



# **Alberta Netcare Portal**

## **eReferral**

### **User Guide**

5.4  
Updated: March 2025

*eReferral*

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For eReferral training support, please contact the eHealth Services team by email ([eHealthProviderSupport@gov.ab.ca](mailto:eHealthProviderSupport@gov.ab.ca)) or telephone: 1-855-643-8649 (Monday - Friday; 8:15 a.m. – 4:30 p.m.).

If you are a community user and need Alberta Netcare Portal support, contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638. *Important note:* The Alberta Netcare Provincial Help Desk is only for Alberta Netcare Portal technical support and password resets.

If you are an Alberta Health Services (AHS) user, contact the AHS IT Service Desk at 1-877-311-4300.

For general eReferral inquiries, please contact the AHS Access Improvement team by email ([access.ereferral@primarycarealberta.ca](mailto:access.ereferral@primarycarealberta.ca)).

Are we missing something in this user guide? Email [access.ereferral@primarycarealberta.ca](mailto:access.ereferral@primarycarealberta.ca) with your suggestions for future additions.

**Important note:** All patient information included in this User Guide is fictional and for example purposes only.

Anything accessed under YOUR Alberta Netcare Portal user name and password is your responsibility.

Remember that it is important to ONLY access the patient data you need to complete your job; you should not access your family, friends, neighbours, coworkers or even your own data.

## 1.0 Welcome to eReferral

Alberta Netcare eReferral, known as eReferral for short, is a paperless referral management system within the Alberta Netcare Portal that allows physicians and their support staff to create, submit, track, and manage referral requests electronically. eReferral started in 2014 with three early adopter groups and has grown to more than 40 specialty areas across Alberta.

With eReferral, referring providers can:

- Create eConsults (previously called Advice Requests), which are non-urgent requests for advice answered by specialists within five calendar days.
- Create Referrals (previously called Consult Requests), which are non-urgent requests for an in-person specialist appointment.
- Provide Clerical and Clinical Triage to ensure the referral is complete and all required patient information is contained within the referral.
- Manage Appointments and track booked, attended, and missed appointments.

### RESOURCES

- [eReferral Learning Centre](#)
- [eReferral User Benefits](#)
- [List of specialties accepting eConsults & Referrals](#)

## 1.1 Accessing eReferral - Alberta Netcare Portal Basics

- To login to the Alberta Netcare Portal from an Alberta Health Services (AHS) facility, go to: <https://portal.albertanetcare.ca/cha/NetcareLogin.htm>. Enter your username and password and click **Login**.

### TIP

For additional Alberta Netcare Portal instructions, visit the [Learning Centre](#).

- To login from a remote site using a fob, go to: <https://access.albertanetcare.ca>. Enter your username and passcode (PIN+Tokencode) and press **Logon**.

## 2.0 Getting Started with eReferral

Login to the Alberta Netcare Portal to access the eReferral homepage from the menu on the left side.

The screenshot shows the eReferral homepage with the following elements highlighted by numbered callouts:

- 1**: COMMON menu (My Details, Worklists, Manage Notifications)
- 2**: Triage Referrals table
- 3**: Referral ID search box
- 4**: Global Menu (Home, Notifications, User Profile, Logout)
- 5**: Patient Search form

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

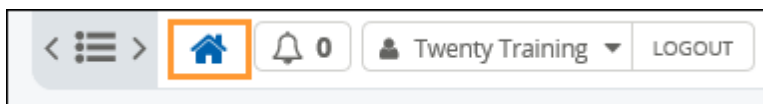
The elements below are visible on the eReferral homepage:

1. **Clinical Portal Menu** – Access information like **My Details**, patient searches and eReferral.
2. **Referral Dashboards** – Shows a running total of eReferral requests by state.
3. **Referral ID Search** – Search for a specific eReferral request.
4. Login/Logout Information and **Homepage** through the **Global Menu** – Including login name, notifications, **Homepage** link, **Global Menu**.
5. **Patient Search** – Search for a patient using their name, Unique Lifetime Identifier (ULI) or Personal Health Number.

## 2.1 Customizing the Homepage

Your **Homepage** can be customized to view your most frequently used dashboards immediately when you log into the Alberta Netcare Portal:

- a. Click the **Home** icon in the **Global Menu**.



- b. Scroll to the bottom of the **Homepage** and click **Configure Layout**.

Triage Referrals

## Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

Referral ID

**Search** [Reset](#)

Enter the Referral ID from your email notification and click 'Search'.

**Configure Layout**

Search for a Patient

Patient Search Select a favourite search ▼

Identifier

Identifier Type PHN / ULI ▼

Last Name  Date Of Birth Day -- Month -- Year

First Name  Sex All Female Male X

Middle Name/Initial  Phone Number

**Search** [Clear](#)  Enter a new favourite search +

Enter search criteria above and click 'Search'

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

- c. Divide the [Homepage](#) into the desired sections. Add a new section to the right or below. For example, you can select [Search for Patient](#) and [My Referrals](#).

Search for a Patient ▼ ✕

+ New Section to the Right

+ New Section Below

My Referrals ▼ ✕

+ New Section to the Right

+ New Section Below

**Update Layout** [Discard Changes](#) [Reset to Defaults](#)

- d. Scroll to the bottom of the page and click [Update Layout](#) to save the configuration. Then confirm that the [Homepage](#) appears with the new configuration by clicking on the [Home](#) icon from the [Global Menu](#).

## 2.2 eReferral Menu and Dashboards

eReferral functions are listed in the [Clinical Portal Menu](#) on the left-hand side of your screen. Items listed vary depending on your user role; you may see some or all the following items.

Providers can view a list of eConsults and Referrals they have created themselves or on behalf of another provider through the dashboards within eReferral. The [Triage Referrals](#) dashboard shown below is an example. Triage users can view all eReferral requests in all the dashboards.

**NOTE:**

The Tasks - Unregistered Referrals and Tasks - Registered Referrals worklists are used to create and update tasks related to a referral. These worklists are only available for Triage users. These functions only pertain to referrals and does not generate any notifications or effect the referral status.

COMMON

FAVOURITES

SEARCHES

EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

EREFERRAL REPORTS

PATIENT LISTS

CLINICAL ETOOLS

NOTIFICATIONS

Triage Referrals

**Triage Referrals**

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

Within each dashboard, there are worklists that can be used to view or add more referral details, see status, assigned to, etc.



## 2.3 Types of eReferral Dashboards

### My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	31	24	7
Cancelled/Declined	9	6	3
Action Required ⚠	9	7	2
Drafts	0	0	0

### My Referrals

Providers can view a list of eConsult and/or Referrals they have created themselves or on behalf of another provider through this dashboard. All eReferral providers have access to this dashboard.

### Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1

### Triage Referral

Receiving providers and those working on behalf of receiving providers can view all the eConsult and/or Referrals submitted to their site using this dashboard. Only providers set up with triage access can see this dashboard.

### My Assigned Referrals

Requests	Total	Referrals	eConsults
Action Required ⚠	18	5	13
Open eConsults ⚠	15	-	15
Waiting for Appointment/Waitlisted	8	8	0
Scheduled	3	3	-

### My Assigned Referrals

Providers who need to respond to an eConsult and/or Referrals that has been specifically assigned to them can view a list through this dashboard. Only receiving or receiving on behalf of providers can access this dashboard.

### Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

If there is an eConsult that is still open or needs attention, then both the [Action Required](#) and [Open Advice Requests](#) will show warning signs as a reminder.

## 2.4 Referral Worklists

Each dashboard is broken down into worklists based on the status of each request. Each worklist has the same headings (e.g., Total, Referrals and eConsults) but the items found in each list will vary.

My Referrals			
Requests	Total	Referrals	eConsults
Recently Updated	31	24	7
Cancelled/Declined	9	6	3
Action Required ⚠	9	7	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	124	92	32
Completed	19	13	6
Waiting for Response	13	11	2

Triage Referrals			
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

My Assigned Referrals			
Requests	Total	Referrals	eConsults
Action Required ⚠	18	5	13
Open eConsults ⚠	15	-	15
Waiting for Appointment/Waitlisted	8	8	0
Scheduled	3	3	-
Completed/Cancelled/Declined	16	10	6
New Requests	0	0	-
Redirected	7	7	0
Triage	15	11	4
Waiting for Response	2	0	2
Deferred	1	1	-

Each worklist has a [Referral ID](#) feature:

COMMON

FAVOURITES

SEARCHES

EREFERRAL

**My Referrals**

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

EREFERRAL REPORTS

PATIENT LISTS

CLINICAL ETOOLS

### My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	31	24	7
Cancelled/Declined	9	6	3
Action Required ⚠	9	7	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	124	92	32
Completed	19	13	6
Waiting for Response	13	11	2

Referral ID 

Search
Reset


Each referral request submitted is given a unique 12 letter/number identifier (e.g., RFS-AAB-000000) which is helpful when looking for a specific eConsult or Referral for a patient or when using your eReferral Provider Notifications.

To use this feature, enter the 12 letter/number **Referral ID** into the search box and click **Search**. The referral will open in a new window.

The screenshot displays the 'Appointment Booked' status for a referral. The referral is for 'Arthritis of hip' and 'Orthopaedic Surgery', submitted on 13-Mar-2024 at 10:41 AM. The eReferral ID is RFS-AAD-938541. The patient's information includes PHN/ULI: 97425-3514, Name: EREFERRAL, Two b, Sex: F, and DOB: 12-Jan-1970. The request was created for 'Arthritis of hip - Edmonton FAST Orthopaedics CAT'. The patient details section shows the patient has been informed. The QuRE Reference section states that the information is based on the Quality Referral Pocket checklist (www.ahs.ca/QuRE). The right sidebar shows the referrer as 'Out of Province Provider', the service provider as 'Dr.', and linked referrals including 'Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre' which is redirected. There are no attachments or notes for this referral. The activity section shows the appointment date as 25-Apr-2024 at 09:00 and the appointment type as 'Consult'.

## 2.5 Health Services Catalogue

The **Health Services Catalogue** (HSC) provides detailed information about available eReferral specialties and their accepted **Referral Reason**. A customized clinical pathway may also be available for each specialty/referral reason. You can search the HSC when creating an eConsult or a Referral. Approximate wait times can be viewed here if available.

- Open the **Clinical Portal Menu**. Click **eReferral** then **Health Services Catalogue**.
- Search or use the filter options as per the example below or when creating an eConsult and/or a Referral. To search, enter three (3) or more characters and choose an option from the drop-down list.
- You can browse the HSC to select a **Referral Reason** when creating a referral. You can further refine your search by **Request Type**, **Specialty**, **Referral Reason**, **Triage Site** and **Zone(s) Served**. Click  next to the Zone(s) Served to ensure options displayed are for the correct zone.

The screenshot shows a search box labeled 'Zone(s) Served' with the text 'Edmonton' entered. A magnifying glass icon is to the right of the text, and a plus icon in a square box is highlighted to the right of the magnifying glass.

- Approximate Wait Time (if available) is displayed. For eConsults, this is within five (5) calendar days. For Referrals, this date is self-reported by the specialist and/or service and will vary by specialty and referral reason.

Referral Reason	Request Type	Specialty	Triage Site	City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
Hematuria gross	Referral	Urology	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	Edmonton		14 Calendar Days	Edmonton

- e. Click the **Clinical Pathway** icon. Clinical Pathways are trusted, evidence-informed clinical, patient and referral pathways. These pathways are co-designed by patients, primary care, and specialty care providers.
- f. Scroll down to the **Select a Topic** section.

Select a Topic		
All Resources	Addiction & Mental Health	Cardiology
COVID-19	Infectious Disease	Gastroenterology
General Surgery	Gynecology	Endocrinology
Hepatology	Multimorbidity	Nephrology
Neurology	Oncology	Oral Maxillofacial
Orthopedics	Otolaryngology	Respirology
Rheumatology	<b>Urology</b>	Vascular
New Pathways		


- g. Scroll through the results to locate the pathway you require.
- h. Click on the pathway title.
- i. Note that many pathways contain multiple **Referral Reasons**. You may need to scroll through the pathway to find the **Referral Reason** you require.
- j. Clinical Pathway links that have not been updated for specific **Referral Reasons** will display a popup window with a link to access the Clinical Pathway.


**NOTE:** Go to [albertapathways.ca](https://albertapathways.ca) for a list of clinical pathways.

## 2.7 Setting a Favourite Search




When using the Alberta Netcare Portal and eReferral, you can save a favourite search to access information quickly. For example, if you are a triage user who triages Referrals, you can set up the following favourite search:


- a. Open the **Triage** worklist from the **Triage Referrals** dashboard.

Triage Referrals			
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 	23	16	7
New Requests	1	1	-
Redirected	18	17	1
<b>Triage</b>	<b>70</b>	<b>45</b>	<b>25</b>
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

- b. Click the  beside the status types you do not want to be included in your search.

Status

Clinical Triage in Progress   
Waiting for Clinical Triage   
 Add

- c. Select **Waiting for Clinical Triage** as the status and **Referral** as the **Request Type**. 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).
- d. Click **Search**.
- e. In the **Enter a new favourite search** field, use the text box to give the search a name (i.e., Waiting for Clinical Triage search).
- f. Click the  icon to save your favourite. Now, when you open your **Triage** worklist, you can select your favourite search from the drop-down menu in the top right-hand corner to execute a search using those criteria.

Triage: Triage

Received Date: 03-Feb-2024 to

Referral Reason

Specialty

Triage Site

Service Provider

External Triage Site

Status: Waiting for Clinical Triage

PHN/ULI

Patient First Name

Patient Last Name

Request Type: Referral

Referral ID

Priority

Exclude Waiting for Response

Show Referrals for Review

Clear Received Date before entering new search criteria.

Search Reset Referrals - Waiting Clin Triage

- g. Click the drop-down menu in the top right-hand corner to execute a search with those criteria.

Triage: Triage

Received Date: 03-Feb-2024 to

Referral Reason

Specialty

Triage Site

PHN/ULI

Patient First Name

Patient Last Name

Request Type: Referral

Exclude Waiting for Response

Show Referrals for Review

Clear Received Date before entering new search criteria.

Search Reset Referrals - Waiting Clin Triage

- h. Click **Reset** to all filters.

Status

Accepted

Appointment Missed

Clerical Triage in Progress

Clinical Triage in Progress

Redirected

Response in Progress

Waiting for Clinical Triage

Clear Received Date before entering new search criteria.

Search Reset Enter a new favourite search

## 2.8 Accessing Netcare from Connect Care

Connect Care users accessing Netcare through Connect Care have full use of their assigned Netcare user role permissions. Access via Connect Care is no longer restricted to view-only. This new function allows for full access to the patient's record in Netcare, including referrals.

- Login to Connect Care.
- Access your **Patient List**.
- Double click on the patient's name to open the chart.

- d. Hover over **Other Clinical Systems** located on the **Storyboard** (left hand panel) and click **Launch Netcare**.

**TIPS**

- You can also access Netcare by clicking **More** located on the main toolbar and selecting **Launch Netcare** then click on the patient's name displayed.
- Your screen view may vary depending on your Netcare configuration.

- e. Click **View Referral** to see the patient's referrals (Draft, In Progress, Completed/Cancelled/Declined).

- f. Click on an eConsult or a Referral to open it and access the workflows. This example is using an eConsult.

EREFERRAL, TWO B

DATE OF BIRTH 12-Jan-1970 (54y)SEX F

NO CPAR PRIMARY PROVIDER

PATIENT PRIMARY ADDRESS

PATIENT MAILING ADDRESS

PATIENT HOME 403 475 -1685

Limited Documents

All Documents

Flowsheets

Patient Event History

Immunization History

Medications

More






Drafts

No Results Found




In Progress

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 (days)	Approx Wait Time
eConsult RFS-AAB-067500	08-Apr-2024	Request Additional Information Missing information	Shoulder issue		Orthopaedic Surgery - Provincial		Receiving Provider I				36 / 31	5 Calendar Days
Referral RFS-AAB-067659	25-Apr-2024	Clerical Triage In Progress	Bladder stone		Calgary FAST Urology CAT						19 / -71	90 Calendar Days
Referral RFS-AAB-067640	25-Apr-2024	Clerical Triage In Progress	Hematuria gross		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre						19 / 5	14 Calendar Days

The workflow is available as soon as the eConsult is opened making it easy to action without logging into Netcare.

**EREFERRAL, TWO B** ULI 974253514  < >   0   LOGOUT


DATE OF BIRTH -

**NO CPAR PRIMARY PROVIDER** PATIENT PRIMARY ADDRESS  PATIENT MAILING ADDRESS  PATIENT HOME 

Limited Documents All Documents Flowsheets Patient Event History Immunization History Medications More

Cancel Print Print All Advice Communication Intake Mark as Reviewed

To protect patient records, Netcare will display the following warning if you navigate away from the patient accessed via Connect Care: ***“You have navigated away from the patient currently open in your EMR. Click Return to the patient opened in your EMR”.*** To clear the warning, click [Return to the patient opened in your EMR](#) or click [Search for a Patient](#) to find the patient and return to their EMR.

 You have navigated away from the patient currently opened in your EMR. Return to the patient opened in your EMR.

**COMMON**

**FAVOURITES**

**SEARCHES**

Search for a Patient

Delivery Site Registry (DSR)

**EREFERRAL**

My Referrals

**Triage Referrals**


My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

### Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 	24	18	6
New Requests	1	1	-
Redirected	21	20	1
Triage	65	42	23
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	40	29	11

#### RISKS

- If you choose not to return to your EMR there is a risk of losing information entered in Netcare.
- Opening another patient in Netcare with the original patient open in Connect Care creates an opportunity for error. Close your Netcare session when you are finished working on the patient before accessing another patient in Connect Care and launching Netcare.



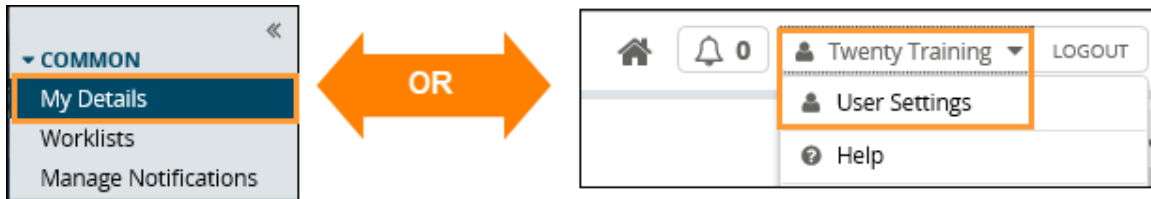
### 3.0 Setting Up My Details (For Referring and Referring On Behalf Of Providers)

Alberta Netcare Portal providers with Clinical 1, Clinical 2, Clinical 5, Clinical 10, and Clinical 12 user roles will have access to [eReferral](#) within the [Clinical Portal Menu](#). However, not all user roles can access all eReferral dashboards.

#### 3.1 Providers Submitting Referrals Themselves

If you have access to the [eReferral](#) menu and the [My Referrals](#) dashboard from the [Clinical Portal Menu](#), you can create/submit Referrals (previously called Consults) and eConsults (previously called Advice Requests). Before you submit a Referral or an eConsult, your provider information must be completed in your [My Details](#).

- From the [Clinical Portal Menu](#), select [Common](#), then [My Details](#), or click [User Settings](#) from the [Global Menu](#).



- Scroll down to the [Referring Provider Referrals](#) section. Click the magnifying glass and search for your full name as per your health profession college registration. **(Optional)** Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created eConsult or Referral. If the provider works at multiple sites, the clinic details (e.g., address, phone, and fax number) can be left blank in [My Details](#) and then added manually on each request. You can also manually change the default demographics within a request as needed.

**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 ☐ Yes ☒ No

Entering clinic demographics (e.g., phone number, address, etc.) is optional but could help the responding clinic to send patient materials to you.

- Click [Update Preferences](#), located at the bottom at the page to save your changes.

## 3.2 Submitting a Referral on Behalf of a Provider

If you are creating/submitting referrals on behalf of a provider (e.g., another physician), you must set up your [My Details](#) with the provider's information.

- Click [My Details](#) from the [Clinical Portal Menu](#) and scroll down to the [Referring Provider On Behalf Of](#) section.
- Click [Yes](#) next to [Use on Behalf Of](#).

Alberta Netcare ELECTRONIC HEALTH RECORD

COMMON

My Details

Worklists

Manage Notifications

FAVOURITES

SEARCHES

EREFERRAL

EREFERRAL REPORTS

PATIENT LISTS

CLINICAL ETOOLS

NOTIFICATIONS

RESOURCES

MESSAGING

Use On Behalf Of **Yes** No

Referring Provider On Behalf Of

Referring Provider

Dr. [X]

**+** Add

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

- Click the [Add](#) button.
- 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](#).

Provincial Provider Registry

Select a favourite search

First Name

Last Name

**Search** Reset Enter a new favourite search +

Please search for a provider

- Select the appropriate provider from the list. This information will automatically populate the [Referring Provider](#) field.
- (Optional) Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created eConsult or Referral. If the provider works at multiple sites, the clinic

details (e.g., address, phone, and fax number) can be left blank in [My Details](#) and then added manually on each request. You can also manually change the default demographics within a request as needed.

- g. Repeat this process for each provider you submit requests on behalf of. The first provider you have inputted in your [My Details](#) will be the default in any future eConsults or Referrals. If you have multiple providers entered in [My Details](#), you can specify the appropriate provider during the request creation process.

**NOTE:** The first provider you enter will be the default when you create a Referral or eConsult.

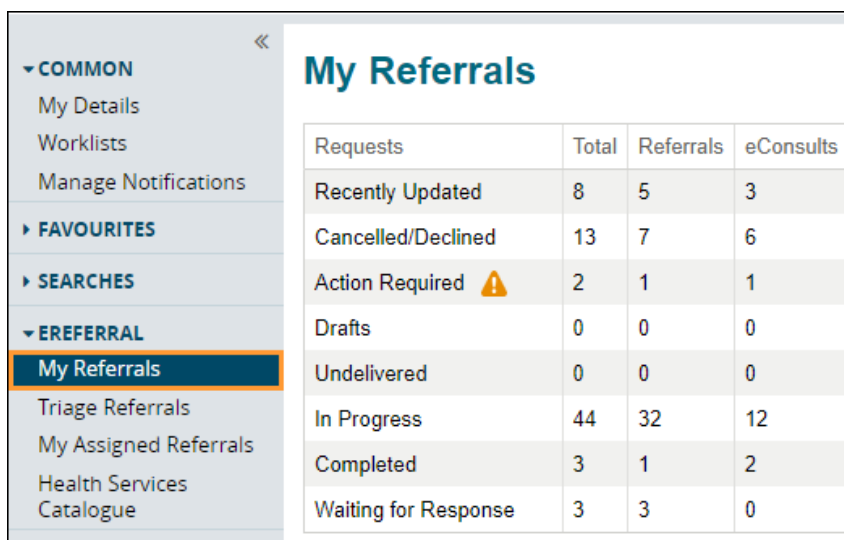
- h. Click [Update Preferences](#) to save your changes.


### 3.4 Viewing Worklists from the My Referrals Dashboard

The [My Referrals](#) dashboard has worklists with eConsults and Referrals that have been created by a referring provider or referring provider on behalf of.

**NOTE:** This dashboard is visible to anyone with the same providers entered in their [My Details](#).

- a. Select [eReferral](#) from the [Clinical Portal Menu](#), then [My Referrals](#) to display the dashboard.



Requests	Total	Referrals	eConsults
Recently Updated	8	5	3
Cancelled/Declined	13	7	6
Action Required 	2	1	1
Drafts	0	0	0
Undelivered	0	0	0
In Progress	44	32	12
Completed	3	1	2
Waiting for Response	3	3	0

- b. From there, click to access any of the following worklists:
  - [Recently Updated](#) – These are requests that have had recent activity. You can set the date ranges you wish to filter for [Recently Updated](#). You can also set the [Show Recently Updated](#) timeframe in [My Details – Referring Provider Referrals](#) and [Referring Provider Referrals On Behalf Of](#).
  - [Cancelled/Declined](#) – These are requests that were not accepted by the specialty.
  - [Action Required](#) – These are requests requiring information. This information can be requested by triage or by the receiving provider. If you are a triage user, this can also indicate that the referring provider has added new information to a request or asked for additional information.

- **Drafts** – These are incomplete requests (i.e., not submitted) that are a work in progress and may be shared with other members of a team who can also work on them.
  - **Undelivered** – These are referrals that failed to be sent because of a technical problem. eReferral requests are normally delivered instantaneously. If you see a request on this list, you should contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638 if you are a community user or the AHS IT Service Desk at 1-877-311-4300 if you are an AHS employee to investigate.
  - **In Progress** – These are requests that have been submitted and are being processed by the specialty.
  - **Completed** – These are requests that the specialty has finished processing and has marked as complete.
  - **Waiting for Response** – These are requests that are waiting for a response. If you have sent an eConsult or a Referral requesting additional information from the specialty, the request will stay on the **Waiting for Response** worklist until it has been replied to. The request will also appear on the receiving providers **Waiting for Response** worklist.
- c. Sort or search a worklist to find specific referrals. This includes by **Referral Reason**, **Specialty**, **Triage Site**, **Service Provider**, **Referring Provider**, **Priority**, and the patient's name and/or their **PHN/ULI**.

Referrer: In Progress

Received Date	<input type="text"/> to <input type="text"/>	PHN/ULI	<input type="text"/>
Referral Reason	<input type="text"/>	Patient First Name	<input type="text"/>
Specialty	<input type="text"/>	Patient Last Name	<input type="text"/>
Triage Site	<input type="text"/>	Request Type	<input type="text"/>
Service Provider	<input type="text"/>	Referral ID	<input type="text"/>
Referring Provider	<input type="text"/>	External Triage Site	<input type="text"/>
Priority	<input type="text"/>	Show Referrals for Review	<input type="checkbox"/>
Status	<div> Accepted <input type="checkbox"/> Appointment Booked <input type="checkbox"/> Appointment Missed <input type="checkbox"/> </div> <div> Cancelled <input type="checkbox"/> Clerical Triage in Progress <input type="checkbox"/> </div> <div> Clinical Triage in Progress <input type="checkbox"/> Completed <input type="checkbox"/> Declined <input type="checkbox"/> </div> <div> Deferred <input type="checkbox"/> New Request <input type="checkbox"/> Redirected <input type="checkbox"/> </div> <div> Request Additional Information <input type="checkbox"/> Response in Progress <input type="checkbox"/> </div> <div> Waiting for Appointment <input type="checkbox"/> Waiting for Clinical Triage <input type="checkbox"/> </div> <div> Waitlisted <input type="checkbox"/> </div> <div> <input type="button" value="+ Add"/> </div>		

## 4.0 eConsult Actions (For Referring & Referring On Behalf Of Providers)

### 4.1 Create an eConsult

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a non-urgent question or if they are unsure if a referral would be appropriate. In many cases, an eConsult may be all you need to manage your patient in their medical home. Before you submit a request, your [Referring/Referring on Behalf of](#) information must be completed in your My Details.

- From the [Clinical Portal Menu](#), go to [Searches](#). You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI).
- Press [Search](#) to bring up a list.

- Click the patient from the populated list to open the patient's Electronic Health Record (EHR).
- Click [Create Referrals](#) from the [Context Menu](#).

- Enter a reason in the [Referral Reason](#) field. You can start typing the reason to see what selections are available.

- f. Select **eConsult** as the **Request Type**.
- g. Enter the **Specialty**. You can start typing the name of the specialty to see a list.
- h. Enter the **Zone(s) Served**. This is the Zone(s) that the specialty provides services to. Some specialties offer services to multiple Zones.
- i. Enter the **City** if necessary.
- j. Click **Search for Options** to see a list matching your **Referral Reason** criteria. A list of **Drafts**, **In Progress** and **Completed/Cancelled/Declined** eConsults and Referrals are also shown.


Create Request Select a favourite search

Referral Reason:  Specialty:

Request Type:  Zone(s) Served:

Triage Site:  City:

**Search for Options**

Referral Reason	Request Type	Specialty	Triage Site	City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
Shoulder issue	eConsult	Orthopaedic Surgery	Orthopaedic Surgery - Provincial			5 Calendar Days	Calgary, Central, Edmonton, North, South

Results 1-1

**Drafts**

No Results Found

**In Progress**

Request Type/Referral ID	Received Date (TZ)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (TZ)	Referring Provider	Elapsed Time/Time To Target	Approx Wait Time	Flag for Ref
Referral RFS-AAB	10-Jan-2024	Redirected Assigned to next available service	Dyspepsia	Normal	Single Hub Access Referral Program (SHARP) - Adult GI				09-Jan-2024		2 days	90	Y
Referral RFS-AAB	08-Jan-2024	Redirected Assigned to local service based on patient address	Bladder stone		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre			27-Mar-2024 09:00	10-Jan-2024		4 days	90	Y
Referral RFS-AAB	10-Jan-2024	Waiting for Appointment	Instability of knee		Calgary FAST Orthopaedics CAT		Receiving Provider II		10-Jan-2024		2 days		Y
Referral RFS-AAB	05-Jan-2024	Clerical Triage In Progress	Hip dysplasia		South FAST Orthopaedics CAT						1 week		Y

Results 1-4

**Completed/Cancelled/Declined**

Request Type/Referral ID	Received Date (TZ)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (TZ)	Referring Provider	Elapsed Time/Time To Target	Last Modified/Last Modified By
Referral RFS-AAB	08-Jan-2024	Cancelled Referral no longer needed	Instability of knee		Calgary FAST Orthopaedics CAT		Receiving Provider I				4 days	10-Jan-2024 / Three Training

If the eConsult is a duplicate, the **Check for duplicate referral(s)** icon  is shown. Hover over the symbol to see the duplicate eConsult.

- k. Click the **Clinical Pathway** icon to view detailed information to help support care decisions. If no **Clinical Pathway** icon is showing, it indicates a pathway is currently not available.
- l. Click the appropriate **Referral Reason**. Ensure that the **Request Type** field indicates **eConsult**.
- m. Select **Flag Referral (For Referring Provider use)** if you want the referring provider to be notified of the eConsult.
- n. Select the **Received Date (T2) (For Receiving Office use only)**. If you are a not receiving office, leave this blank. It will default to the current date and time. All fields marked with a red asterisk (\*) are mandatory and must be completed to submit an eConsult.

- o. Enter your **Clinical Question**.
- p. Select the **Reason**.
- q. Enter any **Pertinent Information** that may help the specialist answer your clinical question.
- r. Attach any **Relevant Documentation** if applicable (e.g., diagnostic imaging/labs) or link documents that are already available in Alberta Netcare in the **Clinical Document Viewer (CDV) Tree**.



- To include a document from your computer, select **Choose a file** for external attachments. This will allow you to search on your computer. *Single files no larger than 30MB can be attached, and multiple files not exceeding 150MB in total can be added.*
- To include a document available in Alberta Netcare, select **Link a document**. A pop-up will open that will allow you to search for the document you want to attach. You can search by **Report Name** or **Category** and dictate the date range to search within.

- s. Confirm that the **Referring Provider Information** section is complete with the referring provider's name. The clinic's details will auto-populate from **My Details** (if added) and can be changed if needed.
- t. Scroll to the bottom of the page and click **Submit** to send the eConsult. Select **Save as Draft** if the eConsult is incomplete or you want to return to it later. Press **Cancel** if you want to stop completing the eConsult.

## 4.2 Reviewing a Response from the Specialty

When a specialty responds to an eConsult, you can open it in the **My Referrals** dashboard. The response will appear in the **Activity** section of the eConsult.

- a. From the **Clinical Portal Menu**, click **My Referrals**. Click on the **Completed** worklist and filter on **eConsult** as the **Request Type**



» COMMON

» FAVOURITES

» SEARCHES

▼ EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

## My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	38	30	8
Cancelled/Declined	9	6	3
Action Required ⚠	8	6	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	130	99	31
Completed	21	13	8
Waiting for Response	14	12	2

- Scroll through the list or search for the patient.
- To view the response, navigate to the **Activity** section on the **Right Panel** of the eConsult. The response can also be viewed at the bottom of the eConsult. The arrow located on the **Summary Bar** can be used to expand/collapse the referral header to see more details.

Completed

eConsult

Shoulder Issue

Orthopaedic Surgery

Triage Site

Orthopaedic Surgery - Provincial

Submitted 7 months ago

eReferral ID RFS-AAB-067500

Status Reason

Continue Managing Within Your Scope of Practice

Referred For

eConsult

Submitted By

Twenty TRAINING

Flagged for Referrer

—

CancelDate

—

Orthopaedic Surgery Request for Service

Patient Information

PHN/ULI: 10000-8114 Name : F DOB: 15-Mar-1974

Request Created For

Shoulder issue - Orthopaedic Surgery - Provincial

Request Details

Clinical Question

A good clinical question with with relevant history

Reason

I am seeking advice

Pertinent Information

—

Relevant Documentation

No Files

Get Netcare Documents

No documents

The advice provided is based on the information that the requesting provider has submitted. It is one piece of information that contributes to the overall care of the patient. It is the responsibility of the requesting provider to incorporate this information into the broader knowledge of the patient context.

Referring Provider Information

Referring Provider

Dr.

Phone Number

780 123 4567

Fax Number

780 123 4567

Address

Line 1

Test Address

Line 2

1234 Street

City

Calgary

Province

Alberta

Postal Code

T6I2C6

Respond with Advice

REASON Continue Managing Within Your Scope of Practice

Hide Form

Response Date

12-Nov-2024

Set Service Provider

Receiving Provider I

Advice/Response

Add advice/response

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Complete Reason

Continue Managing Within Your Scope of Practice

People

Referrer

Dr.

Service Provider

Receiving Provider I

Linked Referrals

RFS-AAB-067667

Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre

REDIRECTED

RFS-AAB-069031

Central FAST Orthopaedics CAT

COMPLETED

Show this patient's other referrals

Referral Attachments

There are no attachments for this referral.

Choose a file...

Activity

Show Notes Only

Mark as Reviewed

Last updated by Twenty Six TRAINING on 12-Nov-2024 12:57 PM

Respond with Advice

REASON Continue Managing Within Your Scope of Practice

Hide Form

Response Date

12-Nov-2024

Set Service Provider

Receiving Provider I

Advice/Response

Add advice/response

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Complete Reason

Continue Managing Within Your Scope of Practice

Last updated by Twenty Six TRAINING on 12-Nov-2024 12:55 PM

Respond to Receiver

Hide Form

Comment to Receiver

Here is the missing information.

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Last updated by Twenty TRAINING on 16-Apr-2024 12:16 PM

- d. Review the advice/response provided and any attachments.

### 4.3 Responding to a Request for Additional Information/Action Required

A triage centre or receiving provider may require additional information from you (the referring provider) before they can complete the eConsult. Follow these instructions to add information:

- a. From the [Clinical Portal Menu](#), go to [My Referrals](#). Then open the [Action Required](#) worklist.

Requests	Total	Referrals	eConsults
Recently Updated	38	30	8
Cancelled/Declined	9	6	3
Action Required ⚠️	8	6	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	130	99	31
Completed	21	13	8
Waiting for Response	14	12	2

- b. Select [eConsult](#) for [Request Type](#) and press [Search](#). Click the appropriate eConsult from the list.
- c. Review the [Activity](#) section located on the [Right Panel](#) of the eConsult and read the question/request from the specialist.
- d. When you are ready to respond click [Respond to Receiver](#).

Cancel | Print | Print All | **Respond to Receiver**

- e. Type your response/additional information into the comment box, add any attachments, and click [Provide Information](#).

Respond to Receiver

Comment to Receiver \*

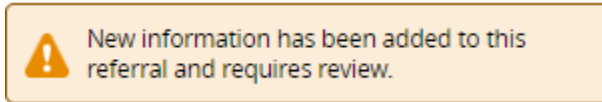
Attach External Document(s) Choose a file...  
File size restricted to 30MB. Multiple files can be uploaded up to a limit of 150MB.

Netcare Document(s) + Link a document

**Provide Information** Cancel

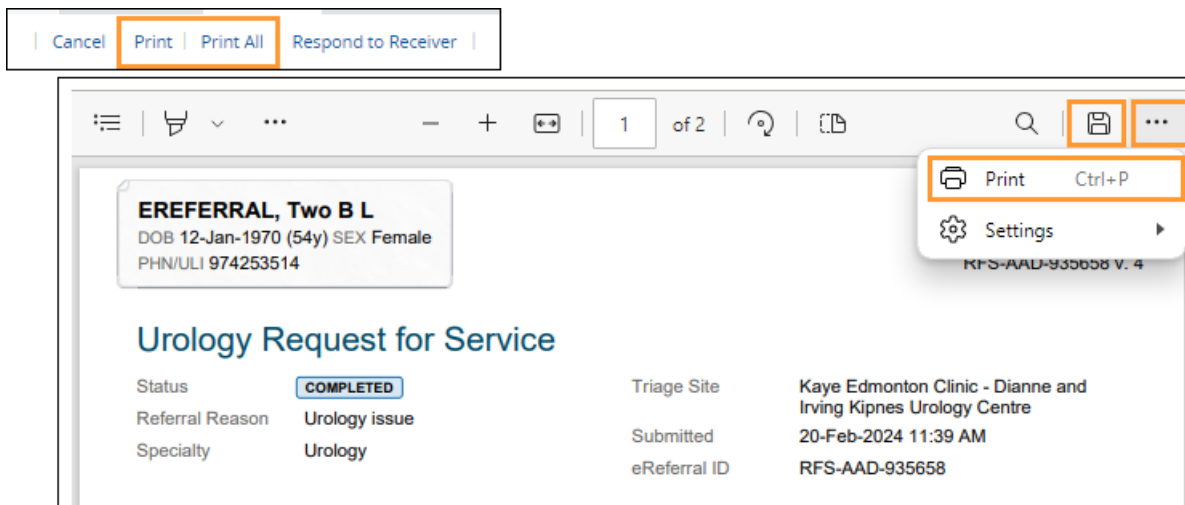
- The eConsult will then be removed from your [Action Required](#) worklist within the [My Referrals](#) dashboard.

- For the receiving provider, a panel is displayed at the top of the **Right Panel** with a note identifying that new information has been added.



#### 4.4 Print a Copy of an eConsult

- Locate the eConsult on the **My Referrals** dashboard or **Triage** dashboard and open it.
- Click **Print** or **Print All**. You can also save the PDF file.



**Print All:** Generates a print-out of the following sections in the following order:

- eConsult Contents – The entire eConsult form will print except for free text fields that are blank.
- Support Documents – This section lists the titles of all the attached documents. This includes external documents attached in the **Right Panel** or within the eConsult. It does not include linked Alberta Netcare documents.
- Notes** and **Activity** – All the notes (General, Clinical or Clerical) and activity that appear in the **Right Panel**.
- Referral Attachments** – This section displays copies of all the attached documents. This includes external documents attached in the **Right Panel** or the eConsult. It does not include linked Alberta Netcare documents.

**Print:** Generates a print-out of the following sections in the following order:

- eConsult Contents – See above.
- Support Documents – See above.
- Notes** – All the notes (General, Clinical or Clerical) that appear in the **Right Panel**.

## 5.0 Referral Actions (For Referring & Referring On Behalf Of Providers)

### 5.1 Viewing Referrals

A Referral is a request for an in-person specialist appointment. A Referral form is used for most specialties to create a consistent referral experience.

Before submitting a referral, check to see if a similar request has already been submitted. All referrals in eReferral are visible to authorized users within the Alberta Netcare Portal.

- a. From the [Clinical Portal Menu](#), go to [Searches](#). You can search for your patient using their first and last name, their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Click [Search](#) to bring up a list.

- b. Select the patient from the populated list. Once the patient's Electronic Health Record (EHR) opens, you will see the [Context Menu](#) running along the top of the screen.

There are two ways to view referrals from the [Context Menu](#):

- [View Referral](#) tab
- [Clinical Document Viewer \(CDV\) Tree](#) located in the [Limited](#) or [All Documents](#) folders.

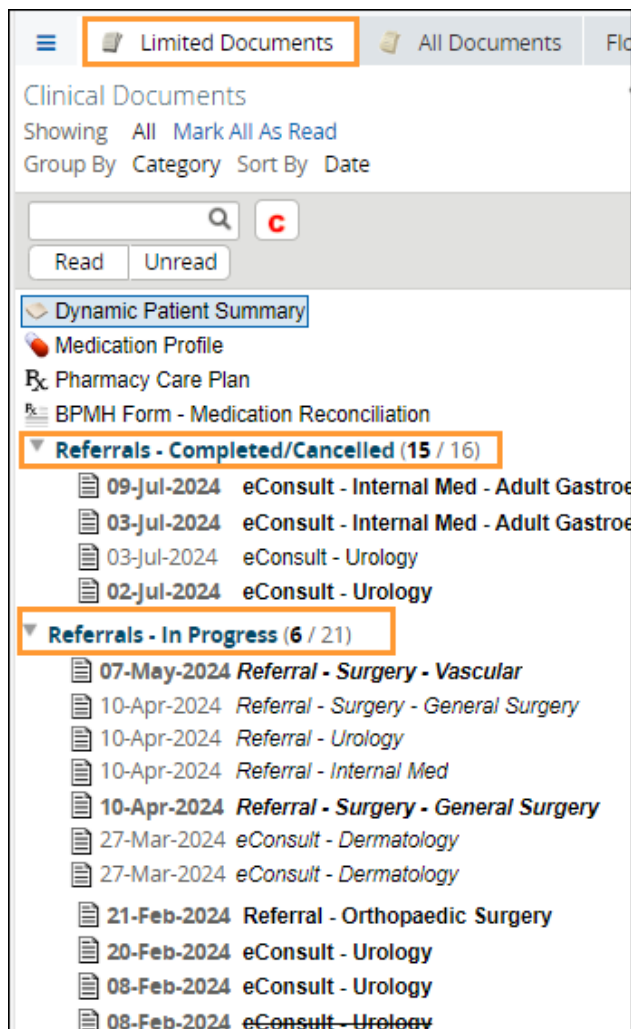
## View Referral Tab

Click [View Referral](#). This displays a list of the patients [In Progress](#) and [Completed/Cancelled/Declined](#) Referrals. These are editable by referring providers and referring providers on behalf of that created them and are read-only for all other Alberta Netcare Portal users. Draft requests are also visible, but only to those who created them.

Drafts														
No Results Found														
In Progress														
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(days)	Approx Wait Time	Flagged for Referrer	Spec Review
eConsult RFS-AAD-938070	05-Mar-2024	Waiting for Clinical Triage	Urology Issue		Urology - Central Zone						20 hours	5 Calendar Days	Y	
Referral RFS-AAD-938037	05-Mar-2024	Accepted	Knee pain		Edmonton FAST Orthopaedics CAT				05-Mar-2024		23 hours	Not Supplied	Y	
eConsult RFS-AAD-938010	28-Feb-2024	Response In Progress Called Requesting Provider - Routine	Metabolic genetic issue		Clinical and Metabolic Genetic Services - Southern Alberta						1 week	5 Calendar Days	Y	
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(days)	Last Modified/Last Modified By		
eConsult RFS-AAD-935054	08-Feb-2024	Completed Continue Managing Within Your Scope of Practice	Urology Issue		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre						3 weeks 5 days	05-Mar-2024 /		
eConsult RFS-AAD-935658	20-Feb-2024	Completed Continue Managing Within Your Scope of Practice	Urology Issue		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre						2 weeks	20-Feb-2024 /		
eConsult RFS-AAD-935011	08-Feb-2024	Cancelled Referral no longer needed	Urology Issue		Urology - Calgary Zone						3 weeks 6 days	20-Feb-2024 /		

## Clinical Document Viewer (CDV) Tree

- Click either [Limited Documents](#) or [All Documents](#) to view the [Clinical Document Viewer \(CDV\) Tree](#). You can find referrals that are [In Progress](#) or have been [Completed/Cancelled](#) from the menu here.



Each folder contains links to the patient's eConsults 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 **In Progress** will have its text italicized – Bold means the referral is unread. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. You can also view a short summary by hovering your mouse over the referral link for eConsult and/or Referral.

**Clinical Documents**  
Showing All Mark All As Read  
Group By Category Sort By Date

Read Unread

Dynamic Patient Summary

Medication Profile

Pharmacy Care Plan

BPMH Form - Medication Reconciliation

Referrals - Completed/Cancelled (15 / 16)

- 09-Jul-2024 eConsult - Internal Med - Adult Gastroenterology
- 03-Jul-2024 eConsult - Internal Med - Adult Gastroenterology
- 03-Jul-2024 eConsult - Urology
- 02-Jul-2024 eConsult - Urology
- 10-Apr-2024 Referral - Urology
- 09-Apr-2024 Referral - Orthopaedic Surgery
- 02-Apr-2024 Referral - Orthopaedic Surgery
- 26-Mar-2024 Referral - Orthopaedic Surgery
- 05-Mar-2024 Referral - Orthopaedic Surgery
- 04-Mar-2024 Referral - Urology
- 28-Feb-2024 eConsult - Clinical and Metabolic
- 22-Feb-2024 Referral - Orthopaedic Surgery
- 21-Feb-2024 Referral - Orthopaedic Surgery

**Patient Demographics**

**EREFERRAL, Two B**

Date Of Birth	12-Jan-1970
Age	54 years
Sex	F
Eligibility Start Date	
	Note: Future-dated confirmed in Person
Address (Primary)	
AH Address (Mailing)	


**Referral - Orthopaedic Surgery**

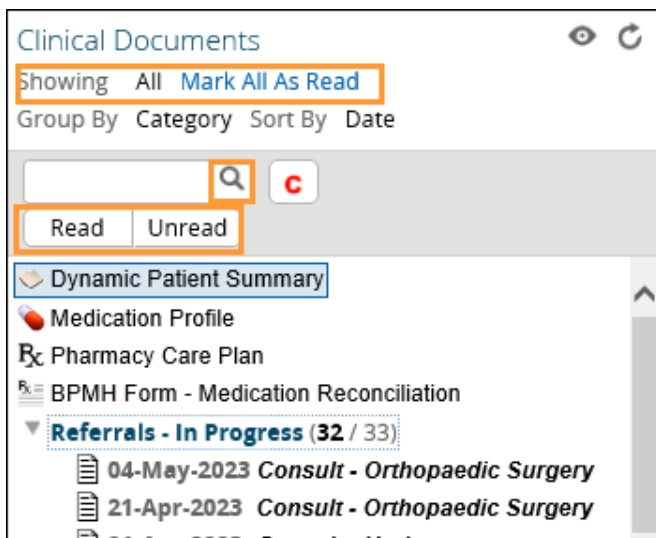
Source date	09-Apr-2024
Category	Referrals - Completed/Cancelled
Status	Completed
Author	Dr. [Redacted]
Result Source	Provincial
Mark As	Read   Unread

- b. Click [Read](#) to mark as the referral as read or click the referral to open it and access the workflows (depending on your eReferral access permissions).



Other **Clinical Document Viewer (CDV) Tree** functionality relating to Referrals includes:

- a. Click the magnify button (  ), then enter text in the text box. Press **Enter** to search for a document in the **Clinical Document Viewer (CDV) Tree**.



- b. Select **Referrals - In Progress** to view eConsults and Referrals in progress. In the **Right Panel** you can review the **Status**, **Notes** and **Activities** occurring on the eConsult and/or Referral to track its life cycle.
- c. Click on the Referral/eConsult to display it with the associated workflow actions. Workflow options available depends on your eReferral permissions. Triage user permissions allow for all workflow actions to be visible.

Limited Documents

All Documents

Dashboards

Flowsheets

Immunization History

Medications

Create Referrals

More

Add Note

Edit Referral

Print

Print All

Advice

Closing

Communication

Intake

Scheduling

Triage

Completed

Referral

Hip dysplasia

Orthopaedic Surgery

Triage Site Edmonton FAST Orthopaedics CAT

Submitted 2 weeks ago

eReferral ID RFS-AAB-070021

Orthopaedic Surgery Request for Service

Patient Details

Referral Details

Referral Requirements

Providers

Exclusions

1. Dislocation

2. Infection

Patient Information

PHN/ULI: 10000-8114 Name: Sex: F DOB: 15-Mar-1974

Request Created For

Hip dysplasia - Edmonton FAST Orthopaedics 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

9998887777

Preferred Contact?

—

Line 1

362 Faraway Street

Line 2

—

City

LETHBRIDGE

Province

AB

Postal Code

Additional Info

Special Considerations

—

Referral Details

Referral Form Source

eReferral Form

Reason for sending this referral

—

Patient's current status

Stable

test

Current and past management

—

Pertinent History

None

Referral Requirements

Mandatory

Requirement

Weight bearing hip - routine x-rays: AP pelvis, AP hip, lateral view (Lauenstein)

Time Period

180

People

Referrer

Dr.

Service Provider

Receiving Provider I

Tasks

Add Task

Edit Tasks

Linked Referrals

There are no linked referrals for this referral.

Show this patient's other referrals

Referral Attachments

Doc2.pdf (5759.11 KB) 2 WEEKS AGO

Doc3 - Copy.docx (30020.23 KB) 2 WEEKS AGO

Choose a file...

Referral Notes

Clerical

Add notes

Added by Twenty Six Training on 15-Nov-2024 8:00 AM

Activity

Show Notes Only

Clerical Note

ACTION Add Note

Add notes

Last updated by Twenty Six TRAINING on 15-Nov-2024 8:00 AM

Respond with Advice

REASON Continue Managing Within Your Scope of Practice

Hide Form

Response Date

14-Nov-2024

Set Service Provider

Receiving Provider I

Advice/Response

A referral is not needed at this time. Continuing managing within your scope of practice.

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Complete Reason

Continue Managing Within Your Scope of Practice

Last updated by Twenty Six TRAINING on 15-Nov-2024 7:58 AM

Complete Clerical Triage

STATUS Waiting for Clinical Triage

Last updated by Twenty Six TRAINING on 15-Nov-2024 7:57 AM

- d. Click the **Print** or **Print All** button at the top of the page. Provided the appropriate software is installed on your computer, this action generates a PDF, which can then be printed or saved.

**Print All:** Generates a print-out of the following sections in the following order:

- eConsult Contents – The entire eConsult form will print except for free text fields that are blank.
- Support Documents – This section lists the titles of all the attached documents. This includes external documents attached in the **Right Panel** or within the eConsult. It does not include linked Alberta Netcare documents.
- **Notes** and **Activity** – All the notes (General, Clinical or Clerical) and activity that appear in the **Right Panel**.
- **Referral Attachments** – This section displays copies of all the attached documents. This includes external documents attached in the **Right Panel** or the eConsult. It does not include linked Alberta Netcare documents.

**Print:** Generates a print-out of the following sections in the following order:


- eConsult Contents – See above.
- Support Documents – See above.
- **Notes** – All the notes (General, Clinical or Clerical) that appear in the **Right Panel**.


## 5.2 Create a Referral

A Referral (previously called a Consult Request) 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**.

- From the **Clinical Portal Menu**, go to **Searches**. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Click **Search** to bring up a list.

- b. Open the patient's Electronic Health Record (EHR) and click [Create Referrals](#). Review the alert and information messages under [Information](#) at the top of the screen.

- c. Enter a reason in the [Referral Reason](#) field. You can start entering the reason to see what selections are available. If you don't know the reason for referral or would like to see what options are available, click [Browse](#) to open the [Health Services Catalogue](#).
- d. Enter a reason in the [Referral Reason](#) field. You can start typing the reason to see what selections are available
- 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.
- e. Select [Referral](#) beside [Request Type](#).
- f. 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.
- g. Click [Search for Options](#) and click on the appropriate option based on your search selections.
- h. 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.

Referral Reason	Request Type	Specialty
Shoulder instability 	Referral	Orthopaedic Surgery
<b>Check for duplicate referral</b>		
Patient has existing referral(s) <a href="#">RFS-AAD-935062</a>		

- i. 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 currently not available.

Create Request Select a favourite search

Referral Reason:

Request Type:

Specialty:

Zone(s) Served:

Triage Site:

City:

Referral Reason	Request Type	Specialty	Triage Site	City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
Instability of knee	Referral	Orthopaedic Surgery	Calgary FAST Orthopaedics CAT			Not Supplied	Calgary

**Drafts**

No Results Found

**In Progress**

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	Flagged for Referrer	Sp. Req.
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Urology Issue		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre						3 days	5		
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Shoulder Issue		Orthopaedic Surgery - Provincial						3 days	5		
eConsult RPS-AAB	26-Jan-2024	Waiting for Clinical Triage	Shoulder Issue		Orthopaedic Surgery - Provincial						3 days	5		
Referral RPS-AAB	16-Jan-2024	Clinical Triage in Progress	Hematuria gross		Calgary FAST Urology CAT						1 week 6 days	14		

**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 By
eConsult RPS-AAB	28-Dec-2023	Completed Continue Managing within Your Scope of	Shoulder Issue		Orthopaedic Surgery - Provincial		Receiving Provider I				4 weeks 4 days	12-Jan-2023 Three Trai

- j. 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.

Orthopaedic Surgery Request for Service

Flag Referral (For Referring Provider use) ☒

Received Date (T2) (For Receiving Office use only)

- k. Review the **Exclusions** to ensure that this referral is appropriate. Exclusions are specialty and/or **Referral Reason** specific.
- l. Select **Who has been informed**.
- m. For helpful information on completing the Referral, refer to the **QuRE Card Checklist** by clicking on the box beside **View QuRE Card Checklist**.

Who has been informed? \* ☐ Patient ☐ Guardian ☐ Patient & Guardian ☐ Information not available   
*Please ensure the patient or guardian has been informed of the diagnosis or reason for referral.*

QuRE Reference

☐ View QuRE Card Checklist  
*The information captured in this form is based on the Quality Referral Pocket Checklist ([www.ahs.ca/QuRE](http://www.ahs.ca/QuRE)).*

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

**Patient Details**  
*Any changes to the patient's information will be saved in this referral only.*

**Patient Preferences** ☒ Next Available Provider ☐ Preferred Provider  ☐ Preferred Location

**Patient Details**  
*Any changes to the patient's information will be saved in this referral only.*

Patient Preferences ☐ Next Available Provider ☒ Preferred Provider  ☒ Preferred Location

Preferred Provider \*   
*If a preferred provider is selected instead of next available, the patient's wait time may be longer.*

Preferred Location \*   
*If a preferred location is selected instead of next available, the patient's wait time may be longer.*

- o. 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.

**Patient Details**  
*Any changes to the patient's information will be saved in this referral only.*

**Patient Preferences** ☒ Next Available Provider ☐ Preferred Provider ☒ Preferred Location

**Contact Information**

Phone Number Type *	Phone Number *
<input checked="" type="radio"/> Home <input type="radio"/> Mobile <input type="radio"/> Work <input checked="" type="checkbox"/>	000 999 0000
<input type="button" value="+ Add Row"/> <i>At least one row is required.</i>	

**Preferred Contact?** ☐ Home ☐ Mobile ☐ Work ☒

Line 1 \* XXX Test Street City \* LETHBRIDGE

Line 2 Province \* AB

Postal Code \* XXX XXX

**Additional Info**

☐ Patient Has Guardian

☐ Patient Has Alternate Contact

☐ Patient unable to communicate adequately in English

☐ Patient has hearing or vision requirements

☐ WCB Claim

**Special Considerations**

*Please provide details about the patient's physical, psychological, social and economic situation.*

- p. Complete the **Referral Details** section. There are two options: 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. If you are attaching an external referral form, locate the referral form by clicking **Choose File** beside **Attach Referral Form**.

**NOTE:**

To learn more about adding an external document to eReferral from your computer or EMR, visit the [Helpful Resources](#) page.

- q. 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

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

**Referral Requirements**

Mandatory	Requirement	Time Period
	Weight bearing hip - routine x-rays: AP pelvis, AP hip, lateral view (Lauenstein)	180

Have all mandatory requirements listed above been met? ☒ Yes ☐ No

Optional --

**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**

- r. Confirm that the **Referring Provider** section is complete with the referring provider's name 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 \*

- s. Search **First Name** – Out, **Last Name** – Province.
- t. Select **Out of Province Provider**. Enter the name of the referring provider and the phone number; these fields are mandatory.



Provincial Provider Registry Select a favourite search ▼

First Name  Last Name

+

Name	Provider Type	City	Status
Out of Province Provider			

Referring Provider Information

Complete the Referring Provider Referrals or Referring Provider Referrals On Behalf Of section on your My Details to display referrals on the My Referrals dashboard and to auto complete this section each time a referral is created.

Referring Provider \*  ✖

Indicate name of Out of Province Provider

Phone Number \*  Fax Number

Address

Line 1   
 Line 2   
 City   
 Province   
 Postal Code

- u. Click the appropriate option under **Primary Care Provider**.

\*

☒ Same as Referring Provider ☐ Different from Referring Provider ☐ Patient does not have a Primary Care Provider

☐ Unknown ✖

- v. Select the **Submission Method**.

Primary Care Provider \*

Submission Method \*  ▼

eReferral  
 Fax rerouted from non-FAST Office  
 Connect Care  
 Phone  
 Fax  
 Mail

- w. Click **Submit** to send the Referral to the specialty. If you did not complete all mandatory fields marked by an asterisk (\*), 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 **In Progress** and **Recently Updated** worklists with a status of **Clerical Triage in Progress**.

### 5.3 Reviewing a Submitted Referral

At any point, you can review a submitted Referral from the [My Referrals](#) dashboard.

- a. Click [eReferral](#) from the [Clinical Portal Menu](#). Click [My Referrals](#) and then the [In Progress](#) worklist.

COMMON

FAVOURITES

SEARCHES

EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

## My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	38	30	8
Cancelled/Declined	9	6	3
Action Required ⚠	8	6	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	130	99	31
Completed	21	13	8
Waiting for Response	14	12	2

- b. 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.

Referrer: In Progress

Received Date	<input type="text"/> to <input type="text"/>	PHN/ULI	<input type="text"/>
Referral Reason	<input type="text"/>	Patient First Name	<input type="text"/>
Specialty	<input type="text"/>	Patient Last Name	<input type="text"/>
Triage Site	<input type="text"/>	Request Type	<b>Referral</b> ▼
Service Provider	<input type="text"/>	Referral ID	<input type="text"/>
Referring Provider	<input type="text"/>	External Triage Site	<input type="text"/>
Priority	▼	Show Referrals for Review	<input type="checkbox"/>

Status

Accepted (x) Appointment Booked (x) Appointment Missed (x)  
Clerical Triage in Progress (x) Clinical Triage in Progress (x)  
Deferred (x) Redirected (x) Request Additional Information (x)  
Response in Progress (x) Waiting for Appointment (x)  
Waiting for Clinical Triage (x) Waitlisted (x)

- c. 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**).
- d. View the activity that has occurred on the Referral in the **Right Panel** in the **Activity** and **Notes** sections.
- e. 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. Only receiving providers can link Referrals/eConsults.

Waiting for Appointment

Referral

Instability of knee

Orthopaedic Surgery

Triage Site

Calgary FAST Orthopaedics CAT

Submitted

5 weeks ago

eReferral ID

RFS-AAB-

Status Reason

Accepted (T3)

External Triage Site

Referred For

Submitted By

Flagged for Referrer

10-Jan-2024

Referral

Three TRAINING

Yes

Orthopaedic Surgery Request for Service

Patient Details

Referral Details

Referral Requirements

Providers

Exclusions

1. Dislocation

2. Infection

Patient Information

PHN/ULI: 10000-

Name:

Sex: F DOB: 15-Mar-1974

Request Created For

Instability of knee - Calgary FAST Orthopaedics 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

000 999 0000

Preferred Contact?

Home

Line 1

XXX Faraway Street

Line 2

—

City

LETHBRIDGE

Province

AB

Postal Code

Additional Info

Special Considerations

—

People

Referrer

Dr.

Service Provider

Receiving Provider II

Linked Referrals

RFS-AAB-

Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre

COMPLETED

Show this patient's other referrals

Referral Attachments

AHC0562 (1).pdf

(1185.94 kB)

4 WEEKS AGO

Choose a file...

Referral Notes

Clerical

Latest lab results have been attached

Added by Three Training on 12-Jan-2024 12:44 PM

Activity

Show Notes Only

Link

A link between this referral and RFS-AAB- was added

RELATIONSHIP Related To

Last updated by Three TRAINING on 30-Jan-2024 10:04 AM

Clerical Note

ACTION Add Note

Latest lab results have been attached

Last updated by Three TRAINING on 12-Jan-2024 12:44 PM

Waiting for Appointment

STATUS Waiting for Appointment

Last updated by Three TRAINING on 10-Jan-2024 12:58 PM

Set Service Provider

Hide Form

Set Service Provider

Receiving Provider II

Last updated by Three TRAINING on 10-Jan-2024 12:58 PM

Accept (T3)

Hide Form

Accepted Date (T3)

10-Jan-2024

Attachments

No Files

Netcare Document(s)

No documents

## 5.4 Referring & Referring on Behalf of Providers – Find a Referral Status

- Click [Searches](#) from the [Clinical Portal Menu](#).
- Click [Search for a Patient](#). Enter the patient's name or identifier.
- Click [Search](#) to locate your patient.
- Click on the patient's name to open the patient's Electronic Health Record (EHR).

PHN / ULI	Name	Date Of Birth	Age	Sex	Address	Town/City
97425-3514	EREFERRAL, Two B	12-Jan-1970	54 years	F		Calgary

e. Click the **Clinical Document Viewer (CDV Tree)** located on the left-hand side of the screen. The **Clinical Document Viewer (CDV tree)** has two folders for eReferral activity:

- Referrals – In Progress
- Referrals – Completed/Cancelled

Each folder contains links to the patient's eConsults and Referrals. Any eConsult or Referral that has been complete/cancelled will have a strike through the middle of the text. Any eConsult or Referral in progress will have its text italicized. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. The status will show up beside the **Status** field.

The screenshot shows the 'Dynamic Patient Summary' on the left with a list of referrals. The 'Referrals - In Progress (7 / 14)' section is expanded, showing a list of referrals. The '13-Mar-2024 Referral - Orthopaedic Surgery' is highlighted. A pop-up window titled 'Referral - Orthopaedic Surgery' displays details for this referral:

Source date	13-Mar-2024
Category	Referrals - In Progress
Status	In Progress
Author	[Redacted]
Result Source	Provincial
Mark As	Read   Unread

- f. Navigate to the **Activity** section on the **Right Panel** of the eConsult. The response can also be viewed at the bottom of the eConsult. The arrow located on the **Summary Bar** can be used to expand/collapse the referral header to see more details.

The screenshot shows the 'Orthopaedic Surgery Request for Service' eConsult. The 'Activity' section on the right panel is expanded, showing a list of activities. The 'Clerical Note' is highlighted, showing the following details:

**Clerical Note**  
ACTION Add Note  
Testing  
Last updated by [Redacted] on 06-Mar-2024 10:40 AM

**Appointment Booked**  
Hide Form  
Appointment Date 13-Mar-2024 09:00  
Appointment Type Consult

**Mark as Reviewed**  
Last updated by [Redacted] on 01-Mar-2024 11:33 AM

**Start Clinical Triage**  
STATUS Clinical Triage in Progress  
Last updated by [Redacted] on 01-Mar-2024 11:33 AM

**Waiting for Appointment**  
STATUS Waiting for Appointment  
Last updated by [Redacted] on 01-Mar-2024 11:33 AM

**Set Service Provider**  
Hide Form  
Set Service Provider Dr [Redacted]  
Last updated by [Redacted] on 01-Mar-2024 11:33 AM

**Start Clinical Triage**  
STATUS Clinical Triage in Progress  
Last updated by [Redacted] on 01-Mar-2024 11:32 AM



**Clerical Triage In Progress** | **Referral** | **Hip dysplasia** | Orthopaedic Surgery  
Triage Site: South FAST Orthopaedics CAT | Submitted: 5 weeks ago | eReferral ID: RFS-AAB-XXXXXX

Status Reason: — | External Triage Site: —  
Accepted (T3): — | Referred For: Referral  
Submitted By: Twenty TRAINING  
Flagged for Referrer: Yes

**Action Required**  
Action: Referrer to provide information  
Details: Missing required investigations  
See Activity Section for additional information.

**Orthopaedic Surgery Request for Service**  
Patient Details | Referral Details | Referral Requirements | Providers

Exclusions: 1. Dislocation, 2. Infection  
Patient Information: PHN/ULI: 10000-XXXX, Name: XXXXX, Sex: F, DOB: 15-Mar-1974  
Request Created For: Hip dysplasia - South FAST Orthopaedics 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)

**People**  
Referrer: Dr. XXXXX  
Service Provider: —

**Linked Referrals**  
There are no linked referrals for this referral.  
Show this patient's other referrals v

**Referral Attachments**  
AHC0562.pdf (1185.94 kB) | 5 WEEKS AGO  
Choose a file...

**Referral Notes**  
There are no notes for this referral.

**Activity** | Show Notes Only  
**Request Information (from Referrer)**  
REASON: Missing required investigations  
Hide Form  
Reason: Missing required investigations  
Attachments: No Files  
Netcare Document(s): No documents  
Comment to Referrer: Please provide the latest lab results  
Last updated by One TRAINING on 07-Feb-2024 11:33 AM

- c. Click **Provide Information (to Receiver)** from the **Workflow Bar**.

Print | Print All | **Provide Information (to Receiver)** | Request Information (from Receiver)

- d. Attach or link the requested information if required and enter a **Comment to Receiver** (e.g., Requested x-rays attached). Click **Provide Information**. *Single files no larger than 30MB can be attached, and multiple files not exceeding 150MB in total can be added.*

**Provide Information (to Receiver)**

**i** A new version of the referral details is available. It will be automatically applied when you complete this action. This will not affect the content of the referral.

**i** Do not include any clinical information in the Comment to Receiver box below.

Attachments: 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

**Comment to Receiver \***  
Please state where in the referral information was edited.

**Provide Information** | Cancel

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



## 5.6 Opening a Draft Referral

A Referral can be saved as a draft for later completion. There is no expiry period for a draft Referral. Drafts are accessible to the user who created them or to the staff members who create referrals on their behalf. Drafts are also viewable by anyone who has the same providers added to their [My Details](#). Draft referrals are not listed in a patient's [Clinical Document Viewer \(CDV tree\)](#).

- Click [eReferral](#) from the [Clinical Portal Menu](#). Click [My Referrals](#) and select [Drafts](#). Drafts can also be viewed from the [Context Menu](#) under [View Referrals](#).

Requests	Total	Referrals	eConsults
Recently Updated	38	30	8
Cancelled/Declined	9	6	3
Action Required	8	6	2
<b>Drafts</b>	<b>0</b>	<b>0</b>	<b>0</b>
Undelivered	0	0	0
In Progress	130	99	31
Completed	21	13	8
Waiting for Response	14	12	2

- Select the appropriate referral to review or continue completing the Referral form. A referral can be saved in draft format multiple times at any stage during the creation process.

Primary Care Provider ☒ Same as Referring Provider ☐ Different from Referring Provider

Submission Method

**Submit** **Save as Draft** **Delete Draft** **Cancel**

- Click [Delete](#) at the bottom of the referral to permanently remove it from the patient's Electronic Health Record (EHR). This action must be confirmed.

**Delete Referral**

**Are you sure you want to permanently delete this referral?**  
You will not be able to undo this action.

**Delete** **Cancel**

## 6.0 Triage Types and Roles

Triage is the process of checking a Referral or an eConsult to ensure that all required information is present and that an appointment can be booked (if required) according to the patient's clinical needs. There are three (3) types of triages: Clerical, Clinical and Booking. Depending on the size of clinic, triages may be performed by the same person or different people.

eReferral users tasked with triaging requests must have a Clinical 1, Clinical 2 or Clinical 5 Alberta Netcare Portal user role and belong to the **Triage Referrals** group with receiving or receiving on behalf of permissions. These users can view all requests on the **Triage Referrals** dashboard. If the **My Assigned Referrals** dashboard is needed as well, then users must add the specific provider's name(s) to **My Details**. Referrals or eConsults assigned to the providers listed in **My Details** will populate onto the **My Assigned Referrals** dashboard.

### TIP

Not sure what access level you have? Go to **My Details** from the **Clinical Portal Menu**. Underneath your username, your assigned role will be listed. If it's not a Clinical 1, Clinical 2 or Clinical 5, ask your manager to contact the eHealth Services team to have this changed. Once this has been changed to the appropriate Alberta Netcare Portal user role (i.e., Clinical 1, Clinical 2, or Clinical 5), please ask your manager to email the AHS Access Improvement team at [access.ereferral@primarycarealberta.ca](mailto:access.ereferral@primarycarealberta.ca) to request triage access.

## 6.1 Customizing My Details – Receiving Providers Triage

If you are a receiving provider, such as a specialist, your Alberta Netcare Portal user role must be Clinical 1 to receive eReferral requests and your **My Details** needs to be set up as per the instructions below:

- Click **My Details** from the **Clinical Portal Menu**.
- Scroll down to the **Receiving Provider Referrals** section and click **Add**.

- Type your full name in the box (as per your health profession college registration) and then click to display a list of names. Select your name.

- Look at the **Receiving Provider Referrals** section and confirm that your full name has been added.
- Click **Update Preferences** to save your updates.

## 6.2 Managing Referrals on Behalf of a Provider

If you are managing referrals on behalf of a provider, you will need an Alberta Netcare Portal user role of Clinical 2 or Clinical 5.

Adding the receiving provider's name to your [My Details](#) is only necessary if you need to:

- Use the [My Assigned Referrals](#) dashboard.
  - Respond to an eReferral request on behalf of a provider.
- a. Click on [My Details](#) from the [Clinical Portal Menu](#) to add the receiving provider's name.
  - b. Scroll down to the [Receiving Provider Referrals On Behalf Of](#) section and click [Add](#).

- c. Type the receiving provider's full name in the box and then click [Search](#).

- d. Once the list displays, click on the receiving provider's name.
- e. Confirm the [Receiving Provider Referrals On Behalf Of](#) section and confirm that the provider's full name has been added. You can add multiple providers if necessary.
- f. Click [Update Preferences](#) to save your changes.

## 6.3 Saving and Sharing eReferral

Triage centres continue to receive faxes after adopting eReferral, and some opt to enter those faxes into the Alberta Netcare Portal. If you are creating Referrals from faxes received at your triage centre, you can add users who you want to view your draft referrals.

- a. Click on [My Details](#) from the [Clinical Portal Menu](#).
- b. Scroll down to the [Triage Referrals](#) section.
- c. Click on the [Add](#) button next to [Add Referral Creators to Drafts List](#).

**COMMON**

- My Details
- Worklists
- Manage Notifications

**FAVOURITES**

**SEARCHES**

**EREFERRAL**

**Triage Referrals**

Triage Facility: Central FAST Urology CAT [VRTL0078], Calgary FAST Orthopaedics CAT [VRTL0084], Central FAST Orthopaedics CAT [VRTL0083], North FAST Orthopaedics CAT [VRTL0082], Edmonton FAST Plastics CAT [VRTL0075], Edmonton FAST General Surgery CAT [VRTL0063], OBS-GYN STH Colposcopy Clinic [VRTL0070], Edmonton Bone and Joint Centre [WDFAGBOY], Alberta Hip and Knee Clinic [WDFAG5AL], Alberta Hip and Knee Clinic [WDFAGBOX], Chinook

Add Referral Creators to Drafts List

Show Completed/Cancelled/Declined referrals for

+ Add

Last 6 months

- d. Enter the name of any Alberta Netcare Portal user.

**NOTE:**

The referring provider who created the referral will be able to see it in their [My Referrals](#) dashboard.

- e. Click [Update Preferences](#) to save your updates.

## 7.0 Responding to eConsults & Referrals

This section is for receiving providers who are responding to eConsults or managing Referrals.

### 7.1 Setting up your My Details as a Receiving Provider

You can see referrals in your My Assigned Referrals dashboard by adding yourself as a receiving provider.

- Click on [My Details](#).
- Scroll down to the [Receiving Provider Referrals](#) section. Click [Add](#).

- Type your full name in the box and click [Search](#).
- Click on your name.
- Scroll to the bottom of the page to the [Triage Referrals](#) section and confirm that the correct [Triage Facility](#) is listed.

- Click the [Update Preferences](#) button to save your updates.

### 7.2 Referral – Workflow Options

Workflow actions are accessed using the mini menus located on the right side of the Referral. Actions are listed alphabetically.

REFERRAL MENUS & WORKFLOW OPTIONS	WHEN TO USE?
<b>Advice</b>	
<b>Respond with Advice</b>	Select if the Referral is more appropriate for an eConsult than a Referral. Provide the advice in the comment box, attach relevant files if required and click <b>Complete</b> . The referral is now complete and will appear on the <b>Completed</b> worklist on the <b>My Referrals</b> dashboard of the referring provider as well as the <b>Completed/Cancelled/Declined</b> worklist on the <b>Triage Referrals</b> dashboard and <b>My Assigned Referrals</b> dashboard.
<b>Respond with Advice (Review Required)</b>	Select if there is a need for a specialist to review the advice before it is provided to the referrer (e.g., if a fellow or other staff member composes the response). Provide the advice in the comment box, then click <b>Submit for Review</b> . The referral is now awaiting specialist review and will appear on the <b>Action Required</b> worklist on the <b>Triage Referrals</b> dashboard and <b>My Assigned Referrals</b> dashboard.
<b>Closing</b>	
<b>Cancel</b>	Select to change the status of the Referral to <b>Cancelled</b> .
<b>Complete (T5)</b>	Select to change the status of the Referral to <b>Completed</b> . The request will now move to the <b>Completed</b> worklist for referring and receiving providers. There is an option to enter the <b>Accepted Date (T3)</b> of the referral if it was not entered previously. There is also the option to enter the <b>Priority</b> and <b>Service Provider</b> .
<b>Decline</b>	Select to change the status of the Referral to <b>Declined</b> . The request will now move to the <b>Declined</b> worklist for referring and receiving providers.
<b>Communication</b>	
<b>Create and Attach Letter</b>	Used only by the FAST Program to send referral letters to referring/receiving providers. Letters include: <b>Accepted, Received, Reassigned, Incomplete, Pending, Updated, Declined, Cancelled</b> .
<b>Provide Information (to Referrer)</b>	Select to provide information to the referring provider. If selected, the Referral will then appear on the <b>Action Required</b> worklist of the <b>My Referrals</b> dashboard of the referring provider.
<b>Request Information (from Referrer)</b>	Select to ask for more information from the referring provider. This will appear on the receiving provider's <b>Triage Referrals</b> dashboard on the <b>Waiting for Response</b> worklist, and on the referring provider's <b>Action Required</b> worklist.
<b>Request Info: Received/Not Required</b>	Select to indicate the information has been provided, is not required or the request for more information was made in error. This will remove the referral from the <b>Triage Dashboard - Waiting for Response</b> worklist, and on the referring provider's <b>Action Required</b> worklist.
<b>Intake</b>	
<b>Change Reason for Referral</b>	Select this to enter a more specific <b>Referral Reason</b> or correct a <b>Referral Reason</b> that may have been entered incorrectly (for both Referrals and eConsults). Only users who have access to the <b>Triage</b> dashboard or the <b>My Assigned Referrals</b> dashboard have access to this function.

<b>Complete Clerical Triage</b>	Select to identify the completion of clerical triage. This will change the status to <b>Waiting for Clinical Triage</b> .
<b>Redirect</b>	Select to redirect the Referral to another triage facility. The Referral status will change to Redirected and appear on the newly assigned facility's <b>Triage Referrals</b> dashboard.
<b>Set External Triage Site</b>	Select this workflow if clinical triage is being completed by an external and add the site name.
<b>Set Service Provider</b>	Select to enter the service provider's name.
<b>Start Clerical Triage</b>	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 <b>Clerical Triage in Progress</b> .
<b>Update Received Date (T2) (For Receiving Office use only)</b>	Select to update the received date of the Referral. Used if an incorrect received date was entered for a faxed referral that you created in eReferral and need to change the date.
<b>Scheduling</b>	
<b>Appointment Booked</b>	Select this option to enter the appointment date and details.
<b>Appointment Missed</b>	Select to change the status of the Referral to <b>Appointment Missed</b> . If the referring provider has their eReferral Provider Notifications set up with the default options, this will trigger an email to them.
<b>Defer</b>	Select to show that a request is not ready to be triaged or booked. This option could be used if a patient needs to lose weight before their surgery, or an Oncology patient who has had a mastectomy needs to heal prior to getting radiation. The Referral will move to the <b>Deferred</b> worklist on the <b>My Assigned Referrals</b> dashboard, and you need to check this list regularly as no alerts are associated with it.
<b>Waitlist</b>	Select this option to change the status of the Referral to <b>Waitlisted</b> . As a comment box is not available for changing the status to <b>Waitlisted</b> , select <b>Add Note</b> and choose <b>Clerical</b> to enter a note regarding the patient's waitlist status if required.
<b>Triage</b>	
<b>Accept (T3)</b>	Select to enter the accepted date of the referral. The status of the Referral will change to <b>Accepted</b> . The referral stays on the receiving provider's <b>Triage</b> worklist on the <b>Triage Referrals</b> dashboard and <b>My Assigned Referrals</b> dashboard.
<b>Ready for Booking</b>	Select to change the status of the Referral to <b>Waiting for Appointment</b> . This action can be used by facilities and specialties that do not have a waitlist, and an appointment can be scheduled as soon as triage is complete. It can also move a referral from the <b>Waitlist</b> to the <b>Waiting for Appointment</b> worklist.
<b>Set Priority and Booking Instructions</b>	Select to set the priority of the Referral (based on the request's clinical content). There may also be a situation where a referring provider contacts the triage centre and states the patient's condition has worsened, and the priority needs to be changed. It can also be used if the previously set acuity may be lessened. Select priority: <b>Routine</b> , <b>Semi Urgent</b> , or <b>Urgent</b> . The default priority is <b>Routine</b> .



**Start Clinical Triage**

Select to start clinical triage. This will change the status to **Clinical Triage in Progress**.

## 7.3 Managing 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.

### 7.3.1 Referrals – New Request Worklist

New referrals located in the **New Requests** worklist are referrals (not eConsults) that have not had any actions perform on them. In most cases this worklist will be used by the Central Access and Triage offices to be alerted when new referrals are received via Netcare, Connect Care and community EMRs. **New Requests** will also appear in the **Waiting for Response** worklist as well as the **In Progress** worklist – **My Referrals** dashboard.

- Select **eReferral** from the **Clinical Portal Menu**, then **Triage Referrals**.
- 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 **Redirected** worklist. The referral will appear on the newly assigned facility's **Triage Referrals** dashboard in the **Redirected** worklist. 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.

- c. Open the referral to access the workflows.

Triage: New Requests

Received Date: [ ] to [ ] PHN/ULI: [ ]

Referral Reason: [ ] Patient First Name: [ ]

Specialty: [ ] Patient Last Name: [ ]

Triage Site: [ ] Request Type: [ ]

Service Provider: [ ] Referral ID: [ ]

External Triage Site: [ ] Priority: [ ]

Status: [ New Request ] Exclude Waiting for Response: [ ]

[ + Add ] Show Referrals for Review: [ ]

Clear Received Date before entering new search criteria.

[ Search ] [ Reset ] [ Enter a new favourite search ] [ + ]

Patient	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider
EREFERRAL, Two B ULI: 10000-8114 12-Jan-1970 (54 years) / Female	Referral RFS-AAB-070161	08-Nov-2024	New Request	Arthritis of elbow		Central FAST Orthopaedics CAT		Receiving Provider II

- d. 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)

### 7.3.2 Referrals – Triage Worklist

- d. Click **Triage Referrals – Triage** from the **Clinical Portal Menu**.

«

COMMON

My Details

Worklists

Manage Notifications

FAVOURITES

SEARCHES

EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

- If you wish, narrow the search further by selecting [Referral](#) for [Request Type](#) and other filters. 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).
- Click [Search](#). You can click [Received Date](#) to sort the requests by the newest or oldest received date.

Triage: Triage Select a favourite search ▼

Received Date  to

Referral Reason

Specialty

Triage Site

Service Provider

External Triage Site

Status

Accepted (x) Appointment Missed (x)

Clerical Triage in Progress (x)

Clinical Triage in Progress (x)

Response in Progress (x)

Waiting for Clinical Triage (x)

+ Add

PHN/ULI

Patient First Name

Patient Last Name

Request Type

Referral ID

Priority

Exclude Waiting for Response ☐

Show Referrals for Review ☐

Clear Received Date before entering new search criteria.

+

Patient	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site
Click to sort ascending						

- e. Select a Referral from this list. When the 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**.



COMMON

FAVOURITES

SEARCHES

EREFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

Tasks - Unregistered Referrals

Tasks - Registered Referrals

EREFERRAL REPORTS

My Assigned Referrals

Requests	Total	Referrals	eConsults
Action Required ⚠	18	5	13
Open eConsults ⚠	15	-	15
Waiting for Appointment/Waitlisted	8	8	0
Scheduled	3	3	-
Completed/Cancelled/Declined	16	10	6
New Requests	0	0	-
Redirected	7	7	0
Triage	15	11	4
Waiting for Response	2	0	2
Deferred	1	1	-

- (If required) Reference back to the patient's Electronic Health Record (EHR) by clicking on the selection in the **Context Menu** such as **Flowsheets**.
- Return to the eConsult and select **View Referral**.

EREFERRAL, TWO B

DATE OF BIRTH - ULI 974253514

NO CPAR PRIMARY PROVIDER

PATIENT PRIMARY ADDRESS

PATIENT MAILING ADDRESS

PATIENT HOME

Limited Documents All Documents **Flowsheets** Patient Event History Immunization History Medications Create Referrals **View Referral**

- Click **Advice**, then **Respond with Advice** from the **Workflow Bar** menu if the eConsult is appropriate. Select **Respond with Advice (Review Required)** 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).
  - If **Respond with Advice (Review Required)** is selected, then set the supervising specialist as the **Service Provider**. Enter your response and add any attachments.
  - Choose a **Complete Reason** from the list provided and click **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.

Patient Event History Immunization History More

Cancel Print Print All **Advice** Communication Intake

Respond with Advice

Respond with Advice (Review Required)

- 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.

- f. If **Respond with Advice (Review Required)** was selected, click **Submit for Review**.

Respond with Advice

Response Date05-Mar-2025

Set Service Provider \*Dr

Advice/Response \*

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
- ☐ A Healthcare Professional has reviewed the referral and provided advice

Clear

CompleteCancel

Respond with Advice (Review Required)

Set Service Provider \*Dr

Advice/Response \*

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
- ☐ Clinical Review/Triage Completed
- ☐ 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

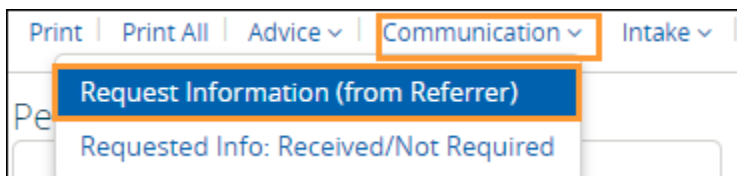
Submit for ReviewCancel

The eConsult will now appear on your **Complete** worklist on your **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 the request will appear in their **Completed** worklist on their **My Referrals** dashboard.

## 7.5 Requesting Additional Information from Referring Provider

On occasion, the FAST Program or a receiving provider may require additional information from you, the referring provider. The Requesting Additional Information (from Referrer) form is slightly different for Referrals and eConsults. To request additional information from the referring provider, use the process below:

- a. Go to the [Workflow Bar](#), click [Communications](#), then [Request Information \(from Referrer\)](#).



- b. (eConsults) Click [Add](#) to set the [Service Provider](#). Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click [Request Information](#).
- c. (Referrals) Select the [Reason](#), add [Comment to Referrer](#) and click [Request Information](#).

Request Information (from Referrer)

Set Service Provider \*

Reason \*

Comment to Referrer \*

Attach External Document(s)

Netcare Document(s)

Request Information

+ Add

☐ Missing clear clinical question

☐ Missing information

☐ Missing required patient demographics

☐ Missing required investigations

☒ Clear

Choose a file...

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

+ Link a document

eConsult

Request Information (from Referrer)

Reason \*

Comment to Referrer \*

Request Information

☐ No reason for referral

☐ No referral letter

☐ Missing mandatory information

☒ Clear

Attachments

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

Referral

Cancel

The eConsult will now appear on your **Waiting for Response** worklist on your **My Assigned Referrals** dashboard and **Triage Referrals** dashboard (if you have access to triage). If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have requested information, and the request will appear in their **Action Required** worklist on the **My Referrals** dashboard.





Cancel

Print

Print All

Advice

Communication

Intake

Request Additional Information

eConsult

Metabolic genetic issue

Clinical and Metabolic Genetic Services

Triage Site Clinical and Metabolic Genetic Services - Southern Alberta

Submitted 01-Mar-2024 12:42 PM eReferral ID RFS-AAD-938010

Status Reason

Missing information

Action Required

Action Required

Action

Awaiting specialist review

Details

—

See Activity Section for additional information.

Referred For

eConsult

Submitted By

Flagged for Referrer

Yes

Clinical and Metabolic Genetic Services Request for Service

Patient Information

PHN/ULI: 97425-3514 Name: EREFERRAL, Two b Sex: F DOB: 12-Jan-1970

Request Created For

Metabolic genetic issue - Clinical and Metabolic Genetic Services - Southern Alberta

Request Details

Clinical Question

Testing Testing 1 2 3

Reason

I am unsure if this patient requires a referral

Pertinent Information

—

Relevant Documentation

AHC0562 (1).pdf (1185.94 kB)

11 DAYS AGO

Get Netcare Documents

No documents

The advice provided is based on the information that the requesting provider has submitted. It is one piece of information that contributes to the overall care of the patient. It is the responsibility of the requesting provider to incorporate this information into the broader knowledge of the patient context.

Referring Provider Information

People

Referrer

Dr.

Service Provider

Dr.

Linked Referrals

There are no linked referrals for this referral.

Show this patient's other referrals

Referral Attachments

AHC0562 (1).pdf (1185.94 kB)

11 DAYS AGO

Choose a file...

Activity

Show Notes Only

Respond to Receiver

Hide Form

Comment to Receiver

Information is attached.

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Last updated by

on 12-Mar-2024 10:36 AM

Request Information (from Referrer)

Hide Form

Set Service Provider

Dr.

Reason

Missing information

Comment to Referrer

Please provider the latest lab results for.....

Attach External Document(s)

No Files

Netcare Document(s)

No documents

Last updated by

on 12-Mar-2024 9:10 AM

c. If you choose to respond after reviewing the information, click **Advice**, then **Respond with Advice** from the **Workflow Bar** menu.

Edit Referral

Print

Print All

Advice

Close

Respond with Advice

Respond with Advice (Review Required)

March 2025

Page | 65

5.4

- d. 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

Response Date
05-Mar-2025

Set Service Provider \*
Di

Advice/Response \*

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  
☐ A Healthcare Professional has reviewed the referral and provided advice

Complete Cancel

- e. 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. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded.
- g. Once done, click [Mark as Reviewed](#) on the top taskbar. Enter a comment, if desired, and click [Mark as Reviewed](#) to finish. The panel indicating that new information was added to the referral will now be removed.

Cancel Print Print All Advice Communication Intake Mark as Reviewed

Urology

New information has been added to this referral and requires review.



Triage: Triage Select

Received Date  to

Referral Reason

Specialty

Triage Site

Service Provider

External Triage Site

Status  + Add

PHN/ULI

Patient First Name

Patient Last Name

Request Type

Referral ID

Priority

Exclude Waiting for Response ☐

Show Referrals for Review ☐

*Clear Received Date before entering new search criteria.*

Search Reset  +

- d. Click **Search** to filter the list, then click on eConsult to view it. Sort by **Received Date** to list the most recent referrals first.
- e. Open the referral and click **Intake**.
- f. Select **Set Service Provider**.

Cancel Print Print All Advice Communication Intake

Change Referral Reason

Redirect

Set Service Provider

- g. The current date will default for the Set Service Provider Date field. Use the calendar icon to change if required.

- h. Click the **Add** button and type your name (or receiving provider's name) and select it from the list. Then click **Set Service Provider** to finish.

- i. The request will now show up in the receiving provider's **My Assigned Referrals – Triage** worklist dashboard provided the receiving provider added their name in 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.

## 7.8 Redirecting an eConsult/Referral

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. This function is only available to users that have access to the **My Assigned** dashboard or the **Triage** dashboard.

- a. Search for and open the eConsult.
- b. Click **Intake** and select **Redirect**.

- c. Click the **X** to clear the current information.

**Redirect**

Triage Site, Specialty, Referral Reason \* Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre, Urology, Hydronephrosis

*Redirect does not update mandatory requirements or external triage facility.*

Reason \*

Currently Assigned Service Provider —

Service Provider \* ☐ Leave unchanged ☐ Change provider ☐ No provider assigned at this time ☒ Clear

Attachments  [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](#)

Comment

[Redirect](#) [Cancel](#)

- d. Click **Add** to select where to redirect the referral (e.g. another zone FAST CAT).

**Redirect**

Triage Site, Specialty, Referral Reason \* [+ Add](#)

*Redirect does not update mandatory requirements or external triage facility.*

Reason \*

- e. Enter the original **Referral Reason** or a new one if needed.
- f. Enter the **Triage Site** to redirect the referral.

**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 \*

- g. Select **No provider assigned at this time**.

Redirect

Triage Site, Specialty, Referral Reason \*

Calgary FAST Urology CAT, (x)

Urology,

Hematuria gross

Reason \*

Assigned to local service based on patient address

Currently Assigned Service Provider

Service Provider \*

Leave unchanged

Change provider

☒ No provider assigned at this time

Attachments

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

Comment

Redirect

Cancel

- h. Click **Redirect**. The eConsult will now appear on the chosen service provider's **My Assigned Referrals** dashboard on the **Open eConsults** worklist and will be removed from the original receiving provider's dashboard.

## 7.9 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 Referrals and eConsults). 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. This action does not change the referral status or generate any notifications.

- a. Open the appropriate referral.
- b. Click **Intake** then **Change Referral Reason** from the **Workflow Bar**.



- c. Click the **Add** button and select the appropriate referral reason from the list of **Referral Reasons**.
- d. Click **Change Reason**.

## 7.10 Linking Referrals

The ability to link referrals is helpful in cases where an eConsult was submitted and, upon review, it has been determined that a Referral is required. It can also be used when the first Referral was for a pre-screening appointment and a second Referral is required for the procedure. Only users who have access to the **Triage** dashboard and **My Assigned Referrals** dashboard can create and delete links. Referring providers do not have access to this feature.

- From the **Clinical Portal Menu**, go to **Searches**. You can search for your patient using their first and last name, their Personal Health Number (PHN), or their Unique Lifetime Identifier (ULI). Press **Search** to bring up a list.
- Open the patient's Electronic Health Record (EHR) and click the referral to open it.
- Click **View Referral**.
- Click **Show this patient's other referrals**. This will expand and show all referrals for the patient, regardless of status.

- Hover over the Referral to view the **Referral Card**. Click the **Link** icon, then click **Relate To**.

The eConsult is now linked to the Referral and will appear in the **Linked Referral** section of the **Right Panel**.

- Click the **Open in a Window** icon to open and view the referral in a new window

The screenshot shows the eReferral details on the left and the Linked Referrals section on the right. The eReferral details include:

- eReferral ID: RFS-AAB-067500
- Specialty: Orthopaedic Surgery
- Organization: Alberta Health Services
- Triage Site: Orthopaedic Surgery - Provincial
- Referred for: eConsult
- Submitted: 08-Apr-2024 12:08 PM
- Last Updated: 16-Apr-2024 12:49 PM
- Status: Request Additional Information
- Relationship: Related To
- Linked at: 27-Jun-2024 10:49 AM (< 15 minutes ago)

The Linked Referrals section shows two referrals:

- RFS-AAB-067500 Orthopaedic Surgery - Provincial (with an "Open in a new window" button and a trash can icon)
- RFS-AAB-067314 Calgary FAST General Surgery CAT (with the status "CLERICAL TRIAGE IN PROGRESS")

Below the referrals is a link to "Show this patient's other referrals" and a section for "Referral Attachments".

- g. If you mistakenly linked a Referral or eConsult, you can remove it by clicking the **Trash Can** icon to delete this link. This function will not delete the original Referral or eConsult; it will just remove the incorrect link.

The screenshot shows the Linked Referrals section with one referral: RFS-AAB-070161 Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre. Below the referral name is a button that says "Delete the link to this referral" and a trash can icon. Below this is a link to "Show this patient's other referrals".

If an incorrect file has been attached, it can be deleted using the same process as deleting a linked eConsult or Referral. The name of the attachment will stay, but the attachment will be removed.

The screenshot shows the Referral Attachments section. It lists a file: AHC0562 (1).pdf, 1185.94kB, created by One Training on 20-Feb-2024 7:06 AM. Below the file name is a button that says "Delete this attachment" and a trash can icon. Below this is a button that says "Choose a file...".

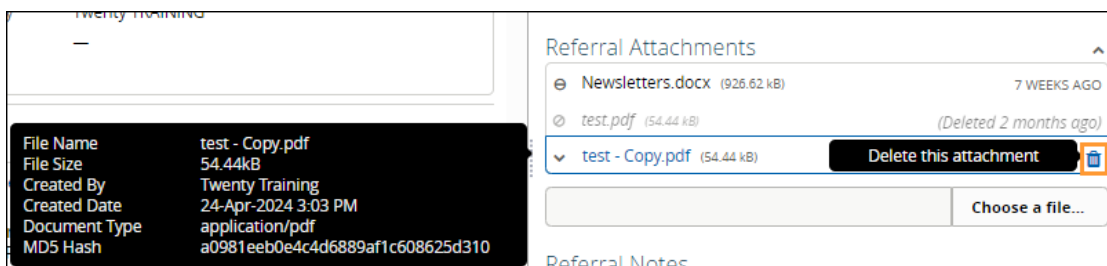
## 7.11 Attaching Files to a Referral/eConsult

- Click **Choose file...**
- Navigate to the file you wish to upload.
- Click the **Upload** icon.

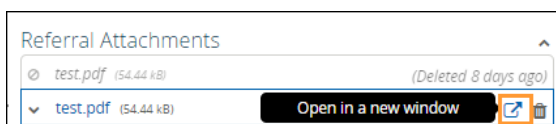
The screenshot shows the Referral Attachments section with the message "There are no attachments for this referral." Below this is a button that says "Choose a file...".

The screenshot shows the Referral Attachments section with the message "There are no attachments for this referral." Below this is a button that says "Upload" and a trash can icon. Below this is a button that says "Choose a file...".

- Click the **Upload** icon.
- Click the **Delete the attachment** icon to remove the attachment. The file name will remain but the file will be deleted.



- f. Click the *Open in a new window* view an attachment.





Triage: Triage

Received Date	31-Jan-2024 to	PHN/ULI	
Referral Reason		Patient First Name	
Specialty		Patient Last Name	
Triage Site		Request Type	Referral
Service Provider		Referral ID	
External Triage Site		Priority	
Status	Waiting for Clinical Triage	Exclude Waiting for Response	<input type="checkbox"/>

+ Add

- c. Open and review the referral to ensure it is complete. Also, check for duplicate referrals.
- d. Click **Triage** and select **Accept (T3)**.

Closing | Communication | Intake | Scheduling | **Triage**

People

Referrer

Service Provider

Accept (T3)

Ready for Booking

Set Priority and booking Instructions

Start Clinical Triage

- e. Enter the date and add attachments. Link Alberta Netcare Portal documents and add comments as required.

Accept (T3)

Accepted Date (T3) \* 01-Mar-2024

Attachments Choose a file...

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

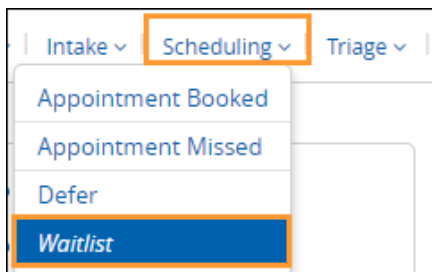
Netcare Document(s) + Link a document

Comment

Accept Cancel

- f. Click **Accept**.

- g. (Optional) Click **Scheduling** and select **Waitlist**. Depending on who is doing this work, they will need to notify the referring provider that the patient has been added to the waitlist.



## 8.2 Appointment Management – Booking

Now that the patient has been waitlisted, it's time to start booking an appointment. Once the appointment is booked the status of the referral will change to **Appointment Booked**. The referral will appear on the **Triage Referrals** dashboard – **Scheduled** worklist.

- Click **Triage Referrals** from the **Clinical Portal Menu**.
- Click the **Triage Referrals** then **Waiting for Appointment/Waitlisted** worklist.

Triage Referrals			
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

- Search for the patient and click on the referral.



Triage: Waiting for Appointment/Waitlisted

Received Date: [ ] to [ ] PHN/ULI: [ ]

Referral Reason: [ ] Patient First Name: Two

Specialty: [ ] Patient Last Name: Ereferral

Triage Site: [ ] Request Type: [ ]

Service Provider: [ ] Referral ID: [ ]

External Triage Site: [ ] Priority: [ ]

Status: Waiting for Appointment (x) Waitlisted (x)

+ Add

Clear Received Date before entering new search criteria.

Search Reset Enter a new favourite search (+)

Patient	Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site
REFERRAL, Two B ULI: 10000-8114 12-Jan-1970 (54 years) / Female	Referral RFS-AAB-069309	05-Jan-2024	Waitlisted	Hip dysplasia		South FAST Orthopaedics CAT

- d. Click **Scheduling** and select **Appointment Booked**. The FAST team will update the referral with the information from the Clinic/Specialist/Surgeon.

Closing v Communication v Intake v Scheduling v Triage v

Appointment Booked

Appointment Missed

Defer

Waitlist

Provider —

- e. Enter the date and time. Select either **Screening** or **Consult**, attach any required documents, and click **Appointment Booked**.
- Virtual**: Choose this option if the appointment is not an in-person appointment e.g. Phone, Zoom etc.)
  - Screening**: Choose this option if pre-screening is required before the patient is scheduled to see the surgeon.
  - Consult**: Choose this option if it's an in-person appointment with the surgeon to assess the patient's condition.

Appointment Booked

Appointment Date

08-Oct-2024

09:00

Both Date and Time fields are Mandatory. Please enter time in 24 Hr format (ie. 3pm is 15:00).

Appointment Type

Virtual  
Screening  
Consult

Attach External Document(s)

Choose a file...

limited to 30MB. Multiple files can be uploaded up to a limit of 150MB.

Netcare Document(s)

Document

Comment

Appointment Booked

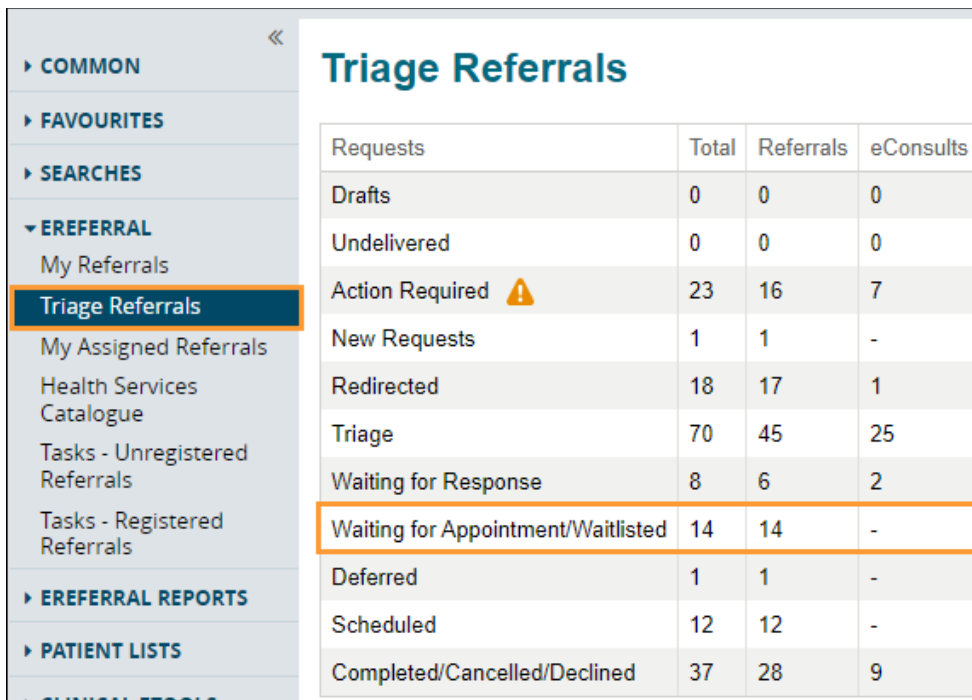
Cancel


### 8.3 Appointment Management – Attended and Missed Appointments

Once the appointment has been booked, there are two possible scenarios: attended or missed. The scenarios require different actions.

#### Appointment Attended – Complete (T5) Referral

- Click [eReferral](#) from the [Clinical Portal Menu](#).
- Click [My Assigned Referrals](#), then [Waiting for Appointment/Waitlisted](#). The referral can be found in the [Scheduled](#) worklist if the appointment date has been entered.



Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

- Search for and open the Referral.
- Click [Closing](#) and set the appointment status to [Complete \(T5\)](#).



- Enter the [Accepted Date \(T3\)](#) if it is missing or incorrect.
- Set the [Service Provider](#) to who the patient saw for their appointment if known or incorrect.
- Select [Patient attended appointment](#) as the [Reason](#). This will cause the [Date Appointment Attended \(T5\)](#) to appear below. Choosing any of the other reasons does not cause this option 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

- h. Choose an **Outcome**. The first three (3) outcomes are for surgical consult appointments. The screening outcomes are related to screening clinic appointments only. The last option - **Information Not Provided by Service** - is used by the FAST Program to complete referrals when they have not been provided with a specific outcome.

Complete (T5)

Accepted Date (T3)

13-Dec-2023

Priority

Routine

Set Service Provider

Dr

Reason \*

☒ Patient attended appointment  
☐ Consult Letter Sent  
☐ Consult Letter Sent and Available on Alberta Netcare Portal  
☐ Lab results sent  
☐ Lab results sent and available on Alberta Netcare Portal  
 Clear

Date Appointment Attended (T5) \*

14-Feb-2024

Appointment Type

Consult

Outcome \*

☐ Procedure completed at appointment  
☐ Patient discharged from our care, as per consult letter  
☐ We will continue ongoing patient care  
☐ Booking the patient for procedure  
☐ Pre-screening completed and patient will be booked to see specialist  
☐ Pre-screening completed; patient discharged as per consult letter  
☐ Pre-screening completed; information not provided by service  
☐ Information Not Provided by Service  
 Clear

Attach External Document(s)

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

Netcare Document(s)

Link a document

Comments

Complete (T5)

Cancel

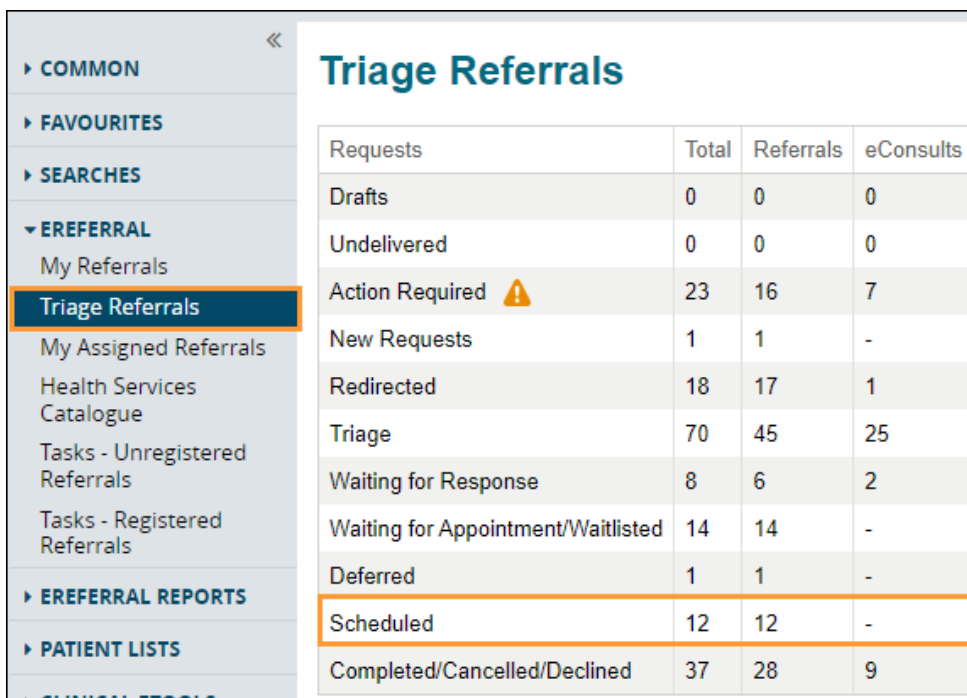
- i. Click **Complete (T5)**. This referral will now move to the **Completed/Cancelled/Declined** worklist.


## Appointment Missed

Specialties may rebook or cancel a referral when an appointment is missed based on their clinic policy.

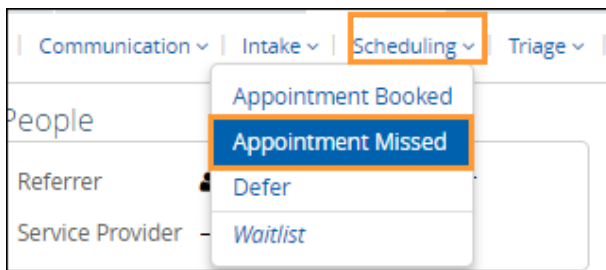
- a. Click **eReferral** from the **Clinical Portal Menu**.

- b. Click [My Assigned Referrals](#), then [Scheduled](#).



Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required 	23	16	7
New Requests	1	1	-
Redirected	18	17	1
Triage	70	45	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

- c. Click [Scheduling](#) and then [Appointment Missed](#).



Communication | Intake | **Scheduling** | Triage

People

Referrer

Service Provider

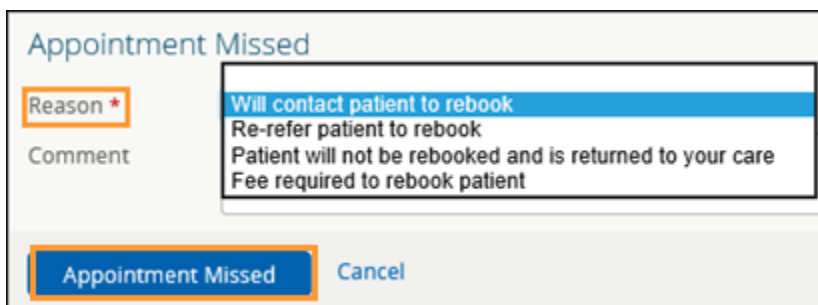
Appointment Booked

**Appointment Missed**

Defer

Waitlist

- d. Select the [Reason](#) and click [Appointment Missed](#).



Appointment Missed

Reason \*

Comment

Will contact patient to rebook

Re-refer patient to rebook

Patient will not be rebooked and is returned to your care

Fee required to rebook patient

**Appointment Missed** Cancel

- e. Click [Closing](#) and select [Cancel](#).

The screenshot shows the top navigation bar with tabs: Advice, Closing, Communication, Intake, Scheduling, and Triage. The 'Closing' tab is selected, and its dropdown menu is open, showing three options: Cancel, Complete (T5), and Decline. The 'Cancel' option is highlighted with a blue background. Below the navigation bar, the 'People' section is visible, showing a 'Referrer' field with a person icon and a search bar.

- f. Select **Reason** (e.g., Patient has been unsuccessful in attending appointments) and, if required, enter a comment.
- g. Click **Apply**.

The screenshot shows a 'Cancel' dialog box. It has a 'Reason \*' dropdown menu, a 'Comment' text field, and 'Apply' and 'Cancel' buttons. The 'Reason \*' dropdown is open, showing a list of reasons: Referral no longer needed, Patient has been unsuccessful attending appointments, Unable to contact patient, Patient has declined service, Patient deceased, Incorrect Referring Provider added to form, and Referral created against incorrect patient. The 'Apply' button is highlighted with a blue background.

## 9.0 eReferral Provider Notifications

eReferral Provider Notifications allows users to track Referrals and eConsults through an immediate or daily summary email. Provider Notifications are subscription-based and managed by the user. There is no identifiable patient information in any provider notification email. All eReferral users can customize what type of notification they would like to receive.

**Important note:** Notifications are sent to the email entered in your [My Details](#), based on the system's default settings.

**TIP** For more information about eReferral Provider Notifications, go the [Provider Notifications Portal](#).

### 9.1 Auto-Subscribed Notifications - Referring Provider & Referring On Behalf Of

Below is a list of **default** notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral. These notifications can be customized to meet your needs.

NOTIFICATIONS – eREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Referrer - eConsult: Redirected	Notify Overnight in Daily Summary Email
eReferral Referrer - eConsult: Cancelled	Notify Immediately by Email
eReferral Referrer - eConsult: Completed	Notify Immediately by Email
eReferral Referrer - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - eConsult: Action Required	Notify Immediately by Email
eReferral Referrer - Referral: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Cancelled	Notify Immediately by Email
eReferral Referrer - Referral: Waitlisted	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Action Required	Notify Immediately by Email
eReferral Referrer - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Deferred	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Declined	Notify Immediately by Email
eReferral Referrer - Referral: Appointment Booked	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Appointment Missed	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Completed	Notify Immediately by Email

### 9.2 Register for Notifications - Referring Provider & Referring On Behalf Of

- Click [My Details](#) from the [Clinical Portal Menu](#).
- Scroll to the section titled [Users](#). Beside the [Notification email address](#), enter your preferred email address that you use and check regularly (this can be an AHS email or another email address external to

AHS). If you update your email address in [My Details](#), you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

- c. You will also notice an AHS IAM (Identify Access Management) email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: [iam.albertahealthservices.ca/uaa/login](http://iam.albertahealthservices.ca/uaa/login) to update.
- d. Click [Update Preferences](#) to save your changes.

### 9.3 Managing Notifications Subscriptions - Referring Provider & Referring On Behalf Of

A user can customize their notifications and method of delivery:

- a. Click on [Manage Notifications](#) from the [Clinical Portal Menu](#).

- b. Confirm that your email is correct. If you need to update your email address, go to [My Details](#).
- c. Choose your [Default Delivery Method](#).



My Email Address

By default ☐ Notify By Email  
☐ Notify in Daily Summary Email

- d. In the **My General Subscriptions** section, as a referring provider or referring provider on behalf of user, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.
- e. Click **Change** in the delivery method column and select the desired delivery method.

<input checked="" type="checkbox"/> eReferral Referrer - eConsult: Redirected	eReferral Referrer	<input type="checkbox"/> Notify Immediately by Email (Absent of Patient Identifiable Information) <input checked="" type="checkbox"/> Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) <input type="button" value="Accept"/> <input type="button" value="Use My Defaults"/>
<input checked="" type="checkbox"/> eReferral Referrer - Referral: Service Provider Set	eReferral Referrer	Use default <input type="button" value="Change"/>

- f. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you, and you will no longer receive that notification.
- g. Click **Accept** or select **Use My Defaults** to reset the notification option to the default value.
- g. To unsubscribe to ALL Provider Notifications from eReferral, click the box in front of **Notification** in the header until all boxes below are unchecked.

**General Subscriptions**

☐ Notification

- h. Scroll to the bottom of the page and click **Save**.

## Notification Emails

As a referring provider or referring provider on behalf of, you will receive emails notifying you that an activity has occurred on an eConsult or a Referral that has been submitted. See example of email sent immediately after an activity occurs:

The consult request, on which you are recorded as the Referrer, has had a recent event occur of 'Consult: Completed'.

Referral Id: [REDACTED]  
Referring Provider: [REDACTED]  
Submitted By: [REDACTED]

To view this referral,  
1. Log into Alberta Netcare Portal.  
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.  
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

-----

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:  
- Remote site using a fob - <https://access.albertanetcare.ca>  
- AHS facility - <https://portal.albertanetcare.ca>

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

### Steps to review a referral update received through Provider Notifications:

- Login to the Alberta Netcare Portal and click [My Referrals](#).
- Copy the complete [Referral ID](#) (including RFS-XXX) included in the email and paste the [Referral ID](#) into the box under the [My Referrals](#) dashboard to search for your patient using the [Referral ID](#). [Referral ID](#) is only available on emails sent as 'Notify Immediately by Email.'
- Click [Search](#) and the specific referral will display. Daily summary emails do not contain the [Referral ID](#), only a brief activity summary.

Example of a Daily Summary Email:

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team

- [1 occurrence] Advice: Action Required (check your 'Action Required' workload)
- [13 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' workload)
- [4 occurrences] Consult: Completed (check your 'Completed/Cancelled/Declined' workload)
- [7 occurrences] Consult: Clerical Triage in Progress (check your 'Triage' workload)
- [2 occurrences] Consult: Action Required (check your 'Action Required' workload)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer

- [5 occurrences] Consult: Appointment Booked
- [2 occurrences] Advice: Reassigned
- [3 occurrences] Consult: Service Provider Set
- [1 occurrence] Consult: Waitlisted
- [1 occurrence] Advice: Service Provider Set (check your 'Triage' workload)
- [1 occurrence] Consult: Deferred

To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' workload.

## 9.4 Auto-Subscribed Notifications - Receiving & Receiving On Behalf Of Providers

Below is a list of **default** notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral. These notifications can be customized to meet your needs.

NOTIFICATIONS – eREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Receiver - eConsult: Action Required	Notify Immediately by Email
eReferral Receiver - eConsult: Cancelled	Notify Immediately by Email
eReferral Receiver - eConsult: Redirected	Notify Overnight in Daily Summary Email
eReferral Receiver - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Action Required	Notify Immediately by Email
eReferral Receiver - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Service Provider Set	Notify Overnight in Daily Summary Email

## 9.5 Register for Notification - Receiving & Receiving On Behalf Of Providers

- Click on **My Details** from the **Clinical Portal Menu**.
- Scroll to the section titled **Users**. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the **Notification email address** field. If you update your email address in **My Details**, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

The screenshot shows the 'My Details' page in the Alberta Netcare Portal. The left sidebar contains a menu with 'My Details' selected. The main content area is divided into sections: 'User Information' (Username, Roles, Inactivity Timeout), 'Groups I belong to', and 'Users'. The 'Users' section is highlighted with an orange box. It contains two email address fields: 'IAM email address' and 'Notification email address', both highlighted with orange boxes. The 'Notification email address' field has a placeholder text: 'Please enter a regularly accessed email address. This address is used for ANP Outage notifications, eReferral updates, Provider Notifications and as an alternate for remote access expiry notifications. You must log out of Alberta Netcare for an hour for your email address change to be processed.' Below the email fields are 'Job Role' and 'IS Staff' fields. At the bottom of the 'Users' section is an 'Update Preferences' button, also highlighted with an orange box, and a 'Discard Changes' link.

- You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: [iam.albertahealthservices.ca/uaa/login](http://iam.albertahealthservices.ca/uaa/login) to update.
- Click the **Update Preferences** button to save your changes.

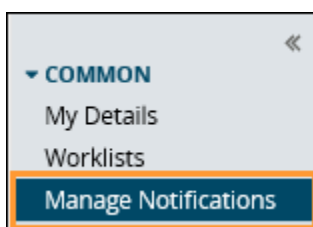
**NOTE:**

While providers are auto-subscribed by default to eight (8) [Receiver](#) notifications (see above), there are other notifications that can be subscribed to.

## 9.6 Managing Notification Subscriptions - Receiving & Receiving On Behalf Of Providers

A user can customize their notifications and method of delivery:

- a. Click [Manage Notifications](#).



- b. Confirm that your email is correct. If you need to update your email address, go to [My Details](#).
- c. Choose your [Default Delivery Method](#).

You can be notified immediately or to receive an overnight summary. Immediate notifications via email contain a [Referral ID](#) that can be used to find the referral, whereas summary emails overnight do not contain any [Referral IDs](#). Example emails are shown below:

The consult request, on which you are recorded as the assigned Receiver, has had a recent event occur of 'Consult: Appointment Missed'.

Referral Id: RFS-XXX-000000

Referring Provider: Dr. XXX

Submitted By: Dr. XXX

To view this referral,

1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Assigned Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

To change your notification subscriptions, Common > 'Manage Notifications' settings

To access Alberta Netcare Portal:

- Remote site using a fob - <https://access.albertanetcare.ca>
- AHS facility - <https://portal.albertanetcare.ca>

For help, please click on the "Need Help?" screen

Sample email from a notification with a delivery method of: Notify Immediately by Email.

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

- 1) Notification events where you are recorded as the assigned Receiver
  - [20 occurrences] Consult: Service Provider Set (check your 'Triage' worklist)
  - [10 occurrences] Advice: Clinical Triage in Progress
  - [10 occurrences] Consult: Waiting for Clerical Triage (check your 'Triage' worklist)
  - [6 occurrences] Advice: Completed (check your 'Completed/Cancelled/Declined' worklist)
  - [5 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' worklist)
  - [6 occurrences] Consult: Waitlisted (check your 'Waiting for Appointment/Waitlisted' worklist)
  - [4 occurrences] Consult: Cancelled (check your 'Completed/Cancelled/Declined' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'My Assigned Referrals' dashboard.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:

- Remote site using a fob - <https://access.albertanetcare.ca>
- AHS facility - <https://portal.albertanetcare.ca>

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email.

- d. In **My General Subscriptions**, click **Change** and select the desired delivery method. Click **Accept** to save your changes or **Use My Defaults** to select the default delivery settings.

My General Subscriptions		
<input type="checkbox"/> Notification	User Type	Delivery Methods
<input type="checkbox"/> eReferral Receiver - Referral: Declined	eReferral Receiver or Triage	
<input checked="" type="checkbox"/> eReferral Receiver - eConsult: Action Required	eReferral Receiver or Triage	Customized <a href="#">Change</a>
<input checked="" type="checkbox"/> eReferral Receiver - eConsult: Cancelled	eReferral Receiver or Triage	Customized <a href="#">Change</a>
<input checked="" type="checkbox"/> eReferral Receiver - Referral: Service Provider Set	eReferral Receiver or Triage	<input type="checkbox"/> Notify Immediately by Email (Absent of Patient Identifiable Information) <input checked="" type="checkbox"/> Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) <div> <a href="#">Accept</a> <a href="#">Use My Defaults</a> </div>

- e. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you and you will no longer receive that notification.
- f. Click the [Save](#) button to save your changes.

- g. To find a referral, copy the complete [Referral ID](#) (including RFS-AAD-XXX) included in the email and paste the [Referral ID](#) into the box under the [My Referrals](#) dashboard to search for your patient using the [Referral ID](#). Referral ID is only available on emails sent as 'Notify Immediately by Email.' Daily summary emails do not include Referral IDs.

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## My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	36	29	7
Cancelled/Declined	9	6	3
Action Required 	9	7	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	129	98	31
Completed	22	14	8
Waiting for Response	13	11	2

Referral ID

Enter the Referral Id from your email notification and click 'Search'.

- h. Click [Search](#) and the specific referral will display.

## 9.7 Auto-Subscribed Notifications - Triage User

Below is a list of **default** notifications that all triage users will automatically receive when an activity occurs on an eConsult or Referral. These notifications can be customized to meet your needs. There are several other options that triage users can subscribe to.

NOTIFICATIONS – eREFERRAL TRIAGE	WHEN WILL IT BE SENT?
Referral Triage - eConsult: Action Required	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Cancelled	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Clerical Triage in Progress	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Completed	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Action Required	Notify Overnight in Daily Summary Email
Referral Triage - Referral: New Request	Notify Overnight in Daily Summary Email

## 9.8 Register for Notifications – Triage User

- Click on **My Details** from the **Clinical Portal Menu**.
- Scroll to the section titled **Users**. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the **Notification email address** field. If you update your email address in **My Details**, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

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You last logged in 28-Jul-2023 08:03

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My Details

Username [redacted] Inactivity Timeout: 2 hours  
Your maximum timeout is currently 2 hours.

Change Password

Important Messages: ☐ Show alert until dismissed  
☒ Show alert for 10 seconds  
☐ Do not show alert

Roles I perform: Clinical2-CH

Groups I belong to: Users, Receiving Provider Referrals, Referrals HSC Reports, Referrals Operations Reports (Provincial), Referrals Operations Reports (Triage Facility), Referrals User, Referring Provider Referrals, Triage Referrals

Update Preferences Discard Changes

Users

This email address is for AHS IAM updates and notifications.  
To change this email address, please login through IAM.

IAM email address [redacted]

Please enter a regularly accessed email address.  
This address is used for ANP Outage notifications, eReferral updates, Provider Notifications and as an alternate for remote access expiry notifications.  
You must log out of Alberta Netcare for an hour for your email address change to be processed.

Notification email address [redacted]

- c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: [iam.albertahealthservices.ca/uaa/login](http://iam.albertahealthservices.ca/uaa/login) to update.
- d. Click the **Update Preferences** button to save your changes.
- e. To manage your triage settings, scroll down to **Triage Referrals**. Validate your **Triage Facilities**.

Triage Referrals		
Triage Facility	Margery E. Yuill Cancer Centre [WDF8E87], Foothills Medical Centre - Women's Health Centre - OBS-GYN [WDFAGG0E], Addition and M H - Addiction Medicine - Provincial [VRTL0016], Northern Alberta Renal Program - Nephrology [VRTL0026], RGH - Holy Cross Ambulatory Care	Add Referral Creators to Drafts List  Show Completed/Canc elled/Declined referrals for
		<input type="button" value="+ Add"/> <input type="button" value="Last 1 month"/>

## 9.8 Managing Notifications Subscriptions – Triage User

A triage user can customize their notifications and method of delivery:

- a. Click on **Manage Notifications**.

- b. Confirm that your email is correct. If you need to update your email address, go to **My Details**.
- c. Choose your **Default Delivery Method**. You can be notified immediately or can receive an overnight summary. Immediate notifications via email contain a **Referral ID** that can be used to find the referral, whereas summary emails do not contain any **Referral IDs**. The sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email is shown below.



The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team  
- [1 occurrence] Consult: Clerical Triage in Progress (check your 'Triage' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer  
- [1 occurrence] Consult: Waitlisted

To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' worklist.

-----

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:  
- Remote site using a fob - <https://access.albertanetcare.ca>  
- AHS facility - <https://portal.albertanetcare.ca>

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email

Referral Id: [REDACTED]  
Referring Provider: [REDACTED]  
Submitted By: [REDACTED]

To view this referral,  
1. Log into Alberta Netcare Portal.  
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.  
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

-----

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:  
- Remote site using a fob - <https://access.albertanetcare.ca>  
- AHS facility - <https://portal.albertanetcare.ca>

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Consult

Sample email from a notification with a delivery method of: Notify Immediately by Email.

- d. From the **My General Subscriptions** section, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.

**Manage Notifications**

You can update your email address (above) in My Details.  
If required, your subscribed notifications and delivery methods can be changed in the My General Subscriptions settings below.

**My General Subscriptions**

Notification	User Type	Delivery Methods
<input type="checkbox"/> eReferral Triage - Consult: Declined	eReferral Receiver or Triage	
<input checked="" type="checkbox"/> eReferral Triage - Advice: Action Required	eReferral Receiver or Triage	<input type="checkbox"/> Notify Immediately by Email (Absent of Patient Identifiable Information) <input checked="" type="checkbox"/> Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) <a href="#">Accept</a> <a href="#">Use My Defaults</a>
<input checked="" type="checkbox"/> eReferral Triage - Advice: Cancelled	eReferral Receiver or Triage	<a href="#">Customized Change</a>
<input type="checkbox"/> eReferral Triage - Consult: Service Provider Set	eReferral Receiver or Triage	
<input checked="" type="checkbox"/> eReferral Triage - Consult: Waiting for Clinical Triage	eReferral Receiver or Triage	<a href="#">Customized Change</a>
<input type="checkbox"/> eReferral Triage - Consult: Waitlisted	eReferral Receiver or Triage	
<input type="checkbox"/> eReferral Triage - Advice: Waiting for Clinical Triage	eReferral Receiver or Triage	
<input checked="" type="checkbox"/> eReferral Triage - Consult: Clerical Triage in Progress	eReferral Receiver or Triage	<a href="#">Customized Change</a>
<input type="checkbox"/> eReferral Triage - Consult: Reassigned	eReferral Receiver or Triage	
<input type="checkbox"/> eReferral Triage - Consult: Completed	eReferral Receiver or Triage	

[Save](#) [Cancel](#) [Reset to defaults](#)

- e. Click [Change](#) in the delivery method column and select the desired delivery method.
- f. Click [Accept](#) to save your changes or [Use My Defaults](#) to select the default delivery setting.
- g. Click the box next to a specific triage notification to uncheck it. This will unsubscribe you and you will no longer receive that notification.
- g. Click the [Save](#) button to save your changes.

[Save](#) [Cancel](#) [Reset to defaults](#)

- h. To find a referral, copy the complete [Referral ID](#) (including RFS-XXX) included in the email and paste the [Referral ID](#) into the box under the [My Referrals](#) dashboard to search for your patient using the [Referral ID](#). Referral ID is only available on emails sent as 'Notify Immediately by Email.' Daily summary emails do not include Referral IDs.

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Action Required 	9	7	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	129	98	31
Completed	22	14	8
Waiting for Response	13	11	2

Referral ID

Search

Reset

Enter the Referral Id from your email notification and click 'Search'.

- i. Click **Search** and the specific referral will display.

## 10.0 eReferral Reports

The Alberta Netcare Portal eReferral application includes several reports that extract and record selected data from the system. Providers accessing these reports must belong to one (or both) of the following groups:

- **Referrals Operations Reports (Provincial)** – Returns province-wide data; intended for the eReferral project team.
- **Referrals Operations Reports (Triage Facility)** – Returns data relating to a specific facility only; intended for staff at that facility.

These reports are subject to change as new reporting requirements are identified and implemented. To gain access to these reports, email [access.ereferral@primarycarealberta.ca](mailto:access.ereferral@primarycarealberta.ca) to get started.

The reports are accessed from the [Clinical Portal Menu – eReferral Reports](#). These reports are available to users with Clinical 1, Clinical 2, or Clinical 5 access, with an additional two reports available to those with Clinical 1 access.

### Reports Available to Clinical 1, Clinical 2 and Clinical 5 Users:

- [Referral Request](#) – Provides the total number of Referrals submitted.
- [Referral Request Referrals by Status](#) – Reports the number of Referrals by status. Total number of [Completed](#), [Cancelled](#) and [Declined](#) referrals can be seen, as well as total Referrals with additional information requested. Reports can also be run for specific time periods.
- [Referral Request Referrals by Referral Reason](#) – Provides the number of Referrals submitted under each referral reason.
- [Referral Request Referrals by Referring Provider](#) – Gives the number of Referrals submitted by each user.
- [Referral Request Referrals by Referring Provider and Referral Reason](#) – Generates a list of referring providers for any specific reason for referral along with the number of Referrals the provider submitted using that reason.
- [eConsult Requests](#) – Provides the total number of eConsults submitted, and the total number of times each [Complete Reason](#) was used on the [Complete Form](#). For example, the total number of times that [Continue Managing Within Your Scope of Practice](#) is reported.
- [Health Services Catalogue \(HSC\) Triage Site Listing](#) (Provincial user group only) – Generates a list of all the facilities in the [Health Services Catalogue](#), along with their contact information.
- [Health Services Catalogue \(HSC\) Provider Listing](#) (Provincial user group only) – Lists all of the providers in the [Health Services Catalogue](#), along with their provider identification number.

### Additional Reports Available to Clinical 1 Users:

These two reports are available to Clinical 1 users if they add the triage facility in [My Details](#):

- [Referring Providers On Behalf Of Report](#) - Lists the names of all Alberta Netcare Portal users that have submitted a Referral/eConsult on your behalf by adding your name to their [My Details](#).

- **Receiving Providers On Behalf Of Report** – Lists the names of all Alberta Netcare Portal users that have received a Referral/eConsult on your behalf by adding your name to their [My Details](#).

## 10.1 Running a Report

- Click [eReferral Reports](#) from the [Clinical Portal Menu](#).
- Select the report you wish to generate.
- Enter selection criteria and click the [Search](#) button. The wider the selected criteria, the longer the report will take to generate and display.

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- Referral and eConsult Requests
- Referral Requests**
- Referral Request Referrals by Status
- Referral Request Referrals by Referral Reason
- Referral Request Referrals by Referring Provider
- Referral Request Referrals by Referring Provider and Referral Reason

**eReferral Report - Referrals**

If the Level is selected as Triage Site, a valid Triage Site **must** be selected

Level ☒ Total System ☐ Triage Site Triage Site

Date ☒ Total to Date ☐ Month ☐ Quarter

Year

Month

Quarter

[Search](#) [Reset](#)

Category	Count
Number of Referrals (Total System) [Total to Date]	169

[Printer Friendly Version](#) [Download CSV results](#)

- Enter selection criteria and click the [Search](#) button. The wider the selected criteria, the longer the report will take to generate and display.
- Click [Download CSV results](#) for analysis in Microsoft Excel. Click [Printer Friendly Version](#) to save the report as a PDF or print.

## 10.2 eConsult Billing for Receiving Providers

eReferral eConsults are billable using eConsult 03.01O. Below is the process to gather the information you require for billing.

- View your [My Assigned Referrals](#) dashboard and go to your [Completed/Cancelled/Declined](#) requests.



The results that appear are the eConsults you have received in the date range you selected. For example, for billing purposes you may search the last calendar month to see how many eConsult you received.

Patient Name	DOB/Age/ULI	Received Date (T2)	Referral Reason	Referring Provider	Accepted Date (T3)	Appointment Scheduled	Appointment Attended (T5)	Priority	Access Target	Request Type	Service Provider
PATHFINDER, Test Id		27-Oct-2017	Hip pain						5 Calendar days	Advice	
EREFERRAL, Two B		13-Apr-2018	Hip pain						5 Calendar days	Advice	

Results 1-2 [Printer Friendly Version](#) [Download CSV results](#)

- d. Click either [Printer Friendly Version](#) or [Download CSV results](#) on the bottom of the page to view these results in a more printer friendly version or to save them on your computer. You can share these documents with your team and complete billing as normal.

- o The [Printer Friendly Version](#) is a PDF document that can be printed.

My Assigned Referrals - Completed/Cancelled/Declined												
Patient	Received Date	Referral Reason	Referring Provider	Appt.	Access Target	Elapsed Time	Time to Target (days)	Request Type	Service Provider	Status	Status Reason	Completed/Cancelled/Declined
EREFERRAL, Five A	07-Nov-2017	Urology Issue			5 business days	23 minutes	5	Advice		Completed	Continue Managing Within Your Scope of Practice	2 weeks ago

- o The [Download CSV results](#) opens in Microsoft Excel spreadsheet. You can open and/or save it.

Do you want to open or save **Completed\_Cancelled\_Declined.csv** (2.25 KB) from **portallearn.albertanetcare.ca**?
 

[Open](#)
[Save](#)
[Cancel](#)

**NOTE:** Since this information contains identifiable patient information, please ensure that it is transmitted over secure email only.

- e. To complete your billing process, you can download the Prac ID of the other physician. Go to <https://www.alberta.ca/fees-health-professionals.aspx> for more information.