eReferral Quick Reference



eReferral Triage Facilities Access – Create/Add/Modify

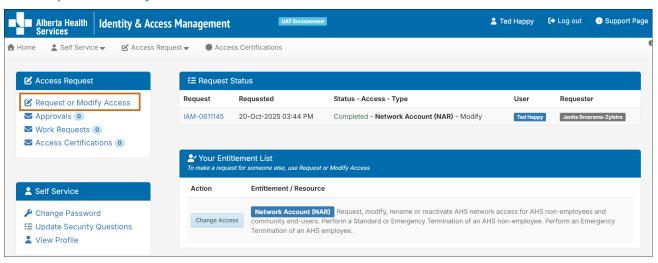
eReferral Access – Create Add Modify Facilities

The document is for managers to submit requests as **Authorized Approvers** using IAM (Identity and Access Management) for their staff to get access to Netcare and/or eReferral as well as adding/modifying receiving Triage Facilities related to staff accounts.

Authorized Approvers are responsible for authorizing and managing appropriate access and use of Alberta Netcare Portal (ANP) and related initiatives for staff at their facilities. A reference guide for Authorized Approvers roles and responsibilities can be found here.

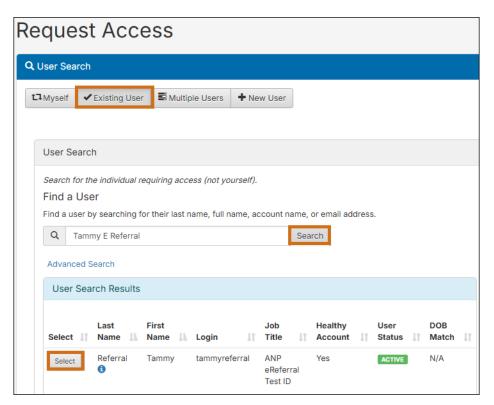
eReferral Account Request - Add Facilities

- 1 Login to the AHS IAM Access Management Portal.
- 2 Click Request or Modify Access.

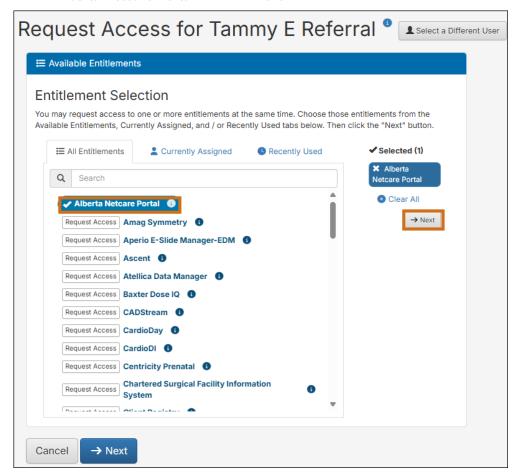


3 Click Existing User if it is not already selected. Search for the user and click Select.





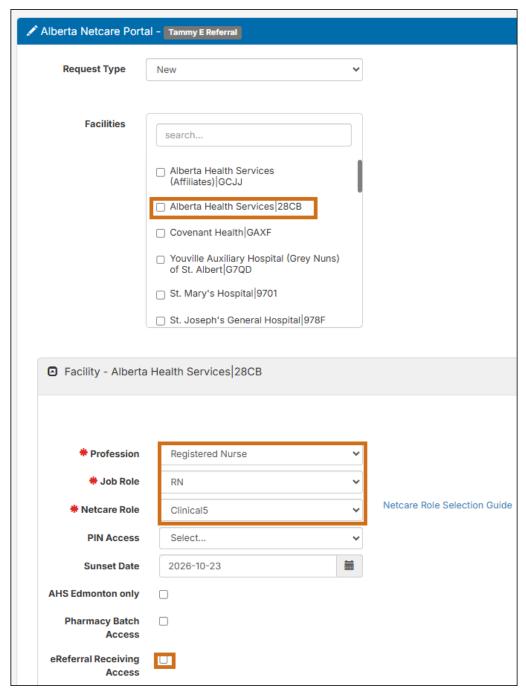
4 Select Alberta Netcare Portal and click Next.



- 5 Select *Alberta Health Services* 28CB as the facility. If you are a community user you would select your own facility.
- 6 Select *Profession*, *Job Role* and *Netcare Role* (depending on the job role use Clinical 1,2 or 5). For more information on roles and user permission see <u>AB Netcare Permission Matrix</u>. An RN is being used in this example.
- **7** Select **eReferral Receiving Access**. The Sunset Date (access is terminated automatically) defaults to one year.

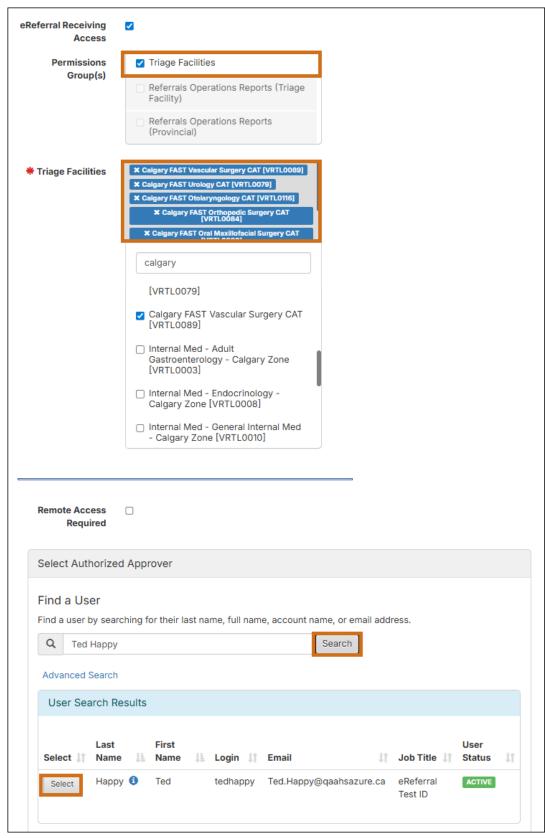
NOTE:

If the clinic/facility is not available IAM a form must be submitted to have it added. The form can be found here - https://www.albertanetcare.ca/documents/eReferral-Form-URF.pdf



8 Search for and select *Triage Facilities* then select all the *Triage Facilities* the staff member will need access to in eReferral. If you select a Triage Facility by mistake, click the *X* next to the selection to remove it.

9 Enter your name as the Authorized Approver for the request and click **Search**.

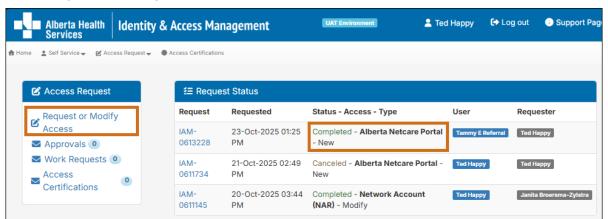


10 Click *Submit Request*. The request is routed to eReferral Provisioning Team and once approved it goes to the IT Access Team for final approval.

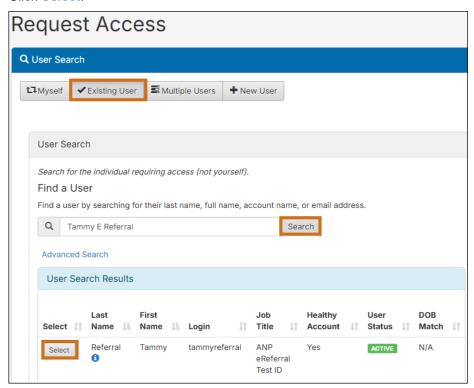
Modify eReferral Facilities

After the initial request is approved by the eReferral Provisioning Admin Group and the IT Access Team, edits to the Triage Facilities can be made.

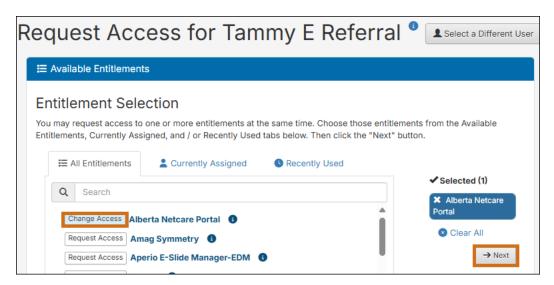
1 Select Request or Modify Access.



- 2 Select Existing User if not already selected. Search for the staff name.
- 3 Click Select.



4 Select *Change Access* next to Alberta Netcare Portal and click *Next*. Note: Changes should only be made to the eReferral Receiving Information – Triage Facilities.



Add or remove Triage Facilities as required and click *Submit*. You can click the X beside the Triage Facilities to remove it. Triage Facilities can be added by selecting from the list.

