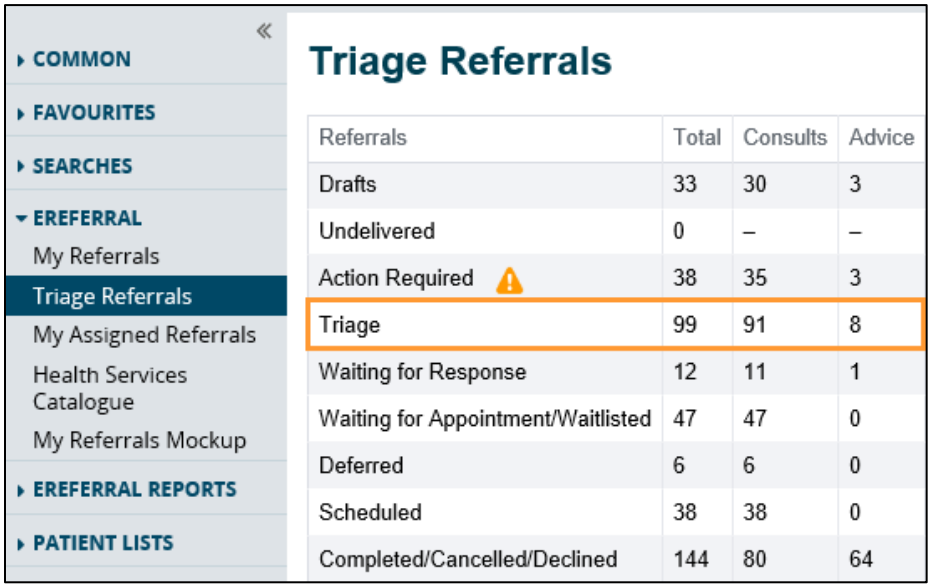
Manage Advice Requests

There are two ways to find a new Advice Request:

a. If you are set up as a triage user, you can use the ***Triage*** worklist on the ***Triage Referrals*** dashboard. This will show every request that has arrived for your facility.



Referrals	Total	Consults	Advice
Drafts	33	30	3
Undelivered	0	–	–
Action Required	38	35	3
Triage	99	91	8
Waiting for Response	12	11	1
Waiting for Appointment/Waitlisted	47	47	0
Deferred	6	6	0
Scheduled	38	38	0
Completed/Cancelled/Declined	144	80	64

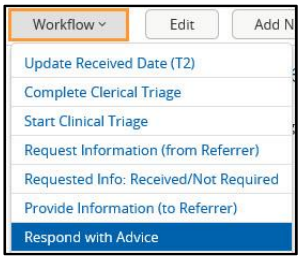
b. If you do not triage referrals, and only respond to them, you may or may not have access to the ***Triage Referrals*** dashboard. In this case, you can view requests on the ***My Assigned Referrals*** dashboard after they have been assigned to you as a provider by a triage user.

- In the Advice Request, there are two options - ***Workflow*** and ***Print***:
  - ***Workflow***: Used to change the referral status and to provide a response to the referring provider.
  - ***Print***: Used to print or save as a document.

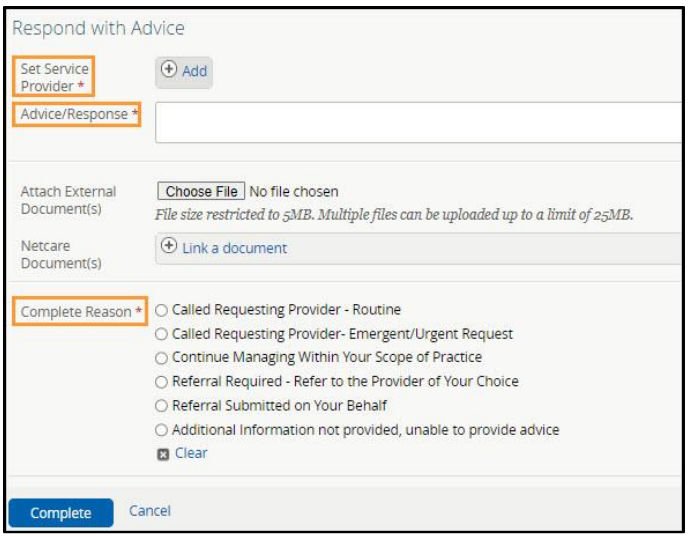
Respond with Advice

Use this option if you are a specialist responding to the Advice Request yourself.

1 If the Advice Request is appropriate and you choose to respond, click ***Respond with Advice*** from the ***Workflow*** taskbar.



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



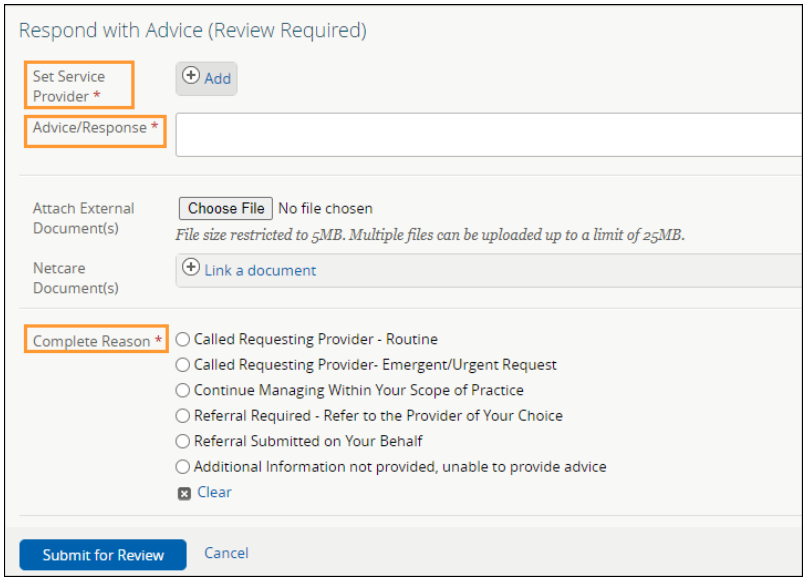
- The Advice Request will now appear on your ***Completed/Cancelled/Declined*** worklist on the ***My Assigned Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response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

Respond with Advice (Review Required)

Use this option if you are a resident or other healthcare provider that requires a specialist to review your response before sending it back to the referring provider.

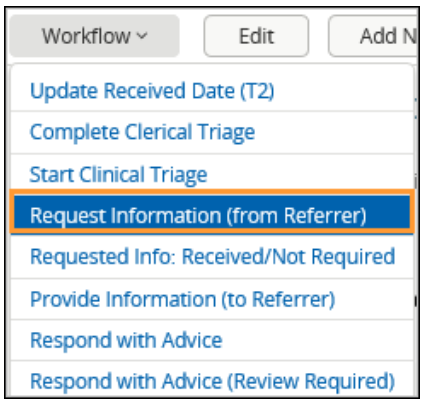
1 Select ***Respond with Advice (Review Required)*** from the ***Workflow*** taskbar if there is a need for a specialist to review the advice before it is provided to the referrer (i.e., if a fellow or other staff member composes the response).

2 Set the 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.

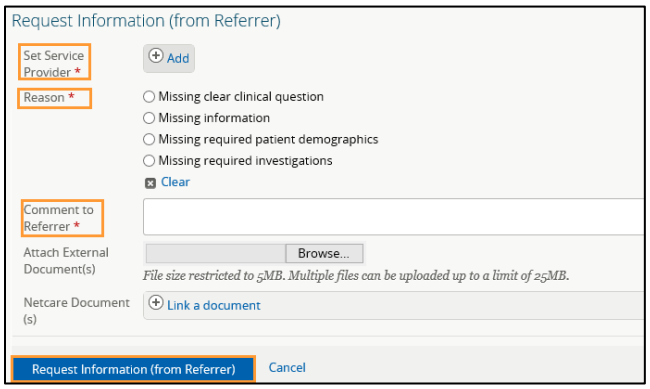


Request Additional Information from the Referring Provider

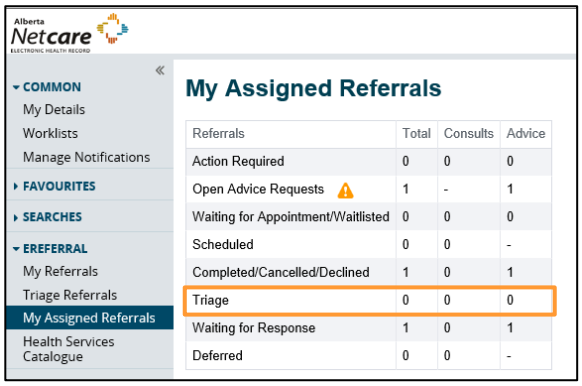
1 If you are not able to provide a response and require more information to complete the Advice Request, go to the ***Workflow*** taskbar and select ***Request Information (from Referrer)***.



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



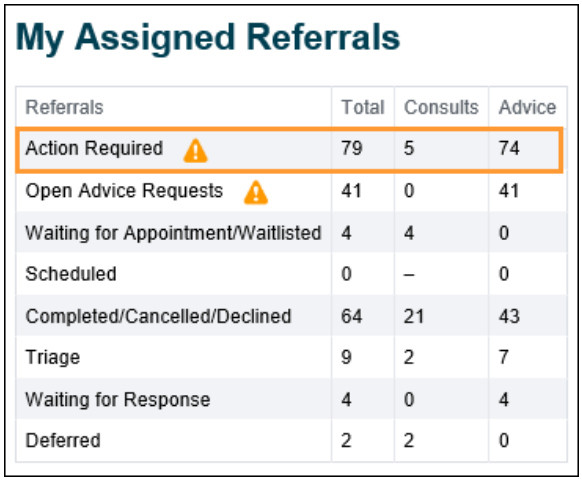
- The Advice Request will now appear on your ***Waiting for Response*** worklist on your ***My Assigned Referrals*** dashboard and ***Triage Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response will appear on their ***My Referrals*** dashboard.



Respond to an Additional Question or Information from a Referring Provider

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

1. Click on ***Action Required*** and filter on Advice Request. The referral will have a panel indicating that new information has been added and requires review.

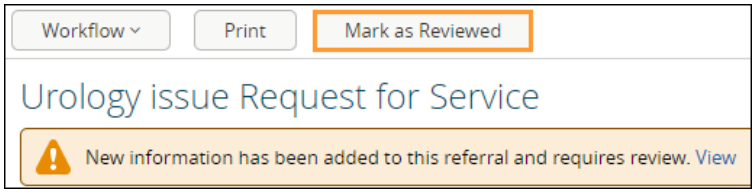


My Assigned Referrals

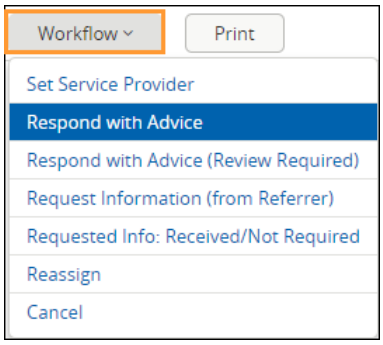
Referrals	Total	Consults	Advice
Action Required	79	5	74
Open Advice Requests	41	0	41
Waiting for Appointment/Waitlisted	4	4	0
Scheduled	0	–	0
Completed/Cancelled/Declined	64	21	43
Triage	9	2	7
Waiting for Response	4	0	4
Deferred	2	2	0

2. To review the additional information, navigate to the ***Activity*** section at the bottom of the Advice Request. Click ***View form for comments and attachments*** under ***Respond to Receiver*** to see the content.

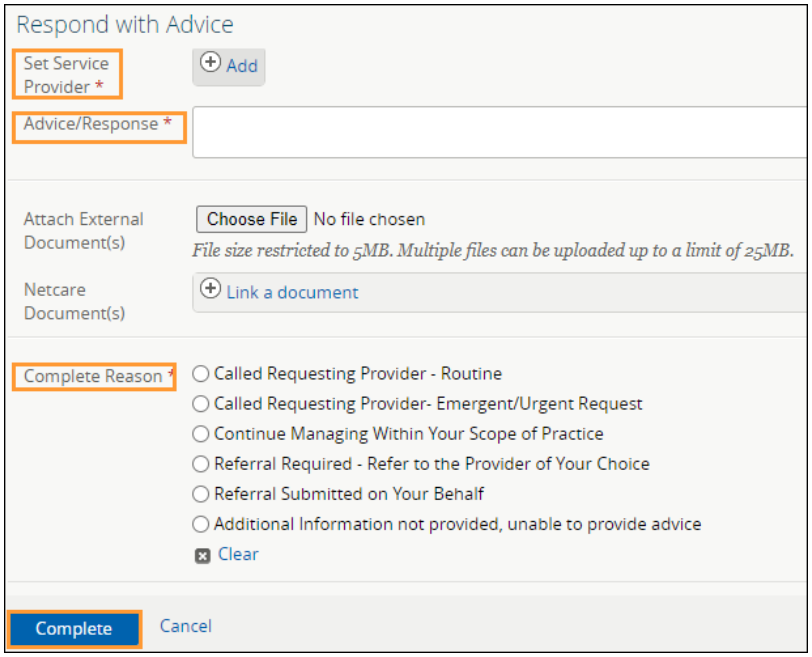
3. Once done, click ***Mark as Reviewed*** on the top task bar. Enter a comment and select the blue ***Mark as Reviewed*** button to finish. The panel indicating that new information was added to the referral will now be removed.



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



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

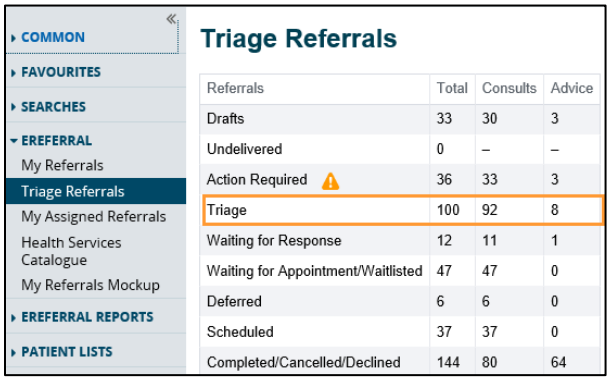


- The Advice Request now appears on the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** and ***My Assigned Referrals*** dashboards, and the ***Completed*** worklist on the ***My Referrals*** dashboard.

Triage Advice Requests

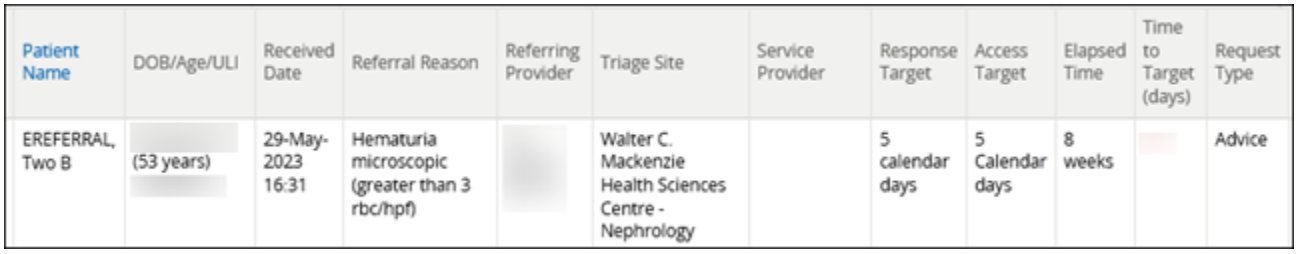
If you have triage access, you can triage Advice Requests using the instructions below:

1. Select ***eReferral*** from the ***Clinical Portal Menu***, then ***Triage Referrals***.
2. Click on ***Triage***.



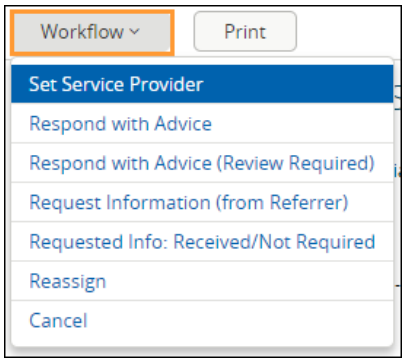
3. Filter on ***Advice*** in the ***Request Type*** section and click ***Search***. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

4. Click on an Advice Request to view it.

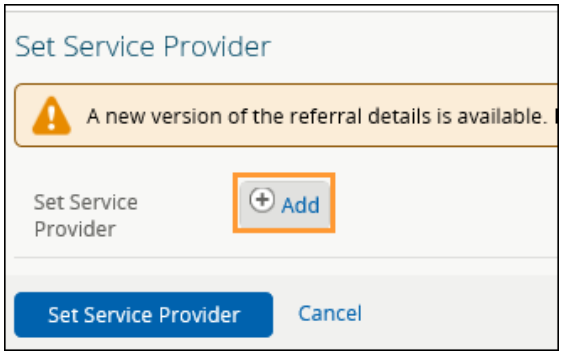


Patient Name	DOB/Age/ULI	Received Date	Referral Reason	Referring Provider	Triage Site	Service Provider	Response Target	Access Target	Elapsed Time	Time to Target (days)	Request Type
EREFERRAL, Two B	(53 years)	29-May-2023 16:31	Hematuria microscopic (greater than 3 rbc/hpf)		Walter C. Mackenzie Health Sciences Centre - Nephrology		5 calendar days	5 Calendar days	8 weeks		Advice

5. Click ***Workflow*** and select ***Set Service Provider***.



6 Click on 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.



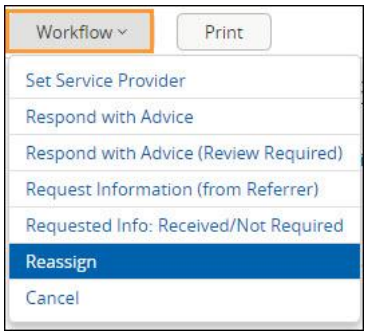
- After setting the service provider, the request will now show up in the selected receiving provider's ***My Assigned Referrals*** dashboard provided the receiving provider added their name in their ***My Details***. If they have configured their eReferral Provider Notifications, they will receive an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

Reassign an Advice Request

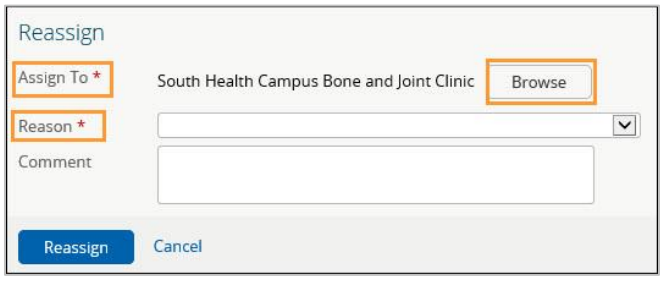
An Advice Request can be reassigned to another facility if it is not appropriate based on the requested Zone or if the assigned provider is not available to respond to the request within an acceptable time period.

1 Open the appropriate Advice Request.

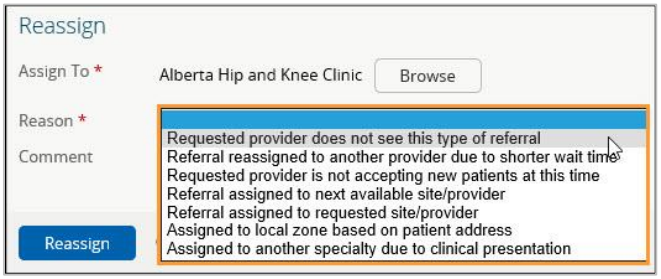
2 Open the ***Workflow*** taskbar and click on ***Reassign***.



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



4 Beside ***Reason***, choose the reason for reassigning the Advice Request and enter any comments if necessary. Click ***Reassign*** to finish.



- The request will now appear on the chosen service's ***Triage Referrals*** dashboard and will disappear from your dashboards.