eREFERRAL QUICK REFERENCE:
How to Create/Review an Advice Request

Configuring My Details
By adding yourself as a Referring Provider you will be able to see your referrals in My Referrals.

1. Click on My Details below the Common folder in the top left hand column on your Homepage.
2. If you are the referring provider, scroll down to the Referring Provider Referrals section. Click on the magnifying glass.

OR

If you are referring on behalf of a provider, scroll down to Referring Provider Referrals on Behalf Of section. Click Add. You may add multiple providers in this section.

3. Type your first and last name or the name of the provider you are referring on behalf of (as per CPSA) in the box and click Search.

4. Once the list displays, click on your name or the referring provider’s name and then complete the section with the clinic’s demographics. This information will be prepopulated into all future referrals.

5. At the bottom of the page click Update Preferences to validate your updates.

6. Click the Home icon in the top right corner to return to your homepage.

Before you get Started
Check the Health Services Catalogue (HSC) as a clinical pathway may be available for information on diagnosis, management, and referrals. See quick reference document How to Use the Health Services Catalogue for more details.

Creating an Advice Request
An advice request can be used when clinicians are unsure if a referral would be appropriate, or when they are seeking specialty advice for a non-urgent question.

1. Open the patient’s record and click Create Referrals on the Patient Context Menu.

2. Enter a reason in the Reason for Referral field and click Create; or click Browse.
3. Click **Browse** (see above) then click **Request Type Advice**. You can further sort by **Specialty, Reason for Referral and or Zone**. Click **Search** and select from the list that populates.

4. Click **Create** to open the Advice Request form.

5. Select **Add** next to **Send To** in the **Recipient** section to identify where you would like the advice request sent. Choose from facilities listed for the specialty.

6. In the **Advice Request Conversation** section click **Add** to input yourself (the referring provider) or the name of the referring provider as the respondent/author of the entry. The referring provider’s name must be entered in your **My Details** to populate this information. See **Configuring My Details** on page 1, steps 1-6 of this document.

7. Use the first conversation entry box to clearly describe your question/issue including pertinent history and attachments.

8. Confirm the **Referring Provider** section is complete with the referring provider’s name, and the clinic’s demographics as completed in your **My Details**. See **Configuring My Details** on page 1, steps 1-6 of this document.

9. Scroll to the bottom of the page and click **Submit** to finalize and submit the advice request to the appropriate referral triage centre for review. To successfully submit a referral, all mandatory fields (denoted by *) must be completed.

   **Note:** An advice request can be saved as a draft at any time by clicking **Save as Draft** at the bottom of the form. Mandatory fields do not have to be completed for saving. Please note that a saved form is not available for review by a triage centre or provider.

### Reviewing Advice Requests

At any point, a user can review the status of their advice request, by clicking on **My Referrals** from the **eReferral** tab on the **Menu Bar**.

1. Click **eReferral** from the **Menu Bar** located on the left side of the screen. Click **My Referrals**, and then click **In Progress**.

2. Select **Advice** and then click **Search** to generate a list of advice requests. Further define the search by **PHN, Referral Reason** or **Status** of the advice request.
To review the specialist’s response to your advice request, refer to My Referrals, click Completed, select Advice for Request Type, and then Search.

3. Select the appropriate advice request from the list and review the response from the specialist in the Advice Request Conversation area.

Best practice point: Set a reminder in EMR to check in 7 days for a response from the specialist to the advice request.

Responding to a Request for Additional Information

On occasion, the triage centre or provider may require additional information from you. To respond to a request for additional information:

1. Click eReferral from the Menu Bar located on the left side of the screen. Click My Referrals, and select Action Required.

2. Select Advice for Request Type and Search. Click the advice request from the list to open it.

3. Click Edit from the task bar at the top. Scroll down and review the conversation entry provided by the specialist, including the additional requested information.

4. Click Add Conversation Entry and then select Add to input the referring provider as the respondent/author of the entry. The referring provider’s name must be entered in your My Details to populate this information. See Configuring My Details on page 1, steps 1-6 of this document. Type your response/additional information into the conversation box and add any attachments.

5. Scroll down to bottom of the page, click Save, then click Yes, then Edit to send back to the Specialist for review.