

Create an Advice Request

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.

- 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 Click the patient from the populated list to open the patient's Electronic Health Record (EHR).
- 3 Once open, click **Create Referrals** from the **Context Menu**.

- 4 Enter a reason in the **Reason for Referral** field. You can start typing to see what reasons are listed or click **Browse** and the **Health Services Catalogue** will open.

- 5 Click the appropriate reason for referral. Ensure that the **Refer For** field indicates **Advice**. Click **Create** to open the Advice Request form. If the **Reason for Referral** is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the reason for referral list – use Radiculopathy). The exact reason can be entered later in this process in the **Referral Details** section in the **Reason for sending this referral** field.

Request for Service

Select a Form

Reason for Referral* Hematuria microscopic (g

Refer For* Advice - Nephrology

- 6 Select **Flag Referral (For Referring Provider use)** if you want the provider to be notified of the Advice Request.
- 7 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.

Hematuria Microscopic (greater than 5 rbc

Flag Referral (For Referring Provider use) ☒

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

Patient Information

! If this inquiry is of a more urgent nature, please call RAAPID North (for South (for patients in and south of Red Deer, Alberta): 1-800-661-1700. Do not submit a request for consult or advice.

i eReferral advice requests are for **clinical** advice only. For information directly. **Advice requests will be responded to within five days.**

Why are you sending this advice request?

Reason* ☐ I am unsure if this patient requires a referral ☒ I am seeking advice

- 8 Click the **Add** beside **Send To** in the **Recipient** section to identify where you want the Advice Request sent. Choose from one of the facilities listed for the specialty.

Recipient

Send To * + Add

Facility Name

City

Zone ☐ North ☐ Calgary

Search Reset

Specialty	Send to	Zone(s) Served
Nephrology	Royal Alexandra Hospital Nephrology - Nephrology	Edmonton
Nephrology	Sheldon M. Chumir Centre - Nephrology	Calgary
Nephrology	South Edmonton Nephrology - Nephrology	Edmonton
Nephrology	Walter C. Mackenzie Health Sciences Centre - Nephrology	Edmonton

- 9 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.

Advice Request Conversation

This section records the conversation between the referring and receiving providers.
Use the first conversation entry to clearly describe your question including pertinent history and attachments.

Conversation Entry *At least one Conversation Entry is required*

Respondent's name * + Add

Question or Response *

Include Attachments? ☐ Yes ☒ No

+ Add Conversation Entry

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

Advice Request Conversation
 This section records the conversation between the referring and receiving providers.
 Use the first conversation entry to clearly describe your question including pertinent history and attachments.

Conversation Entry *At least one Conversation Entry is required*

Respondent's name *

Question or Response *
 My patient has the following symptoms: Difficulty urinating, pain while urinating, fever and chills, pain in genitals

Include Attachments? ☐ Yes ☒ No

+ Add Conversation Entry

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

Include Attachments? ☒ Yes ☐ No

Netcare Document(s) + Link a document

External Attachments Choose File No file chosen

File size restricted to 5MB. Multiple files can be uploaded up to a limit of 25MB.

- 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.

Get Netcare Documents Select a favourite search

Report Name Category

Date Range 1 month

Note: If the report you are looking for does not appear in the search results then increase the date range.

Warning: Reports that have a Demographics Mismatch are not accessible through this search and cannot be linked to a referral.

Search Reset Enter a new favourite search +

Enter search criteria above and click 'Search'

- 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.*
- 12 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. 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.

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

Name *	<input type="text"/>	Phone Number *	403-123-4567
Line 1 *	6789 Street	City *	Calgary
Line 2	<input type="text"/>	Province *	Alberta
		Postal Code *	xxx xxx

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

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 From the [Clinical Portal Menu](#), go to [My Referrals](#). Click on the [Completed](#) worklist and select the applicable Advice Request.
- 2 To open the response, navigate to the [Activity](#) section at the bottom of the Advice Request. Click [View Form](#) under the [Respond with Advice](#) to see the content.

COMMON

FAVOURITES

SEARCHES

REFERRAL

My Referrals

Triage Referrals

My Assigned Referrals

Health Services Catalogue

My Referrals Mockup

REFERRAL REPORTS

My Referrals

Referrals	Total	Consults	Advice
Recently Updated	10	8	2
Cancelled/Declined	0	0	0
Action Required ⚠	2	1	1
Drafts	0	0	0
Undelivered	0	0	0
In Progress	7	6	1
Completed	3	2	1
Waiting for Response	1	1	0

Workflow ▾ Print

Urology issue Request for Service

Events (2) **Activity (10)**

Status	Completed	Referral Id	<input type="text"/>
Reason	Referral Required - Refer to the Provider of Your Choice	Submitted	31-Jan-2023 14:56
Service Provider	<input type="text"/>	Referred For	Advice - Urology
Recipient	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	Referring Provider	<input type="text"/>
		Submitted By	<input type="text"/>
		Flagged for Referrer	No

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

Activity

Mark as Reviewed

Respond with Advice

EVENT Completed Date

DATE 01 February 2023, 10:30

REASON Referral Required - Refer to the Provider of Your Choice

View form for comments and attachments

Respond with Advice

EVENT Completed Date

DATE 01 February 2023, 09:39

REASON Continue Managing Within Your Scope of Practice

View form for comments and attachments

Request Information (from Referrer)


REASON Missing clear clinical question

View form for comments and attachments

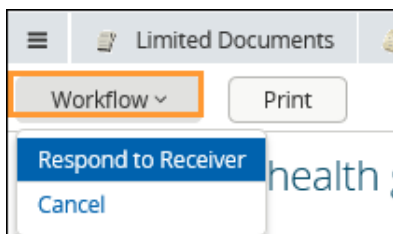
Respond to a Request for Additional Information/Action Required

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

COMMON	My Referrals			
FAVOURITES	Referrals	Total	Consults	Advice
SEARCHES	Recently Updated	10	8	2
REFERRAL	Cancelled/Declined	0	0	0
My Referrals	Action Required 	2	1	1
Triage Referrals	Drafts	0	0	0
My Assigned Referrals	Undelivered	0	0	0
Health Services Catalogue	In Progress	7	6	1
My Referrals Mockup	Completed	3	2	1
REFERRAL REPORTS	Waiting for Response	1	1	0

- 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

⚠ A new version of the referral details is available. It will be automatically applied when you com

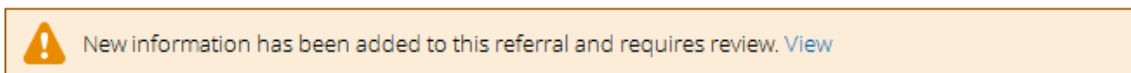
Comment to Receiver *

Attach External Document(s) **Choose File** No file chosen
File size restricted to 5MB. Multiple files can be uploaded up to a limit of 25MB.

Netcare Document(s) **+** Link a document

Provide Information Cancel

- 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**. You can print or save the PDF file.

Limited Documents

Workflow **Print**

Urology Issue Request

REFERRAL, Two B - 1 **PDF** **Print** **Close** **Share**

REFERRAL, Two B
DOB 1 Female
PHN/ULI

Urology Issue Request for Service

Status	Request Additional Information	Referral Id
Reason	Missing clear clinical question	Submitted
Service Provider		Referred For
Recipient	Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	Referring Provider
		Submitted By
		Flagged for Referre