eReferral Quick Reference

Create/Review a Consult Request

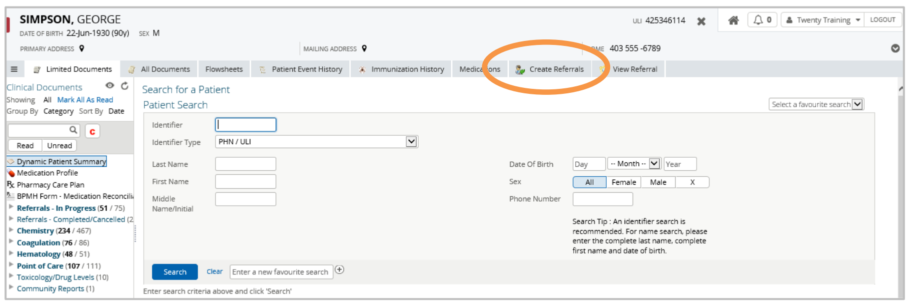
Create a Consult Request

A Consult Request is a request for an in-person specialist appointment. It may also be called a referral. A standard consult form is used for most specialties to create a consistent referral experience.

REMINDER

Orthopaedic Surgery and Oncology Consult Requests have special referral forms that open when creating a Consult Request.

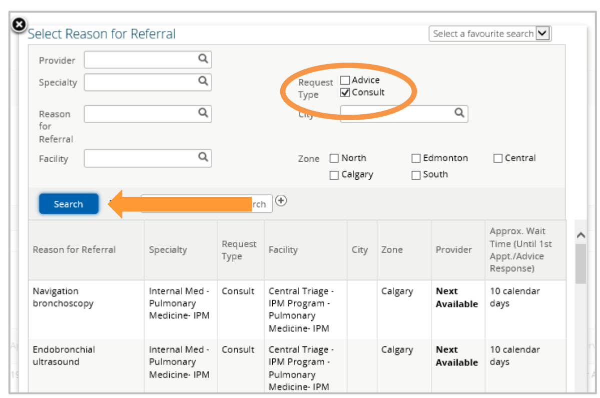
1. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI). Press ***Search*** to bring up a list.
2. Select the patient from the populated list.
3. Open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



- Review the alert and information messages under ***Information*** at the top of the screen.
- Review the patient's existing ***Drafts*** and ***In Progress*** lists below the ***Select a Form*** section to ensure you are not about to create a duplicate referral.

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

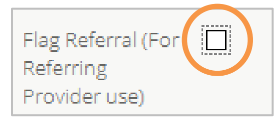
   If you don't know the desired reason for referral or would like to see what options are available, click ***Browse*** to open the ***Health Services Catalogue***. Click ***Consult*** beside ***Request Type***. Click ***Search*** and select from the list that populates.



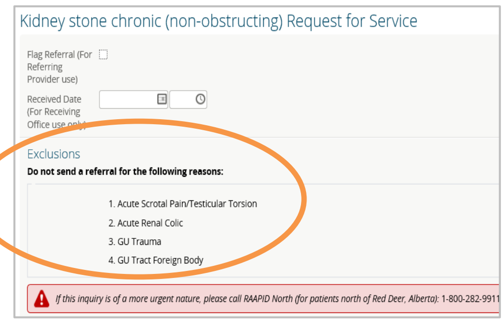
- There may be an Advice Request option for the same reason for referral, and if so, this option will appear on the ***Refer For*** drop-down menu. Select the ***Consult*** option and click ***Create*** to open the standard consult form.

- The standard consult form will populate. Note that on all forms, mandatory fields are denoted by (*) and must be completed to submit the Consult Request.

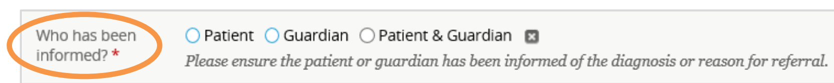
5 If you want the Consult Request to be flagged on your ***My Referrals*** dashboard worklists, click ***Flag Referral (For Referring Provider use)***.



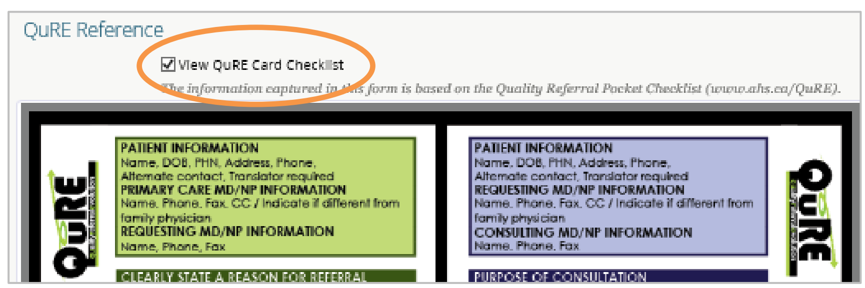
6 Review the ***Exclusions*** which are specialty and/or reason for referral specific to ensure that this Consult Request is appropriate.



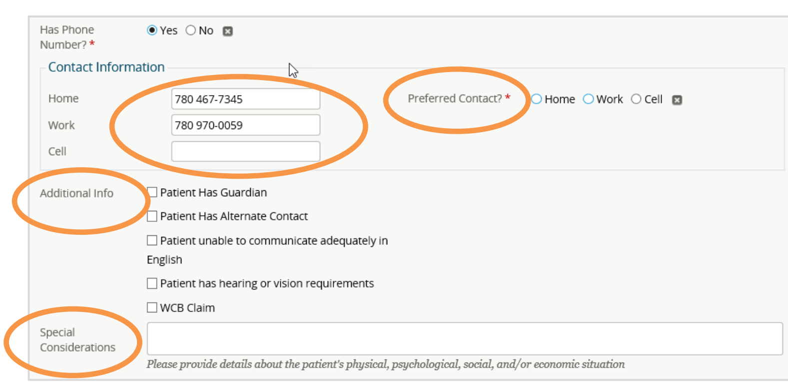
7 Next, use the radio buttons to indicate who has been informed of the referral being made.



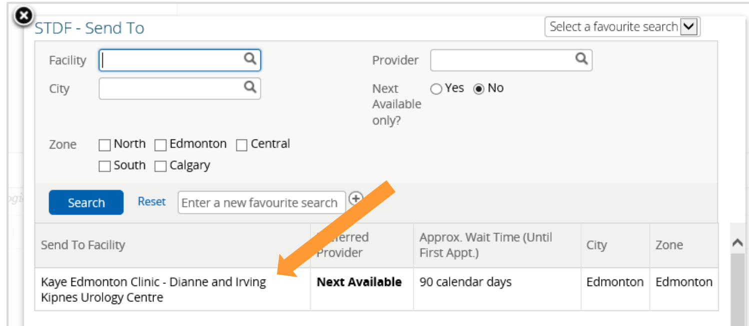
8 For helpful information to complete your Consult Request, refer to the ***QuRE Card Checklist*** by clicking on the button under ***QuRE Reference***.



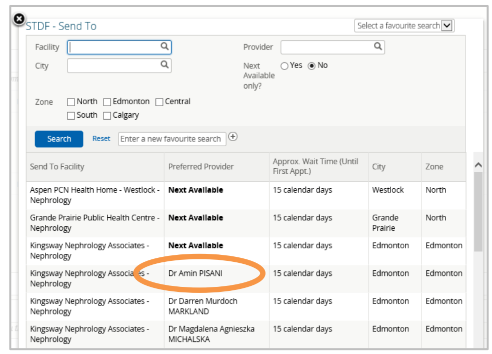
9 Scroll down to ***Patient Details***. The patient's address and phone number will be auto-populated from the patient *Electronic Health Record (EHR)*, but you can modify it if you need to. Please use the radio buttons to indicate preferred number. Continue filling out ***Additional Info*** *and* ***Special Considerations*** (e.g., patient's physical, psychological, social and/or economic situation).



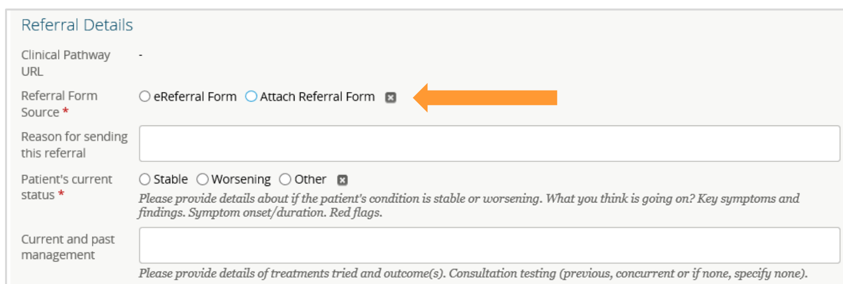
10 Choose the ***Referral Destination*** by clicking ***Add*** next to ***Send To***. A pop-up will open that will show you all of the facilities that can accept this Consult Request. Choose the appropriate facility from the list.



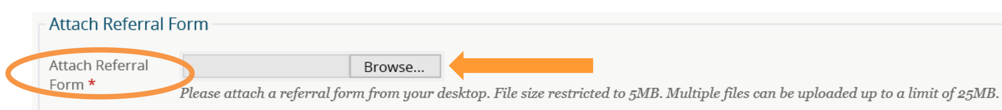
- Some specialties provide the option of sending directly to a specific physician, but others do not. If it is available, you can select a specific specialist.



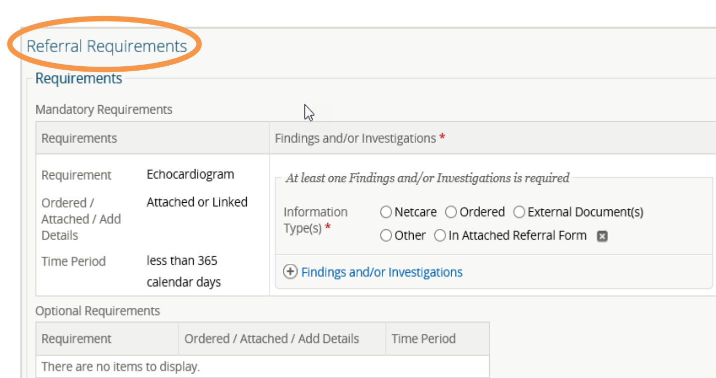
11 Complete the ***Referral Details*** section. There are two options: Either fill out the online eReferral form or attach an external referral form (e.g., QuRE referral form from your Electronic Medical Record (EMR)).



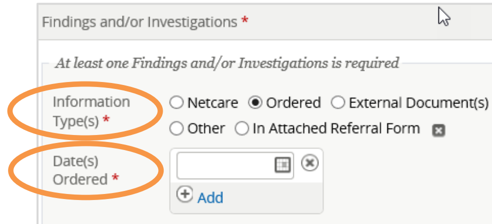
- If you are attaching an external referral form, locate the referral form from your computer by clicking ***Browse***.



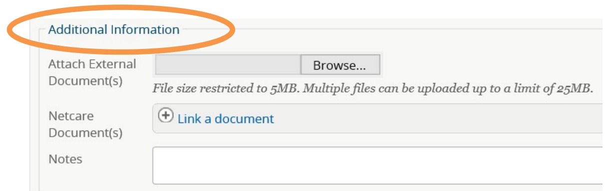
12 Complete the ***Referral Requirements*** section. Review the mandatory and optional requirements.



- On the right-hand side of your screen, you will see ***Findings and/or Investigations***. For each finding or investigation, click on one of the ***Information Type(s)*** and add in the ***Date(s) Ordered***.

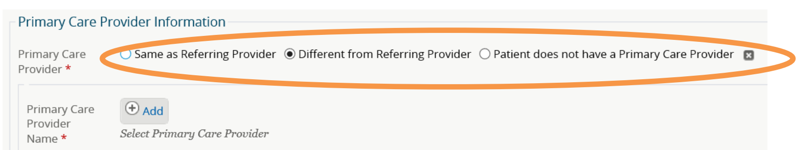


- The ***Additional Information*** section is available for any additional documents or notes you think would be helpful to the receiving provider when they triage the referral and see the patient.

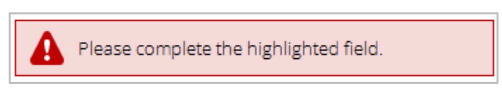


13 Confirm the ***Referring Provider*** section is complete with your (or the referring provider you're referring on behalf of's) name and the clinic's details. The clinic's details will auto-populate from ***My Details*** if added, and can be changed on this request if needed.

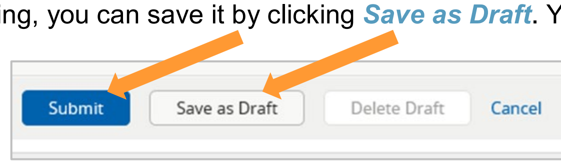
14 Beside ***Primary Care Provider***, click the appropriate radio button.



15 Scroll to the bottom of the page and click ***Submit*** to send the Consult Request to the specialty. If you did not complete all mandatory fields (marked by a *), 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, 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 Consult Request.



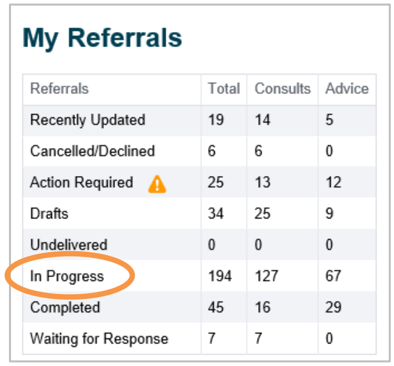
- Once you click *Submit*, the Consult Request will appear on your *My Referrals* dashboard on the ***In Progress*** and ***Recently Updated*** worklists with a status of ***Clerical Triage in Progress***.

NOTE:	If a Consult Request has been declined because it was incomplete or did not meet the criteria appropriateness, do not edit the referral to include more information or attachments. Please create a new Consult Request with the correct information.

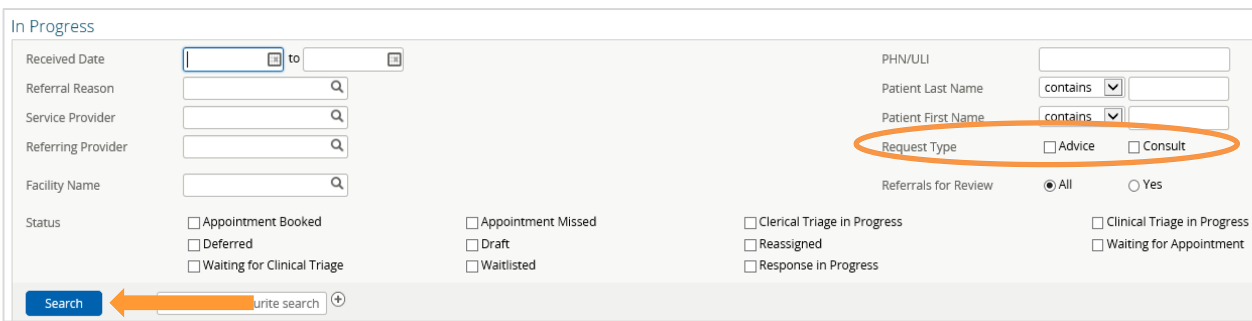
Review a Submitted Consult Request

At any point, you can review the status of a submitted Consult Request from the ***My Referrals*** dashboard.

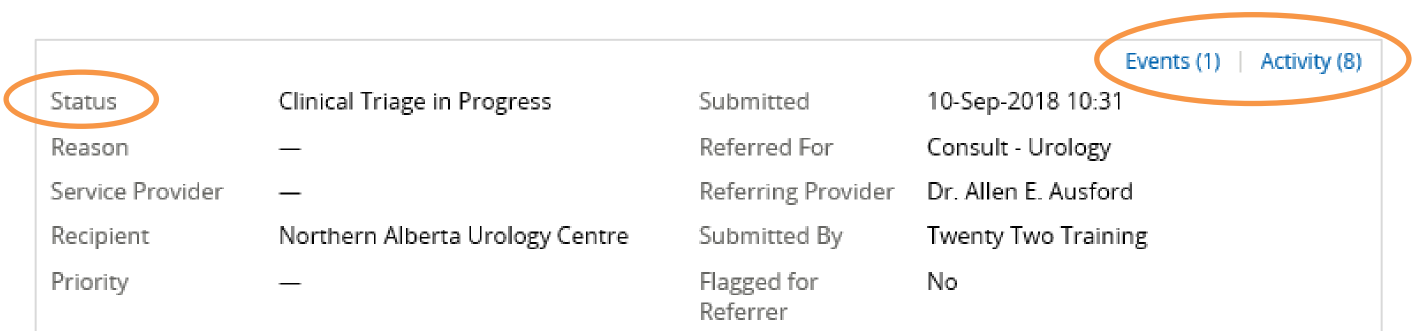
1 Click ***eReferral*** from the ***Clinical Portal Menu***. Click the ***My Referrals*** dashboard and then the ***In Progress*** worklist.



2 Beside ***Request Type***, select ***Consult*** and then click ***Search*** to generate a list of Consult Requests. You can further define the search by ***PHN/ULI***, ***Referral Reason***, or ***Status***.



3 Select the appropriate Consult Request from the list. Review the ***Status***, ***Notes***, ***Events***, and ***Activities*** occurring in the Consult Request to track its life cycle.



Respond to a Request for Additional Information

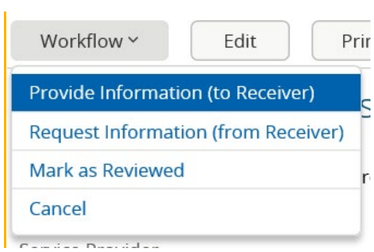
On occasion, the triage centre or responding provider may require additional information from you, the referrer. Follow these instructions to add more information.

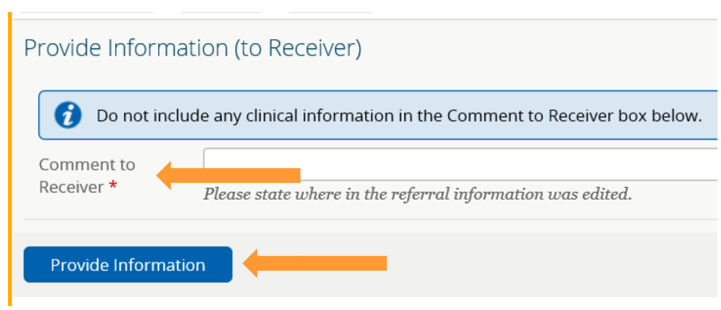
1 Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and select ***Action Required***.

My Referrals

Referrals	Total	Consults	Advice
Recently Updated	19	14	5
Cancelled/Declined	6	6	0
Action Required	25	13	12
Drafts	34	25	9
Undelivered	0	0	0
In Progress	194	127	67
Completed	45	16	29
Waiting for Response	7	7	0

2 From the ***Workflow*** menu, click ***Provide Information (to Receiver)***. Enter a ***Comment to Receiver***. Then click ***Provide Information*** to finish.





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