eREFERRAL QUICK REFERENCE:

How to Manage My Assigned Referrals

My Assigned Referrals displays all consult or advice requests that are assigned to a specific receiving provider (this dashboard is only available to Alberta Netcare users who have a Receiving Provider role). The ***My Assigned Referrals*** dashboard lists consult/advice requests assigned to the Receiving Provider. The referral worklists are:

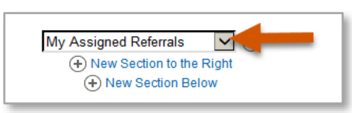
- ***Action Required:*** Referring provider has requested additional information or clarification for you to review.
- ***Open Advice Requests:*** Any open advice requests.
- ***Waiting for Appointment/Waitlisted:*** Consult Requests waitlisted and waiting for an appointment.
- ***Scheduled:*** Consult requests with a booked appointment.
- ***Completed/Cancelled/Declined:*** Referrals that have been completed, cancelled or declined.
- ***Triage:*** Consult or advice requests in queue to be triaged.
- ***Waiting for Response:*** Consult or advice requests that have been sent to the referring provider to provide information.
- ***Deferred:*** Consult requests that have been deferred due to the patient medically, functionally or socially not ready to book.

Adding My Assigned Referrals to the Homepage

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

   Configure Layout

2. Choose how you want the windowlet to be displayed on the Homepage by selecting ***New Section to the Right*** or ***New Section Below*** click the ***Add*** ⊕ button.
3. Click the drop-down arrow to reveal a list of configurable options. Select ***My Assigned Referrals*** from the list.



4. Click ***Update Layout*** at the bottom of the page to save the changes.

   Update Layout

5. Confirm the Homepage is now displaying the ***My Assigned Referrals*** dashboard.

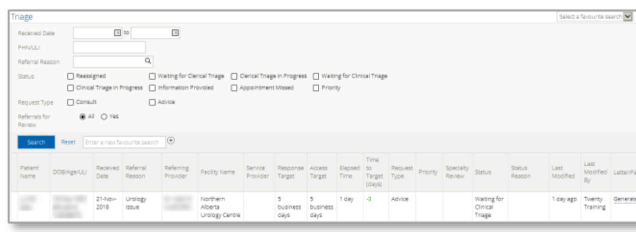
Managing My Assigned Referrals

1. Click on any of the worklists on the ***My Assigned Referrals*** dashboard, located under the eReferral tab on the left side of the screen or on the Homepage, to view a summary of referrals.

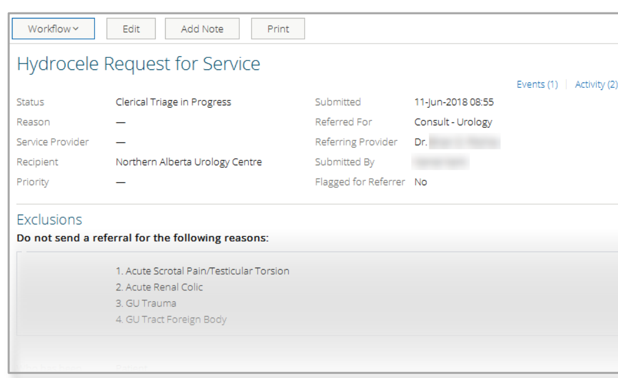
My Assigned Referrals

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

2. Click on a referral in the list to access the applicable patient Referral Form.



3. Within the Referral Form, you will have access to the workflow and be able to apply triage workflow actions to assigned consult requests or advice requests.



For further information on triage workflow and actions, review the eReferral Quick Reference document, ***How to Manage/Triage a Consult Request*** *or* ***How to Manage/Triage an Advice Request.***