

Create Advice Requests

An Advice Request can be used when clinicians are seeking specialty advice for a non-urgent question or when they are unsure if a referral would be appropriate. In many cases, an Advice Request is all you need to manage your patient in their medical home and avoid an in-person specialist appointment.

- 1 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.
- 2 Select the patient from the populated list.
- 3 Open the patient's Electronic Health Record (EHR) and click **Create Referrals** from the **Context Menu**.

- 4 Enter a reason in the **Reason for Referral** field.

- If you don't know the reason for referral or want to see what reasons are available, click **Browse** and the **Health Services Catalogue** will open. Click **Advice** beside **Request Type**. You can further sort by **Specialty**, **Reason for Referral** and/or **Zone**. Click **Search** and review the list that populates.

Reason for Referral	Specialty	Request Type	Facility	City	Zone	Provider	Approx. Wait Time (Until 1st Appt./Advice Response)
Opiate Agonist Therapy	Addiction and M H - Addiction Medicine	Advice	Addiction and M H - Addiction Medicine - Provincial	All		Next Available	5 calendar days
Transgender health general consultation	Family Medicine - Transgender Care	Advice	Family Medicine - Transgender Care - Provincial	All		Next Available	5 calendar days
Hepatology Issue	Internal Med - Adult Gastroenterology	Advice	Internal Med - Adult Gastroenterology - Edmonton Zone	Edmonton		Next Available	5 calendar days

- 5 Click the appropriate reason for referral. Ensure that the **Refer For** field indicates **Advice**. Click **Create** to open the Advice Request form.

6 Select the reason why you are sending this Advice Request. All fields marked with a red asterisks (*) are mandatory and must be completed to successfully submit an Advice Request.

7 Beside **Recipient**, click the **Add** button beside **Send To** in order to identify where you want the Advice Request sent. Choose from one of the facilities listed for the specialty.

Specialty	Send to	Zone	City	Approximate Wait Time
Urology	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	Edmonton	Edmonton	5 calendar days

8 In the **Conversation Entry** section, click **Add** beside **Respondent's name** to input yourself (the referring provider) or the name of the referring provider you are referring on behalf of. The referring provider's name must be entered in **My Details** to populate this information.

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

10 If you want to add an attachment, click **Yes** to include files from your computer or link to Alberta Netcare reports or lab results.

TIP If external attachments are required, refer to the [Big Ideas reference documents on eReferral](#).

- To include reports and lab results available in Alberta Netcare on the Advice Request, 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.

- To include a document from your computer, select **Browse** for external attachments. This will allow you to search on your computer. *Note that the maximum file size is 5MB per file.*

11 Confirm 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.

12 Scroll to the bottom of the page and click **Submit** to send the Advice Request. Select **Save as Draft** if the Advice Request is not complete or you want to come back to it later. Press **Cancel** if you want to stop completing the Advice Request.

REMINDER Once the Advice Request is submitted it cannot be deleted or cancelled.

Reviewing the Response from the Specialty

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

- 1 Click on the **Completed** worklist and select the applicable Advice Request.

Referrals	Total	Consults	Advice
Recently Updated	14	5	9
Cancelled/Declined	25	22	0
Action Required	29	1	28
Drafts	48	39	9
Undelivered	0	0	0
In Progress	592	270	322
Completed	9		224
Waiting for Response	233	87	146

- 2 To open the response, navigate to the **Activity** section at the bottom of the Advice Request. Click **View form for comments and attachments** under **Respond with Advice** to see the content.

Activity

Respond with Advice

EVENT Completed Date

DATE 04 October 2021, 14:09

REASON Continue Managing Within Your Scope of Practice

 [View form for comments and attachments](#) 

- 3 Review the **Advice/Response** provided and any attachments.

Activity

Respond with Advice

EVENT Completed Date

DATE 04 October 2021, 14:09

REASON Continue Managing Within Your Scope of Practice

 [Hide Form](#)

Set Service Provider Dr Rachel Ann SCHACHAR

Advice/Response Please have the patient use the attached shoulder exercises daily for six weeks. If the patient condition doesn't improve, a referral will be required.

 [Attach External Document\(s\)](#)

 Shoulder Exercises.pdf (35.4 kB) 

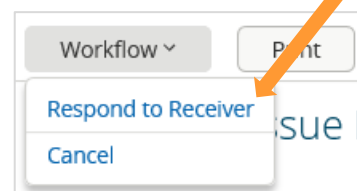
Netcare Document (s) No documents

Complete Reason Continue Managing Within Your Scope of Practice

Respond 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 Advice Request. Follow these instructions for adding more information:

- 1 Click **eReferral** from the **Clinical Portal Menu**. Then, click **My Referrals** and open the **Action Required** worklist.
- 2 Select **Advice** for **Request Type** and then press **Search**. Click the appropriate Advice Request from the list to open it.
- 3 Scroll to the bottom of the Advice Request to view the **Activity Feed** and read the question from the specialist.
- 4 When you are ready to respond, click **Workflow** from the task bar at the top of the page, then click **Respond to Receiver**.



- 5 Type your response/additional information into the comment box, add any attachments, and click **Provide Information**.

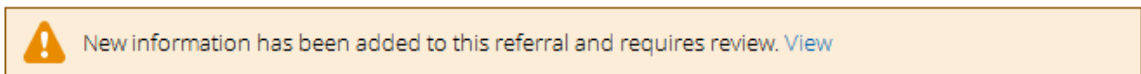
Respond to Receiver

Comment to Receiver *

Attach External Document(s) File size restricted to 5MB. Multiple files can be uploaded up to a limit of 25MB.

Netcare Document (s)

- The Advice Request 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 referral with a note identifying that new information is present for the specialty.



Export a Copy of an Advice Request from Alberta Netcare Portal

- 1 Locate the Advice Request on the **My Referrals** dashboard or **Triage** dashboard and open it. Click **Print** from the task bar at the top of your screen. You will have the option to print a hard copy of the referral, or to save it as a PDF file.

