

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

- 1 Login to the <u>Alberta Netcare Portal</u>.
- 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.

						A 0	💄 Twenty T
≪ ► COMMON	Patient Sear	ch					Select a favo
FAVOURITES	Identifier	100008114					
- SEARCHES	Identifier	PHN / ULI			~		
Search for a Patient	туре						
Delivery Site Registry (DSR)	Last Name	Ereferral			Date Of Birth	Day Month N	✓ Year
▼ EREFERRAL	First Name	Тwo			Sex	All Female N	1ale X
My Referrals Triage Referrals	Middle Name/Initial				Phone Number		
My Assigned Referrals Health Services Catalogue						Search Tip : An identifier recommended. For name enter the complete last r first name and date of bi	search is e search, please name, complete rth.
EREFERRAL REPORTS	Courth	Clear Enter a new f		)			
PATIENT LISTS	Search	Enter a new 1	avounte search _ C				
CLINICAL ETOOLS	PHN / ULI	Name	Birthdate	Age	Gender	Address	Town/City
► NOTIFICATIONS	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.



	🖾 Pa	atient Event History	/ 🖲 Imn	nunization History	Medications	🎥 Create Referrals	🖏 View Referral	🗸 Mor
Clinical Documents Showing All Mark All As Read Group By Category Sort By Date	C Pa	atient Demogra	aphics <b>L, Two</b>	в				
Read Unread		Date Of Birth	, 12-Jan-1970				Home Phone	
Dynamic Patient Summary     Modication Profile		Sex	54 years F				Work Phone	
R Pharmacy Care Plan		Eligibility Start Date				Cell/Alternate Phone		
Referrals - In Progress (13 / 15)     O7-Feb-2024 eConsult - Urology	eConsul	lt - Urology	isiole Enime-	dated and blank eligib story.	oility start dates sl	hould be confirmed		
<ul> <li>O7-Feb-2024 eConsult - Urology</li> <li>30-jan-2024 Referral - Urology</li> <li>29-jan-2024 Referral - Orthopaet</li> <li>Consult Urology</li> </ul>	Source da Category Status	ate 07-Feb-2 Referrals In Progre	024 • In Progress ss	T I				
<ul> <li>⊇2-jan-2024 eConsult - Urology</li> <li>⊇2-jan-2024 eConsult - Orthopat</li> <li>⊇2-jan-2024 eConsult - Orthopat</li> <li>⊇2-jan-2024 eConsult - Orthopat</li> </ul>	Author Result So	ource Provincia	l			Print	Data Inquiry	More
23-jan-2024 eConsult - Urology	Mark As	Read	Unread					

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.

7 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*.

Waitlisted Ref	erral Hip dysplasia Orthopaedic Surge	ery 🔼	People
Triage Site Calgary FAS	T Orthopaedics CAT Submitted 6 weeks ago	eReferral ID RFS-AAB-	Referrer
Ctatus Baasan	External Tria	ura Cita	Out of Province Provider
Status Reason	- External ma	ge site —	Service Provider
Accepted (13)	- Referred For	Referral	-
	Submitted B	y Three TRAINING	
	Flagged for Referrer	-	Linked Referrals There are no linked referrals for this referral.
Orthopaedic	Surgery Request for Service	2	Show this patient's other referrals $\checkmark$
	Patient Details   Refe	erral Details   Referral Requirements   Providers	Referral Notes There are no notes for this referral.
Exclusions	1. Dislocation 2. Infection		Activity Show Notes Only <b>T</b>
Patient Information	PHN/ULI: 46044- Name:	F DOB: 06-Oct-1953	Waitlisted
Request Created For	Instability of knee - Calgary FAST Orthopaedio	cs CAT	STATUS Waitlisted Last updated by Three TRAINING on 29-Dec-2023 2:54
Clinical Pathway URL	https://www.albertahealthservices.ca/aph/pa	ge18236.aspx	PM
Who has been informed?	Guardian		Update Received Date (T2) REASON Received date entered in error
QuRE Reference			Update Received 29-Dec-2023 15:00 Date (T2)
	The information captured in this form is base (www.ahs.ca/QuRE)	ed on the Quality Referral Pocket checklist.	Reason Received date entered in error
			Comment —
Patient Details			Last updated by Three TRAINING on 29-Dec-2023 2:53 PM

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

=	🧃 All Documer	nts Flow	sheets 🛛 💆	Patient Event	History		Immuniza	tion H	istory	Medica	ations	🐉 Cr	eate Refer	rals 🥳	🗼 Vie	w Referral	✓ More
D No In	Progress																
	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority		Triage Site	E	Externa Triage Site	l Service Provide	er Da	ppointme ate/Time	ent Accep Date (	ted Refe (T3) Prov	erring /ider	Elapsed Time/Tin To Targe	Approx Wait Time
	Referral RFS-AAB-069309	05-Jan- 2024	Ciericai Triage in Progress	Hip dysplasia			South FAST Orthopaedi CAT	ics								5 weeks days	3
	eConsult RFS-AAB-070161	26-Jan- 2024	Completed Referral Submitted on Your Behalf	Urology issue			Kaye Edmonton Clinic - Diar and Irving Kipnes Urology Centre	ne		Receivi Provide	ng er l			Out Prov Prov	Of /ince /ider	2 weeks days	3 5
	Completed/Can	celled/De	clined														
	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Tria	age Site	Exter Triag Site	nal S e P	ervice rovider	Appoir Date/1	ntment Time	Accepted Date (T3)	Referrin Provider	g Ela Tin To	ipsed ne/Time Target	Last Modified/ Modified I
	eConsult RFS-AAB-070056	28-Dec- 2023	Completed Continue Managing Within Your Scope of Practice	Shoulder Issue		Ort Sur Pro	thopaedic rgery - ovincial		R P I	ecelving rovider				Dr.	6 v da	veeks 4 ys	12-jan-20 Three Training
	Referral RFS-AAB-069295	08-Jan- 2024	Cancelled Referral no longer needed	Instability of knee		Cal Ori CA	lgary FAST thopaedics T		R P I	ecelving rovider				Dr.	5 v	veeks	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, <u>go online</u> 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 a next to *Referring Provider* to bring up the *Provincial Provider Registry* (PPR) search.

Referring Provider Referrals									
Referring Provider	This section must be comp for eReferral. Q Dr.	eleted to submit, manage and receive notifications	Show Recently Updated referrals for	Last 2 weeks					
Phone Number	403 000 0000	]							
Fax Number	346 000 0000	]							
Address Line 1	4343 Slippery St	]							
Address Line 2		]							
City	calgary	]							
Postal Code	xxx xxx	]							
Province	Alberta	]							
Use On Behalf Of	Yes No								

- 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	Dr. 🛞
Phone Number	780 123 4567
Fax Number	780 123 4567
Address Line 1	Test Address
Address Line 2	1234 Street
City	Calgary
Postal Code	T6I2C6
Province	Alberta

- 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.

COMMON «	My Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
► SEARCHES	Recently Updated	8	7	1
▼ EREFERRAL	Cancelled/Declined	2	2	0
My Referrals	Action Required 🛕	4	3	1
My Assigned Referrals	Drafts	1	0	1
Health Services	Undelivered	0	0	0
Catalogue	In Progress	54	44	10
EREFERRAL REPORTS	Completed	5	1	4
PATIENT LISTS	Waiting for Response	5	5	0

2 Click Respond to Receiver from the Workflow bar

Cancel   Print   Print All	Respond to Receiver

- 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.

Respond to Receiver									
Comment to Receiver *	The latest lab results have been attached to this referral								
Attach External Document(s)	Choose a file File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.								
Netcare Document(s)	⊕ Link a document								
Provide Informat	tion								

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.

COMMON ≪	My Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES     Search for a Patient	Recently Updated	11	8	3
Delivery Site Registry	Cancelled/Declined	2	2	0
(DSR)	Action Required 🔒	5	4	1
▼ EREFERRAL	Drafts	1	0	1
My Referrals	Undelivered	0	0	0
Triage Referrals My Assigned Referrals	In Progress	61	48	13
Health Services Catalogue	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.

Received Date	to		PHN/ULI	
Referral Reason	Q		Patient First Name	
Specialty	Q		Patient Last Name	
Triage Site	Q		Request Type	Referral 🗙
Service Provider	Q		Referral ID	
Referring Provider	Q		External Triage Site	
Priority	~		Show Referrals for Review	
Status	Appointment Booked 🛞			
	Waiting for Appointment 🛞 V 🕂 Add	Vaitlisted 🛞		

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

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 Appoli	ntment Referral He go exeferral ID RFS-AAB-00	maturia gross Urolog 57276	gy Triage Site Calgary FAST Urology CAT	^	People Referrer	
Status Reason Accepted (T3)	— 12-Mar-2024	External Tria Referred For Submitted B	ige Site — r Referral iv Twenty Six TRAINING		Dr.     Service Provider     Receiving Provider I	
		Flagged for Referrer	-		Linked Referrals There are no linked referr	als for this referral.
Urology Req	uest for Service				Show this	patient's other referrals 🗸
Exclusions	1. For Acute scrotal pain. T	Patient Details esticular torsion. Genitouri	s   Referral Details   Referral Requirements	Providers	Referral Attachmer	115 × *
	renal colic with FEVER, ref Department as appropriat 2. IMPORTANT NOTE: If pa Urology Centre, Referral & 3. For Fistula-enteric, plea	er directly to the emergency e. tient needs to be seen in 2 Triage Department - 780-4 se refer to General surgery	cy department or call RAAPID or send to Em 2-4 weeks, call directly to the Dianne and Irvi 407-3800 / In your zone.	ergency Ing Kipnes	<ul> <li>AHC0562 (1).pdf (11</li> <li>Referral Notes</li> <li>There are no notes for this</li> <li>Activity</li> </ul>	st.94 kB) 5 WEEKS AGO
Patient Information	PHN/ULI: 10000-8114 Nan	ne: Sex: F D(	OB: 15-Mar-1974		Activity	Show Notes Only (
Request Created For Clinical Pathway URL Who has been Informed?	Hematuria gross - Calgary https://www.albertahealth Patient	FAST Urology CAT iservices.ca/aph/page1823/	i6.aspx		Set Service Provider Hide Form Set Service Provider Re Last updated by Twenty Six PM	r ceiving Provider I TRAINING on 12-Mar-2024 3:08
QuRE Reference	The information captured	in this form is based on the	e Quality Referral Pocket checklist. (www.ah	is.ca/QuRE)	Waiting for Appoint STATUS Waiting for Appoint Last updated by Twenty Six PM	: <b>ment</b> intment TRAINING on 12-Mar-2024 3:08
Patient Details					Accept (T3)	
Patient Preferences	lext Available Provider				Accepted Date (T3)	12-Mar-2024
Contact					Attachments	No Files
Information	Phone Number Type Phon	e Number			Netcare Document(s)	No documents
	Home 555 0	00 5555			Comment	_
	Preferred Contact?	Home			Last updated by Twenty Six PM	TRAINING on 12-Mar-2024 3:08