

Manage and Triage eConsults

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a nonurgent question or when unsure if a referral would be appropriate. An eConsult is often all you may need to manage your patient in their medical home.

View New eConsults

There are two ways to find a new eConsult:

a. If you are set up as a triage user, you can use the *Triage* worklist on the *Triage Referrals* dashboard. This will show every request that has arrived for your facility.

COMMON ≪	Triage Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
▶ SEARCHES	Drafts	0	0	0
▼ EREFERRAL My Deferrals	Undelivered	0	0	0
Triage Referrals	Action Required 🔒	23	16	7
My Assigned Referrals	New Requests	2	2	-
Health Services	Redirected	18	17	1
Catalogue	Triage	69	44	25
Referrals	Waiting for Response	8	6	2
Tasks - Registered	Waiting for Appointment/Waitlisted	14	14	-
Referrais	Deferred	1	1	-
EREFERRAL REPORTS	Scheduled	12	12	-
PATIENT LISTS	Completed/Cancelled/Declined	37	28	9

b. If you do not triage eConsults and only respond to them, you may or may not have access to the *Triage Referrals* dashboard. In this case, you can view requests on your *My Assigned Referrals* dashboard on the *Triage* or *Open eConsults* worklist after they have been assigned to you as a provider by a triage user.

✓ COMMON	My Assigned Referrals			
FAVOURITES SEARCHES	Requests Action Required	Total 18	Referrals 5	eConsults 13
▼ EREFERRAL My Referrals	Open eConsults 🛕	15	-	15
Triage Referrals	Waiting for Appointment/Waitlisted	8	8	0
My Assigned Referrals	Scheduled	3	3	-
Health Services	Completed/Cancelled/Declined	16	10	6
Catalogue Tasks - Unregistered	New Requests	0	0	-
Referrals	Redirected	7	7	0
Tasks - Registered Referrals	Triage	15	11	4
	Waiting for Response	2	0	2
	Deferred	1	1	-



In the eConsult, there are several workflow options and two print options.

- Workflow Bar: Used to change the referral status and to provide a response to a
 referring provider. Some eConsult workflow actions contain dropdown options indicated
 by the down arrow.
- Print and Print All: Used to print or save as a PDF document.
- *Cancel*: Used to cancel an eConsult.

Respond with Advice

Use this option if you are a specialist responding to an eConsult.

1 If the eConsult is appropriate and you choose to respond, click *Advice*, then *Respond with Advice* from the *Workflow Bar*.



2 Set yourself as the *Service Provider*. Your name will populate automatically as per your *My Details* configuration. Enter your response and add any attachments. Choose a *Complete Reason* from the list provided and click *Complete* to finish.

Respond with Advice		
A new version the referral.	of the referral details is available. It will be automatically applied when you complete this action.	
Response Date Set Service Provider * Advice/Response *	05-Nov-2024 III Receiving Provider I 🛞	
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	
Complete Reason *	 Called Requesting Provider - Routine Called Requesting Provider- Emergent/Urgent Request Continue Managing Within Your Scope of Practice Referral Required - Refer to the Provider of Your Choice Referral Submitted on Your Behalf Additional Information not provided, unable to provide advice Clear 	
Complete Ca	ncel	

The eConsult will now appear on your *Completed/Cancelled/Declined* worklist on the *My Assigned Referrals* dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response will appear in the eConsult on their *My Referrals* dashboard.

Respond with Advice (Review Required)

Use this option if you are a resident or other healthcare provider that requires a specialist to review your response before sending it back to the referring provider.

1 Select *Advice*, then *Respond with Advice (Review Required)* from the *Workflow Bar* if there is a need for a specialist to review the advice before it is provided to the referrer (i.e. if a fellow or other staff member composes the response).

	Medications	🐉 Create Referrals	🕵 View Referral	✓ More
	Cancel F	Print Print All Advice	Communication ~	Intake ~
١.	Respond with A	dvice		
	Respond with A	dvice (Review Required)		
ч				

2 Set the specialist as the *Service Provider*. Enter your response and add any attachments. Choose a *Complete Reason* from the list provided and click on *Submit for Review* to finish. 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.

Respond with Advice (Review Required)				
🧃 A new version (A new version of the referral details is available. It will be automatically applied when you complete this action.			
Set Service Provider * Advice/Response *	Set Service Provider * Advice/Response *			
Attach External Document(s) Netcare	Choose a file File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.			
Document(s)	Document(s)			
Complete Reason *	Called Requesting Provider - Routine Called Requesting Provider- Emergent/Urgent Request			
	O Continue Managing Within Your Scope of Practice			
	O Referral Required - Refer to the Provider of Your Choice			
	O Referral Submitted on Your Behalf			
Additional information not provided, unable to provide advice				
🔀 Clear				
Submit for Review	Cancel			

Request Additional Information from the Referring Provider

1 If you cannot provide a response and require more information to complete the eConsult, go to the *Workflow Bar* and select *Communication*, then *Request Information (from Referrer)*.



2 Click Add to set the Service Provider. Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click Request Information (from Referrer).

Request Information (from Referrer)				
👩 A new version	👩 A new version of the referral details is available. It will be automatically applied when you complete this action.			
Set Service Provider *	Set Service Provider *			
Reason *	Missing clear clinical question Missing information			
	Missing required patient demographics			
	 Missing required investigations 			
	S Clear			
Comment to Referrer *				
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) ① Link a document				
Request Information Cancel				

The eConsult will now appear on your *Waiting for Response* worklist on your *My Assigned Referrals* dashboard and *Triage Referrals* dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response will appear on their *My Referrals* dashboard.

Respond to an Additional Question or Information from a Referring Provider

If a referring provider adds new information to an eConsult and requires your review, the request will appear on your *Action Required* worklist within the *My Assigned Referrals* dashboard.

1 Click on *Action Required* and filter on eConsults. The referral will have a panel indicating that new information has been added and requires review.

, COMMON My Assigned Referrals				
FAVOURITES	Requests	Total	Referrals	eConsults
> SEARCHES	Action Required 🛕	18	5	13
▼ EREFERRAL My Referrals	Open eConsults 🛕	15	-	15
Triage Referrals	Waiting for Appointment/Waitlisted	8	8	0
My Assigned Referrals	Scheduled	3	3	-
Health Services	Completed/Cancelled/Declined	16	10	6
Catalogue	New Requests	0	0	-
Referrals	Redirected	7	7	0
Tasks - Registered Referrals	Triage	15	11	4
► EREFERRAL REPORTS	Waiting for Response	2	0	2
	Deferred	1	1	-

2 To review the additional information, navigate to the *Activity* section in the *Right Panel* of the eConsult. The comments/content can be viewed under *Respond to Receiver*.



3 Once done, click Mark as Reviewed on the Workflow Bar. Enter a comment and click Mark as Reviewed.

Cancel Print Print All Respond to Receiver Mark as Reviewed

The panel indicating that new information was added to the referral will now be removed.



4 If you choose to respond after reviewing the information, click Respond with Advice on the Workflow Bar.

	Cancel Print Print All Advice	Communication - Intake -
1	Respond with Advice	
ľ	Respond with Advice (Review Required)	
h	Keterrer	ovince Provider

5 Set yourself as the *Service Provider*. Your name will populate automatically as per your *My Details* configuration. Enter your response and add any attachments. Choose a *Complete Reason* from the list provided and click *Complete* to finish.

Respond with Advice				
🧃 A new version	A new version of the referral details is available. It will be automatically applied when you complete this action			
Response Date Set Service Provider * Advice/Response *	13-Nov-2024 Receiving Provider I			
Attach External Document(s) Netcare Document(s)	Choose a file File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB. ① LInk a document			
Complete Reason *	Called Requesting Provider - Routine Called Requesting Provider - Emergent/Urgent Request Continue Managing Within Your Scope of Practice Referral Required - Refer to the Provider of Your Choice Referral Submitted on Your Behalf Additional Information not provided, unable to provide advice Clear			
Complete				

The eConsult now appears on the *Completed/Cancelled/Declined* worklist on the *Triage Referrals* and *My Assigned Referrals* dashboards, and the *Completed* worklist on the *My Referrals* dashboard.

Triage eConsults – Set the Service Provider

If you have triage access, you can triage eConsults using the instructions below:

- 1 Select eReferral from the Clinical Portal Menu, then Triage Referrals.
- 2 Click on Triage.

► COMMON	Triage Referrals			
FAVOURITES	Requests	Total	Referrals	eConsults
SEARCHES	Drafts	0	0	0
▼EREFERRAL	Undelivered	0	0	0
My Referrals	Action Required 🔒	23	16	7
My Assigned Referrals	New Requests	2	2	-
Health Services	Redirected	18	17	1
Catalogue	Triage	69	44	25
lasks - Unregistered Referrals	Waiting for Response	8	6	2
Tasks - Registered	Waiting for Appointment/Waitlisted	14	14	-
Referrais	Deferred	1	1	-
EREFERRAL REPORTS	Scheduled	12	12	-
PATIENT LISTS	Completed/Cancelled/Declined	37	28	9

3 Filter on *eConsults* in the *Request Type* section and click *Search*. 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: Triage				
Received Date	to H	PHN/ULI		
Referral Reason	Q	Patient First Name		
Specialty	Q	Patient Last Name		
Triage Site	Q	Request eConsult 🗸		
Service Provider	Q	Referral ID		
External Triage Site	Q	Priority 🗸		
Status	Accepted (*) Appointment Missed (*) Clerical Triage in Progress (*) Clinical Triage in Progress (*) Response in Progress (*) Waiting for Clinical Triage (*) (+) Add	Exclude Waiting for Response		
Clear Receive	ed Date before entering new search criteria.	Show Referrals for Review		
Search	Reset Enter a new favourite search 🕀			

- 4 Click on an eConsult to view it.
- 5 Click Intake, then Set Service Provider on the Workflow Bar.

Cancel Print Print All Advice ~ Communication ~ Intake ~					
	Deeple		Change Referral Reason		
	People		Redirect		
	Referrer	🛔 Out of Provi	Set Service Provid	ler	

6 Click the *Add* button. In the pop-up, type your name (or receiving provider's name) and select it from the list. Click *Set Service Provider* to finish.

Set Service Provider		
Set Service Provider 🕀 Add		
Set Service Provider Cancel		

After setting the service provider, the request will show up in the selected receiving provider's *My Assigned Referrals* dashboard provided the receiving provider added their name to their *My Details*. If they have configured their eReferral Provider Notifications, they will receive an email telling them a request is in eReferral for them.

Redirect an eConsult

An eConsult can be redirected (previously called reassigning) to another facility if it is not appropriate based on the requested zone or if the assigned provider is not available to respond to the request within an acceptable time.

- **1** Open the appropriate eConsult.
- 2 Click Intake, then Redirect from the Workflow Bar.



3 Click the X to clear the current information.

Redirect	
Triage Site, Specialty, Referral Reason *	Calgary FAST Urology CAT, 🛞 Urology, Hematuria microscopic (greater than 3 rbc/hpf)
	Redirect does not update mandatory requirements or external triage facility
Reason *	✓

4 Click *Add*. Enter the original *Referral Reason* if you want to retain this or enter a new one if you need to change the *Referral Reason*.

- 5 Select the appropriate *Reason*.
- 6 Select the Service Provider.
- 7 Click *Redirect*.

Redirect		
A new version of the refe	erral details is available. It will be automatically applied when you complete this action.	
Triage Site, Specialty, Referral Reason *	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre, 🛞 Urology, Urology Issue	
Reason *	Redirect does not update mandatory requirements or external triage facility.	
Currently Assigned Service Provider	Receiving Provider I	
Service Provider *	 Leave unchanged Change provider No provider assigned at this time Clear 	
Attachments	Choose a file	
Netcare Document(s)	Link a document	
Comment		
Redirect Cancel		

The request will now appear on the chosen service's *Triage Referrals* dashboard - *Redirected* worklist and will disappear from your *My Referrals* dashboards.