

Referring & Referring On Behalf Of Providers - How to Find a Referral Status

- 1 Login to the [Alberta Netcare Portal](#).
- 2 Click [Searches](#) from the [Clinical Portal Menu](#).
- 3 Click [Search for a Patient](#). Enter the patient's name or identifier.
- 4 Click [Search](#) to locate your patient.
- 5 Click on the patient's name to open the patient's Electronic Health Record.

Search Tip : An identifier search is recommended. For name search, please enter the complete last name, complete first name and date of birth.

PHN / ULI	Name	Birthdate	Age	Gender	Address	Town/City
10000-8114	EREFERRAL, Two B	12-Jan-1970	54 years	F		CALGARY

There are two ways to view the status of a referral:

- a. The [Clinical Document Viewer \(CDV\)](#) Tree
 - b. The [View Referral](#) button. .
- 6 Click to expand the referral list in the [CDV](#).

Each folder within the **CDV** contains links to the patient's eConsult and Referrals. Any eConsult or Referral that has been Cancelled/Declined will have a strike through the middle of the text. Any eConsult or Referral that is In Progress will have its text italicized. By holding the mouse over any Referral link, a tooltip will appear with a summary of the referral. The status will show up beside the **Status** field.

- Click the Referral to see more detail including the **Status**. You can also see all the activity that has taken place with this Referral by referring to the **Activity** section located in the **Right Panel**.

- Click **View Referral**. A list of all referrals is displayed.
- Click on a referral to open it.

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
Drafts												
No Results Found												
In Progress												
Referral RFS-AAB-069309	05-Jan-2024	Clerical Triage In Progress	Hip dysplasia		South FAST Orthopaedics CAT						5 weeks 3 days	
eConsult RFS-AAB-070161	26-Jan-2024	Completed Referral Submitted on Your Behalf	Urology issue		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre		Receiving Provider I			Out Of Province Provider	2 weeks 3 days	5
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 I
eConsult RFS-AAB-070056	28-Dec-2023	Completed Continue Managing Within Your Scope of Practice	Shoulder Issue		Orthopaedic Surgery - Provincial		Receiving Provider I			Dr.	6 weeks 4 days	12-Jan-20 Three Training
Referral RFS-AAB-069295	08-Jan-2024	Cancelled Referral no longer needed	Instability of knee		Calgary FAST Orthopaedics CAT		Receiving Provider I			Dr.	5 weeks	10-Jan-20 Three Training

Set Up Your eReferral Provider Notifications

eReferral Provider Notifications notify you via email when activity occurs on a referral. Notification emails can go to the referring provider, their Medical Office Assistant (MOA) or to a clinic. There are six different Provider Notifications you can receive for **In Progress** referrals, including:

**Default notifications are labelled with an asterisk*

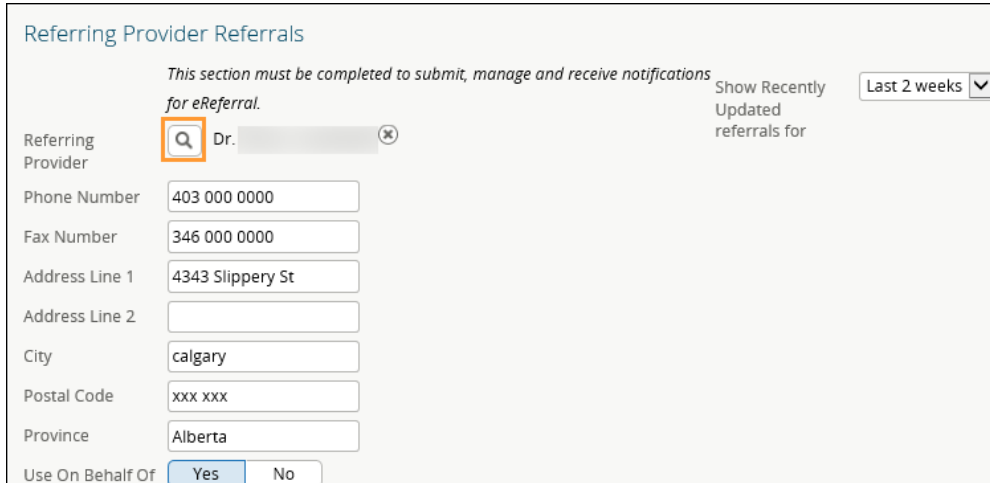
- *** Redirected:** Referrals redirected to a different triage site than originally sent to.
- **Clerical Triage in Progress:** New referrals that are pending initial review or referrals requiring additional information/activities before assigning to a provider.
- **Waiting for Clinical Triage:** Clerical triage has been completed and is awaiting clinical review by a specialist/clinic.
- **Clinical Triage In Progress:** Clinician/specialist has started a clinical review of the referral.
- *** Appointment Missed:** Referrals with previous appointment booked dates that the patient missed.
- **Accepted:** Referrals that have been accepted by the specialty and are pending further processing. This may also be required when the specialist/clinic does clinical triage, and the referral has been accepted by the specialist/clinic.

You can also receive notifications when a referral is completed or cancelled/declined by a specialty. To set up your eReferral Provider Notifications, [go online](#) for instructions.

Referring Provider - Setting Up My Details to View All of Your Referrals in Worklists


If you are the referring provider and would like to see all your referrals in one place, you must complete the [Referring Provider Referrals](#) section in [My Details](#) to see your submitted referrals on your [My Referrals](#) worklist.

- 1 Click on the magnifying glass  next to [Referring Provider](#) to bring up the [Provincial Provider Registry \(PPR\)](#) search.



Referring Provider Referrals

This section must be completed to submit, manage and receive notifications for eReferral.

Referring Provider 

Phone Number

Fax Number

Address Line 1

Address Line 2

City

Postal Code

Province

Use On Behalf Of

Show Recently Updated referrals for

- 2 Enter your [First Name](#) and [Last Name](#) (as per your college registration) then click [Search](#). The search will return selections that include [Name](#), [Provider Type](#), [City](#), and [Status](#).
- 3 Select one of the options (as a referring provider, this should be your own name) and this information will populate the [Referring Provider](#) field.
- 4 Complete the remaining fields: [Phone Number](#), [Fax Number](#), [Address Line 1](#), [Address Line 2](#), [City](#), [Postal Code](#), [Province](#).
- 5 (Optional) The [Show Recently Updated referrals for](#) field is located on the right section of the screen. This dropdown field determines the length of time that a newly created or updated referral will appear on the [Recently Updated](#) worklist on the [My Referrals](#) dashboard.
- 6 Choose one of the values.
- 7 At the bottom of the page, click [Update Preferences](#) to validate your updates.

Referring Provider Submitting on Behalf Of - Setting Up My Details

If you are creating/submitting referrals on behalf of another provider, you will need to set up your *My Details* with the provider's information.

- 1 Select **Yes** next to the **Use On Behalf Of** section.
- 2 Click **Add**.

Use On Behalf Of Yes No

Referring Provider On Behalf Of **Referring Provider On Behalf Of**

Referring Provider

Phone Number

Fax Number

Address Line 1

Address Line 2

City

Postal Code

Province

- 3 Enter **First Name** and **Last Name** of the provider (as per their college registration) then click **Search**. The search will return selections that include **Name**, **Provider Type**, **City**, and **Status**.
- 4 Select one of the returned results and this information will populate the **Referring Provider** field.
- 5 At the bottom of the page, click **Update Preferences** to validate your updates.

Respond to a Request for Additional Information - Referrals in Action Required Worklist

Occasionally, the triage centre or responding provider may require additional information from you, the referrer. 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 request.

Alberta Netcare ELECTRONIC HEALTH RECORD

COMMON

FAVOURITES

SEARCHES

EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

EREFERRAL REPORTS

PATIENT LISTS

Requests	Total	Referrals	eConsults
Recently Updated	8	7	1
Cancelled/Declined	2	2	0
Action Required ⚠️	4	3	1
Drafts	1	0	1
Undelivered	0	0	0
In Progress	54	44	10
Completed	5	1	4
Waiting for Response	5	5	0

- 2 Click **Respond to Receiver** from the **Workflow** bar



- 3 Attach or link the requested information if required and enter a **Comment to Receiver** (e.g., Latest lab results attached). Single files no larger than 100MB can be attached, multiple files not exceeding 300MB in total can be added.
- 4 Click **Provide Information**.

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


Referring & Referring On Behalf Of Providers – Referrals In Progress

Referring providers and referring on behalf of users can check on the status of their submitted **In Progress** referrals.

- 1 Click **eReferral** from the **Clinical Portal Menu**. Click **My Referrals** and select **In Progress**. Choose the appropriate request.

Requests	Total	Referrals	eConsults
Recently Updated	11	8	3
Cancelled/Declined	2	2	0
Action Required ⚠️	5	4	1
Drafts	1	0	1
Undelivered	0	0	0
In Progress	61	48	13
Completed	4	1	3
Waiting for Response	5	4	1

- 2 You can view all the referrals or filter on a specific status. This example is filtering on **Appointment Booked**, **Waiting for Appointment** and **Waitlisted** referrals.

3 Click the **Add** button add more statuses to search for. Click the  to remove a status.

Referrer: In Progress

Received Date to PHN/ULI

Referral Reason Patient First Name

Specialty Patient Last Name

Triage Site Request Type **Referral**

Service Provider Referral ID

Referring Provider External Triage Site

Priority Show Referrals for Review

Status

+ Add

Search

4 Click the referral to see more detail. You can also see all the activity that has taken place with this referral by viewing the **Events** and/or **Notes** in the **Right Panel**.

Waiting for Appointment Referral Hematuria gross Urology Triage Site Calgary FAST Urology CAT

Submitted 5 weeks ago Referral ID RFS-AAB-067276

Status Reason — External Triage Site —
 Accepted (T3) 12-Mar-2024 Referred For Referral
 Submitted By Twenty Six TRAINING
 Flagged for Referrer —

Urology Request for Service

Patient Details | Referral Details | Referral Requirements | Providers

Exclusions

1. For Acute scrotal pain, Testicular torsion, Genitourinary trauma, Genitourinary tract foreign body, Acute renal colic with FEVER, refer directly to the emergency department or call RAAPID or send to Emergency Department as appropriate.
2. IMPORTANT NOTE: if patient needs to be seen in 2-4 weeks, call directly to the Dianne and Irving Kipnes Urology Centre, Referral & Triage Department - 780-407-5800
3. For Fistula-enteric, please refer to General surgery in your zone.

Patient Information PHN/ULI: 10000-8114 Name: Sex: F DOB: 15-Mar-1974
 Request Created For Hematuria gross - Calgary FAST Urology CAT
 Clinical Pathway URL https://www.albertahealthservices.ca/aph/page18236.aspx

Who has been informed? Patient

QuRE Reference

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

Patient Details

Patient Preferences Next Available Provider

Contact Information

Phone Number Type	Phone Number
Home	555 000 5555
Preferred Contact?	Home

People

Referrer
 Dr.
 Service Provider
 Receiving Provider I

Linked Referrals

There are no linked referrals for this referral.

show this patient's other referrals

Referral Attachments

- AHC0562 (1).pdf (1185.94 KB) 5 WEEKS AGO
- AHC0562 (1).pdf (1185.94 KB) 5 WEEKS AGO

Referral Notes

There are no notes for this referral.

Activity **Show Notes Only**

Set Service Provider
 Hide Form
 Set Service Provider Receiving Provider I
 Last updated by Twenty Six TRAINING on 12-Mar-2024 3:08 PM

Waiting for Appointment
 STATUS Waiting for Appointment
 Last updated by Twenty Six TRAINING on 12-Mar-2024 3:08 PM

Accept (T3)
 Hide Form
 Accepted Date (T3) 12-Mar-2024
 Attachments No Files
 Netcare Document(s) No documents
 Comment —
 Last updated by Twenty Six TRAINING on 12-Mar-2024 3:08 PM