

# Manage Referrals

The user role you have been assigned in eReferral will dictate what dashboards and associated workflow items you can access. Regardless of your assigned role, the same process is used to filter and find referrals.

- Referring providers have access to the My Referrals dashboard.
- Receiving providers can access the *My Assigned Referrals* dashboard and the *Triage Referrals* dashboard. Sometimes, they may also have access to the *My Referrals* dashboard.
- Triage users will have access to all dashboards.

### New Referrals - New Requests Worklist

- 1 Select eReferral from the Clinical Portal Menu, then Triage Referrals.
- 2 Select *New Requests* to display a list of referrals awaiting clerical triage in the *New Request* worklist. New requests are referrals that have been entered or received and have not had any action taken on them. Once a workflow action has been taken on a referral it will move to the appropriate worklist.

Triage Referrals			
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 🛕	22	16	6
New Requests	2	2	-
Redirected	19	18	1
Triage	67	44	23
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	39	28	11

NOTE:Referrals that have been redirected from another triage facility will appear in the<br/>*Redirected* worklist. The referral will appear on the newly assigned facility's *Triage*<br/>*Referrals* dashboard in the *Redirected* worklist. Only users who have access to the<br/>Triage dashboard or the My Assigned Referrals dashboard have access to this<br/>function. Referring providers do not have access to this feature.

**3** Open the referral to access the workflows.



Triage: New Requ	uests								
Received Date		to	Ξ				PHN/ULI		
Referral Reason		Q					Patient Firs	t Name	
Specialty		Q					Patlent Las	t Name	
Triage Site		Q					Request Ty	pe	~
Service Provider		Q					Referral ID		
External Triage		Q					Priority		
Site									
Status	New Request (🗷						Exclude Wa for Respon	alting C se	)
Clear Received Date	before entering new s	earch criteria.					Show Refer Review	rrals for	)
Search Res	set Enter a new fav	ourite search 🕀							
Patient		Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider
EREFERRAL, Two 12-Jan-1970 (54 ye	<b>B</b> ULI: 10000-8114 ars) / Female	<b>Referral</b> RFS-AAB-070161	08-Nov- 2024	New Request	Arthritis of elbow		Central FAST Orthopaedics CAT		Receiving Provider II

4 Click Start Clerical Triage. This will change the status of the referral from New Request to Clerical Triage in Progress and the referral will move to the Triage worklist. If Clerical Triage Complete is selected the status of the referral will change to Waiting for Clinical Triage and the referral will move to the Triage worklist. Any workflow actions taken on a New Request will move to the associated worklist.

Communication ~   Intake ~	Scheduling ~   Triage ~
Change Referral Reason	
Complete Clerical Triage	
Redirect	
Set External Triage Site	
Set Service Provider	
Start Clerical Triage	
Update Received Date (T2)	

# **Triage Worklist**

- 1 Select eReferral from the Clinical Portal Menu, then Triage Referrals.
- 2 Select the *Triage* worklist.

Triage Referrals			
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 🛕	22	16	6
New Requests	2	2	-
Redirected	19	18	1
Triage	67	44	23
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	39	28	11

- 3 Filter on *Referrals* from this list. You can also filter by *Referral Reason*, *Specialty*, *Triage Site*, *Service Provider*, *External Triage Site* and *Priority*. Use the *Received Date* to narrow down and focus on newly received referrals to ensure they are triaged on time.
- 4 Click *Exclude Waiting for Response* to exclude all referrals that are still waiting for responses.
- 5 You can further refine your search results by filtering on referral status:
  - 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.
  - *Appointment Missed*: Referrals with previous appointment booked dates that the patient missed. The reason for missing can also be selected, and notes can be added to further clarify.
  - *Clerical Triage in Progress*: New referrals that are pending initial review or referrals requiring additional information before assigning to a provider.
  - Clinical Triage Progress: Clinician/specialist has started a clinical review of the referral.
  - *Response in Progress*: Advice has been provided on the referral and is pending a review from a clinician/specialist.
  - *Waiting for Clinical Triage*: Clerical triage has been completed and is awaiting clinical review by a specialist/clinic.
  - *Information Provided*: Requested information from the referring provider has been received, and the referral has been updated.
  - The referral *Received Date* has a system default date of a one-month timeframe. Clear this field if
    you wish to view all referrals based on your selected filter(s).

Triage: Tria	ge				
Received Date		to		PHN/ULI	
Referral Reason		Q	]	Patient First Name	
Specialty		Q	]	Patient Last Name	
Triage Site		۹	]	Request Type	Referral 🗸
Service Provider		م	]	Referral ID	
External Triage Site		۹	]	Priority	~
Status	Accepted 🛞	Appointmen	t Missed 🛞	Exclude	
	Clerical Triage	in Progress 🖲	0	Waiting for	
	Clinical Triage	in Progress 🖲		Response	
	Response in Pr	rogress 🙁			
	Waiting for Cli	nical Triage 🛞			
	(+) Add				
				Show Referrals for Review	

- 6 When a referral is opened, the *Workflow Bar* and other actions are located at the top right of the referral.
  - Add Note: Used to add notes (i.e., General, Clinical or Clerical).
  - *Edit Referral*: Used to make changes to the referral, such as to add/modify an address or phone/fax number.
  - Print and Print All: Used to print to a local printer or save as a PDF document.
    - (*Print All & Print*) Referral Contents The entire Referral form will print except for free text fields that are blank.
    - (*Print All & Print*) Support Documents This section lists the titles of all the attached documents. This includes external documents attached in the *Right Panel* or within the Referral. It does not include linked Alberta Netcare documents.
    - (*Print All*) *Notes* and *Activity* All the notes (General, Clinical or Clerical) and activity that appear in the *Right Panel*.
    - (*Print All*) *Referral Attachments* This section displays copies of all the attached documents. This includes external documents attached in the *Right Panel* of the Referral. It does not include linked Alberta Netcare documents.
    - (Print) Notes All the notes (General, Clinical or Clerical) that appear in the Right Panel.
  - Workflow Bar: Used to change the referral status. Each of these items has options that can be accessed by clicking the drop-down arrow. The Workflow Bar is selected to identify the progress of the request, which begins with Update Received Date (T2) through to Cancel. The items displayed on the Workflow Bar are dictated by the user role you have been assigned in eReferral.

## Triage Referrals & My Assigned Referrals Workflow Bar

# **Workflow Bar Options**

#### **Advice**

Add Note	Edit Referral Print Print All Advice
	Respond with Advice
5 days ago	Respond with Advice (Review Required)

Respond with Advice – Select this option if this referral requires advice/further investigation (i.e., missing required information, continuing to manage the patient in the scope of practice, informing the receiving provider/clinic that a referral has been submitted on their behalf, etc.). Provide the advice in the comment box, choose the Complete Reason, and click Complete. The referral is now complete and will appear on the Completed worklist of the My Referrals dashboard of the referring provider and the Completed/Cancelled/Declined worklist on the Triage Referrals dashboard.

Response bate	30-Oct-2024 🔳				
Set Service Provider *	Receiving Provider I 🛞				
Advice/Response	•				
Attach External		Choose a file			
Document(s)	File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150ME				
Netcare Document(s)	⊕ Link a document				
Complete Reason	Called Requesting Provide	r - Routine			
	Called Requesting Provide	r- Emergent/Urgent Request			
	O Continue Managing Withir	n Your Scope of Practice			
	O Referral Required - Refer t	o the Provider of Your Choice			
	O Referral Submitted on You	nr Behalf			
	<ul> <li>Referral Submitted on You</li> <li>Additional Information no</li> </ul>	ır Behalf t provided, unable to provide advice			

 Respond with Advice (Review Required) – Select this option to provide advice that requires a review by a specialist before it is provided to the referrer (i.e., if a fellow or other staff member composes the response). Provide the advice in the comment box, choose the Complete Reason, and click Submit for Review. The referral is now awaiting specialist review and will appear on the Action Required worklist on the Triage Referrals dashboard and My Assigned Referrals dashboard.

Set Service Provider *	Receiving Provider I ()
Advice/Response *	
Attach External	Choose a file
Document(s)	File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.
Netcare Document(s)	Unk a document
Complete Reason	Called Requesting Provider - Routine
	Continue Managing Within Your Scope of Practice     O Referral Regulated Refer to the Regulator of Your Choice
	Additional information not provided, unable to provide advice
	Clear Action Required
Submit for Review	Cancel

#### Closing

Ad	lvice ~   Closing	y l c	Comm	unicat	tion 🗸 🕴 Intake 🗸
m	Cancel	bgy	~	-	People
e	Complete (T5)	~			Referrer
	Decline				4

 Cancel – Select this option to change the referral status to Cancelled. Select the Reason for cancelling the referral. The request will now move to the Completed/Cancelled/ Declined worklist for referring and receiving providers.

Cancel			
Reason *			~
Comment		Referral no longer needed Patient has been unsuccessful attending appointments Unable to contact patient Patient has declined service	
Apply	Cancel	Patient deceased Incorrect Referring Provider added to form Referral created against incorrect patient	

Decline – Select this option to change the referral status to Declined. The request will now move to the Completed/Cancelled/
 Declined worklist for referring and receiving providers. Select the Reason and an option for Standard Advice if applicable. The date will default to the current day. Change if required.

	~	
File size restricted to an MR Multi	Choose a file	3
€ Link a document	hio tino can oo ahoonaca ah io a muu of 20044	
	File size restricted to 30MB. Multi	✓ Choose a file File size restricted to goMB. Multiple files can be uploaded up to a limit of 150MI ⊕ Link a document

 Complete (T5) – Select this option to change the referral status to Complete. The request will now move to the Completed worklist for the referring provider on the My Referrals dashboard and the Completed/Cancelled/Declined worklist on the Triage Referrals dashboard and My Assigned Referrals dashboard.

If the patient attended the appointment, make sure to select *Patient attended appointment*. This will cause the *Date Appointment Attended (T5)* to appear.

The *Date Appointment Attended (T5)* will autopopulate based on the date it was booked. This will be used along with the *Received Date (T2)* and *Accepted Date (T3)* to calculate the patient's referral wait time.

The default selection for referrals in the *Completed/Cancelled/Declined* list is one (1) month. This value is set by the *Show Completed/Cancelled/Declined* referrals in the *Triage Referrals* panel on your *My Details* screen.

#### **Communication**

All   Advice ~   Closing ~   Communication	Y Intake V
Create and attach letter	ople
Provide Information (to Referrer)	opie
Request Information (from Referrer)	eferrer
Requested Info: Received/Not Required	ervice Provid

Accepted Date (T3)	13-Dec-2023			
Priority	Routine 🗸			
Set Service Provider	Dr	*		
Reason *	Patient attended	appointment		
	O Consult Letter Sent O Consult Letter Sent and Available on Alberta Netcare Portal			
	O Lab results sent			
	O Lab results sent a	and available on Alberta	Netcare Portal	
	🛛 Clear			
Date Appointment Attended (T5) *	14-Feb-2024 🔳			
Appointment Type	Consult 🗸			
Outcome *	O Procedure completed at appointment			
	Patient discharged from our care, as per consult letter			
	○ We will continue ongoing patient care			
	○ Booking the patient for procedure			
	$\bigcirc$ Pre-screening completed and patient will be booked to see specialist			
	O Pre-screening completed; patient discharged as per consult letter			
	O Pre-screening completed; information not provided by service			
	O Information Not Provided by Service			
	🛛 Clear			
Attach External			Choose a file	
Document(s)	File size restricted to	30MB. Multiple files car	be uploaded up to a l	imit of 150M
Netcare Document(s)	• Link a documen	it		
Comments				

 Create and attach letter – This option is for the Facilitated Access to Specialized Treatment (FAST) team to generate and send a letter to the referring provider. Each letter has drop-down fields available to customize the content depending on the referral status (i.e., Accepted, Incomplete, Declined, etc.).



 Provide Information (to Referrer) – Select this option to provide information to the referring provider. If selected, the referral will then appear on the Action Required worklist of the referring provider's My Referrals dashboard.

Attachments		Choose a file	
	File size restricted to 30MB.	Multiple files can be uploaded up to a limit o	of 1501
Netcare Document(s)	① Link a document		
Comment to			

 Request Information (from Referrer) – Select to ask for more information from the referring provider. The referral will appear on the receiving provider's *Triage Referrals* dashboard on the *Waiting for Response* worklist and the referring provider's *Action Required* worklist. When Missing mandatory information is selected a second *Details* list is displayed to further define what is missing.



Requested Info: Received/Not Required – Select this option if a referring provider submitted the requested information via fax or the information is found elsewhere or is no longer required (i.e., the referral is no longer required because it has been cancelled or declined). Attach the requested information to clear all flags (i.e., Waiting for Response and Action Required). There is no status change.

Attachments		Choo	se a file	
	File size restricted to 30MI	. Multiple files can be uplo	aded up to a limit of 1	50MI
Netcare Document(s)	() Link a document			
Comment				

#### Intake

Workflow items that are italicized indicate that there is no form to enter information in but the referral status will change.

Communication ~   Intak	<u>xe</u> ✓   Scheduling ✓   Triage ✓
Change Referral Reason	
Complete Clerical Triage	
Redirect	larbo
Set External Triage Site	arbo
Set Service Provider	ler I
Start Clerical Triage	
Update Received Date (T2	0

- Change Referral Reason The Change Referral Reason workflow can be used to enter a more specific Referral Reason or correct a Referral Reason that may have been entered incorrectly (for both eConsults and Referrals). Only users who have access to the Triage dashboard or the My Assigned Referrals dashboard have access to this function. Referring providers do not have access to this function. This action does not change the referral status or generate any notifications. For example, a referral is submitted for the Adult Gastroenterology Specialty with Adult gastroenterology issue as the Referral Reason. The triage centre changes the Referral Reason to a more specific Gastroenterology reason, such as Gastroesophageal reflux disease (GERD).
- Complete Clerical Triage –Select this option to complete clerical triage. This will change the status to Waiting for Clinical Triage. There is no form associated with this workflow.

Change Reason	Adult gastroenterology issue
From -	
Referral Reason *	⊕ Add
	Changing referral reason does not update mandatory requirements.
Comment	
Change Referra	Adult gastroenterology issue
From -	
Referral Reason *	Gastroesophageal reflux disease (GERD)
	Changing referral reason does not update mandatory requirements
Comment	



 Redirect (previously named Reassign)– Select this option to redirect the referral to another triage facility. The referral status will change to Redirected and appear on the newly assigned facility's Triage Referrals dashboard in the Redirected worklist. Redirect does not update mandatory requirements. Only users who have access to the Triage dashboard or the My Assigned Referrals dashboard have access to this function. Referring providers do not have access to this feature.

Triage Site, Specialty, Referral Reason *	Central FAST Orthopaedics CAT, 🛞 Orthopaedic Surgery, Arthritis of elbow		
	Redirect does not update mandatory requi	rements or external triag	ge facility.
Reason *		~	
Currently Assigned Service Provider	Receiving Provider II		
Service Provider *	O Leave unchanged		
	O Change provider		
	O No provider assigned at this time		
	🛛 Clear		
Attachments		Choose a file	
	File size restricted to 30MB. Multiple files	an be uploaded up to a h	imit of 150l
Netcare Document(s)	⊕ Link a document		
Comment			

 Set External Triage Site – Select this workflow if clinical triage is being completed by a site external and add the site name.



 Set Service Provider – Select this workflow to assign a service provider to the referral. In the pop-up, type the service provider's name and select it from the list. Click Set Service Provider to finish.



 Start Clerical Triage – Select this workflow to ensure that users are aware that the referral has been received and processing has started. It will change the status to Clerical Triage in Progress. There is no associated form.

≡	Limited Documents	🧃 All Documents	Dashboard
		Add Note Edit F	teferral Print
C	<b>Terical Triage in Progress</b> age Site Calgary FAST Urolog	<b>Referral Hem</b> y CAT Submitted 2	n <b>aturia gross</b> hours ago
Ur	ology Request fo	or Service	

Update Received Date (T2) – Used to update the received date of the referral. The wait for surgical consultation is calculated and reported on for the period between Received Date (T2) and Completion (T5). Referral Wait is calculated for all patients that have their referral processed through the FAST (Facilitated Access to Specialized Treatment) Program. If a referral is redirected to another service provider do not change the received date.

Update Received Date (T2) *	
Reason *	
Comment	
	Received date entered in error
	Other

### Scheduling

Workflow items that are italicized indicate that there is no form to enter information in but the referral status will change.



 Appointment Booked – Select this option to add an appointment date and select the Appointment Type – Screening, Consult or Virtual.



 Appointment Missed – Select this option to change the referral status to Appointment Missed. If the referring provider has their Provider Notifications set up with the default options, this will trigger an email to them.

12 94	
Reason *	
Comment	Will contact patient to rebook Re-refer patient to rebook
	Patient will not be rebooked and is returned to your care

 Defer – Select this option to show that a request is not ready to be booked. The referral will move to the Deferred worklist. You need to check this list regularly, as no alerts are associated with it.

Review Date *	25-Jan-2024 🛄	7
Reason *	Social factors Functional limitations	Choose a file.
Attachments	Unable to contact patient / guardian Other medical considerations	les can be uploaded up
Netcare Document(s)	⊕ Link a document	
Comment		

 Waitlist – Select this option to change the referral status to Waitlisted. As a comment box is unavailable for changing the status to Waitlisted, select Add Note and choose Clerical to enter a note regarding the patient's waitlist status if required.



### Triage

Workflow items that are italicized indicate that there is no form to enter information in, but the referral status will change.



Accept (T3) – Select this option to enter the accepted date of the referral. The status of the referral will change to Accepted. Accepted status indicates the referral has been accepted by the specialist/clinic. The referral stays on the receiving provider's Triage worklist on the Triage Referrals dashboard and My Assigned Referrals dashboard.

Accepted Date (13)*	13-Nov-2024		
Attachments		Choose a file	
	File size restricted to 30MB. Multip	le files can be uploaded up to a limit	of 150Ml
Netcare Document(s)	• Link a document		
Comment			

 Ready for Booking –Select this option to change the referral status to Waiting for Appointment. This action can be used by specialties that do not have a waiting list, and an appointment can be scheduled as soon as triage is complete. This also moves the referral from the Triage to the Waiting for Appointment/Waitlisted worklist.

+	DATE OF BIRTH 12-Jan-197	0 (54y) s	ex F	ULI I	^
	NO CPAR PRIMARY PROVIDER	1	PATIENT PRIMARY ADDRESS	•	PATIENT MAILIN
=	All Documents	Flowshee	ets 📋 Patient Event	History	Immunizat
		Add Note	Edit Referral Print	Print All	Advice ~   Clos
T	Waiting for Appointme riage Site South FAST Ort Referral ID RFS-AAB	nt Ref	ferral Hip dysplasia CAT Submitted 5 wee	o Orth ks ago	opaedic Surgery

Set Priority and Booking Instructions – Select this option to set the priority of the referral (based on the request's clinical content). The default Priority is Routine. If it's not Routine select Semi Urgent, or Urgent.



Start Clinical Triage – Select this option to start clinical triage. This will change the status to Clinical Triage in Progress. There is no form associated with this action.

EREFERRAL, TWO B DATE OF BIRTH 12-Jan-1970 (54y) SEX F		×			
NO CPAR PRIMARY PROVIDER     PATIENT PRIMARY ADDRESS       Image: Strate	History	TIENT MAILING A			
Add Note   Edit Referral   Print	Print All   Adv	ice 🗸 🕴 Closing			
Clinical Triage in Progress Referral Hip dysplasia Orthopaedic Surgery Triage Site South FAST Orthopaedics CAT Submitted 5 weeks ago eReferral ID RFS-AAB					