EREFERRAL QUICK REFERENCE:

How to Create/Review a Consult Request



Configuring My Details

By adding yourself as a Referring Provider you will be able to see your referrals in *My Referrals*.

- Click on the *My Details* icon above the *Logout* button in the top left hand column.
- 2. If you are the referring provider, scroll down to the *Referring Provider Referrals* section. Click on the magnifying glass.

Referring Provider Referrals				
Referring Provider	۹.			

OR

If you are referring on behalf of a provider, scroll down to **Referring Provider Referrals on Behalf Of** section. Click **Add**. You may add multiple providers in this section.

Referring Provider Referrals On Behalf Of				
Referring Provider	+ Add	-		

 Type your first and last name or the name of the provider you are referring on behalf of (as per CPSA) in the box and click *Search*.

Provincial Provider Registry				
First Name	Last Name			
Search	er a new favourite search			

- 4. Once the list displays, click on your name or the referring provider's name and then complete the section with the clinic's demographics. This information will be prepopulated into all future referrals.
- At the bottom of the page click *Update Preferences* to validate your updates.
- 6. Click the *Home* icon to return to your homepage.

Creating a Consult Request

A standard consult form is used for multiple specialties to create a consistent referral experience.

RONIC HEALTH RECORD

Alberta

 Open the patient's record and click the *Create Referral* icon on Patient *Context Menu*, along the top right side of the screen.

ORION* «	# 42534-6114 SIMPSON,	Geor	ge (M/85 years)	1 4 4 4 1 🕫 🛙	. 🖲 🂊 🐉 🔇	04-May
training15	Showing all documents	XÞ	View By Category	Look For	🗆 C Status 🐴	Clear
G C Logout	Mark selected document as unread		Patient Demo	graphics	-	
✓ Common My Details	Dynamic Patient Summary Medication Profile		SIMPSO	N, George		
O Worklists	 Referrals - In Progress (47/48) Referrals - Completed/Cancelled 	(3/3)	Date Of Birth	22-Jun-1930		(403)
Favourites	Blood Bank (18/21) Chemistry (83/100)		Age	85 years	Home Phone	6789
+ Searches	Coagulation (83/86)		Sex	М	Work Phone	
▶ eReferral			Eligibility Start Date		Cell/Alternate Phone	
eReterral Reports Patient Lists				Note: Future-dated and blank eligibility start dates should be confirmed in Person		
+ Clinical eTOOLS			Address	512 10 Avenue Sw. Calgary		
Resources			(Primary)	AB, CANADA, T2N 0Z9		
 Enhancement Request 			AH Address (Mailing)	512 10 Avenue Sw, Calgary, AB, CANADA, T2N 029		
▶ Messaging				Print	Data Inquiry	More

2. Enter a reason in the *Reason for Referral* field and click *Create*; or click *Browse*.

Request for S	ervice		
Select a F	orm		
Reason for Referral *		Q Browse	
	Create		

 Click *Browse* (see above) then click *Request Type Consult*. You can further sort by Specialty, Reason for Referral and or Zone. Select from the list that populates.

Select Reaso	on for Refe	rral				Select a fav	ourite search 🔽
Provider		Q					
Specialty		Q	Request Ty	pe □ Adv ☑ Cor	ice Isult ┥		
Reason for Referral		Q	City			Q	
Facility		Q	Zone	North		dmonton	Central
				Calgar	y 🗆 S	South	
Search Reset	Enter a new favou	rite search	٠				
Reason for Referral	Specialty	Request Type	Facility	City	Zone	Provider	Approx. Wait Time (Until 1st Appt./Advice Response)
Fecal Immunochemical Test (FIT) Positive Finding	Internal Med - Adult Gastroenterology	Consult	Single Hub Access Referral Program (SHARP) - Adult Gl		Edmonton	Next Available	56 calendar day
Superior vena cava obstruction	Oncology - Lung Cancer	Consult	Margery E. Yuill Cancer Centre	Medicine Hat	South	Next Available	19 calendar day
Non small cell lung cancer	Oncology - Lung Cancer	Consult	Margery E. Yuill Cancer Centre	Medicine Hat	South	Next Available	19 calendar day

4. Click Create to open the Consult Request form.



- 5. The standard consult form will populate. Review the *Exclusions* (specialty specific).
- Continue scrolling. All mandatory fields (denoted by *) must be completed. Refer to the QuRE card Checklist.

QuRE Reference			
	View QuRE Card Checklist		
Th Cl	he information captured in this form is based on the Quality Referral Pocket hecklist (www.ahs.ca/QuRE).		

- 7. Complete Patient Details, including Additional Information and Special Considerations.
- Choose Referral Destination by clicking Add next to Send To. Choose the applicable site or location to send the consult request to.
- 9. Complete the *Referral Details* section and *Referral Requirements.*

Note: Option to attach referral form from another source such as your EMR. See instructions document here: <u>www.albertanetcare.ca/ereferral.htm</u>

- 10. Confirm the *Referring Provider* section is complete with the referring provider's name, and the clinic's demographics as completed in your *My Details*. See *Configuring My Details* on page 1, steps 1-6 of this document.
- Scroll to the bottom of the page and click *Submit* to finalize and submit the consult request to the appropriate referral triage centre for review. To successfully submit a referral, all mandatory fields (denoted by *) must be completed.

Note: A consult request can be saved as a draft at any time by clicking **Save as Draft** at the bottom of the form. Mandatory fields do not have to be completed for saving. Please note that a saved form is **not** available for review by a triage centre or provider.

Reviewing Consult Requests

At any point, a user can review the status of their consult request, by clicking on *My Referrals* from the *eReferral* tab on the *Menu Bar*.

 Click *eReferral* from the *Menu Bar* located on the left side of the screen. Click *My Referrals,* and then click *In Progress*.

My Referrals			
Referrals	Total	Consults	Advice
Recently Updated	11	8	3
Cancelled/Declined	10	10	-
Action Required	55	15	40
Drafts	21	11	10
Undelivered	0	0	0
In Progress	224	145	79
Completed	113	6	107
Waiting for Response	7	7	0

 Select *Consult* and then click *Search* to generate a list of consult requests. Further define the search by *PHN*, *Referral Reason* or *Status* of the consult request.

n Progress	5			Select a favourite search
Received Date				
Status	Draft Waiting for Clinical Triage Deferred	Reassigned Clinical Triage in Progress Appointment Booked	Waiting for Clencal Triage Waiting for Appointment	Clerical Triage in Progres Waitlisted
Request Type	Consult	Advice		

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.



Responding to a Request for Additional Information

On occasion, the triage centre or provider may require additional information from you. To respond to a request for additional information:

 Click *eReferral* from the *Menu Bar* located on the left side of the screen. Click *My Referrals*, and select *Action Required*.

My Referrals			
Referrals	Total	Consults	Advice
Recently Updated	11	8	3
Cancelled/Declined	10	10	-
Action Required	55	15	40
Drafts	21	11	10
Undelivered	0	0	0
In Progress	224	145	79
Completed	113	6	107
Waiting for Response	7	7	0

- 2. Select *Consult* for *Request Type* and *Search*. Click the consult request from the list to open it.
- From the Workflow menu, click Provide Information (to Receiver). Enter a Comment to Receiver as applicable. Then click Provide Information.

Workflow∽	Edit	Print				
Provide Information (to Receiver)						
Request Informat	ion (from Re	ceiver)				
Mark as Reviewed	Mark as Reviewed					
Provide Information (to Re	Provide Information (to Receiver)					
Do not include any clinical information in the Comment to Receiver box below. Comment to Receiver * Please state where in the reference information was edited.						
Provide Information Cancel	-					

 Click *Edit* from the top task bar and scroll to the section that you will update/provide requested information.



 When editing is complete, scroll down to the bottom of the page, click *Save*, then click *Yes*, and then *Edit* to send back to the Specialist for review.

