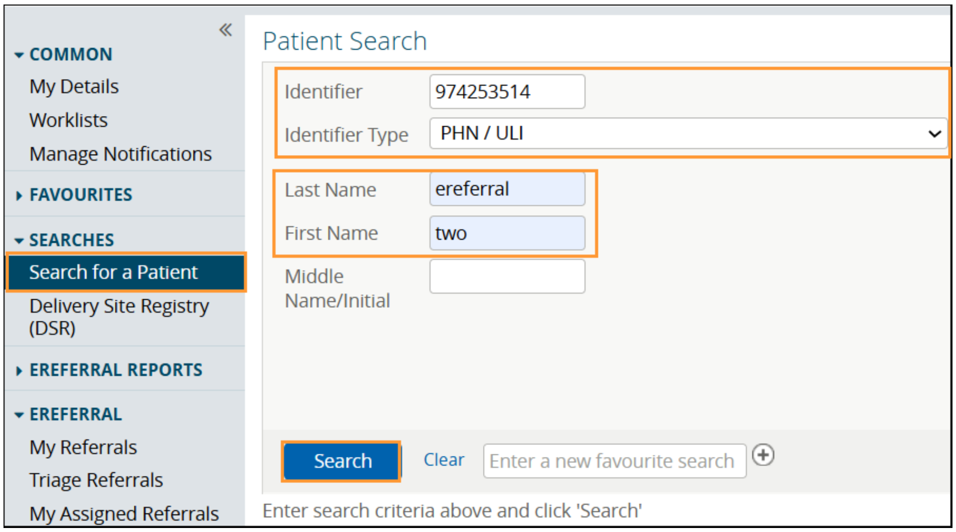
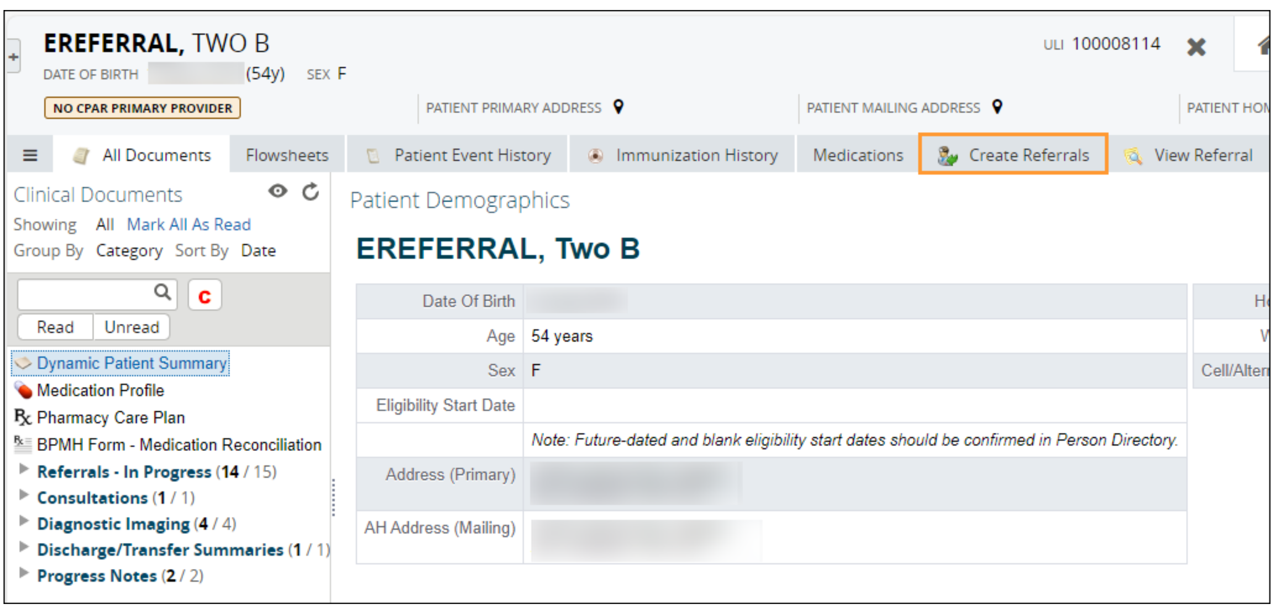
Create a Referral

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.



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



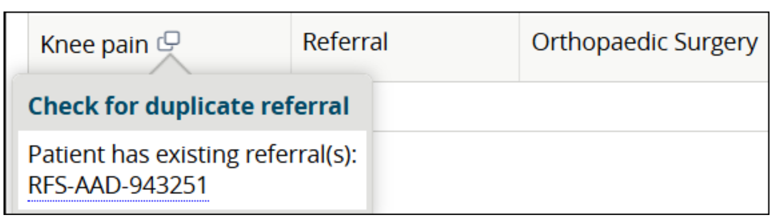
3 Enter a reason in the ***Referral Reason*** field. You can start typing the reason to see what selections are available. Note that the referral reason can be searched/found by synonyms that don't exactly match the Referral Reason in the HSC. This is indicated by an asterisk.

- 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.

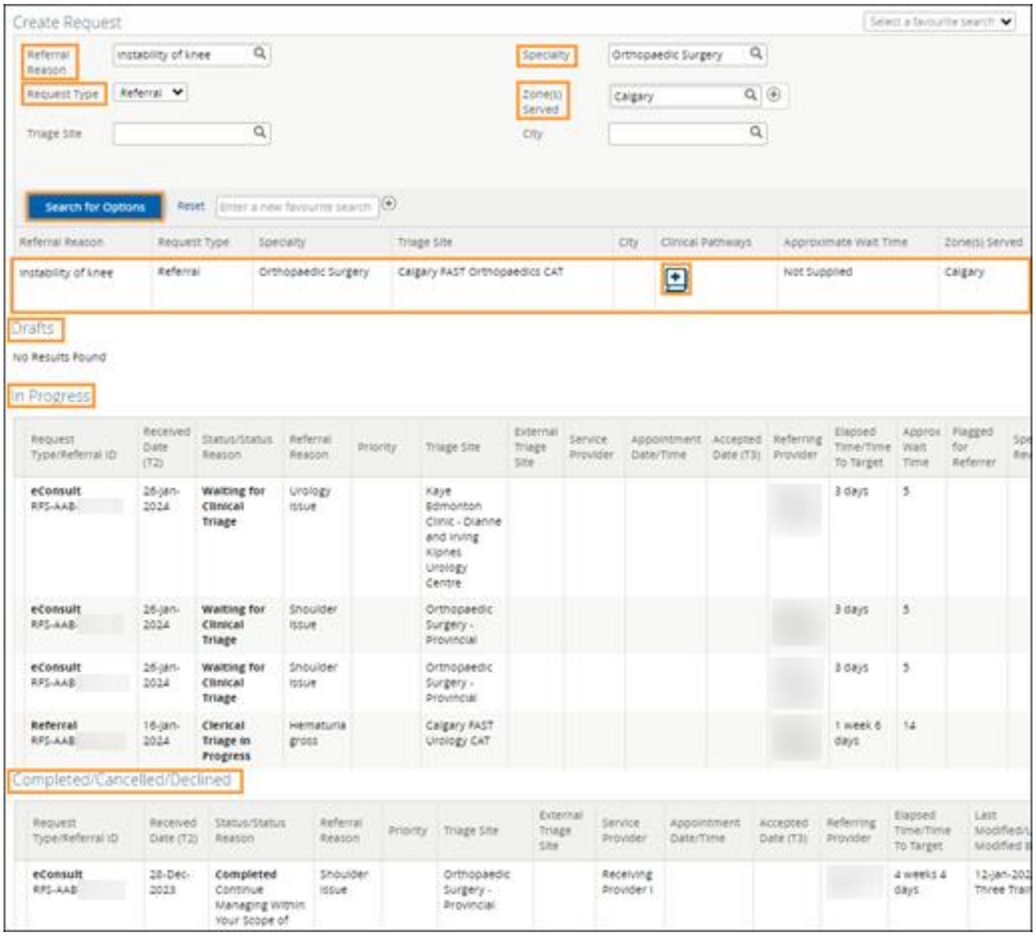
4 Select ***Referral*** beside ***Request Type***.

5 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.

6 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.



7 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.



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.

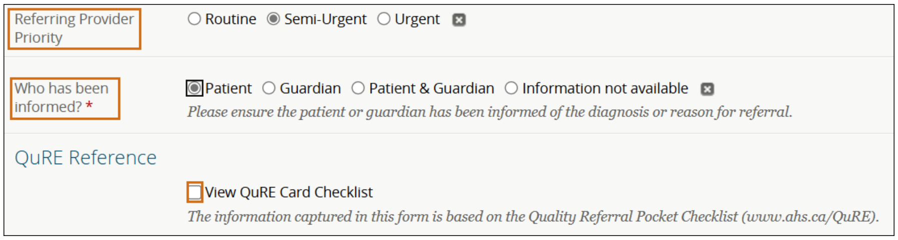
9 Review the ***Exclusions*** to ensure that this referral is appropriate. Exclusions are specialty and/or ***Referral Reason*** specific.

10 Set the ***Referring Provider Priority*** if known.

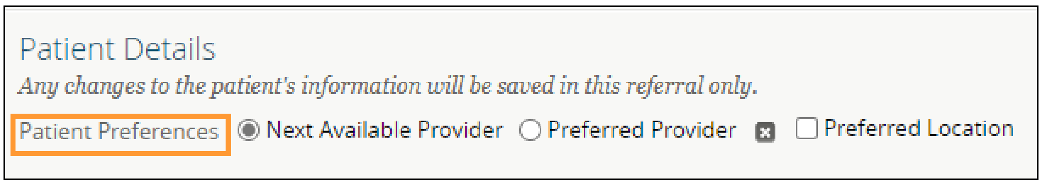
11 Click the ***Pathway URL***. This will save you valuable time making clinical decisions, including knowing what investigations to order based off current evidence, when to seek advice or refer to a specialist, or how to best manage the condition in the community

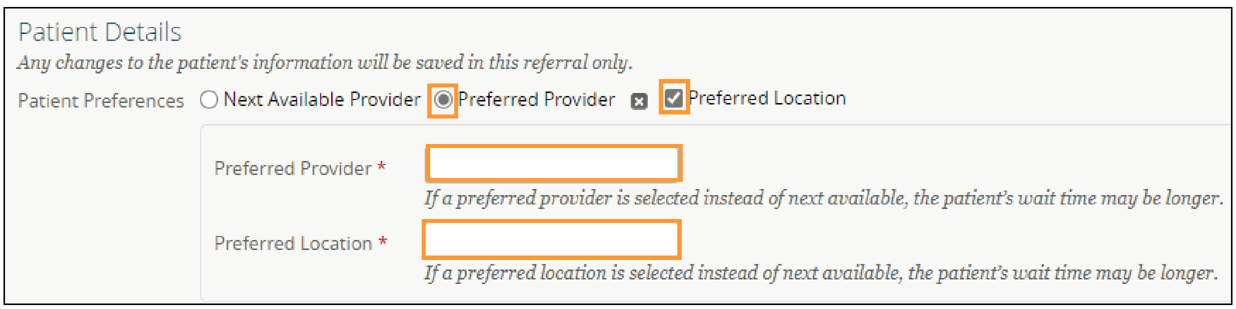
12 Select ***Who has been informed***.

13 For helpful information on completing the Referral, refer to the ***QuRE Card Checklist*** by clicking on the box beside ***View QuRE Card Checklist***.

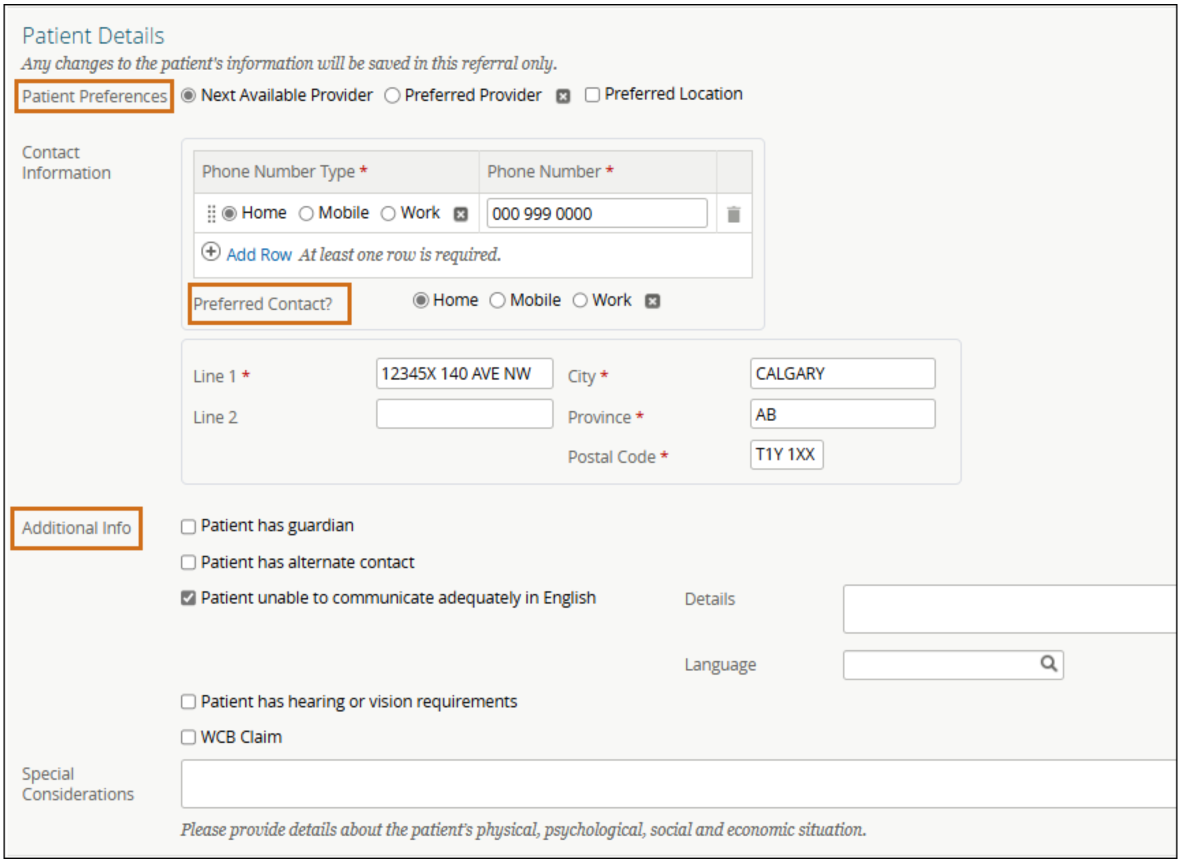


14 Scroll down to ***Patient Details*** and select the ***Patient Preference*** if indicated. Select ***Preferred Provider*** and/or ***Preferred Location*** if indicated by the patient.





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.

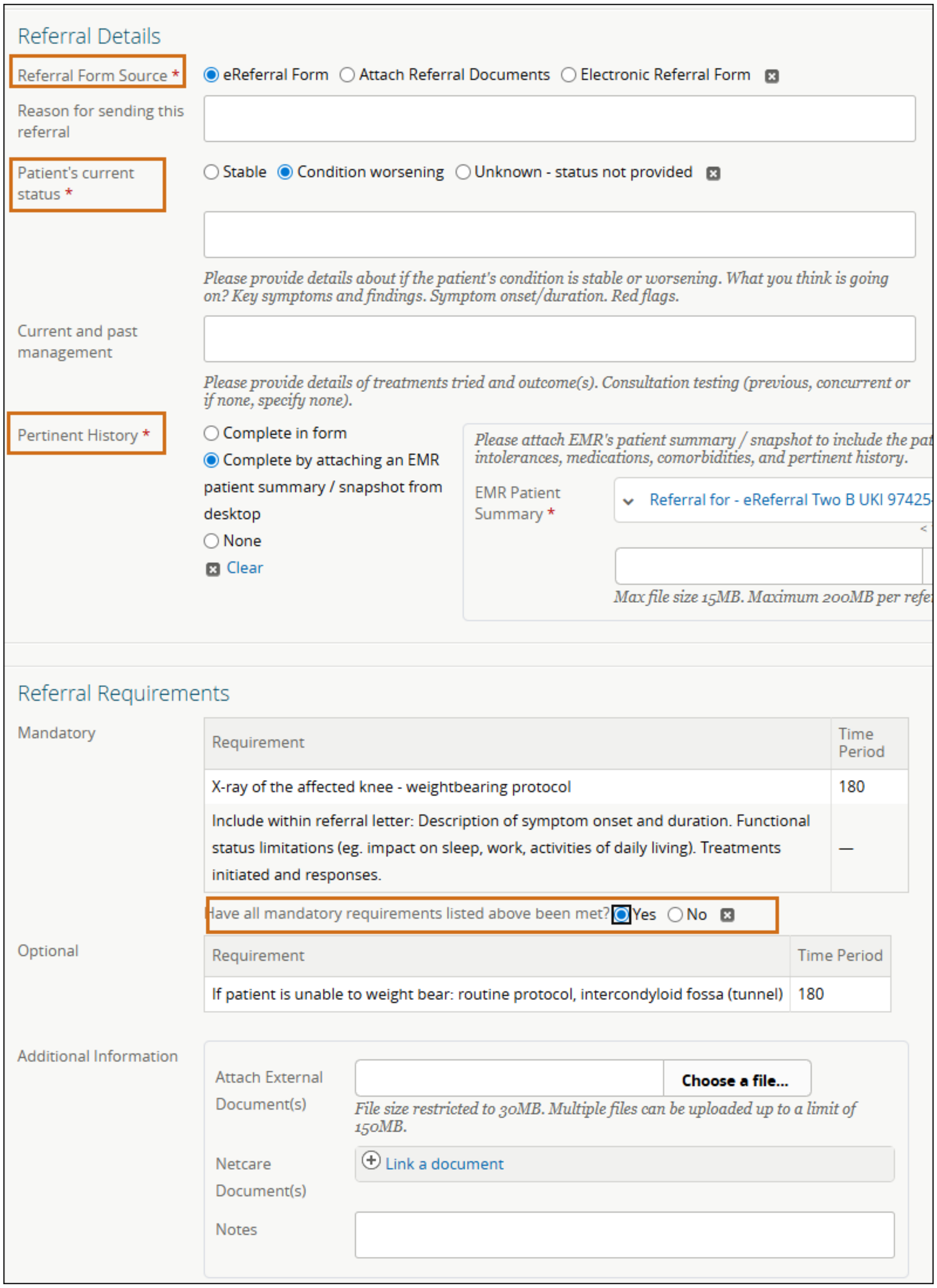


16 Complete the ***Referral Details*** section. There are three options for the ***Referral Source***: Complete the form in eReferral, attach the referral from your EMR or select Electronic Referral Form (indicating is was received via Connect Care). If you are attaching an external referral form, locate 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 pat intolerances, medications, comorbidities, and pertinent history.

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

Max file size 15MB. Maximum 200MB per refe

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

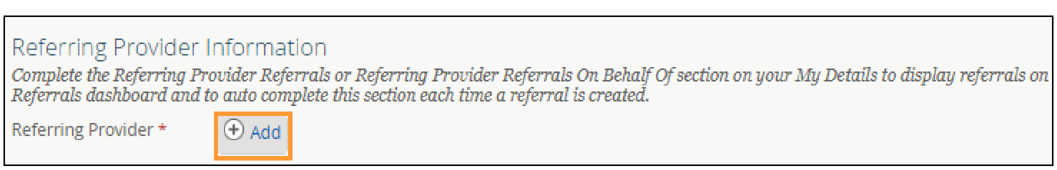
Attach External Document(s) Choose a file...

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

Netcare Document(s) Link a document

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.



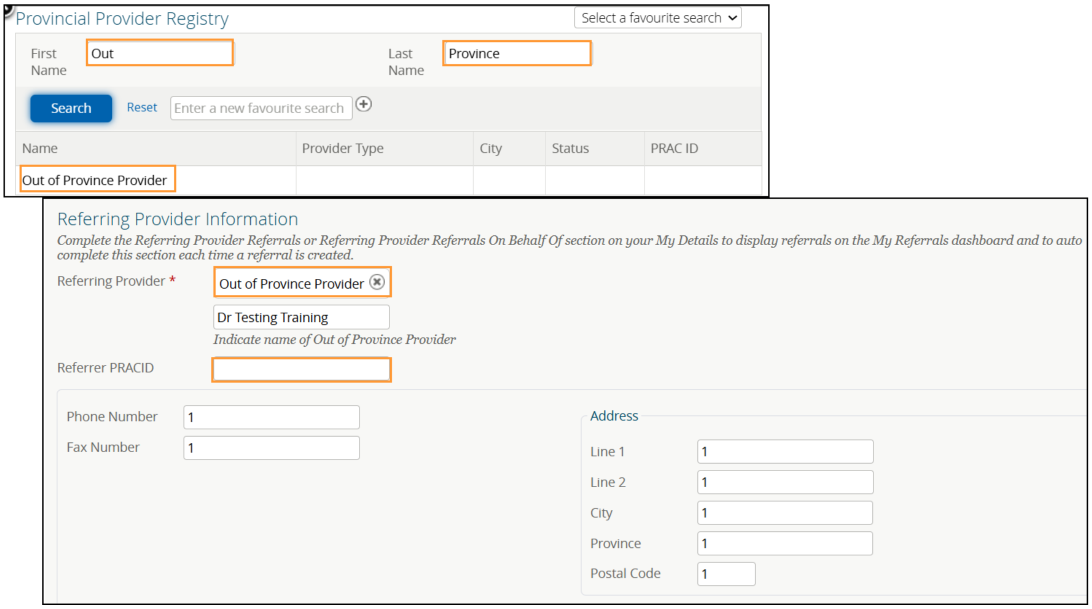
Referring Provider Information

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 * Add

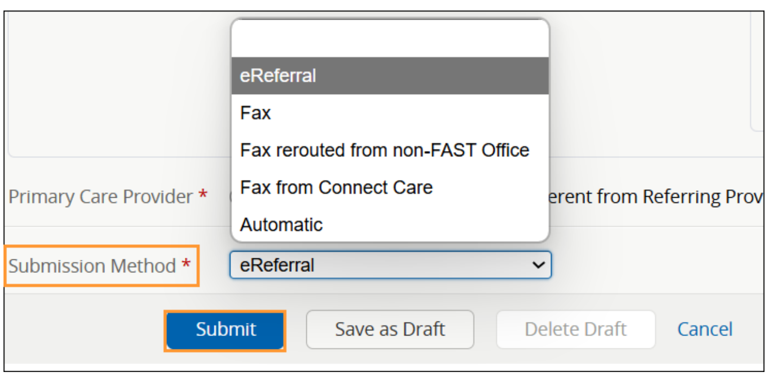
19 Search ***First Name*** – Out, ***Last Name*** – Province.

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



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

22 Select the ***Submission Method***.



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.

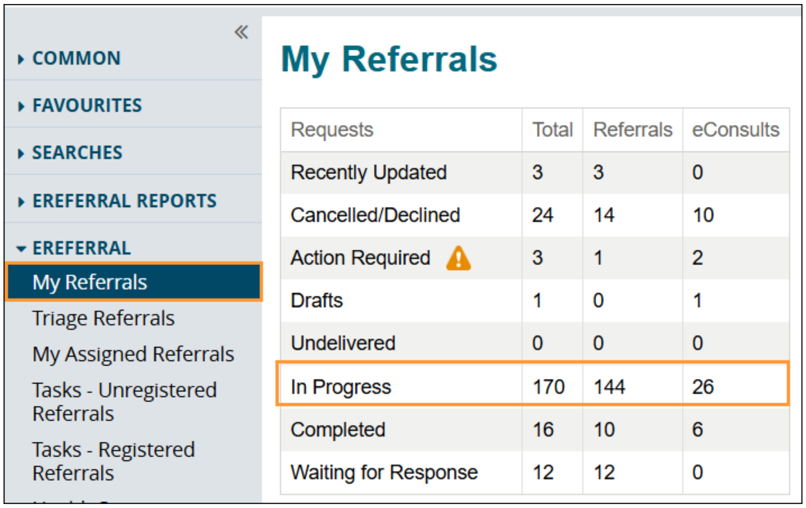
- If you want to save a draft of the Referral before submitting it, you can save it by clicking ***Save as Draft***. You can access the draft at any time in the ***Drafts*** worklist on the ***My Referrals*** dashboard. You can click ***Cancel*** if you want to stop completing the Referral.
- Once you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

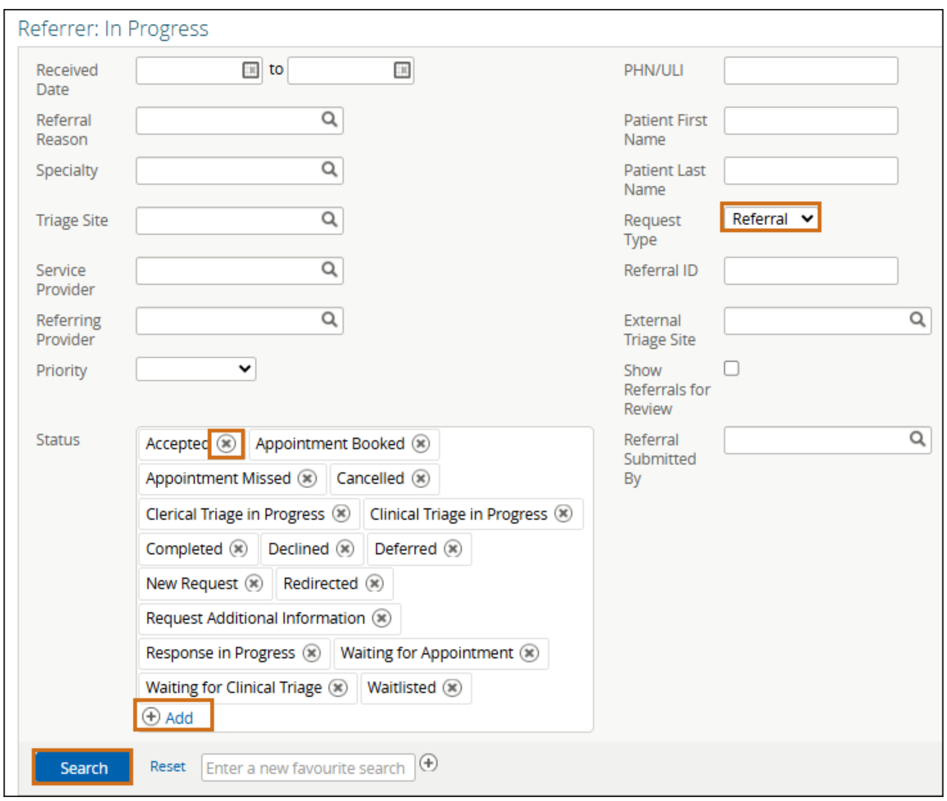
At any point, you can review the status of a submitted Referral from your ***My Referrals*** dashboard.

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



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

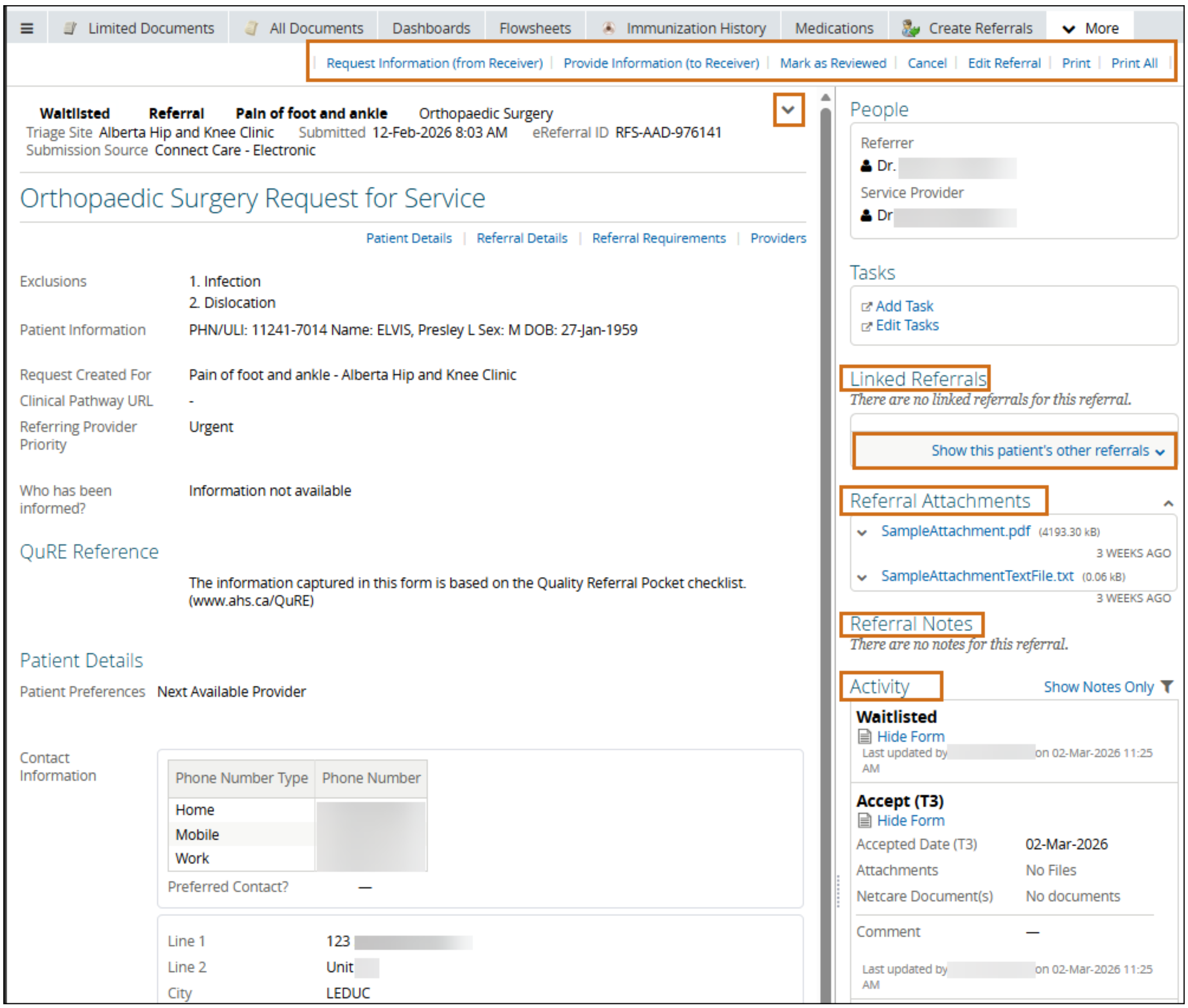
2 Select ***Referral*** for ***Request Type*** and click ***Search*** to generate a list of referrals. You can further define the search by choosing options like ***PHN/ULI***, ***Referral Reason***, or ***Status***. To remove a status, click the ***X*** to the right of the status; to add a status, click 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.



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.

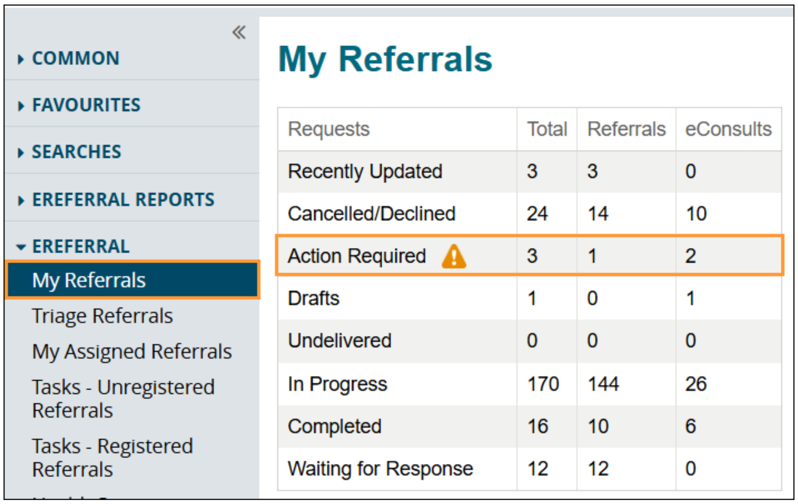
5 Click ***Show this patient's other referrals*** to view all referrals for this patient. All referrals are listed here regardless of the status. This is helpful if a screening Referral or eConsult needs to be linked to the procedural referral.



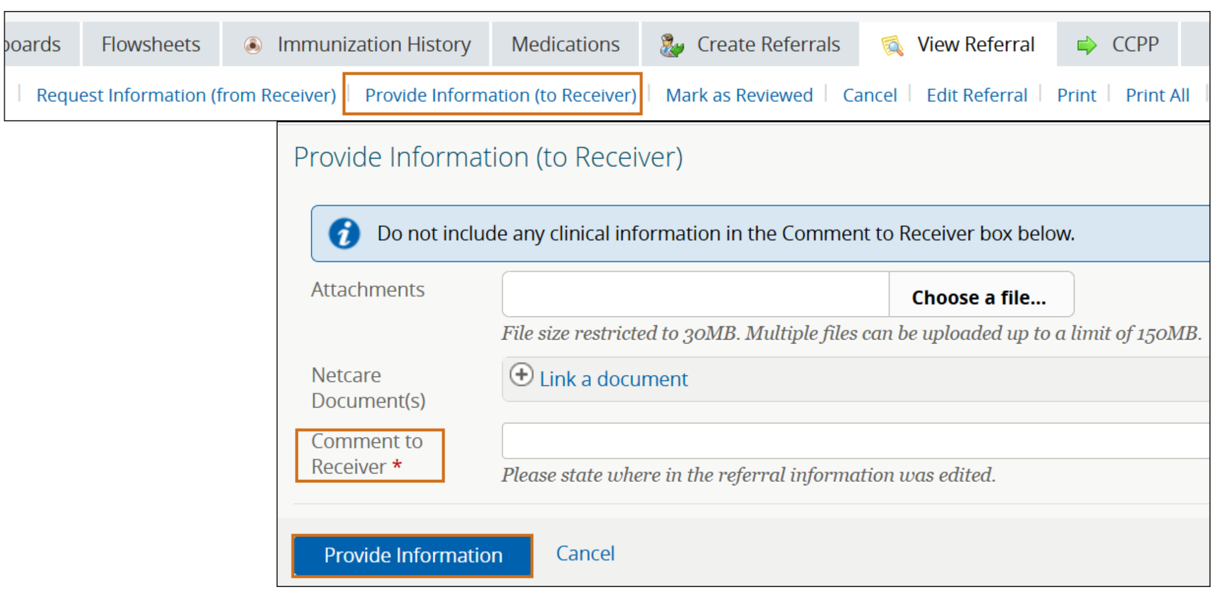
Respond to a Request for Additional Information

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.



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.



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