eREFERRAL QUICK REFERENCE:

How to Manage/Triage an Advice Request

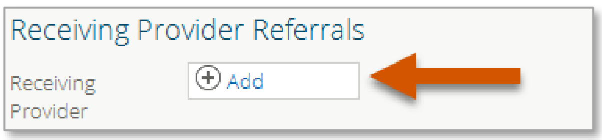
Alberta Netcare ELECTRONIC HEALTH RECORD

Configuring My Details

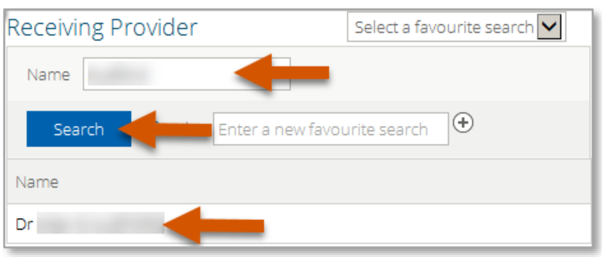
By adding yourself as a Receiving Provider you will be able to see your referrals in ***My Assigned Referrals***.

1. Click on ***My Details*** below the ***Common*** folder in the top left hand column on your ***Homepage***.

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



3. Type your FULL name in the box (as per CPSA license) and click ***Search***.



4. Once the list displays, click on your name.

5. Scroll down to the ***Receiving Provider Referrals*** section and confirm that your full name has been added.

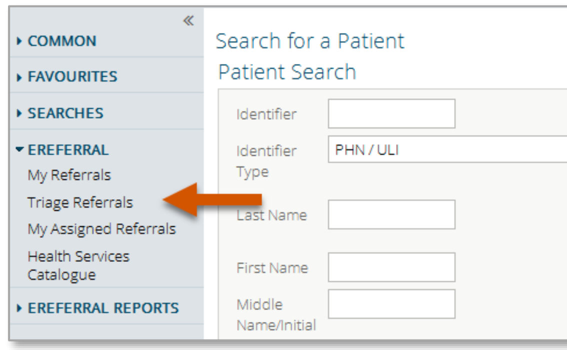
6. Scroll to the bottom of the page to the ***Triage Referrals*** section and confirm that the correct Triage Facility is listed.

7. Click the ***Update Preferences*** button to validate your updates. Click the ***Home*** icon in the top right corner to return to your homepage.

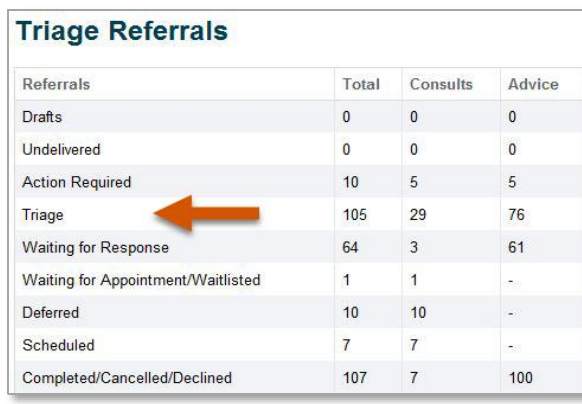
Triage Management

Use the following steps to triage advice requests submitted to your facility.

1. Select ***Triage Referrals*** from the ***eReferral*** menu on the ***Menu Bar***.



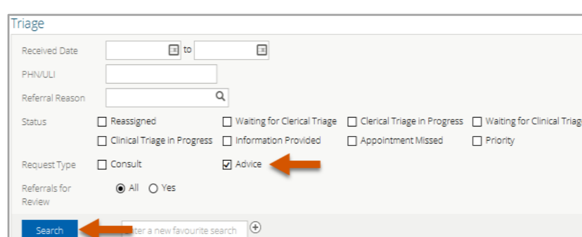
2. The ***Triage Referrals*** dashboard will open. Click on ***Triage*** and the ***Triage Worklist*** will open in a new window.



Triage Referrals

Referrals	Total	Consults	Advice
Drafts	0	0	0
Undelivered	0	0	0
Action Required	10	5	5
Triage	105	29	76
Waiting for Response	64	3	61
Waiting for Appointment/Waitlisted	1	1	-
Deferred	10	10	-
Scheduled	7	7	-
Completed/Cancelled/Declined	107	7	100

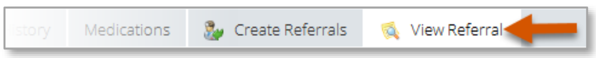
3. Select ***Advice*** in the ***Request Type*** section.



Click ***Search*** to filter the list and then click on an advice request to view it.

*Note: Selections can be saved as a favorite search. Type the status or request type in the **Enter a new favorite search** field. Click the button to save the favorite search.*

4. Review the entire request (in the conversation entry box) and any attachments that have been included. You may also reference back to the patient's Netcare record by clicking on the selections on the ***context menu***. To return to the advice request select the ***View Referral*** option.



Once your review is complete, you can respond with advice or request additional information from the referring provider.

Responding to an Advice Request

1. If the advice request is appropriate and you choose to respond, click ***Edit*** from the top task bar.

2. Scroll to the ***Advice Request Conversation*** section.

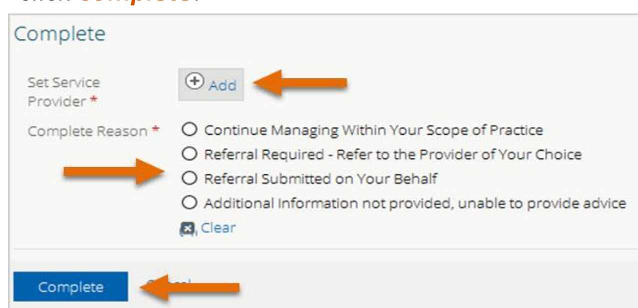
3. Click ***Add Conversation Entry*** below the last entry to open up a ***Conversation Entry*** box for yourself.

4. In the ***Conversation Entry*** section click ***Add***. Your name as the receiving provider will populate automatically as per your ***My Details*** configuration. See ***Configuring My Details*** on page 1, steps 1-7 of this document.

5. Type your response to the advice request in the ***Conversation Entry*** text box including any attachments, such as a clinical pathway.

6. Once your response is complete, scroll to the bottom of page, click ***Save*** then select ***No*** to submit to specialty for review. Click ***Edit***.

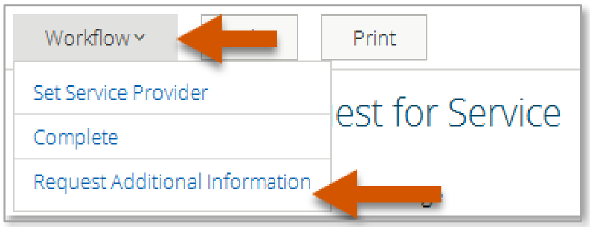
7. Return to the top task bar and click ***Workflow*** and then ***Complete***. Click ***Add*** to search for yourself by typing your name to set yourself as the ***Service Provider***. Next choose the ***Complete Reason*** from the list provided and click ***Complete***.



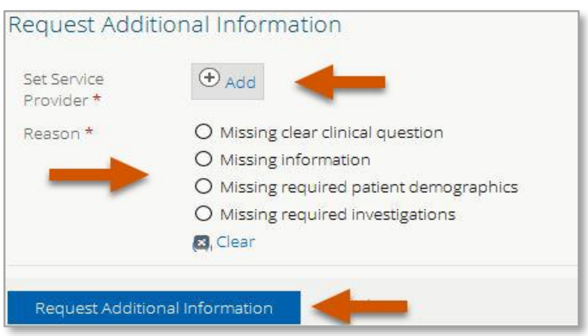
Responding to an Advice Request is now complete and the advice request will appear as ***Completed*** on the Referring Provider's worklist and on the Receiving Provider's ***My Assigned Referrals*** dashboard.

Requesting Additional Information

1. If you are not able to provide a response and require more information to complete the advice request, follow steps 1-6 on page 2 of this document ***Responding to an Advice Request*****.** Then return to the ***Workflow*** taskbar and select ***Request Additional Information***.

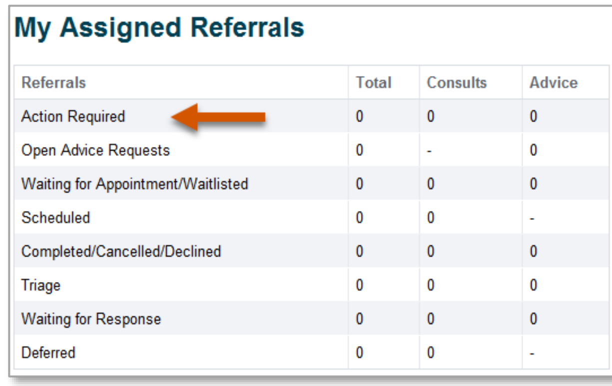


2. Click ***Add*** and type in your name to set yourself as the ***Service Provider***. Select the ***Reason*** for requesting additional information and click ***Request Additional Information***. Now the ***Advice Request*** will appear on the Referring Provider's ***Action Required*** worklist and the receiving provider's ***Waiting for a Response*** worklist.



Responding to an Action Required Request from the Referring Provider

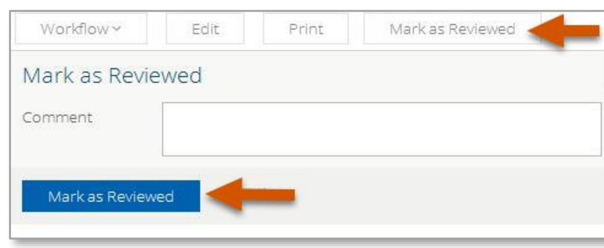
1. If a Referring Provider requests additional information or clarification from you the request will appear on your ***Action Required*** worklist. Click on ***Action Required*** and select the applicable advice request.



My Assigned Referrals

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

3. Click ***Mark as Reviewed*** on the top task bar, enter a ***comment*** as applicable and select ***Mark as Reviewed.***



2. Click the ***Edit*** on the top taskbar. Review the additional question or response in the ***Advice Request Conversation*** section.

3. Click ***Add Conversation Entry*** below the last conversation entry and follow steps 1-7 on page 2 of this document ***Responding to an Advice Request*** to provide your response.