applied when you complete	
Set Service Provider * Add Advice/Response			
Attach External Document(s) Netcare Document(s) Choose I File size re	File No file chosen stricted to 5MB. Multiple files o document	can be uploaded up to a limit of 25MB.	
Complete Reason * O Called R	Reques Respond with Ac	dvice (Review Required)	
Called F	Reques A new version	of the referral details is available. It will be	automatically applied when you con
 Referra Referra Addition Clear 	I Requ I Subm Set Service Provider * Advice/Response *	① Add	
Complete Cancel	Attach External Document(s)	Choose File No file chosen File size restricted to 5MB. Multiple files ca	n be uploaded up to a limit of 25MB.
	Netcare Document(s)	⊕ Link a document	
	Complete Reason *	 Called Requesting Provider - Routine Called Requesting Provider - Emergent/ Continue Managing Within Your Scope Referral Required - Refer to the Provide Referral Submitted on Your Behalf Additional Information not provided, un Clear 	Urgent Request of Practice er of Your Choice nable to provide advice
	Submit for Review	Cancel	

The eConsult will now appear on your *Complete* worklist on your *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 their *My Referrals* dashboard.

7.5 Requesting Additional Information from Referring Provider

On occasion, the FAST Program or a receiving provider may require additional information from you, the referring provider. The Requesting Additional Information (from Referrer) form is slightly different for Referrals and eConsults. To request additional information from the referring provider, use the process below:

a. Go to the Workflow Bar, click Communications, then Request Information (from Referrer).



- b. (eConsults) Click *Add* to set the *Service Provider*. Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click *Request Information*.
- c. (Referrals) Select the Reason, add Comment to Referrer and click Request Information.

Request Inform	ation <mark>(</mark> from Re	ferrer)				
Set Service Provider * Reason *	 Add Missing clear Missing inform Missing require Missing require 	clinical questi nation red patient de red investigati	on emographics ions	eConsult		
Comment to Referrer *	🛛 Clear					
Attach External Document(s)	File size restricte	d to 30MB. Mi	ultiple files can b	Choose a file be uploaded up to a	limit of 150MB.	
Netcare	🕀 Link a docur	ment				
Request Informat	ion Reaso	est Informa	ation (from ○ No reason ○ No referra ○ Missing m ■ <u>Clear</u>	Referrer) for referral l letter andatory informat	Referral	
	Attac	hments	Eile size noste	inted to a SMP Mail	(hoose a file
	Netca Docu	are ment(s)	• Link a do	ocument	ирие јиез сан De	aprouuea up to a l
	Comr Refer	nent to rer *				
	Req	uest Informat	ion Cance	I		

The eConsult 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.



≪ ► COMMON	My Assigned Refe	rrals	5	
FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES	Action Required 🛕	3	0	3
▼ EREFERRAL My Referrals	Open eConsults	3	0	3
Triage Referrals	Waiting for Appointment/Waitlisted	1	1	0
My Assigned Referrals	Scheduled	2	2	-
Health Services	Completed/Cancelled/Declined	1	1	0
	Triage	2	1	1
EREFERRAL REPORTS	Waiting for Response	2	1	1
PATIENT LISTS	Deferred	0	0	-

7.6 Reviewing Additional Information Provided by a Referring Provider

If a referring provider adds new information to an eConsult 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 eConsult. The eConsult will have a panel indicating that new information has been added to the referral and requires review.

≪ ▶ COMMON	My Assigned Refe	rrals	6	
FAVOURITES	Requests	Total	Referrals	eConsults
► SEARCHES	Action Required 🛕	3	0	3
▼ EREFERRAL My Deferrals	Open eConsults	3	0	3
Triage Referrals	Waiting for Appointment/Waitlisted	1	1	0
My Assigned Referrals	Scheduled	2	2	-
Health Services	Completed/Cancelled/Declined	1	1	0
Catalogue	Triage	2	1	1
EREFERRAL REPORTS	Waiting for Response	2	1	1
PATIENT LISTS	Deferred	0	0	-

b. View all activity that has occur on the eConsult in the Right Panel.



Alberta Netcare Portal eReferral



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





d. 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.



- e. The eConsult 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 taskbar. Enter a comment, if desired, and click Mark as Reviewed to finish. The panel indicating that new information was added to the referral will now be removed.



7.7 Triaging eConsults

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

- a. Select eReferral from the Clinical Portal Menu, then Triage Referrals.
- b. Click on *Triage*.



≪ ~ COMMON My Details	Triage Referrals			
Worklists	Requests	Total	Referrals	eConsults
Manage Notifications	Drafts	2	1	1
► FAVOURITES	Undelivered	0	0	0
► SEARCHES	Action Required 🛕	2	1	1
+ EREFERRAL	Triage	16	12	4
My Referrals	Waiting for Response	3	2	1
Triage Referrals	Waiting for Appointment/Waitlisted	6	6	-
My Assigned Referrals	Deferred	2	2	-
Catalogue	Scheduled	3	3	-
• EREFERRAL REPORTS	Completed/Cancelled/Declined	22	18	4

c. Filter on *eConsults* in the *Request Type* section and click *Search*. When you receive a new eConsult, the status will be *Waiting for Clinical Triage*. This 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.



Triage: Triage	Select
Received to E	PHN/ULI
Referral Q Reason	Patient First Name
Specialty Q	Patient Last Name
Triage Q Site	Request eConsult 🗸 Type
Service Q Provider	Referral ID
External Q Triage Site	Priority 🗸 🗸
Status Waiting for Clinical Triage 🛞 🕀 Add	Exclude Waiting for Response
	Show Referrals for Review
Clear Received Date before entering new search criteri	<i>a.</i>
Search Reset Enter a new favourite search	ch (+)

- d. Click Search to filter the list, then click on eConsult to view it. Sort by Received Date to list the most recent referrals first.
- e. Open the referral and click Intake.
- f. Select Set Service Provider.



g. 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.



Set Service Provider	(Add	
-------------------------	-------	--

h. 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.

7.8 Redirecting an eConsult/Referral

An eConsult can be redirected (previously called reassigning) to another facility if it is not appropriate based on the requested zone or if the assigned provider is not available to respond to the request within an acceptable time. This function is only available to users that have access to the *My Assigned* dashboard or the *Triage* dashboard.

- a. Search for and open the eConsult.
- b. Click Intake and select Redirect.



c. Click the X to clear the current information.



Triage Site, Specialty, Referral Reason *	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre, 🛞 Urology, Urology issue
	Redirect does not update mandatory requirements or external triage facility.
Reason *	
Currently Assigned Service Provider	Dr
Service Provider *	 Leave unchanged Change provider No provider assigned at this time Clear
Attachments	Choose a file File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300M
Netcare Document(s)	⊕ Link a document
Comment	

- d. Click *Add* to select where to redirect the referral (e.g. another zone FAST CAT).
- e. Enter the original *Referral Reason* or a new one if needed.
- f. Enter the *Triage Site* to redirect the referral.

Redirect	
Triage Site, Specialty, Referral Reason *	Calgary FAST Urology CAT, 🔊 Urology, Hematuria microscopic (greater than 3 rbc/hpf)
	Redirect does not update mandatory requirements or external triage facility
Reason *	

g. Select No provider assigned at this time.



Redirect		
Triage Site, Specialty, Referral Reason *	Grande Prairie Public Health Centre - Nep Nephrology, Suspected glomerulonephritis	hrology, 🛞
	Redirect does not update mandatory require	ements or external triage f
Reason *	Assigned to next available service	~
Currently Assigned Service Provider	-	
Service Provider *	 Leave unchanged 	
	 Change provider 	
	No provider assigned at this time	
	🛛 Clear	
Attachments		Choose a file
	File size restricted to 100MB. Multiple files c	an be uploaded up to a lin
Netcare Document(s)	🕀 Link a document	
Comment		
Redirect Cancel		

h. Click *Redirect*. The eConsult will now appear on the chosen service provider's *My Assigned Referrals* dashboard on the *Open eConsults* worklist and will be removed from the original receiving provider's dashboard.

7.9 Change Referral Reason

The *Change Referral Reason* workflow can be used to enter a more specific *Referral Reason* or correct a *Referral Reason* that may have been entered incorrectly (for both Referrals and eConsults). Only users who have access to the *Triage* dashboard or the *My Assigned Referrals* dashboard have access to this function. Referring providers do not have access to this feature. This action does not change the referral status or generate any notifications.

- a. Open the appropriate referral.
- b. Click Intake, then Change Referral Reason from the Workflow Bar.



~	Communication ~ Intake ~		Sche	duling ~	Triage ~	l
	Change Referral Reason	-				
	Complete Clerical Triage			_		
	Redirect			d		
	Set Service Provider					
	Update Received Date (T2)	1				

- c. Click the Add button and select the appropriate referral reason from the list of Referral Reasons.
- d. Click Change Reason.

Change Referral Reason		
Change Reason From -	Adult gastroenterology issue	
Referral Reason *	⊕ Add	
	Changing referral reason does not update mandatory requirements.	
Comment		
Change Referral Reason		
Change Reason From -	Adult gastroenterology issue	
Referral Reason *	Gastroesophageal reflux disease (GERD)	
	Changing referral reason does not update mandatory requirements.	
Comment		
Change Reason	Cancel	

7.10 Linking Referrals

The ability to link referrals is helpful in cases where an eConsult was submitted and, upon review, it has been determined that a Referral is required. It can also be used when the first Referral was for a pre-screening appointment and a second Referral is required for the procedure. Only users who have access to the *Triage* dashboard and *My Assigned Referrals* dashboard can create and delete links. Referring providers do not have access to this feature.

- 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). Press *Search* to bring up a list.
- b. Open the patient's Electronic Health Record (EHR) and click the referral to open it.


- c. Click View Referral.
- d. Click Show this patient's other referrals. This will expand and show all referrals for the patient, regardless of status.

= 🧳 All Documen	ts Flowsheets	🛯 Patient Event History	Immunization History	Medications	🐉 Create Referrals 🛛 🕵 View Referral 🗸 🗸 More				
			Cancel Print Print All Advice - Communication - Intake -						
Accepted Refe Triage Site Kaye Edmo eReferral ID RFS-AAB-	rral Hematuri nton Clinic - Dianne 070161	a microscopic (greater than 3 and Irving Kipnes Urology Cen	rbc/hpf) Urology tre Submitted 4 days ago	^	People Referrer				
Status Reason	_	Referred For Submitted By	Referral Three TRAINING		Service Provider Receiving Provider I				
		Flagged for Referrer	_		Linked Referrals There are no linked referrals for this referral.				
Urology Requ	lest for Ser	vice			Show this patient's other referrals \checkmark				

e. Hover over the Referral to view the Referral Card. Click the Link icon, then click Relate To.

Referrer		Hide this patient's other referrals 🔺
eReferral ID: Specialty: Organization: Triage Site:	RFS-AAB-070161 Urology Alberta Health Services Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	RFS-AAB-070161 Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre COMPLETED C
Val Referred for: Im Submitted: Last Updated: Status:	eConsult 26-Jan-2024 10:14 AM 30-Jan-2024 8:37 AM Completed	Related To

The eConsult is now linked to the Referral and will appear in the *Linked Referral* section of the *Right Panel*.

Linked Referrals		^
RFS-AAB-070161 Irving Kipnes Urolog	- Kaye Edmonton Clinic - Dianne and y Centre	
	COMPLETED	
	Show this patient's other referrals 🗸	•

f. Click the Open in a Window icon to open and view the referral in a new window

		l	Linked Referrals	5 ^
eReferral ID: RFS-AAB-067500 Specialty: Orthopaedic Surgery Organization: Alberta Health Services	-1		RFS-AAB-067500	Orthopaedic Surgery - Provincial Open in a new window
Inage Site: Orthopaedic Surgery - Province Referred for: eConsult Submitted: 08-Apr-2024 12:08 PM ILast Updated: 16-Apr-2024 12:49 PM	cial		RFS-AAB-067314	Calgary FAST General Surgery CAT CLERICAL TRIAGE IN PROGRESS
Status: Request Additional Information c Relationship: Related To Linked at: 272-Linz-2024 10:49 AM (< 15 m)	on vinutes ago)			Show this patient's other referrals \checkmark
	indices ago,		Referral Attachr	nents

g. If you mistakenly linked a Referral or eConsult, you can remove it by clicking the *Trash Can* icon to delete this link. This function will not delete the original Referral or eConsult; it will just remove the incorrect link.



L	inked Referrals
	RFS-AAB-070161 Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre Delete the link to this referral
	Show this patient's other referrals 🗸

If an incorrect file has been attached, it can be deleted using the same process as deleting a linked eConsult or Referral. The name of the attachment will stay, but the attachment will be removed.

		Referral Attachm	ents 🖍
File Name File Size	AHC0562 (1).pdf 1185.94kB	AHCC Delete t	his attachment 👘
Created By Created Date	One Training 20-Feb-2024 7:06 AM		Choose a file
MD5 Hash	application/pdf 1fdf958b4a25e66411ea0e87fe91bf1d	Referral Notes	

7.11 Attaching Files to a Referral/eConsult

- a. Click Choose file...
- b. Navigate to the file you wish to upload.
- c. Click the Upload icon.



- d. Click the Upload icon.
- e. Click the *Delete the attachment* icon to remove the attachment. The file name will remain but the file we be deleted.

-		Re	eferral Attachments			~
		θ	Newsletters.docx (926.62 kB)		7 WEEKS AGO	D
File Name	test - Copy.pdf	0	test.pdf (54.44 kB)	(I Delete this	eleted 2 months ago)) -
File Size Created By Created Date Document Type	54.44kB Twenty Training 24-Apr-2024 3:03 PM application/pdf				Choose a file	
MD5 Hash	a0981eeb0e4c4d6889af1c608625d310	Re	eferral Notes			

f. Click the Open in a new window view an attachment.

Referral Attachments	^
⊘ test.pdf (54.44 kB)	(Deleted 8 days ago)
✓ test.pdf (54.44 kB)	Open in a new window



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.

≪ ← COMMON My Details	Triage Referrals					
Worklists	Requests	Total	Referrals	eConsults		
Manage Notifications	Drafts	0	0	0		
FAVOURITES	Undelivered	0	0	0		
SEARCHES	Action Required 🔒		1	1		
✓ EREFERRAL	Triage	16	12	4		
My Referrals	Waiting for Response	4	1	3		
Triage Referrals	Waiting for Appointment/Waitlisted	4	4	-		
My Assigned Referrals	Deferred	0	0	-		
Health Services Catalogue	Scheduled	1	1	-		
EREFERRAL REPORTS	Completed/Cancelled/Declined	13	11	2		

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 onemonth timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

Triage: Tria	age		
Received Date	31-Jan-2024 🔝 to	PHN/ULI	
Referral Reason	Q	Patient First Name	
Specialty	Q	Patient Last Name	
Triage Site	Q	Request Type	Referral 💌
Service Provider	Q	Referral ID	
External Triage Site	Q	Priority	~
Status	Waiting for Clinical Triage 🛞	Exclude	
	(Add	for Response	



- c. Open and review the referral to ensure it is complete. Also, check for duplicate referrals.
- d. Click *Triage* and select *Accept (T3*).



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

Accept (T3)	
Accepted Date (T3) *	01-Mar-2024 🗰
Attachments	Choose a file
	File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.
Netcare Document(s)	⊕ Link a document
Comment	
·	
Accept Cancel	

- f. Click Accept.
- g. (**Optional**) Click *Scheduling* 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 Referrals then Waiting for Appointment/Waitlisted worklist.

≪ ▼ COMMON My Details	Triage Referrals					
Worklists	Requests		Referrals	eConsults		
Manage Notifications	Drafts	0	0	0		
FAVOURITES	Undelivered	0	0	0		
SEARCHES	Action Required	2	1	1		
✓ EREFERRAL	Triage	16	12	4		
My Referrals	Waiting for Response	4	1	3		
Triage Referrals	Waiting for Appointment/Waitlisted	4	4			
My Assigned Referrals	Deferred	0	0	-		
Health Services Catalogue	Scheduled	1	1	-		
EREFERRAL REPORTS	Completed/Cancelled/Declined	13	11	2		

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

Patient			Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site
Search	Reset	Enter a new fav	ourite search 🕀					
Clear Received Date before entering new search criteria.								
	(+) Add							
Status	Waiting	for Appointmen	t 🛞 🛛 Waitlisted 🔅					
External Triage Site			Q		Prie	ority		~
Service Provider			Q		Ref	erral ID		
Triage Site			Q		Rec Typ	quest)e	· · ·	•
Specialty			Q		Pat Na	ient Last me	Ereferral]
Referral Reason			Q		Pat Nai	ient First me	Two	
Received Date		to 📰			PH	N/ULI		



d. Click *Scheduling* and select *Appointment Booked*. The FAST team will update the 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*.
 - *Virtual*: Choose this option if the appointment is not an in-person appointment e.g. Phone, Zoom etc.)
 - **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.

Appointment Bo	oked					
Appointment Date 08-Oct-2024 09:00 () Both Date and Time fields are Mandatory. Please enter time in 24 Hr format (ie. 3pm is 15:00).						
Appointment Type	<u> </u>					
Attach External Document(s) Netcare Document(s)	Virtual Screening Consult	Choose a file ted to 30MB. Multiple files can be uploaded up to a limit of 150MB.				
Comment						
Appointment Book	ed Cance	el				



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. The referral can be found in the Scheduled worklist if the appointment date has been entered.

≪ ← COMMON My Details	Triage Referrals			
Worklists	Requests	Total	Referrals	eConsults
Manage Notifications	Drafts	0	0	0
FAVOURITES	Undelivered	0	0	0
SEARCHES	Action Required 🛕	2	1	1
+ EREFERRAL	Triage	16	12	4
My Referrals	Waiting for Response	4	1	3
Triage Referrals	Waiting for Appointment/Waitlisted	4	4	-
My Assigned Referrals	Deferred	0	0	-
Health Services Catalogue	Scheduled	1	1	-
EREFERRAL REPORTS	Completed/Cancelled/Declined	13	11	2

- c. Search for and open the Referral.
- d. Click *Closing* and set the appointment status to *Complete (T5)*.

Advice ~ Closing ~	Communication ~ Intake ~	Scheduling ~ Triage ~
Cancel		
Complete (T5)		
F Decline		

- e. Enter the Accepted Date (T3) if it is missing or incorrect.
- f. Set the Service Provider to who the patient saw for their appointment if known or incorrect.
- g. 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. The Date Appointment Attended (T5) will autopopulate based on the date it was booked. 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.



Complete (T5)					
Accepted Date (T3) Priority	13-Dec-2023				
Set Service Provider					
Reason *	Patient attended appointment Consult Latter Cost				
	Consult Letter Sent O Consult Letter Sent And Available on Alberta Netcare Portal				
	O Lab results sent				
	C Lab results sent and available on Alberta Netcare Portal				
	🛛 Clear				
Date Appointment Attended (T5) *	14-Feb-2024				
Appointment Type	Consult •				
Outcome * O Procedure completed at appointment					
O Patient discharged from our care, as per consult letter					
O We will continue ongoing patient care					
	O Booking the patient for procedure				
O Pre-screening completed and patient will be booked to see specialist					
 Pre-screening completed; patient discharged as per consult letter 					
	Pre-screening completed; Information not provided by service Information Net Provided by Service				
Attach External	Choose a file				
bocument(b)	File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.				
Netcare Document(s)	⊕ Link a document				
Comments					
·					
Complete (T5)	Cancel				

i. Click Complete (T5). This referral will now move to the Completed/Cancelled/Declined worklist.

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.



≪ ► COMMON	Triage Referrals			
► FAVOURITES	Requests	Total	Referrals	eConsults
► SEARCHES	Drafts	2	1	1
▼ EREFERRAL My Referrals	Undelivered	0	0	0
Triage Referrals	Action Required 🛕	4	3	1
My Assigned Referrals	Triage	15	12	3
Health Services	Waiting for Response	4	2	2
Catalogue	Waiting for Appointment/Waitlisted	6	6	-
EREFERRAL REPORTS	Deferred	2	2	-
PATIENT LISTS	Scheduled	2	2	-
► NOTIFICATIONS	Completed/Cancelled/Declined	18	14	4

c. Click Scheduling and then Appointment Missed.



d. Select the Reason and click Appointment Missed.

Appointment Missed				
Reason * Comment	Will contact patient to rebook Re-refer patient to rebook Patient will not be rebooked and is returned to your care Fee required to rebook patient			
Appointmen	t Missed Cancel			

e. Click Closing and select Cancel.





- f. Select *Reason* (e.g., Patient has been unsuccessful in attending appointments) and, if required, enter a comment.
- g. Click Apply.

Cancel	
Reason *	
Comment	Referral no longer needed Patient has been unsuccessful attending appointments Unable to contact patient
Apply Cancel	Patient has declined service Patient deceased Incorrect Referring Provider added to form Referral created against incorrect patient



9.0 eReferral Provider Notifications

eReferral Provider Notifications allows users to track Referrals and eConsults through an immediate or daily summary email. Provider Notifications are subscription-based and managed by the user. There is no identifiable patient 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 Auto-Subscribed Notifications - Referring Provider & Referring On Behalf Of

Below is a list of <u>default</u> notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral These notifications can be customized to meet your needs.

NOTIFICATIONS – EREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Referrer - eConsult: Redirected	Notify Overnight in Daily Summary Email
eReferral Referrer - eConsult: Cancelled	Notify Immediately by Email
eReferral Referrer - eConsult: Completed	Notify Immediately by Email
eReferral Referrer - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - eConsult: Action Required	Notify Immediately by Email
eReferral Referrer - Referral: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Cancelled	Notify Immediately by Email
eReferral Referrer - Referral: Waitlisted	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Action Required	Notify Immediately by Email
eReferral Referrer - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Deferred	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Declined	Notify Immediately by Email
eReferral Referrer - Referral: Appointment Booked	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Appointment Missed	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Completed	Notify Immediately by Email

9.2 Register for Notifications - Referring Provider & Referring On Behalf Of

- a. Click My Details from the Clinical Portal Menu.
- b. Scroll to the section titled *Users*. Beside the *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 <u>not</u> 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: <u>iam.albertahealthservices.ca/uaa/login</u> to update.
 - Net care (A 0) 2 - COMMON My Details My Detail Worklists 2 hours Username Inactivity Timeout Manage Notifications Your maximum timeout is currently 2 hours Change Password • FAVOURITES Groups I belong Users, Receiving Provider Referrals, Receiving Roles I perform Clinical2-CH SEARCHES to Provider Referrals On Behalf Of, Referrals HSC Reports, Referrals Operations Reports (Provincial), EREFERRAL Referrals Operations Reports (Triage Facility), • EREFERRAL REPORTS Referring Provider Referrals, Triage Referrals PATIENT LISTS **Discard Changes** Update Preferences NOTIFICATIONS CLINICAL ETOOLS Users RESOURCES Please enter a regularly accessed email address. This This email address is for AHS IAM updates and address is used for ANP Outage notifications, ESIGNATURE notifications eReferral updates, Provider Notifications and as an MESSAGING To change this email address, please login through alternate for remote access expiry notifications. IAM. You must log out of Alberta Netcare for an hour for your email address change to be processed. IAM email address Notification email address IS Staff Job Role
- d. Click Update Preferences to save your changes.

9.3 Managing Notifications Subscriptions - Referring Provider & Referring On Behalf Of

A user can customize their notifications and method of delivery:

a. Click on Manage Notifications from the Clinical Portal Menu.

	«
- COMMON	
My Details	
Worklists	
Manage Notification	IS

- 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.



My Email Address	@albertahealthservices.ca
By default	Notify By Email Notify in Daily Summary Email

- 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 delivery method.

Refe	ral Referrer - eConsult: Redirected	eReferral Referrer	 Notify Immediately by Email (Absent of Patient Identifiable Information) Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) Accept Use My Defaults
eRefer	ral Referrer - Referral: Service Provider Set	eReferral Referrer	Use default Change

- 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. Click Accept or select Use My Defaults to reset the notification option to the default value.
- 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.

Gene	eral Subscriptions
	Notification

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 eConsult or a Referral 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: I 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 - <u>https://access.albertanetcare.ca</u> - AHS facility - <u>https://portal.albertanetcare.ca</u>
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 pas	t 24 hours.			
 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> 'Referrals'	cently Updated' worklis			

9.4 Auto-Subscribed Notifications - Receiving & Receiving On Behalf Of Providers

Below is a list of <u>default</u> notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral These notifications can be customized to meet your needs.



NOTIFICATIONS – EREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Receiver - eConsult: Action Required	Notify Immediately by Email
eReferral Receiver - eConsult: Cancelled	Notify Immediately by Email
eReferral Receiver - eConsult: Redirected	Notify Overnight in Daily Summary Email
eReferral Receiver - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Action Required	Notify Immediately by Email
eReferral Receiver - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Service Provider Set	Notify Overnight in Daily Summary Email

9.5 Register for Notification - Receiving & Receiving On Behalf Of Providers

- 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.

				☆ 0 ▲ ▼
≪ ← COMMON	My Details			
Worklists Manage Notifications	Username	Change Password	Inactivity Timeout	2 hours Vour maximum timeout is currently 2 hours.
FAVOURITES SEARCHES	Roles I perform	Clinical2-CH	Groups I belong to	Users, Receiving Provider Referrals, Receiving Provider Referrals On Behalf Of, Referrals HSC
EREFERRAL EREFERRAL REPORTS				Reports, Referrais Operations Reports (Provincial), Referrals Operations Reports (Triage Facility), Referring Provider Referrals, Triage Referrals
NOTIFICATIONS		Update Preferences Discard Changes		
CLINICAL ETOOLS RESOURCES	Users			Please enter a regularly accessed email address. This
ESIGNATURE MESSAGING		This email address is for AHS IAM updates and notifications. To change this email address, please login through		address is used for ANP Outage notifications, eReferral updates, Provider Notifications and as an alternate for remote access expiry notifications.
	IAM email address	<i>илин.</i>	Notification email address	You must log out of Alberta Netcare for an hour for your email address change to be processed.
			Job Role	IS Staff

- c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is <u>not</u> 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: <u>iam.albertahealthservices.ca/uaa/login</u> 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.

9.6 Managing Notification Subscriptions - Receiving & Receiving On Behalf Of Providers

A user can customize their notifications and method of delivery:

a. Click 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.

My Email Address	@albertahealthservices.ca
By default	Notify By Email

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 recirecent event occur of 'Consult: Appointment 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 dashboard. 3. Copy/paste the Referral Id into the Refer 'Search'.	orded as the assigned Receiver, has had a It Missed'. > eReferral > 'My Assigned Referrals' rral ld field below your dashboard and click	Sample email from a notification wit a delivery method of: Notify Immediately by Email.	h
	To change your notification subscriptions, Common > 'Manage Notifications' settings	The following eReferral notification events y the past 24 hours.	ou are subscribed to have occurred within	
0	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	 Notification events where you are recordi - [20 occurrences] Consult: Service Provide - [10 occurrences] Advice: Clinical Triage in - [10 occurrences] Consult: Waiting for Cle - [6 occurrences] Advice: Completed (check worklist) - [5 occurrences] Advice: Waiting for Clinica - [6 occurrences] Consult: Waitlisted (check worklist) 	ed as the assigned Receiver rr Set (check your 'Triage' worklist) Progress rical Triage (check your 'Triage' worklist) k your 'Completed/Cancelled/Declined' al Triage (check your 'Triage' worklist) k your 'Waiting for Appointment/Waitlisted'	
Sampl	e email from a notification	 [4 occurrences] Consult: Cancelled (chec worklist) 	k your 'Completed/Cancelled/Declined'	
with a	delivery method of: Notify			
Overni Email.	ght in Daily Summary	To view these referrals, please visit your Alb Assigned Referrals' dashboard.	erta Netcare Portal>eReferral> 'My	
		To change your notification subscriptions, p Common > 'Manage Notifications' settings	olease visit your Alberta Netcare Portal > screen.	
		To access Alberta Netcare Portal: - Remote site using a fob - https://access.a - AHS facility - https://portal.albertanetcare	albertanetcare.ca .ca	
		For help, please click on the "Need Help?" screen.	menu item on the left of the Netcare login	

d. In *My General Subscriptions*, click *Change* and select the desired delivery method. Click *Accept* to save your changes or *Use My Defaults* to select the default delivery settings.

My General Subscriptions		
Notification	User Type	Delivery Methods
eReferral Receiver - Referral: Declined	eReferral Receiver or Triage	
eReferral Receiver - eConsult: Action Required	eReferral Receiver or Triage	Customized Change
eReferral Receiver - eConsult: Cancelled	eReferral Receiver or Triage	Customized Change
eReferral Receiver - Referral: Service Provider Set	eReferral Receiver or Triage	 Notify Immediately by Email (Absent of Patient Identifiable Information) ✓ Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) Accept Use My Defaults



- e. 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.
- f. Click the Save button to save your changes.



g. To find a referral, copy the complete *Referral ID* (including RFS-AAD-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.

→ COMMON	My Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
▶ SEARCHES	Recently Updated	25	21	4
▼ EREFERRAL	Cancelled/Declined	22	12	10
My Referrals	Action Required	1	1	0
Triage Referrals My Assigned Referrals	Drafts	1	0	1
Health Services	Undelivered	0	0	0
Catalogue	In Progress	56	43	13
EREFERRAL REPORTS	Completed	9	6	3
PATIENT LISTS	Waiting for Response	5	5	0
NOTIFICATIONS				
CLINICAL ETOOLS		Selec	t a favourit	e search 🗙
RESOURCES	Referral RFS-AAD-943316			
ESIGNATURE	Search Reset			
MESSAGING	Enter a new favourite search			
NETCARE TERMS OF USE	Enter the Referral ld from 'Search'.	m your	email notif	ication and c

h. Click Search and the specific referral will display.



9.7 Auto-Subscribed Notifications - Triage User

Below is a list of <u>default</u> notifications that all triage users will automatically receive when an activity occurs on an eConsult or Referral. These notifications can be customized to meet your needs. There are several other options that triage users can subscribe to.

NOTIFICATIONS – EREFERRAL TRIAGE	WHEN WILL IT BE SENT?
Referral Triage - eConsult: Action Required	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Cancelled	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Clerical Triage in Progress	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Completed	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Action Required	Notify Overnight in Daily Summary Email

9.8 Register for Notifications – Triage User

- 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.

		You last logged in 28-Jul-2023	08:03	
≪ → COMMON My Details	My Details			
Worklists Manage Notifications	Username	Change Password	Inactivity Timeout	2 hours Vour maximum timeout is currently 2 hours.
FAVOURITES SEARCHES		-	Important Messages	 ○ Show alert until dismissed ③ Show alert for 10 seconds ✓ ○ Do not show alert
EREFERRAL EREFERRAL REPORTS	Roles I perform	Clinical2-CH	Groups I belong to	Users, Receiving Provider Referrals, Referrals HSC Reports, Referrals Operations Reports
PATIENT LISTS CLINICAL ETOOLS				(Provincial), Referrals Operations Reports (Triage Facility), Referrals User, Referring Provider Referrals Triage Referrals
NOTIFICATIONS RESOURCES		Update Preferences Discard Changes		
ESIGNATURE MESSAGING	Users			
	IAM email	This email address is for AHS IAM updates and notifications. To change this email address, please login through IAM.		Prease enter a regurary accessed email address. This address is used for ANP Outage notifications, eReferral updates, Provider Notifications and as an alternate for remote access expiry notifications. You must log out of Alberta Netcare for an hour for your email address change to be processed.
	address		Notification email address	

c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is <u>not</u> 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: <u>iam.albertahealthservices.ca/uaa/login</u> 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.

Triage Refe	rrals		
Triage Facility	Margery E. Yuill Cancer Centre [WDFA8E87],	Add Referral	🕀 Add
	Foothills Medical Centre - Women's Health	Creators to	
	Centre - OBS-GYN [WDFAGG0E], Addiction and N		· · · · · ·
	H - Addiction Medicine - Provincial [VRTL0016],	Show Completed/Cape	Last 1 month V
	Northern Alberta Renal Program - Nephrology	elled/Declined	
	[VRTL0026], RGH - Holy Cross Ambulatory Care	referrals for	

9.8 Managing Notifications Subscriptions – Triage User

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. Sample email from a notification with a 2) Notification events where you are recorded as the Referrer - [1 occurrence] Consult: Waitlisted delivery method of: To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' Notify Overnight in worklist Daily Summary Email 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 Consult For help, please click on the "Need Help?" menu item on the left of the Netcare login screen. Referral Id: Sample email from a Referring Provider: Submitted By: notification with a To view this referral, delivery method of: 1. Log into Alberta Netcare Portal. 2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard. Notify Immediately by 3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'. Email. To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen. To access Alberta Netcare Portal

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.

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

- Remote site using a fob - <u>https://access.albertanetcare.ca</u> - AHS facility -- <u>https://portal.albertanetcare.ca</u>



COMMON My Details Worklists Manage Notifications FAVOURITES NOTIFICATIONS SEARCHES EREFERRAL EREFERRAL	You	M En Ac Di M Di M U ca	Anal Iddress Provide the second sec	formation) (eReferral Referrer , eR tifiable information) (eReferral Re in the My General Subscriptions si	eferral Receiver or Triage) ferrer , eReferral Receiver or Triage) rttings below.
PATIENT LISTS			Netification	User Type	Delivery Methods
+ CLINICAL ETOOLS	11	0	eReferral Triage - Consult: Declined	eReferral Receiver or Triage	
RESOURCES		2	eReferral Triage - Advice: Action Required	eReferral Receiver or Triage	Notify Immediately by Email (Absent of Patient Identifiable
ESIGNATURE MESSAGING					Sorty Overnight in Daily Sortmacy Email (Absent of Patient Identifiable Information) Accept Use My Defaults
	11		eReferral Triage - Advice: Cancelled	eReferral Receiver or Triage	Customized Change
		0	eReferral Triage - Consult: Service Provider Set	eReferral Receiver or Triage	
			eReferral Triage - Consult: Waiting for Clinical Triage	eReferral Receiver or Triage	Customized Change
		0	eReferral Triage - Consult: Waitlisted	eReferral Receiver or Triage	
		0	eReferral Triage - Advice: Waiting for Clinical Triage	eReferral Receiver or Triage	
		2	eReferral Triage - Consult: Clerical Triage in Progress	eReferral Receiver or Triage	Customized Change
		0	eReferral Triage - Consult: Reassigned	eReferral Receiver or Triage	
	IL	0	eReferral Triage - Consult: Completed	eReferral Receiver or Triage	

- e. Click *Change* in the delivery method column and select the desired delivery method.
- f. Click Accept to save your changes or Use My Defaults to select the default delivery setting.
- g. 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 <u>do not</u> include Referral IDs.

► COMMON	My Referrals			
+ FAVOURITES	Poquests	Total	Poforrale	oConsulto
SEARCHES	Recently Updated	25	21	4
▼ EREFERRAL	Cancelled/Declined	22	12	10
My Referrals	Action Required	1	1	0
Triage Referrals My Assigned Referrals	Drafts	1	0	1
Health Services	Undelivered	0	0	0
Catalogue	In Progress	56	43	13
EREFERRAL REPORTS	Completed	9	6	3
PATIENT LISTS	Waiting for Response	5	5	0
► NOTIFICATIONS		Calar		
CLINICAL ETOOLS		Selec	t a favourit	e search ♥
RESOURCES	Referral RFS-AAD-94	13316		
ESIGNATURE	Search Reset			
MESSAGING	Enter a new favour	ite sear	ch 🕀	
NETCARE TERMS OF USE	Enter the Referral ld from 'Search'.	m your	email notif	fication and

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



10.0 eReferral Reports

The Alberta Netcare Portal eReferral application includes several 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 <u>access.ereferral@ahs.ca</u> 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:

- Referral Request Provides the total number of Referrals submitted.
- Referral Request Referrals by Status Reports the number of Referrals 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.
- Referral Request Referrals by Referral Reason Provides the number of Referrals submitted under each referral reason.
- Referral Request Referrals by Referring Provider Gives the number of Referrals submitted by each user.
- Referral Request Referrals by Referring Provider and Referral Reason Generates a list of referring providers for any specific reason for referral along with the number of Referrals the provider submitted using that reason.
- eConsult Requests Provides the total number of eConsults 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) Triage Site Listing (Provincial user group only) Generates a list of all 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:

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



• **Receiving Providers On Behalf Of Report** – Lists the names of all Alberta Netcare Portal users that have received a Referral/eConsult 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.

 COMMON My Details Worklists Manage Notifications FAVOURITES 	If the Level is selected as Triage Site, a valid Triage Site must be selected eReferral Report - Referrals Level Triage Triage Q Site	
 > SEARCHES > EREFERRAL My Referrals Triage Referrals My Assigned Referrals Health Services Catalogue 	Date	
EREFERRAL REPORTS Referral and eConsult Requests Referral Requests	Category Number of Referrals (Total System) [Total to Date] Printer Friendly Version	Count 169
Referral Request Referrals by Status Referrals by Referral Reason Referral Request Referrals by Referring Provider Referral Request Referral Request Referrals by Referring Provider and Referral Reason		

- d. Enter selection criteria and click the *Search* button. The wider the selected criteria, the longer the report will take to generate and display.
- e. Click *Download CSV results* for analysis in Microsoft Excel. Click *Printer Friendly Version* to save the report as a PDF or print.

10.2 eConsult Billing for Receiving Providers

eReferral eConsults are billable using eConsult 03.010. 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.



≪ ► COMMON	My Assigned Refe	rrals	6	
► FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES	Action Required	0	0	0
▼ EREFERRAL	Open eConsults	4	0	4
Triage Referrals	Waiting for Appointment/Waitlisted	1	1	0
My Assigned Referrals	Scheduled	1	1	-
Health Services	Completed/Cancelled/Declined	4	2	2
Catalogue	Triage	3	1	2
EREFERRAL REPORTS	Waiting for Response	3	1	2
PATIENT LISTS	Deferred	0	0	-

- b. Enter the date range for your search in the Completed/Cancelled/Declined Date fields.
- c. Select eConsult for Request Type and click Search.

Receiver: Completed/Cano	elled/Declined		Select a favourite search 👻
Completed/Cancelled/Declined Date	01-Jan-2024 🔝 to 15-Mar-2024 🔠	PHN/ULI	
Referral Reason	٩	Patient First Name	
Specialty	٩	Patient Last Name	
Triage Site	Q	Request eConsult Type	~
Service Provider	Q	Referral D	
External Triage Site	Q	Priority	~
Status	Cancelled (*) Declined (*) (+) Add		
Search Reset Enter a	new favourite search 🕒		



The results that appear are the eConsults 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 eConsult 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 Provider
PATHFINDER, Test Id		27-Oct- 2017	Hip pain						5 Calendar days	Advice	
EREFERRAL, Two B Results 1-2 Printe	r Friendly Version	13-Apr- 2018	Hip pain ad CSV resu	its i					5 Calendar days	Advice	

- 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 Appl. Access Target Time Target Time Status Reason Completed/ Cancelled/ Ca												
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

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

Do you want to open or save Completed_Cancelled_Declined.csv (2.25 KB) from portallearn.albertanetcare.ca?									
	<u>O</u> pen	<u>S</u> ave	•	<u>C</u> ancel					

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.