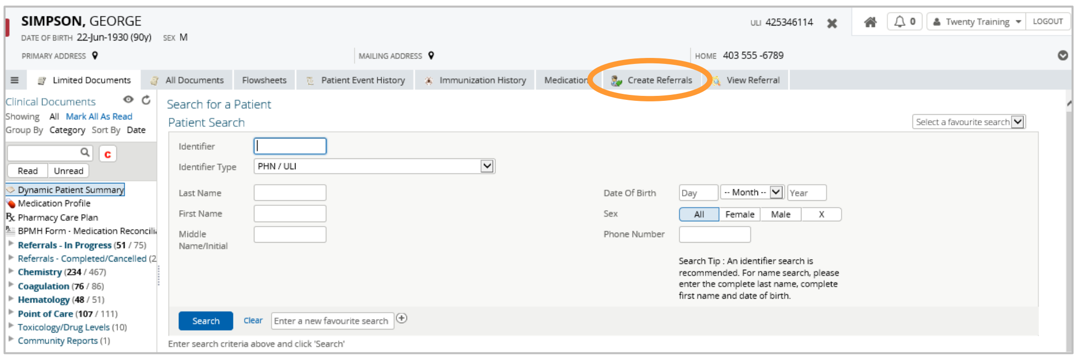
eReferral Quick Reference
Create/Review an Advice Request

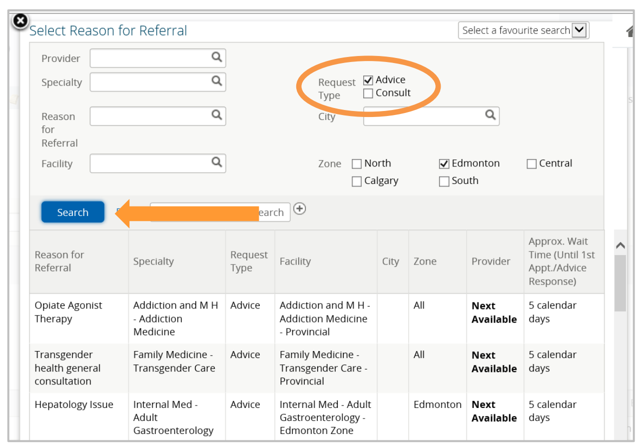
Create Advice Requests

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.

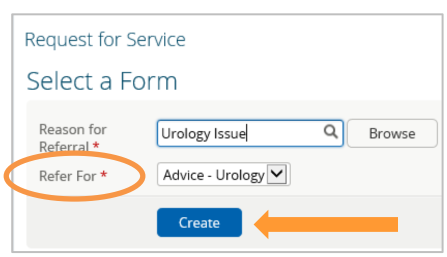
1. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Press ***Search*** to bring up a list.
2. Select the patient from the populated list.
3. Open the patient's Electronic Health Record (EHR) and click ***Create Referrals*** from the ***Context Menu***.



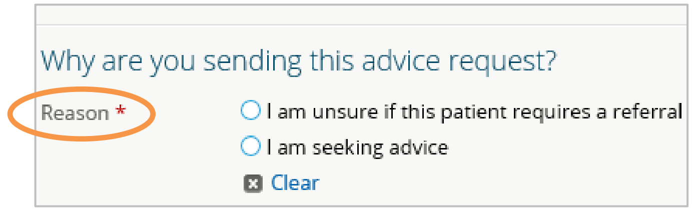
4. Enter a reason in the ***Reason for Referral*** field.
   - If you don't know the reason for referral or want to see what reasons are available, click ***Browse*** and the ***Health Services Catalogue*** will open. Click ***Advice*** beside ***Request Type***. You can further sort by ***Specialty***,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



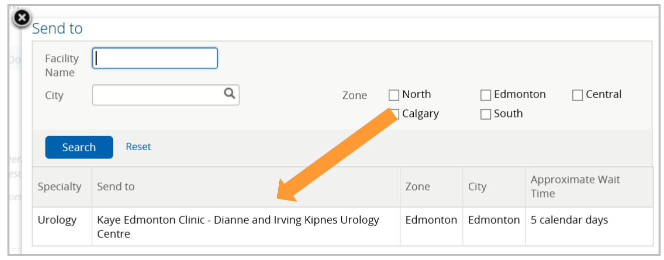
5. Click the appropriate reason for referral. Ensure that the ***Refer For*** field indicates ***Advice***. Click ***Create*** to open the Advice Request form.



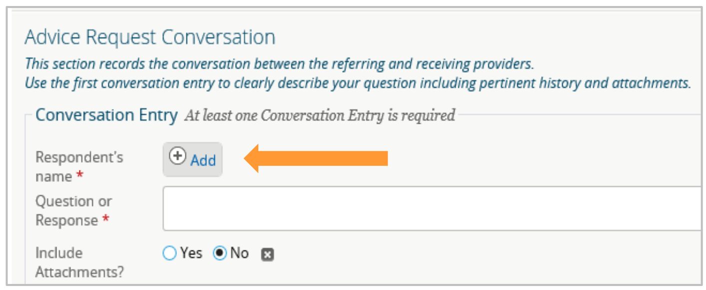
6 Select the reason why you are sending this Advice Request. All fields marked with a red asterisks (*) are mandatory and must be completed to successfully submit an Advice Request.



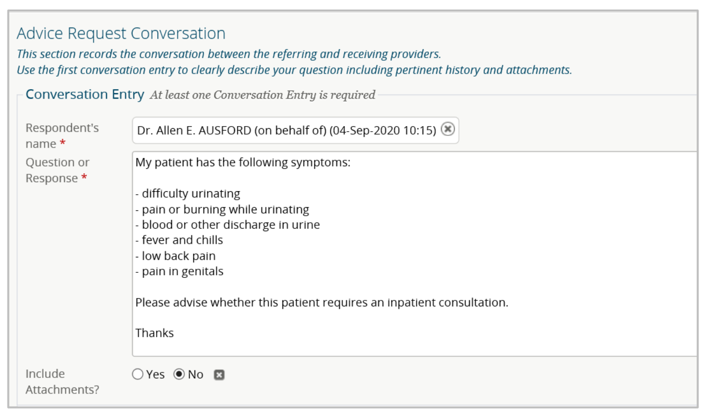
7 Beside ***Recipient***, click the ***Add*** button beside ***Send To*** in order to identify where you want the Advice Request sent. Choose from one of the facilities listed for the specialty.



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.



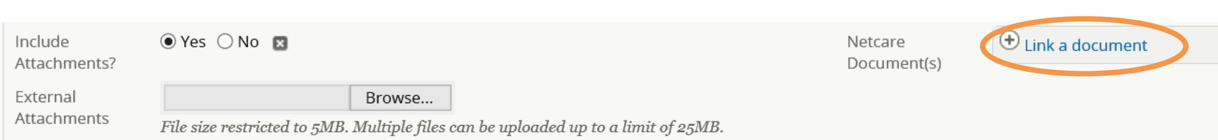
9 Use the first conversation entry box to clearly describe your question including pertinent history and attachments.



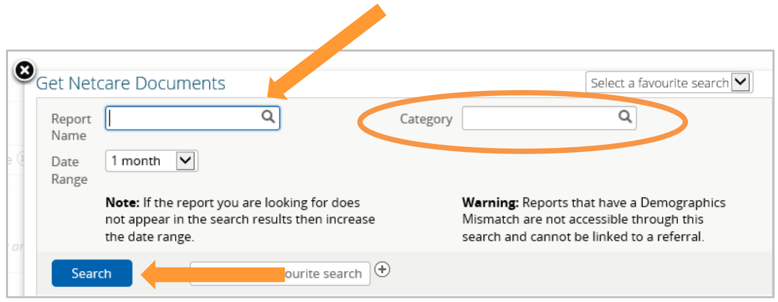
10 If you want to add an attachment, click ***Yes*** to include files from your computer or link to Alberta Netcare reports or lab results.

TIP	If external attachments are required, refer to the <u>Big Ideas reference documents on eReferral.</u>

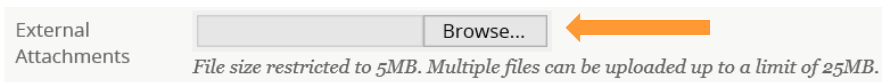
- To include reports and lab results available in Alberta Netcare on the Advice Request, select ***Link a document***.



- 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.

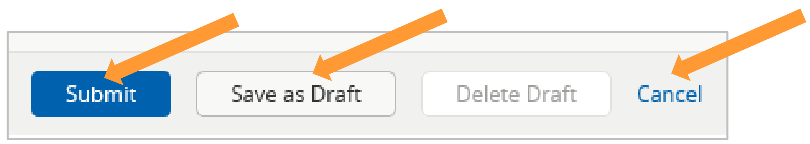


- To include a document from your computer, select ***Browse*** for external attachments. This will allow you to search on your computer. *Note that the maximum file size is 5MB per file*.



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.



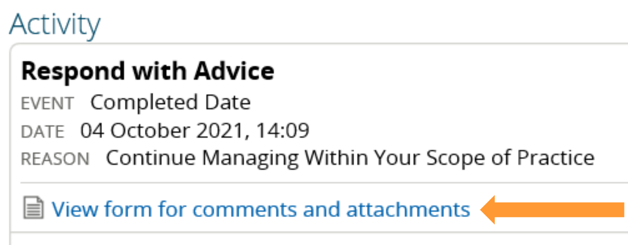
REMINDER	Once the Advice Request is submitted it cannot be deleted or cancelled.

Reviewing the Response from the Specialty

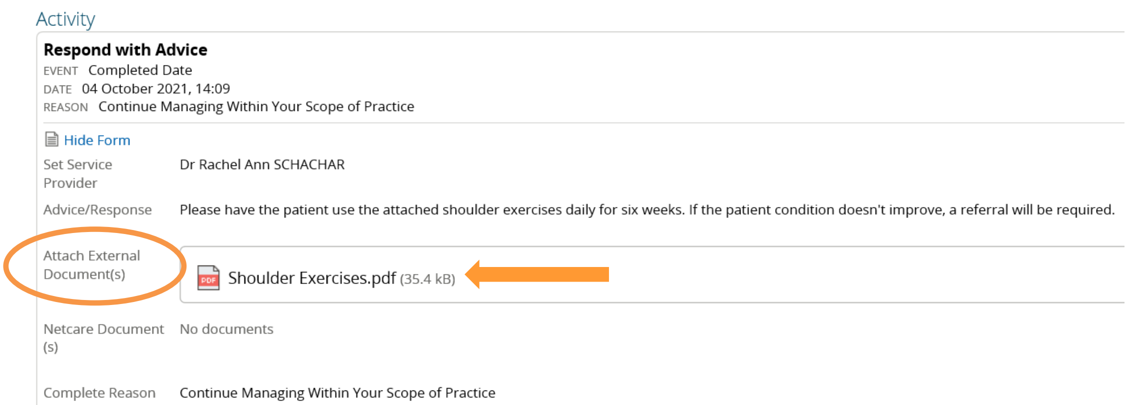
When a specialty responds to an Advice Request, you can open it in the ***My Referrals*** dashboard. The response will appear in the ***Activity*** section of the Advice Request.

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

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.



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



Respond to a Request for Additional Information/Action Required

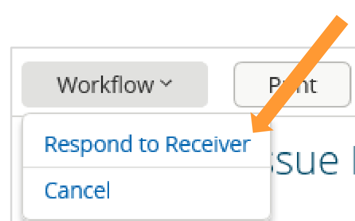
A triage centre or receiving provider may require additional information from you (the referring provider) before they can complete the Advice Request. Follow these instructions for adding more information:

1 Click ***eReferral*** from the ***Clinical Portal Menu***. Then, click ***My Referrals*** and open the ***Action Required*** worklist.

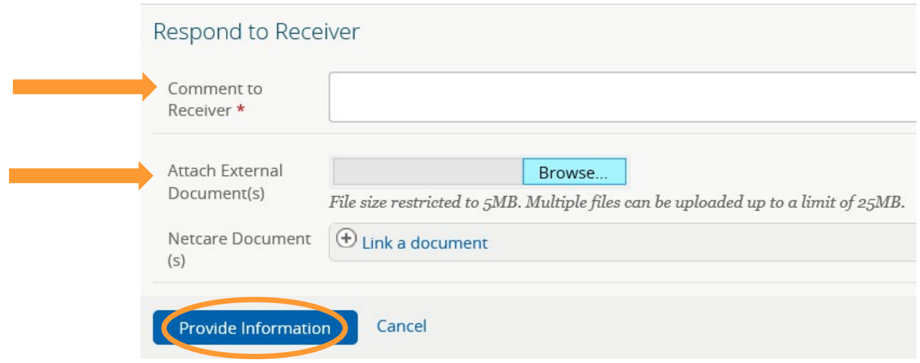
2 Select ***Advice*** for ***Request Type*** and then press ***Search***. Click the appropriate Advice Request from the list to open it.

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.***

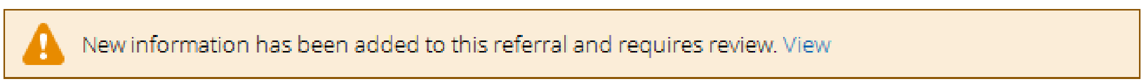


5 Type your response/additional information into the comment box, add any attachments, and click ***Provide Information.***



- 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.