How to attach a referral letter from Accuro

1 **Create a referral letter in Accuro.** Navigate to the EMR section in Accuro and select the **ENCOUNTER NOTES** tab. Be sure the correct patient is selected. Choose the **REFERRAL LETTER** from the **NOTES** section of the Electronic Drawer dropdown.
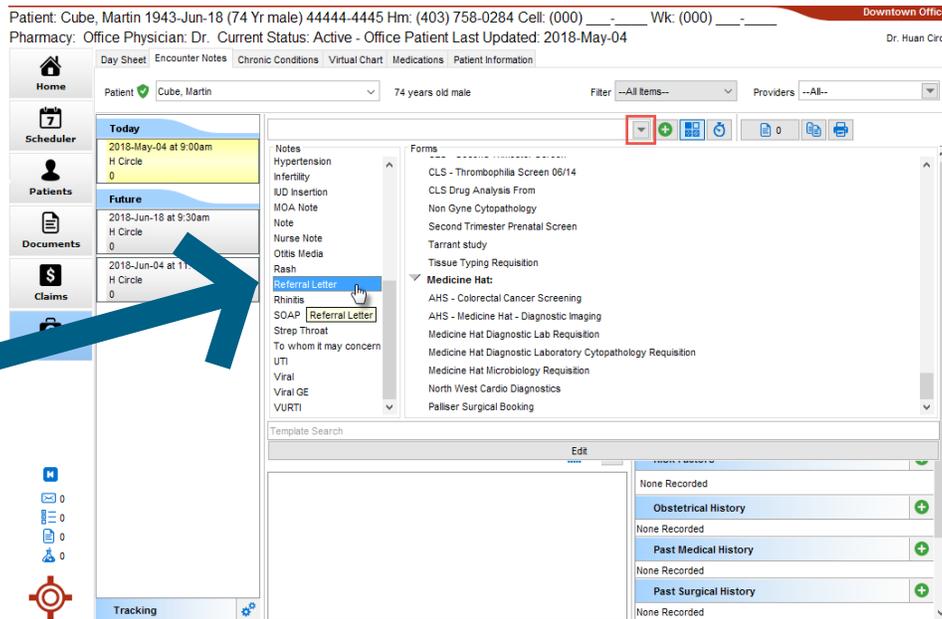
Edit the default referral letter and press **GEN. LETTER** to continue.
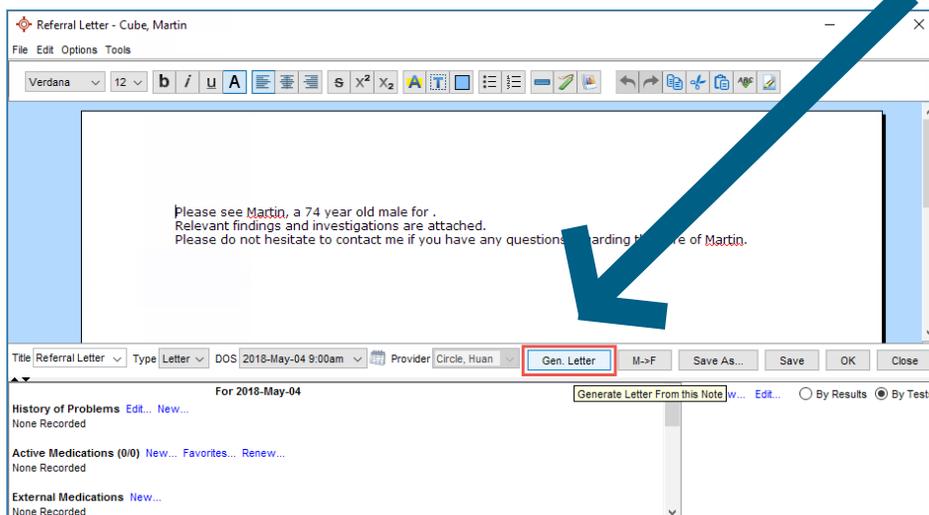
While generating the letter, select the **HEADER** and **FOOTER** along with the **MEDICAL HISTORY INFORMATION** on the left-hand side of your screen that you would like to include.

Select a recipient to continue. While the recipient is required, the letter will not send to the recipient unless you choose to do so.

2 **Print and save the letter.** Once the referral letter is complete, press the **PRINT** button.
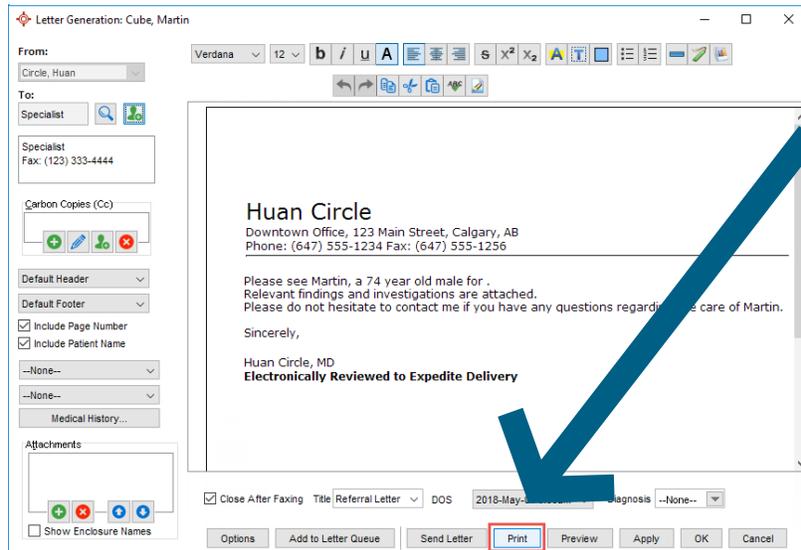
The Print dialog box has a dropdown list to select the desired printer. The printer to select will be a PDF printer such as *Microsoft Print to PDF* or similar. Once you've chosen your printer, press **OK**.
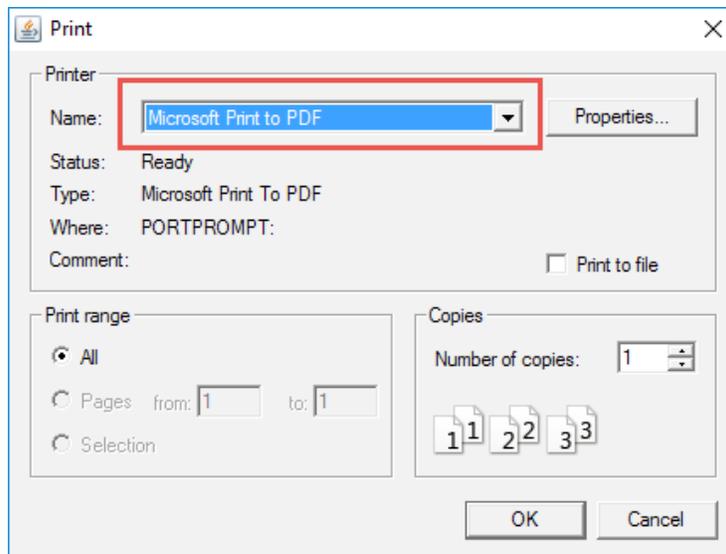
Enter a name to save the file as and then select the location on your computer you would like to save the file to.

IMPORTANT NOTES ABOUT SAVING: If you have a locally-hosted server for Accuro, the most common location to save documents is the *ReadyforAccuro* folder. This can normally be found on the C:\ drive or as a shared folder under *This PC*.

If you have a hosted version of Accuro (ASP) and access it through Citrix, you will need to make sure you are saving the file in the correct location. When you are asked to save the file, first select the Local Disk (C:) from the *Save In* dropdown. This will tell the file to save to your computer instead of the server where Accuro is being hosted.

The file can be saved to any location on your computer. For hosted sites, it is not recommended to save to the *ReadyforAccuro* folder. Files saved to hosted-site's *ReadyforAccuro* folder are transferred to the server to be assigned to patient charts like faxes and scans. Saving to a different location will ensure the file stays on your computer and can be selected to attach to eReferral.

Remember to delete files from your local drive or refer to your clinic's best practices for file management once you no longer need the files.

3 **Attach the letter to eReferral.** Log into Alberta Netcare (http://www.albertanetcare.ca) and search for the patient you want to submit the referral for. When you are in the patient file, click **CREATE REFERRALS**.
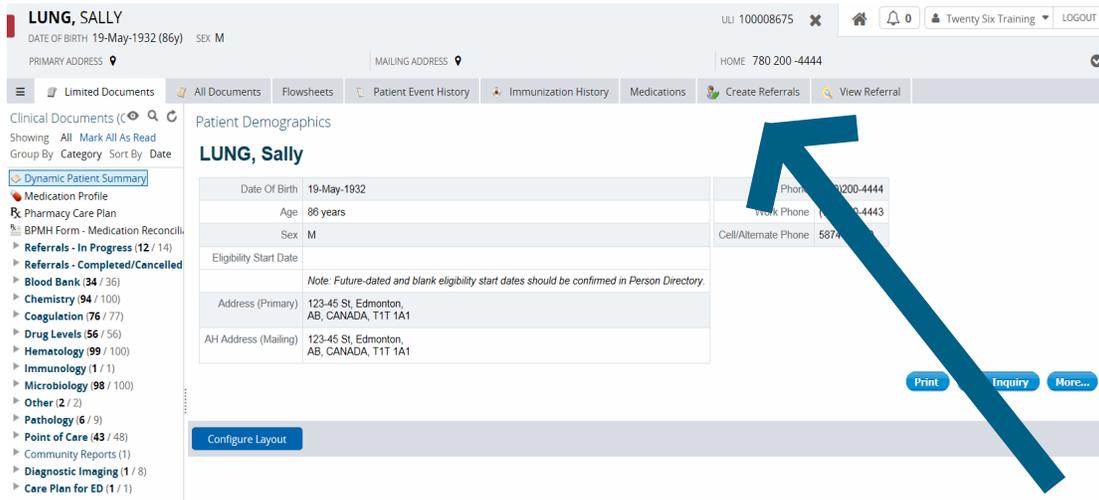
Under **SELECT A FORM**, select a **REASON FOR REFERRAL** and choose what you want to **REFER FOR**. Click **CREATE**.

Once the referral form opens, begin filling in all information, including everything with a red asterisk (*).

When you reach **REFERRAL DETAILS**, choose **ATTACH REFERRAL FORM** from the **REFERRAL FORM SOURCE** field. Fill in the **REASONS FOR SENDING THIS REFERRAL**, **PATIENT'S CURRENT STATUS** and **CURRENT AND PAST MANAGEMENT FIELD**s. Scroll down to **ATTACH REFERRAL FORM**, click **BROWSE** and choose the file you want to upload. Under **SUBMISSION METHOD**, choose **ELECTRONIC**.

Referral Details

Clinical Pathway URL	-
Referral Form Source *	○ eReferral Form ● Attach Referral Form ⊠
Reason for sending this referral *	Please see attached referral.
Patient's current status *	Please see attached referral.
	Please provide details about if the patient's condition is stable or worsening. What you think is going on? Key symptoms and findings. Symptom onset/duration. Red flags.
Current and past management *	Please see attached referral.
	Please provide details of treatments tried and outcome(s). Consultation testing (previous, concurrent or if none, specify none).

ℹ For this referral to be accepted, please complete the **Findings and/or Investigations** column for each requirement in the table below.

Attach Referral Form

Attach Referral Form *	[Browse...]
	Please attach a referral form from your desktop. File size restricted to 1MB
Submission Method *	[Electronic ▾]

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4   **Submit your eReferral Consult Request**. After you have completed the remainder of the eReferral form, click **SUBMIT** at the bottom of the page. Your referral will be received in real time and you will now be able to track the referral status and manage the referral using eReferral.