

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.

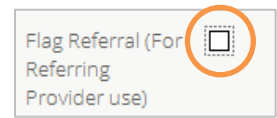
If you don't know the desired reason for referral or would like to see what options are available, click **Browse** to open the **Health Services Catalogue**. Click **Consult** beside **Request Type**. Click **Search** and select from the list that populates.

- 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.

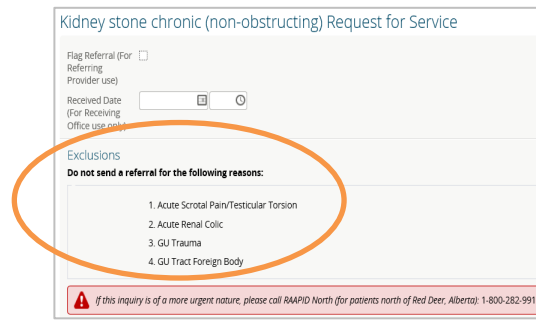
Reason for Referral	Specialty	Request Type	Facility	City	Zone	Provider	Approx. Wait Time (Until 1st Appt./Advice Response)
Navigation bronchoscopy	Internal Med - Pulmonary Medicine- IPM	Consult	Central Triage - IPM Program - Pulmonary Medicine- IPM	Calgary		Next Available	10 calendar days
Endobronchial ultrasound	Internal Med - Pulmonary Medicine- IPM	Consult	Central Triage - IPM Program - Pulmonary Medicine- IPM	Calgary		Next Available	10 calendar days

- 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.

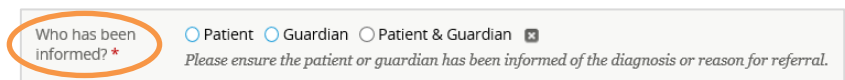
- 5 If you want the Consult Request to be flagged on your **My Referrals** dashboard worklists, click **Flag Referral (For Referring Provider use)**.



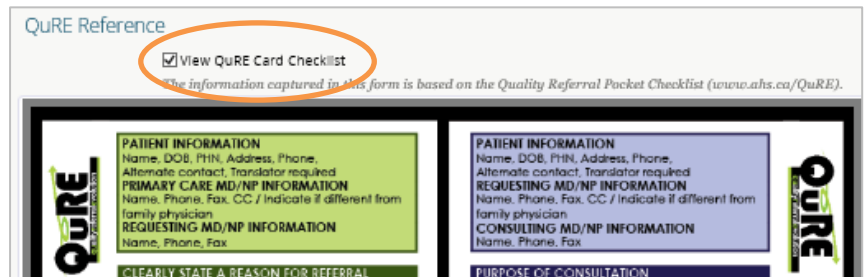
- 6 Review the **Exclusions** which are specialty and/or reason for referral specific to ensure that this Consult Request is appropriate.



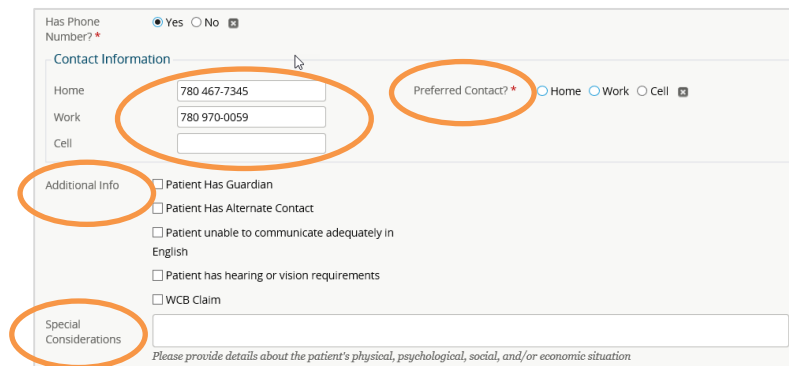
- 7 Next, use the radio buttons to indicate who has been informed of the referral being made.



- 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.

STDF - Send To

Facility: [Search] City: [Search] Zone: North Edmonton Central South Calgary

Provider: [Search] Next Available only? Yes No

Search Reset Enter a new favourite search

Send To Facility	Preferred Provider	Approx. Wait Time (Until First Appt.)	City	Zone
Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre	Next Available	90 calendar days	Edmonton	Edmonton

- 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.

STDF - Send To

Facility: [Search] City: [Search] Zone: North Edmonton Central South Calgary

Provider: [Search] Next Available only? Yes No

Search Reset Enter a new favourite search

Send To Facility	Preferred Provider	Approx. Wait Time (Until First Appt.)	City	Zone
Aspen PCN Health Home - Westlock - Nephrology	Next Available	15 calendar days	Westlock	North
Grande Prairie Public Health Centre - Nephrology	Next Available	15 calendar days	Grande Prairie	North
Kingsway Nephrology Associates - Nephrology	Next Available	15 calendar days	Edmonton	Edmonton
Kingsway Nephrology Associates - Nephrology	Dr Amin PISANI	15 calendar days	Edmonton	Edmonton
Kingsway Nephrology Associates - Nephrology	Dr Darren Murdoch MARKLAND	15 calendar days	Edmonton	Edmonton
Kingsway Nephrology Associates - Nephrology	Dr Magdalena Agnieszka MICHALSKA	15 calendar days	Edmonton	Edmonton

- 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)).

Referral Details

Clinical Pathway URL

Referral Form Source * eReferral Form Attach Referral Form

Reason for sending this referral: [Text Area]

Patient's current status * Stable Worsening Other

Current and past management: [Text Area]

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

Attach Referral Form

Attach Referral Form * [Browse...]

Please attach a referral form from your desktop. File size restricted to 5MB. Multiple files can be uploaded up to a limit of 25MB.

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

Referral Requirements

Requirements

Requirements	Findings and/or Investigations *
Requirement: Echocardiogram	At least one Findings and/or Investigations is required
Ordered / Attached / Add Details: Attached or Linked	
Time Period: less than 365 calendar days	

Information Type(s) * Netcare Ordered External Document(s) Other In Attached Referral Form

Optional Requirements

Requirement Ordered / Attached / Add Details Time Period

There are no items to display.

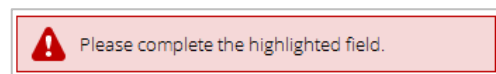
- On the right-hand side of your screen, you will see **Findings and/or Investigations**. For each finding or investigation, click on one of the **Information Type(s)** and add in the **Date(s) Ordered**.

- 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.

- 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.

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

- 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.

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 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*.

In Progress

Received Date: [] to []

Referral Reason: []

Service Provider: []

Referring Provider: []

Facility Name: []

Status:
 Appointment Booked
 Appointment Missed
 Clerical Triage in Progress
 Clinical Triage in Progress
 Deferred
 Draft
 Reassigned
 Waiting for Appointment
 Waiting for Clinical Triage
 Waitlisted
 Response in Progress

PHN/ULI: []

Patient Last Name: [] contains []

Patient First Name: [] contains []

Request Type: Advice Consult

Referrals for Review: All Yes

Search [] Write search []

- 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.

Status	Clinical Triage in Progress	Submitted	10-Sep-2018 10:31
Reason	—	Referred For	Consult - Urology
Service Provider	—	Referring Provider	Dr. Allen E. Ausford
Recipient	Northern Alberta Urology Centre	Submitted By	Twenty Two Training
Priority	—	Flagged for Referrer	No

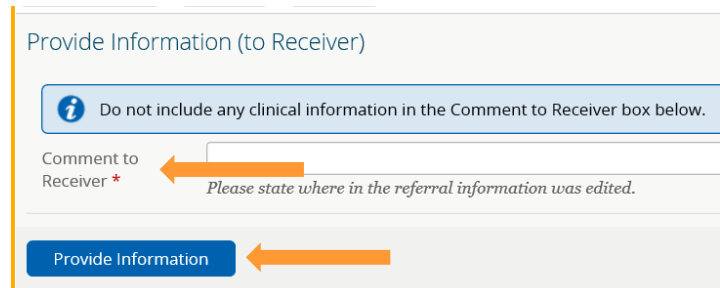
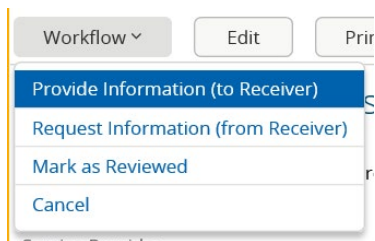
Respond to a Request for Additional Information

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**.

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.

A screenshot of a form titled 'Provide Information (to Receiver)'. At the top, there is an information icon and a warning: 'Do not include any clinical information in the Comment to Receiver box below.' Below this is a text input field for 'Comment to Receiver *' with a red asterisk. A blue arrow points to this field with the text 'Please state where in the referral information was edited.' At the bottom of the form, there is a blue button labeled 'Provide Information' with another blue arrow pointing to it.

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