

Create a Referral

A Referral is a request for an in-person specialist appointment. A standard referral form is used for most specialties to create a consistent referral experience and to identify a specific **Referral Reason**. Before you submit a request, your [Referring/Referring on Behalf of](#) information must be completed in your My Details.

- 1 From the **Clinical Portal Menu**, go to **Searches**. You can search for your patient using their first and last name, Personal Health Number (PHN) or Unique Lifetime Identifier (ULI). Press **Search** to display results.

COMMON

- My Details
- Worklists
- Manage Notifications

FAVOURITES

SEARCHES

- Search for a Patient**
- Delivery Site Registry (DSR)

EREFERRAL REPORTS

EREFERRAL

- My Referrals
- Triage Referrals
- My Assigned Referrals

Patient Search

Identifier: 974253514
Identifier Type: PHN / ULI

Last Name: ereferral
First Name: two

Middle Name/Initial:

Search Clear Enter a new favourite search +

Enter search criteria above and click 'Search'

- 2 Open the patient's Electronic Health Record (EHR) and click **Create Referrals** from the **Context Menu**.

EREFERRAL, TWO B ULI 100008114

DATE OF BIRTH (54y) SEX F

NO CPAR PRIMARY PROVIDER PATIENT PRIMARY ADDRESS PATIENT MAILING ADDRESS PATIENT HOME ADDRESS

All Documents Flowsheets Patient Event History Immunization History Medications **Create Referrals** View Referral

Clinical Documents
Showing All Mark All As Read
Group By Category Sort By Date

Read Unread

- Dynamic Patient Summary
- Medication Profile
- Pharmacy Care Plan
- BPMH Form - Medication Reconciliation
- Referrals - In Progress (14 / 15)
- Consultations (1 / 1)
- Diagnostic Imaging (4 / 4)
- Discharge/Transfer Summaries (1 / 1)
- Progress Notes (2 / 2)


Patient Demographics

EREFERRAL, Two B

Date Of Birth		Hi
Age	54 years	V
Sex	F	Cell/Alter
Eligibility Start Date	Note: Future-dated and blank eligibility start dates should be confirmed in Person Directory.	
Address (Primary)		
AH Address (Mailing)		

- Enter a reason in the **Referral Reason** field. You can start typing the reason to see what selections are available. Note that the referral reason can be searched/found by synonyms that don't exactly match the Referral Reason in the HSC. This is indicated by an asterisk.

The screenshot shows a 'Create Request' form with a search bar for 'Referral Reason' containing the text 'knee'. A dropdown menu is open, displaying several options: 'Knee pain' (highlighted), '* Locking knee', '* Catching knee', '* Effusion of knee', 'Knee issue', 'Instability of knee', and '* Unstable knee'. The asterisk indicates a synonym. A 'Search for Options' button is visible at the bottom left of the form.

- If you don't know the reason or want to see what options are available, enter the **Request Type** and the **Specialty** to show what **Referral Reasons** are available by zone/city.
 - If the **Referral Reason** is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the list – use Radiculopathy). The exact reason can be entered later in this process in the **Referral Details** section – **Reason for sending this referral** field.
- Select **Referral** beside **Request Type**.
 - Select the **Specialty** and **Zone(s) Served** and/or **City**. You can start typing the **Specialty**, **Zone(s) Served**, and **City** to show what is available (e.g. Ortho). These are not mandatory but will help narrow down the options you can select.
 - Click **Search for Options**. If the Referral is a duplicate, the **Check for duplicate referral(s)** icon  is shown. Hover over the symbol to see the duplicate referral. Check for duplicates in the **Drafts**, **In Progress** and **Completed/Cancelled/Declined** list as well to ensure that a duplicate Referral doesn't exist in another Zone or a similar Referral such as Knee Issue - Right vs Knee Issue - Left.

The screenshot shows a table with three columns: 'Knee pain', 'Referral', and 'Orthopaedic Surgery'. A small duplicate icon is next to 'Knee pain'. A tooltip is open over this icon, containing the text 'Check for duplicate referral' and 'Patient has existing referral(s): RFS-AAD-943251'.

- Click the **Clinical Pathway** icon to view detailed information to help support care decisions. You can also view existing referral(s) for the patient. If the **Clinical Pathway** icon is showing, it indicates the pathway is not available at this time.

Create Request Select a favourite search

Referral Reason:

Request Type:

Triage Site:

Specialty:

Zone(s) Served:

City:

Referral Reason	Request Type	Specialty	Triage Site	City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
Instability of knee	Referral	Orthopaedic Surgery	Calgary FAST Orthopaedics CAT		<input type="button" value="📄"/>	Not Supplied	Calgary

Drafts

No Results Found

In Progress

Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target	Approx. Wait Time	Flagged for Referrer	Sp. Ref.
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Urology Issue		Kaye Edmonton Clinic - Dianne and Irving Kipler Urology Centre						3 days	5		
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Shoulder Issue		Orthopaedic Surgery - Provincial						3 days	5		
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Shoulder Issue		Orthopaedic Surgery - Provincial						3 days	5		
Referral RPS-AAB	16-Jan-2024	Clinical Triage In Progress	Hematuria gross		Calgary FAST Urology CAT						1 week 6 days	14		

Completed/Cancelled/Declined

Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target	Last Modified/Modified By
eConsult RPS-AAB	28-Dec-2023	Completed Continue Managing within Your Scope of	Shoulder Issue		Orthopaedic Surgery - Provincial		Receiving Provider I				4 weeks 4 days	12-Jan-2023 Three Tran

- 8 Select the **Received Date (T2) (For Receiving Office use only)**. **Note:** If you are not a receiving office, leave this blank. The field will default to the current date and time. All fields marked with a red asterisk (*) are mandatory and must be completed to submit a Referral.
- 9 Review the **Exclusions** to ensure that this referral is appropriate. Exclusions are specialty and/or **Referral Reason** specific.
- 10 Set the **Referring Provider Priority** if known.
- 11 Click the **Pathway URL**. This will save you valuable time making clinical decisions, including knowing what investigations to order based off current evidence, when to seek advice or refer to a specialist, or how to best manage the condition in the community
- 12 Select **Who has been informed**.
- 13 For helpful information on completing the Referral, refer to the **QuRE Card Checklist** by clicking on the box beside **View QuRE Card Checklist**.

Referring Provider Priority Routine Semi-Urgent Urgent

Who has been informed? * Patient Guardian Patient & Guardian Information not available
Please ensure the patient or guardian has been informed of the diagnosis or reason for referral.

QuRE Reference
The information captured in this form is based on the Quality Referral Pocket Checklist (www.ahs.ca/QuRE).

14 Scroll down to **Patient Details** and select the **Patient Preference** if indicated. Select **Preferred Provider** and/or **Preferred Location** if indicated by the patient.

Patient Details
Any changes to the patient's information will be saved in this referral only.

Patient Preferences Next Available Provider Preferred Provider Preferred Location

Patient Details
Any changes to the patient's information will be saved in this referral only.

Patient Preferences Next Available Provider Preferred Provider Preferred Location

Preferred Provider *
If a preferred provider is selected instead of next available, the patient's wait time may be longer.

Preferred Location *
If a preferred location is selected instead of next available, the patient's wait time may be longer.

15 The patient's address and phone number will be auto populated from the patient's Electronic Health Record (EHR). You can modify it if needed. Use the option to indicate if there is a **Preferred Contact**. Continue filling out **Additional Info** and **Special Considerations** (e.g., patient's physical, psychological, social and/or economic situation) sections. If **Patient unable to communicate adequately in English** is selected additional fields will be displayed details and the language.

Patient Details
Any changes to the patient's information will be saved in this referral only.

Patient Preferences Next Available Provider Preferred Provider Preferred Location

Contact Information

Phone Number Type *	Phone Number *
<input checked="" type="radio"/> Home <input type="radio"/> Mobile <input type="radio"/> Work	000 999 0000
<input type="button" value="Add Row"/> <i>At least one row is required.</i>	

Preferred Contact? Home Mobile Work

Line 1 * 12345X 140 AVE NW City * CALGARY

Line 2 Province * AB

Postal Code * T1Y 1XX

Additional Info

Patient has guardian
 Patient has alternate contact
 Patient unable to communicate adequately in English

Details
 Language

Patient has hearing or vision requirements
 WCB Claim

Special Considerations

Please provide details about the patient's physical, psychological, social and economic situation.

- 16** Complete the **Referral Details** section. There are three options for the **Referral Source**: Complete the form in eReferral, attach the referral from your EMR or select Electronic Referral Form (indicating it was received via Connect Care). If you are attaching an external referral form, locate the referral form by clicking **Choose File** beside **Referral Form**.
- If the exact **Referral Reason** was not available (e.g., Sciatica), make sure to enter this in the **Referral Details** section – **Reason for sending this referral** field.

NOTE: Note: To learn more about adding an external document to eReferral from your computer or EMR, visit the [Helpful Resources](#) page.

- 17** Complete the **Referral Requirements** section. Review the mandatory requirements. Attach or link the required investigations or images and check the **Have all mandatory requirements listed above been met?** box. Additional comments, if any, can be added to the **Notes** field.

Referral Details

Referral Form Source * eReferral Form Attach Referral Documents Electronic Referral Form

Reason for sending this referral

Patient's current status * Stable Condition worsening Unknown - status not provided

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 provide details of treatments tried and outcome(s). Consultation testing (previous, concurrent or if none, specify none).

Pertinent History * Complete in form Complete by attaching an EMR patient summary / snapshot from desktop None Clear

Please attach EMR's patient summary / snapshot to include the patient's intolerances, medications, comorbidities, and pertinent history.

EMR Patient Summary * Referral for - eReferral Two B UKI 97425

Max file size 15MB. Maximum 200MB per referral

Referral Requirements

Mandatory

Requirement	Time Period
X-ray of the affected knee - weightbearing protocol	180
Include within referral letter: Description of symptom onset and duration. Functional status limitations (eg. impact on sleep, work, activities of daily living). Treatments initiated and responses.	—

Have all mandatory requirements listed above been met? Yes No

Optional

Requirement	Time Period
If patient is unable to weight bear: routine protocol, intercondyloid fossa (tunnel)	180

Additional Information

Attach External Document(s) File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.

Netcare Document(s)

Notes

- 18** Confirm that the **Referring Provider** section is complete with the referring provider's name, **PRACID** and clinic details. The clinic details will auto-populate from **My Details** (if available) and can be changed on this request if needed. **Note:** Click **Add** if the Referral is being created on behalf of another provider or the referring provider is from out of province.

Referring Provider Information

Complete the Referring Provider Referrals or Referring Provider Referrals On Behalf Of section on your My Details to display referrals on Referrals dashboard and to auto complete this section each time a referral is created.

Referring Provider *

19 Search **First Name** – Out, **Last Name** – Province.

20 Select **Out of Province Provider**. Enter the name of the referring provider and the phone number; these fields are mandatory.

The image shows two screenshots of a web application. The top screenshot is the 'Provincial Provider Registry' search page. It has search fields for 'First Name' (containing 'Out') and 'Last Name' (containing 'Province'). Below these are 'Search' and 'Reset' buttons, and a field to 'Enter a new favourite search'. A table below shows a search result for 'Out of Province Provider' with columns for Name, Provider Type, City, Status, and PRAC ID. The bottom screenshot is the 'Referring Provider Information' form. It includes a dropdown for 'Referring Provider' (selected as 'Out of Province Provider'), a text field for 'Dr Testing Training' (with a note to 'Indicate name of Out of Province Provider'), a 'Referrer PRACID' field, and sections for 'Phone Number', 'Fax Number', and 'Address' (with fields for Line 1, Line 2, City, Province, and Postal Code).

21 Click the appropriate option under **Primary Care Provider**.

22 Select the **Submission Method**.

The image shows a dropdown menu for 'Submission Method' with options: eReferral, Fax, Fax rerouted from non-FAST Office, Fax from Connect Care, and Automatic. The 'eReferral' option is selected. Below the dropdown are buttons for 'Submit', 'Save as Draft', 'Delete Draft', and 'Cancel'.

23 Click **Submit** to send the Referral to the specialty. If you did not complete all mandatory fields marked by (*), you will receive an error message. Review the Referral to locate any blank fields.

- If you want to save a draft of the Referral before submitting it, you can save it by clicking **Save as Draft**. You can access the draft at any time in the **Drafts** worklist on the **My Referrals** dashboard. You can click **Cancel** if you want to stop completing the Referral.
- Once you click **Submit**, the Referral will appear on your **My Referrals** dashboard on the **New Requests** worklist with a status of **New Request**.

NOTE:

If a referral has been declined because it did not meet the criteria appropriateness, do not edit the referral to include more information or attachments. Please create a new referral with the correct information.

Review a Submitted Referral

At any point, you can review the status of a submitted Referral from your *My Referrals* dashboard.

- 1 Click *eReferral* from the *Clinical Portal Menu*. Click *My Referrals* and then the *In Progress* worklist.

The screenshot shows the 'My Referrals' dashboard. On the left is a sidebar menu with categories: COMMON, FAVOURITES, SEARCHES, EREFERRAL REPORTS, and EREFERRAL. Under EREFERRAL, 'My Referrals' is selected and highlighted. Below it are options for Triage Referrals, My Assigned Referrals, Tasks - Unregistered Referrals, and Tasks - Registered Referrals. The main content area is titled 'My Referrals' and contains a table with the following data:

Requests	Total	Referrals	eConsults
Recently Updated	3	3	0
Cancelled/Declined	24	14	10
Action Required	3	1	2
Drafts	1	0	1
Undelivered	0	0	0
In Progress	170	144	26
Completed	16	10	6
Waiting for Response	12	12	0

- 2 Select *Referral* for *Request Type* and click *Search* to generate a list of referrals. You can further define the search by choosing options like *PHN/ULI*, *Referral Reason*, or *Status*. To remove a status, click the *X* to the right of the status; to add a status, click the *Add* button. Note that the status selections are “sticky”, meaning that if you access this dashboard and worklist during your eReferral working session (have not logged out) the same items will be selected.

The screenshot shows the 'Referrer: In Progress' search filter form. It includes various search criteria on the left and right sides, and a status selection area at the bottom. The 'Request Type' dropdown is set to 'Referral'. The status selection area contains several status options, each with a close button (X):

- Accepted (X)
- Appointment Booked (X)
- Appointment Missed (X)
- Cancelled (X)
- Clerical Triage in Progress (X)
- Clinical Triage in Progress (X)
- Completed (X)
- Declined (X)
- Deferred (X)
- New Request (X)
- Redirected (X)
- Request Additional Information (X)
- Response in Progress (X)
- Waiting for Appointment (X)
- Waiting for Clinical Triage (X)
- Waitlisted (X)

An 'Add' button is located below the status selection area. At the bottom of the form, there is a 'Search' button, a 'Reset' button, and a text input field for 'Enter a new favourite search' with a plus icon.

- 3 Select the appropriate Referral from the list. Click the arrow located on the **Summary Bar** to expand the referral header. The **Status Reason** field may be populated or blank. Only specific changes to the Referral will result in this field being populated (**Redirect**, **Complete/Cancelled/Declined**, **Missed Appointments**, **Provide Information to Receiver**).
- 4 View the activity that has occurred on the Referral in the **Right Panel** in the **Activity** and **Notes** sections.
- 5 Click **Show this patient's other referrals** to view all referrals for this patient. All referrals are listed here regardless of the status. This is helpful if a screening Referral or eConsult needs to be linked to the procedural referral.

The screenshot displays a web-based interface for managing a referral. At the top, there is a navigation bar with tabs for 'Limited Documents', 'All Documents', 'Dashboards', 'Flowsheets', 'Immunization History', 'Medications', 'Create Referrals', and 'More'. Below this is a secondary bar with actions: 'Request Information (from Receiver)', 'Provide Information (to Receiver)', 'Mark as Reviewed', 'Cancel', 'Edit Referral', 'Print', and 'Print All'.

The main content area shows a 'Waitlisted Referral' for 'Pain of foot and ankle' under 'Orthopaedic Surgery'. Key details include: Triage Site: Alberta Hip and Knee Clinic; Submitted: 12-Feb-2026 8:03 AM; eReferral ID: RFS-AAD-976141; Submission Source: Connect Care - Electronic. The title is 'Orthopaedic Surgery Request for Service'. Below the title are links for 'Patient Details', 'Referral Details', 'Referral Requirements', and 'Providers'.

On the left side, there are sections for 'Exclusions' (1. Infection, 2. Dislocation), 'Patient Information' (PHN/ULI: 11241-7014 Name: ELVIS, Presley L Sex: M DOB: 27-Jan-1959), 'Request Created For' (Pain of foot and ankle - Alberta Hip and Knee Clinic), 'Clinical Pathway URL' (-), 'Referring Provider' (Urgent), 'Who has been informed?' (Information not available), and 'QuRE Reference' (The information captured in this form is based on the Quality Referral Pocket checklist. (www.ahs.ca/QuRE)).

The 'Patient Details' section shows 'Patient Preferences' as 'Next Available Provider' and 'Contact Information' with a table for phone numbers:

Phone Number Type	Phone Number
Home	
Mobile	
Work	

Preferred Contact? —

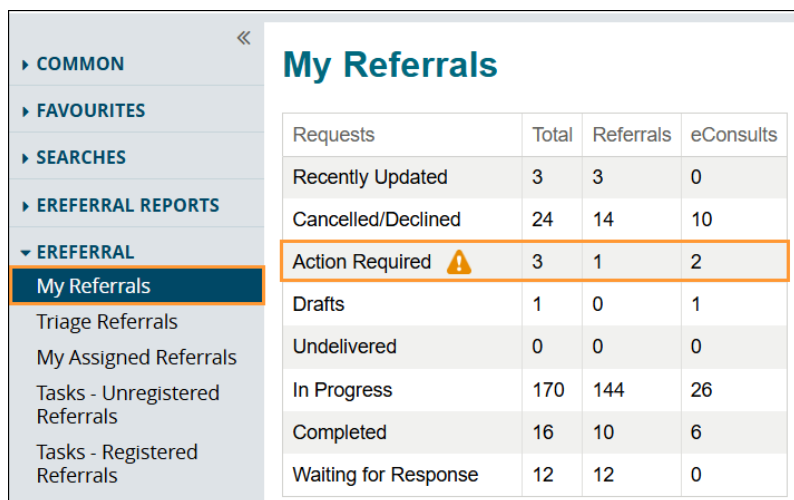
Address details: Line 1: 123 [redacted], Line 2: Unit [redacted], City: LEDUC.

The right-hand panel contains several sections: 'People' (Referrer: Dr. [redacted], Service Provider: Dr. [redacted]), 'Tasks' (Add Task, Edit Tasks), 'Linked Referrals' (There are no linked referrals for this referral. Show this patient's other referrals), 'Referral Attachments' (SampleAttachment.pdf (4193.30 kB) 3 WEEKS AGO, SampleAttachmentTextFile.txt (0.06 kB) 3 WEEKS AGO), 'Referral Notes' (There are no notes for this referral.), and 'Activity' (Show Notes Only). The 'Activity' section shows a 'Waitlisted' status with a 'Hide Form' button, last updated on 02-Mar-2026 11:25 AM. Below that is an 'Accept (T3)' section with a 'Hide Form' button, Accepted Date (T3) 02-Mar-2026, Attachments: No Files, Netcare Document(s): No documents, and a Comment field.

Respond to a Request for Additional Information

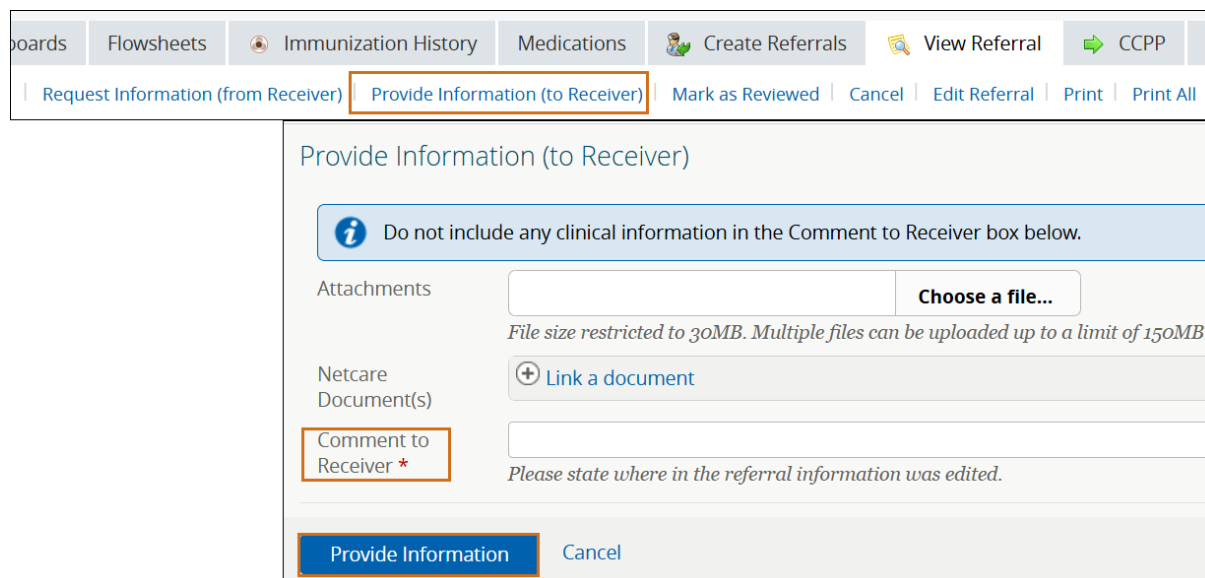
On occasion, the triage centre or receiving provider may require additional information from the referring provider. Follow these instructions to add more information.

- 1 Click **eReferral** from the **Clinical Portal Menu**. Click **My Referrals** and select **Action Required**. Choose the appropriate Referral.



Requests	Total	Referrals	eConsults
Recently Updated	3	3	0
Cancelled/Declined	24	14	10
Action Required ⚠	3	1	2
Drafts	1	0	1
Undelivered	0	0	0
In Progress	170	144	26
Completed	16	10	6
Waiting for Response	12	12	0

- 2 Click **Provide Information (to Receiver)** from the **Workflow bar**. Attach or link the requested information if required and enter a **Comment to Receiver** (e.g., The latest lab results are attached). Click **Provide Information**. Single files no larger than 30MB can be attached, and multiple files not exceeding 150MB in total can be added.



boards | Flowsheets | Immunization History | Medications | Create Referrals | View Referral | CCPP

Request Information (from Receiver) | **Provide Information (to Receiver)** | Mark as Reviewed | Cancel | Edit Referral | Print | Print All

Provide Information (to Receiver)

i Do not include any clinical information in the Comment to Receiver box below.

Attachments **Choose a file...**

File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.

Netcare Document(s) **+** [Link a document](#)

Comment to Receiver *

Please state where in the referral information was edited.

Provide Information Cancel

The Referral will then be removed from the **Action Required** worklist and moved to the **In Progress** and **Recently Updated** worklists.