eReferral
User Guide

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Version 1.6

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Overview

The Alberta Netcare eReferral application replaces the current paper and fax-based referral process.

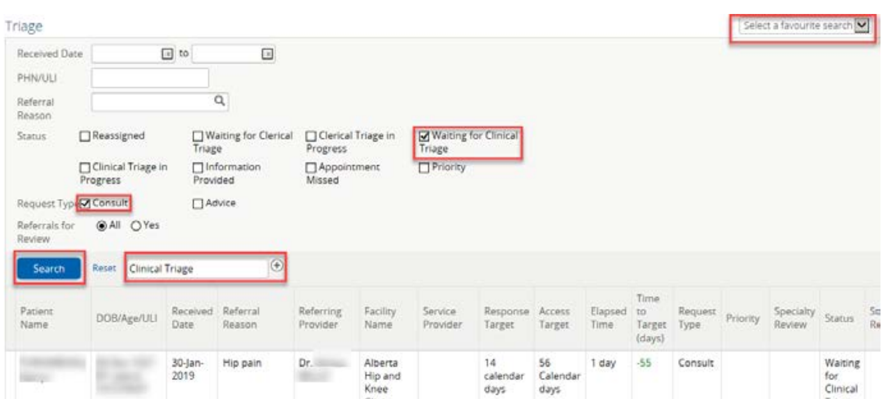
The goals of eReferral are to:

- develop and maintain a complete provincial health service catalogue to support transparency into care options
- standardize the referral and triage criteria for specialties
- establish consistent operational policy regarding service response times
- increase transparency of service availability, wait time, request tracking and referral status reporting

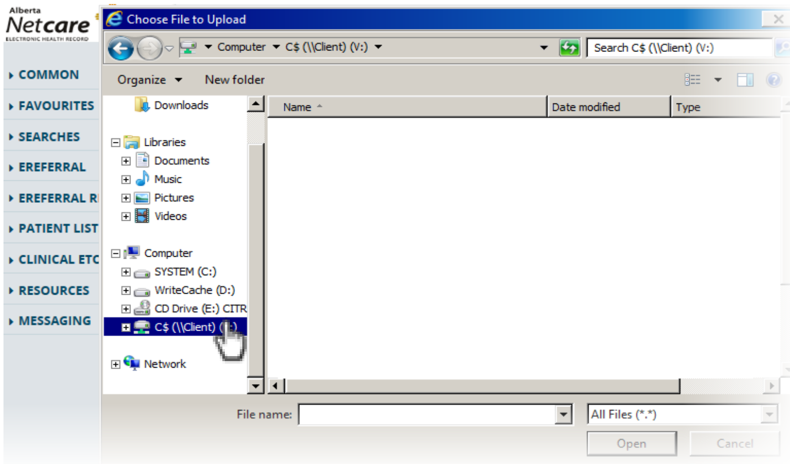
eReferral offers two service types; non-urgent advice request with a response within five calendar days and non-urgent consult request for an in-person consultation.

Optimizing eReferral Use

- All fields indicated with * are mandatory
- Advice requests are billable by referring provider **eConsult 03.01R** and receiving provider **eConsulto 3.01O**
- After completing **My Details** as a support staff the first provider listed in the **Referring Provider on Behalf Of** section will be the default **Referring Provider** when creating referrals. You may be required to change this field to the correct referring provider if referring on behalf of more than one provider.
- The referring provider contact information from the **Referring Provider** section in **My Details** is auto –populated into an advice or consult request. If the provider works at multiple sites, the clinic details (address, phone and fax number) can be left blank in **My Details** and then added manually on each advice or consult request. You can also allow it to default to the contact information in **My Details** and then change manually as needed in each advice or consult request as applicable.
- Throughout eReferral there are opportunities to **Set Favourites** to minimize clicks and have the applicable information present without having to search or filter.
    - For example, if your role is clinical triage for consult requests, select the status **Waiting for Clinical Triage** and request type **Consult** then click **Search**. Set this search as a favourite by typing its name in the **Enter a new favourite search** field and select the ⊕ icon. Now when you open your triage worklist you can select your favourite search from the drop down menu in the top right corner to generate the list of appropriate referrals.



- You can simply attach any document from your EMR to an eReferral once you have moved the document outside of your EMR (into a documents file or on your desktop) - * note the file size must be 1Mb or less
    - Click link external document
    - Select Computer
    - Then select the drive with $

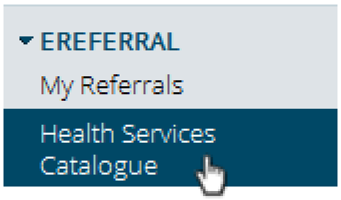


    - From the list that loads select Users
    - Then click on your name
    - Then select desktop or documents (whichever location you saved the document from your EMR)
    - Then click on the applicable document and it will be attached to the eReferral

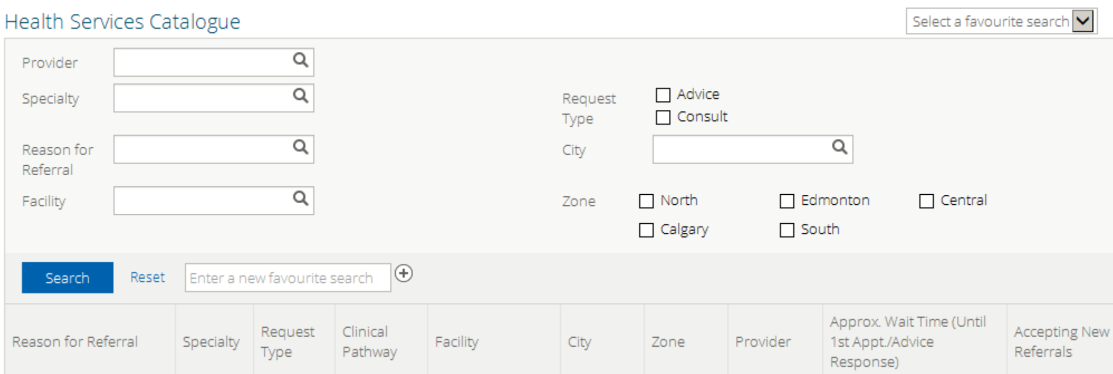
Health Services Catalogue (HSC)

The Health Services Catalogue (HSC) contains all the pertinent referral information for specialties available in eReferral and is used in the platform when creating a request to create transparency into what options are available. The information includes reason for referrals, referral requirements, specialties, facilities, clinical pathways, providers and approximate wait times within Alberta's North, Central, South, Calgary and Edmonton zones.

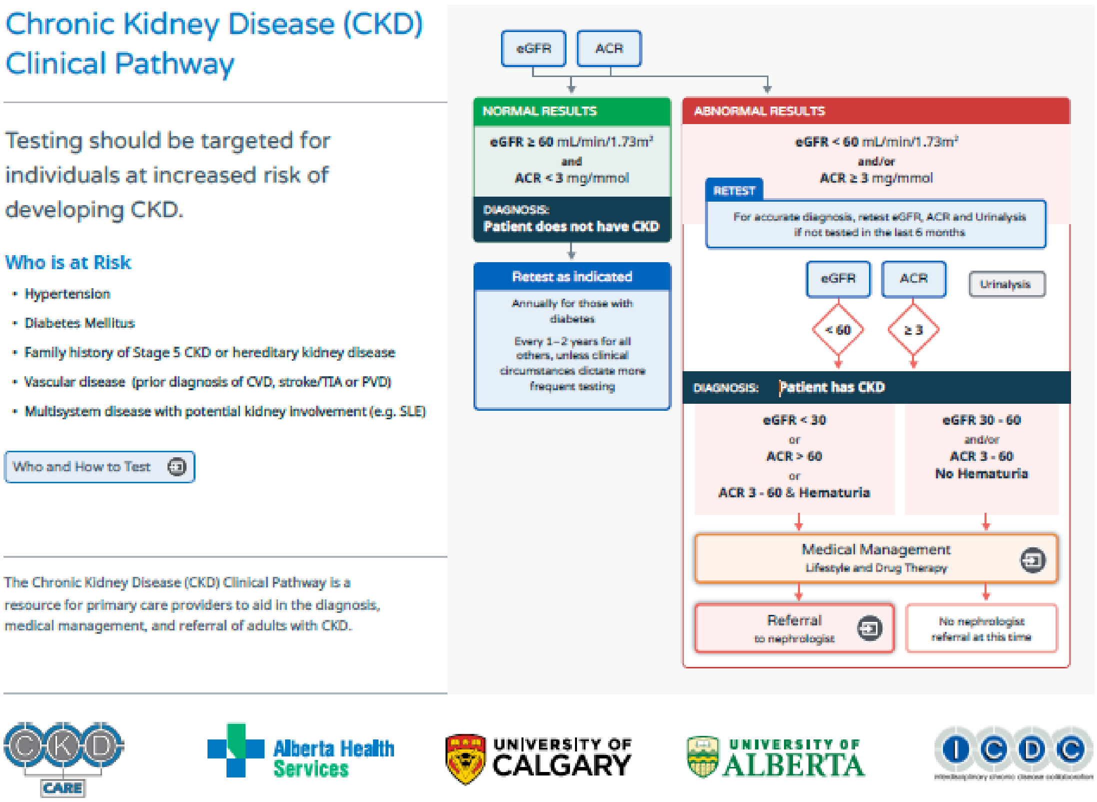
- Select **eReferral → Health Services Catalogue**



- Enter 3 or more characters into any search field. Wait for the matching information to display, then click to select any item.



- The user default for Preferred Zone is specified on the *My Details* page. Click any zone options to change the default to another zone or all zones.
- **Search** – returns all matching details. **Reset** – clears search criteria.
- Sort results by clicking a column title. Click again to reverse the sort.
- Click an entry to view related information:
  - Reason for Referral – indicating specialty details, exclusions, mandatory requirements, and optional requirements.
  - Specialty – accepted reasons for referral for advice request and consult request.
  - Request Type - advice request and consult request.
  - Facility – indicating specialty name, room number, address, hours of operation, telephone/switchboard, wheelchair accessibility, parking, on site directions and website details.
  - Provider – provider details (name), spoken languages, and consultations offered and contact numbers.
  - Clinical Pathway – an interdisciplinary care map to manage a specific health condition.
    - Example of Clinical Pathway for Chronic Kidney Disease:

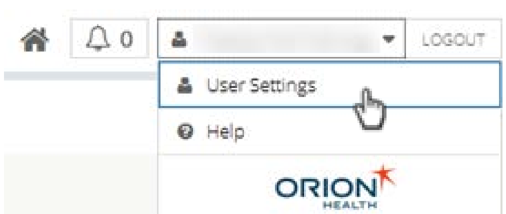


Configuring *My Details* to Submit a Referral

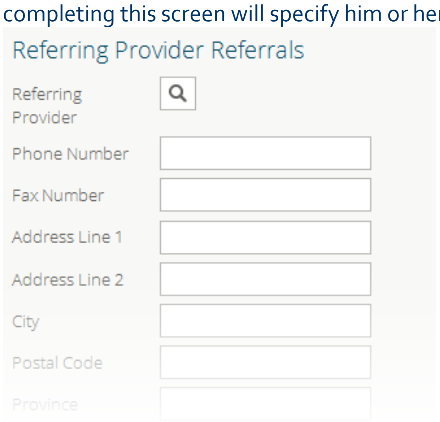
If you have access to the eReferral menu and My Referrals menu items, you will be able to create referrals. Before you can submit a referral, your provider information must be populated in the ***My Details*** page in Alberta Netcare Portal.

- Log in to Alberta Netcare Portal.
- Select **Common → My Details** or click *User Settings* from the menu below your username.

or

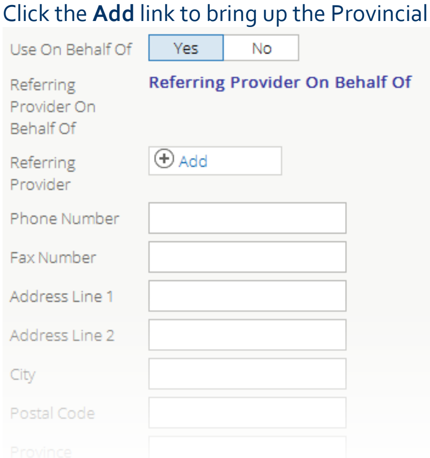


- If you will be creating referrals as the referring provider scroll until the **Referring Provider Referrals** details panel is visible. Select the magnifying glass and search for referring provider's full name in the Provincial Provider Registry (as per CPSA). Select the appropriate referring provider from the list. Enter clinic demographics (these are not validated). A provider completing this screen will specify him or herself during the referral creation process.

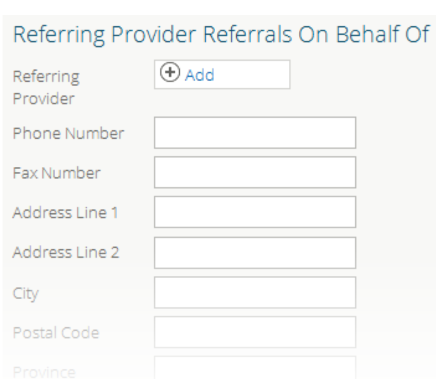


- If you as the referring provider will be submitting referrals on behalf of another provider, the **User On Behalf Of** field should be checked **Yes.**

- Click the **Add** link to bring up the Provincial Provider Registry search.



- If you are support staff and creating/submitting referrals on behalf of a provider or providers scroll until the **Referring Provider Referrals on Behalf Of** details panel is visible. Select **Add** and search for the referring provider's full name (as per CPSA). Select the appropriate referring provider from the list. Enter clinic demographics (these are not validated). Support staff will specify the appropriate provider during the referral creation process.



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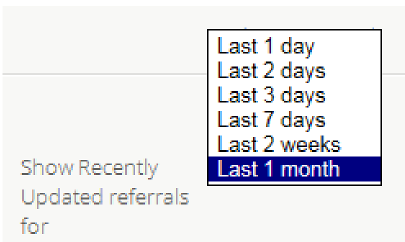
Alberta Netcare ELECTRONIC HEALTH RECORD

- Enter the **First Name** and the **Last Name,** and then click **Search.**
- The search will return selections. Select the appropriate provider from the list. This information will populate the **Referring Provider** field.
- NOTE: This process can be repeated to select each provider you will be submitting referrals on behalf of. The first provider you select will appear as a default when you create a request.
- Complete the remaining fields: **Phone Number, Fax Number, Address Line 1, Address Line 2, City, Postal Code, and Province.**
- Set the **Show Recently Updated Referrals For** setting to limit how long you want the referral in the Recently Updated folder.

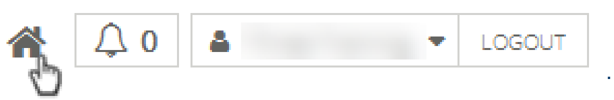


- Click **Update Preferences** to save changes.

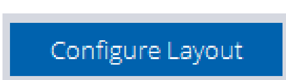
Setting Up the Homepage to Include Referral Information

If you are submitting requests through eReferral it is helpful to configure your homepage so you can view your My Referrals dashboard immediately when you log into Alberta Netcare Portal.

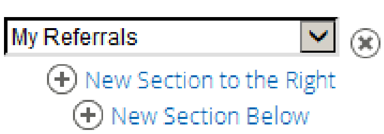
- Click on the **Home** icon in the top right menu bar of the screen.



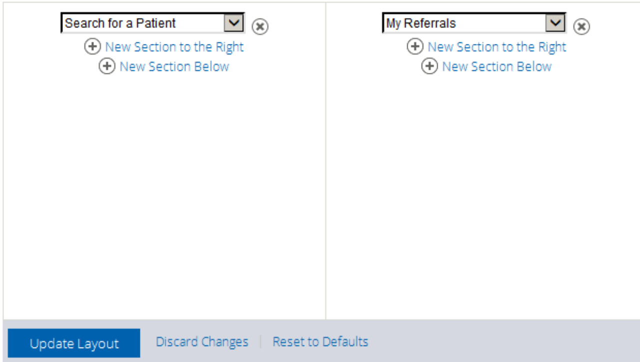
- Scroll to the bottom of the homepage, and click **Configure Layout**.



- Divide the Homepage into the desired windowlets. Add a new section to the right or below, then select **My Referrals** from the drop-down list.



Here is a suggestion for the homepage windowlet configuration: **Search for a Patient** (top left) and **My Referrals** (top right).

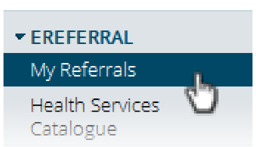


- Scroll to the bottom of the page and click the **Update Layout** button to save the configuration. Confirm the homepage appears with the new configuration.

Viewing the My Referrals Dashboard

Referring providers and support staff are able to view a list of consult requests and advice requests they have created either for their patients or on behalf of a provider.

- Select **eReferral → My Referrals** to display a dashboard grouped by Status:



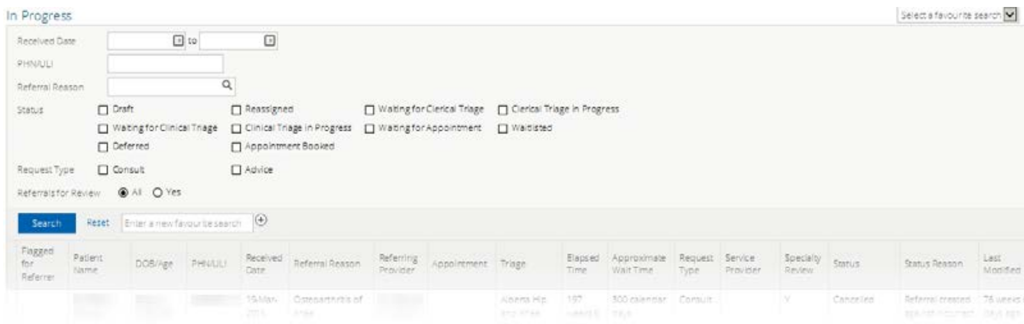
My Referrals

Referrals	Total	Consults	Advice
Recently Updated	0	0	0
Cancelled/Declined	0	0	-
Action Required	3	1	2
Drafts	1	1	0
Undelivered	0	0	0
In Progress	16	12	4
Completed	8	1	7
Waiting for Response	0	0	0

  - **Recently Updated** – referrals whose content has been updated in the last 7 days. This default value can be changed in the *My Details*. See the section ***Configuring My Details to Submit a Referral*** on page 5-7).
  - **Cancelled/Declined** – the triage centre has cancelled or declined the consult request and has provided a reason in the comment field. The referral will/may require further action by the referring provider.
  - **Action Required** – referrals requiring information requested by triage or by the receiving provider.
  - **Drafts** – incomplete referrals (not submitted) waiting further input and submission.
  - **Undelivered** – pending referrals or referrals that are unable to be electronically sent or received. The system will automatically try to resend undelivered referrals; if a problem persists, reopen the referral and resubmit it.

- **In Progress** – referrals waiting for action by triage.
- **Completed** – all activity relating to this referral has been completed, including the patient has seen the consultant and the consultation letter has been sent to the referring provider.
- **Waiting for Response** – referrals that are awaiting additional information from the specialty.

- Selecting a worklist item opens a search screen listing the matching referrals.
  - Filter by *Received Date, PHN/ULI, Referral Reason, Status* and/or *Request Type* then click **Search.**
  - Sort the list by clicking a column title; click again to reverse the sort.



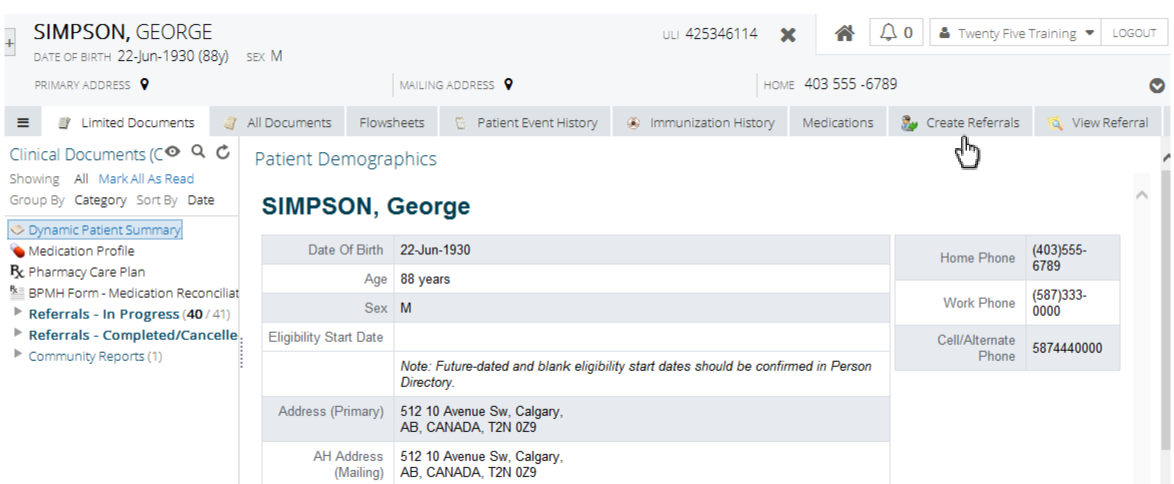
- Click a referral to view the contents.

Creating Advice Requests

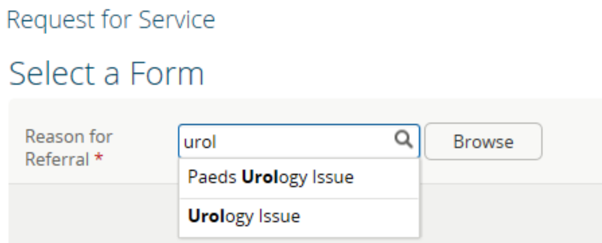
An advice request can be used when clinicians are unsure if a referral would be appropriate, or when they are seeking specialty advice for a non-urgent question.

As a referring provider:

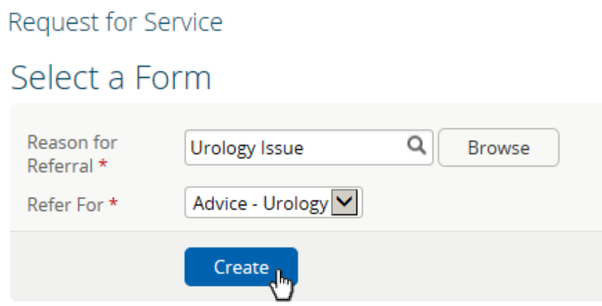
- Select the patient for whom you are seeking advice.
- Click the **Create Referrals** tab in the Context Menu.



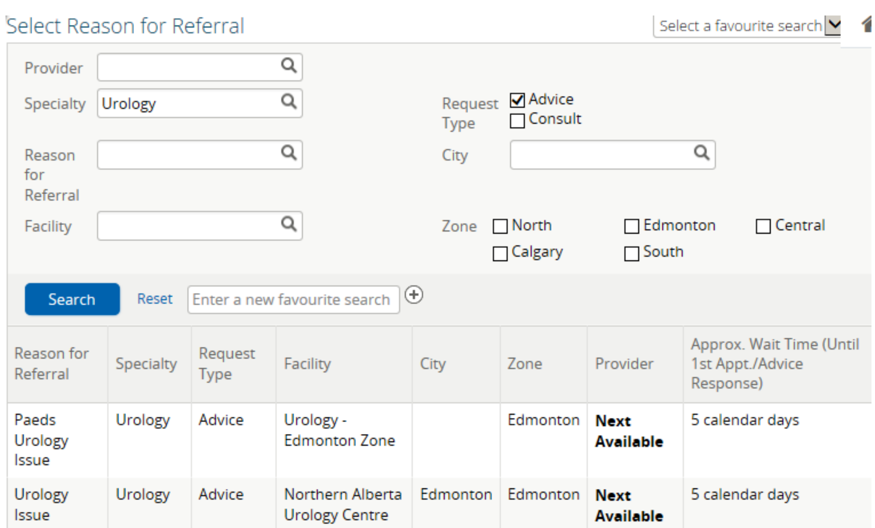
- Select the **Reason for Referral** by either…
    - Entering three or more characters of the reason you want in the search bar, and then select from the list of reasons for referral available for advice request.



Click the appropriate reason for referral. Ensure that the ***Refer For*** field indicates **Advice.** Click **Create**.

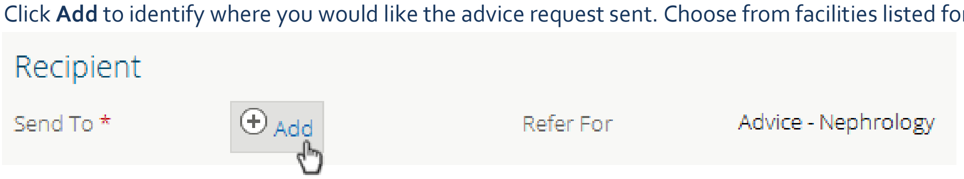


- Or click the **Browse** button to open a new search window. Enter a specialty and select **Advice** as ***Request Type*** then click the **Search** button to list the matching reason for referral and their approximate wait times. Click the appropriate reason for referral.



Reason for Referral	Specialty	Request Type	Facility	City	Zone	Provider	Approx. Wait Time (Until 1st Appt./Advice Response)
Paeds Urology Issue	Urology	Advice	Urology - Edmonton Zone		Edmonton	**Next Available**	5 calendar days
Urology Issue	Urology	Advice	Northern Alberta Urology Centre	Edmonton	Edmonton	**Next Available**	5 calendar days

- Click **Add** to identify where you would like the advice request sent. Choose from facilities listed for the specialty.



- In the *Advice Request Conversation* section click **Add**. Your name will auto populate if you have completed your ***My Details*** section. See the section ***Configuring My Details to Submit a Referral*** on page 5.

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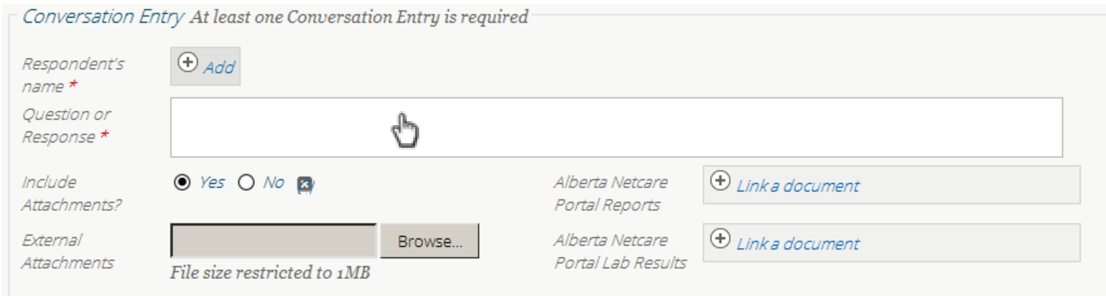
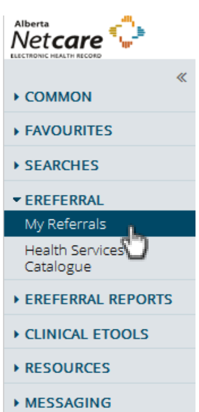
- Use the first conversation entry box to clearly describe your question including pertinent history and attachments. If **External Attachments** is required refer to the quick reference document **How to Attach an External Document to an eReferral**. To include reports and lab results available in Netcare on the advice request select **Link a document** and search for the report or results as they are identified in Netcare to attach them to this conversation entry.



- Confirm the Referring Provider Section is complete with your name, phone number and address as completed in your ***My Details*** section (page 4.
- Scroll to the bottom of the page and click **Submit** to finalize and submit the advice request to the appropriate specialty for review. To successfully submit a referral, all mandatory fields (denoted by *) must be completed. Once the advice request is submitted there is no way to delete or cancel it. Select **Save as Draft** if the advice request is not complete.

Viewing an Advice Request on the My Referrals Dashboard

- The advice request is a private conversation between the referring provider and the specialist and therefore not viewable from the patient's Electronic Health Record (EHR). Any advice request submitted will be viewable only to those who have the referring provider populated in their ***My Details***. See the section ***Configuring My Details to Submit a Referral*** on page 5.
- At any point, a user can review the status of their advice request, by clicking on **My Referrals** from the **eReferral** tab on the left side Menu Bar.

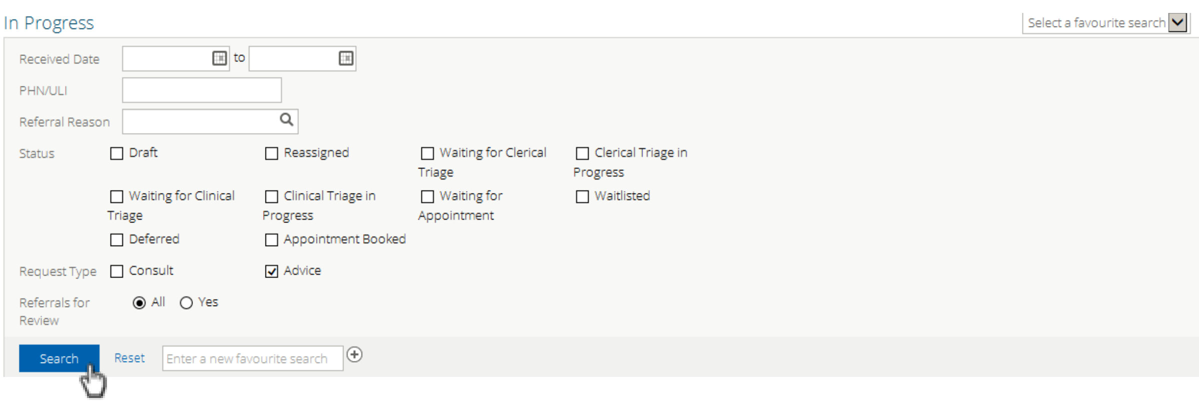


- Alternatively, users can access the My Referrals dashboard from the homepage if they have configured their home page. See section ***Setting Up the Homepage to Include Referral Information*** on page 7 to configure your homepage.
- Open the **My Referrals** dashboard and select a worklist to the view the list of applicable advice requests.

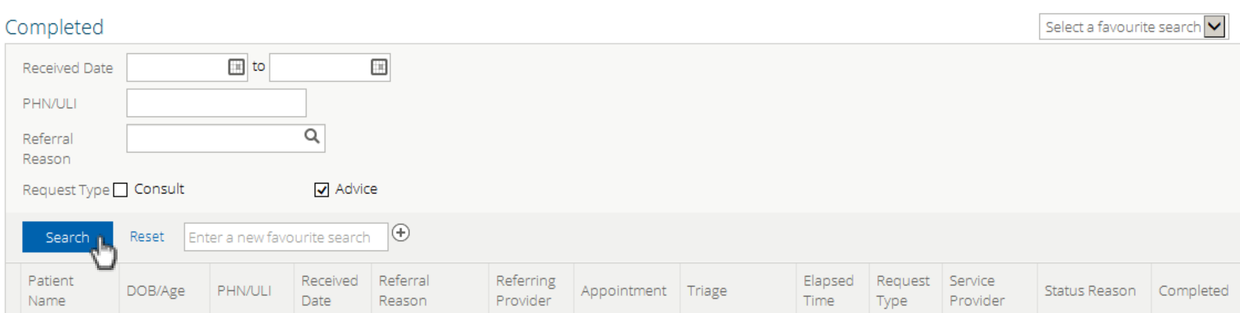
My Referrals

Referrals	Total	Consults	Advice
Recently Updated	9	2	7
Cancelled/Declined	10	10	-
Action Required	55	14	41
Drafts	21	11	10
Undelivered	0	0	0
In Progress	227	145	82
Completed	116	6	110
Waiting for Response	7	7	0

- Click either the **Recently Updated** or **In Progress** worklist to open a search screen that will include the new advice requests.
- Select **Advice** and then click **Search** to generate a list of advice requests. Further define the search by ***Received Date, PHN, Referral Reason*** or ***Status*** of the advice request.



- To review the specialist's response to your advice request, refer to **My Referrals,** click **Completed**, select **Advice** for ***Request Type***, and then **Search.**



- Select the appropriate advice request from the list and review the response from the specialist in the **Advice Request Conversation** area.

Advice Request Conversation

This section records the conversation between the referring and receiving providers.

Reviewing Advice Requests

A newly created (or any) advice request can be reviewed from your **My Referrals** dashboard.

My Referrals

Referrals	Total	Consults	Advice
Recently Updated	9	3	6
Cancelled/Declined	10	10	-
Action Required	55	14	41
Drafts	21	11	10
Undelivered	0	0	0
In Progress	227	145	82
Completed	116	6	110
Waiting for Response	7	7	0

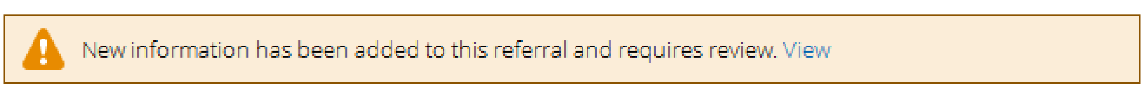
- Click either the **Recently Updated** or **In Progress** worklist to open a search screen that will include a list of referrals.
- Click on the desired advice request to open it. Once the advice request is open options include:

  - **Edit** – click to redisplay the referral in editable form.
  - **Print** – generate a printable PDF of the referral.

Editing an Advice Request

- Click the **Edit** button at the top of the referral and add new information to the referral by selecting **Add Conversation Entry**. Click the **Save** button and click **Yes** in the **Select *"Yes" to submit to specialty for review*** * section and click **Edit** to save the action.

- Selecting **Yes** results in a panel displayed with a note identifying that new information is present, along with a link to view it.



Action Required Worklist

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

- Select the **Action Required** worklist from the ***My Referrals*** dashboard.

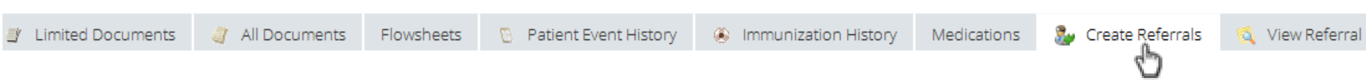
- Select **Advice** for **Request Type** and **Search**. Click the advice request from the list to open it.
- Click **Edit** from the task bar at the top. Scroll down and review the conversation entry provided by the specialist, including the request for additional information.
- Click **Add Conversation Entry** and then select **Add** to input the referring provider as the respondent/author of the entry just as you did for the initial request for advice. The referring provider's name must be entered in your ***My Details*** to populate this information. See the section ***Configuring My Details to Submit a Referral*** on page 5.

- Scroll down to bottom of the page, click the **Save** button and click **Yes** in the **Select *"Yes" to submit to specialty for review**** section and click **Edit** to save the action and send back to the specialist for review. The advice request is then removed from your action required worklist.

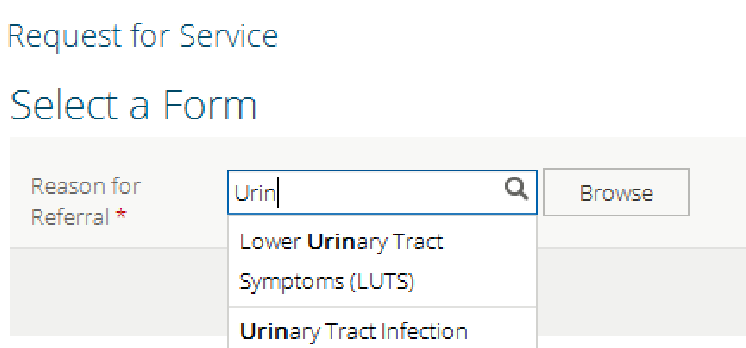
Creating Consult Requests

Select the patient for whom you are seeking consult for.

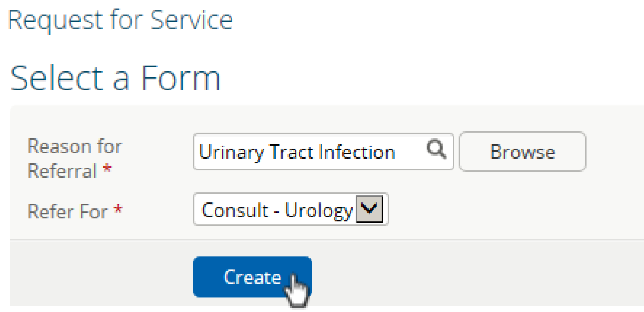
- Click the **Create Referral** tab in the Context Menu.



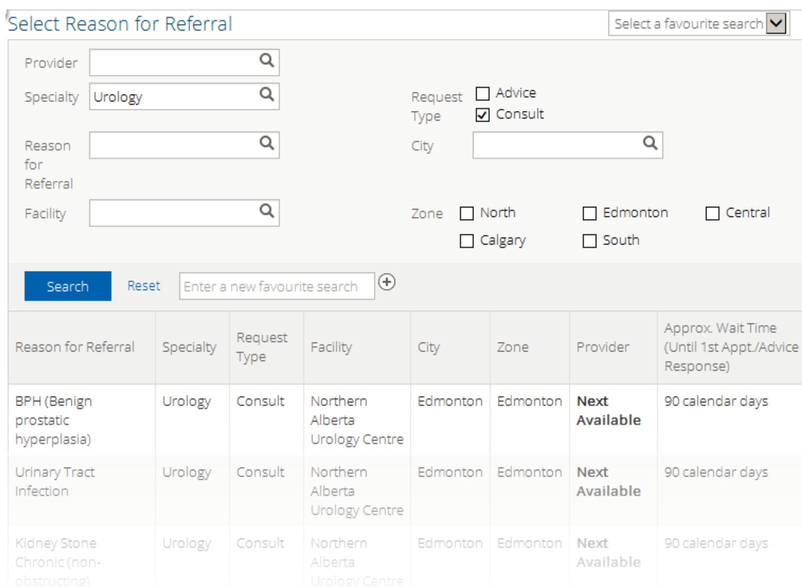
  - Review the alert and information messages under **Information** at the top of the screen.
  - Review the patient's existing **Drafts** and **In Progress** lists to ensure you are not about to create a duplicate of an existing referral.
- Select the **Reason for Referral** by either…
  - Entering three or more characters of the reason you want in the search bar, and then select from the list of reasons for referral available for consult request.



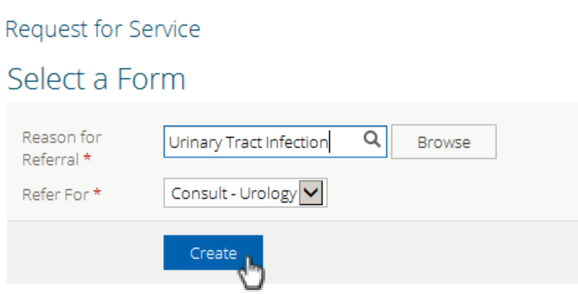
Click the appropriate reason for referral. Ensure that the ***Refer For*** field indicates **Consult.** Click **Create**.



- Or click the **Browse** button to open a new search window. Enter a specialty and select **Consult** as ***Request Type*** then click the **Search** button to list the matching reason for referral and their approximate wait times. Click the appropriate reason for referral.

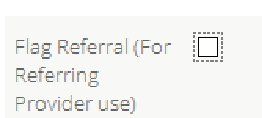


- Click the **Create** button.

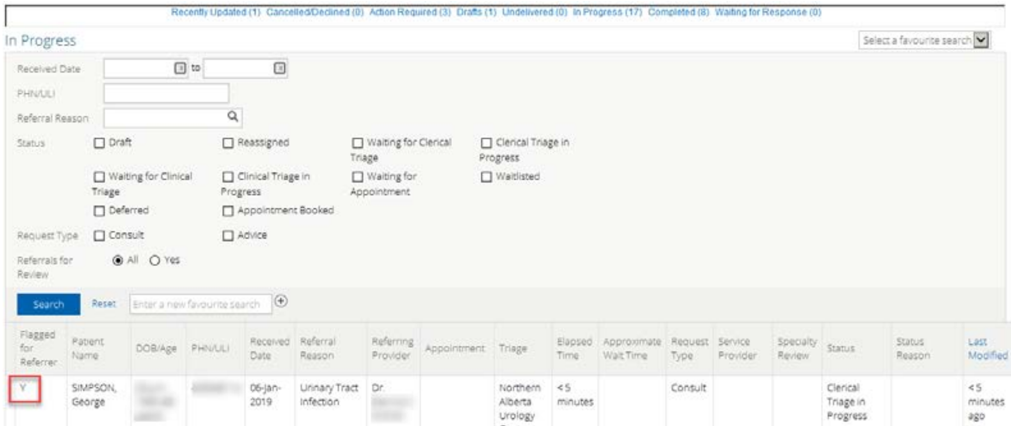


Request for Service and Exclusions

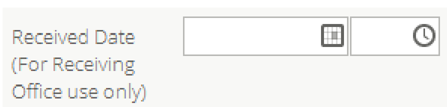
- **Flag Referral**- check this box as the provider if you want the referral to be flagged on your **My Referrals** dashboard worklists.



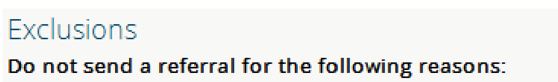
*Note the following is an example of the flag that will appear on your worklists.



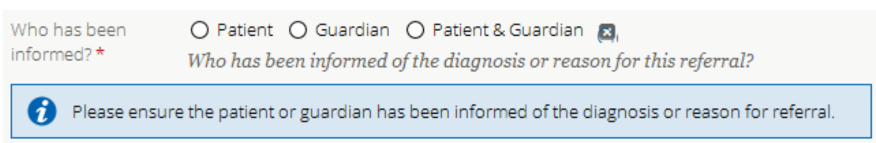
- The **Received Date** (for receiving office use only) field is used at a triage centre to record this information when a faxed or mailed referral is received.



- Review the **Exclusions** to ensure that this referral is appropriate and is not of a more urgent nature.

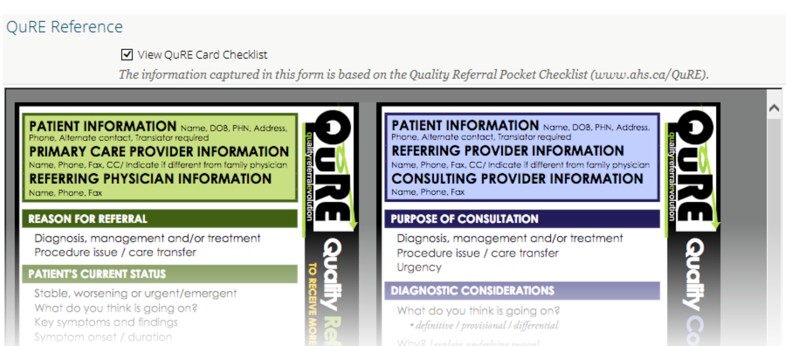


- Select **Patient, Guardian,** or **Patient & Guardian** next to ***Who Has Been Informed?*** of the diagnosis. This is a required field denoted by an asterisk *.



QuRE Reference

- Check the box to **View QuRE Card Checklist** to display the Quality Referral Pocket Checklist.
- Uncheck the box to close the QuRE Card Checklist.

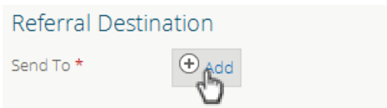


Patient Information and Patient Details

- Review the **Patient Information**
- Complete **Patient Details** including **Address, Phone Number,** and **Additional Information**.
    - A red asterisk * identifies the associated item as *required*.

Referral Destination

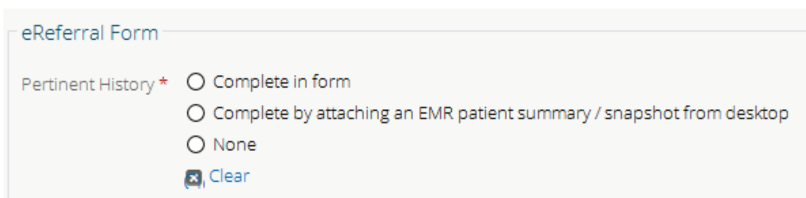
- Click **Add** to view a list of facilities currently accepting this consult request reason for referral.



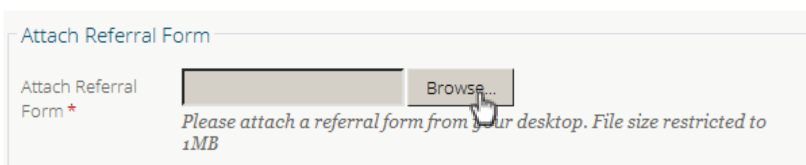
- Select the desired facility and it will populate into the ***Send To*** section.

Referral Details

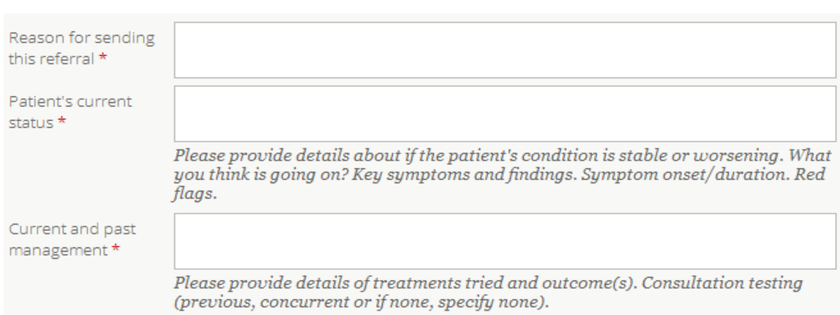
- **Referral Form Source** – choose the source – **eReferral Form** or **Attach Referral Form**
    - If **eReferral Form** is selected then complete the **eReferral Form** section with required ***Pertinent History*** and other required fields based on your selection.



    - If **Attach Referral Form** is selected – refer to the quick reference document **How to Attach an External Document to an eReferral**.

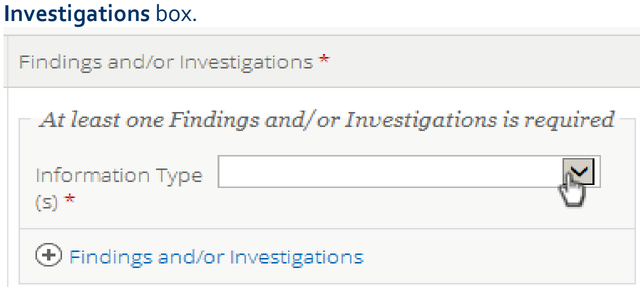


- Complete the required three fields marked by a red asterisk *:
    - **Reason for sending this referral**
    - **Patient's current status**
    - **Current and past management**



Referral Requirements

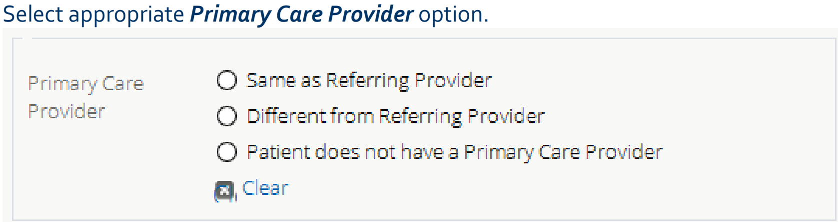
- Review the **Mandatory Requirements**
  - Identify how the requirements are available from the **Information Type** drop down menu within the **Findings and/or Investigations** box.



  - As per your selection complete the required fields marked by a red asterisk *.
- Complete the **Optional Requirements** and **Extra Information** fields as applicable**.**

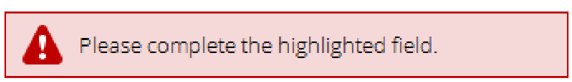
Providers

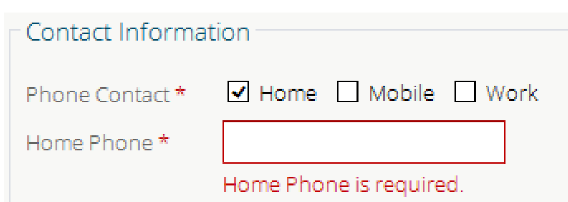
- Confirm that the **Referring Provider** information is complete and correct (this information should auto-populate from ***My Details***).
- Select appropriate ***Primary Care Provider*** option.



When the consult request is complete click **Submit**. This consult request will now appear on your **My Referrals** dashboard on the **In Progress** and **Recently Updated** worklists with a status of **Clerical Triage in Progress.**

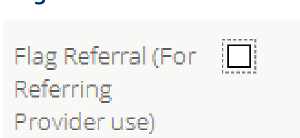
You will be alerted if you have missed any required fields marked by a red asterisk *.



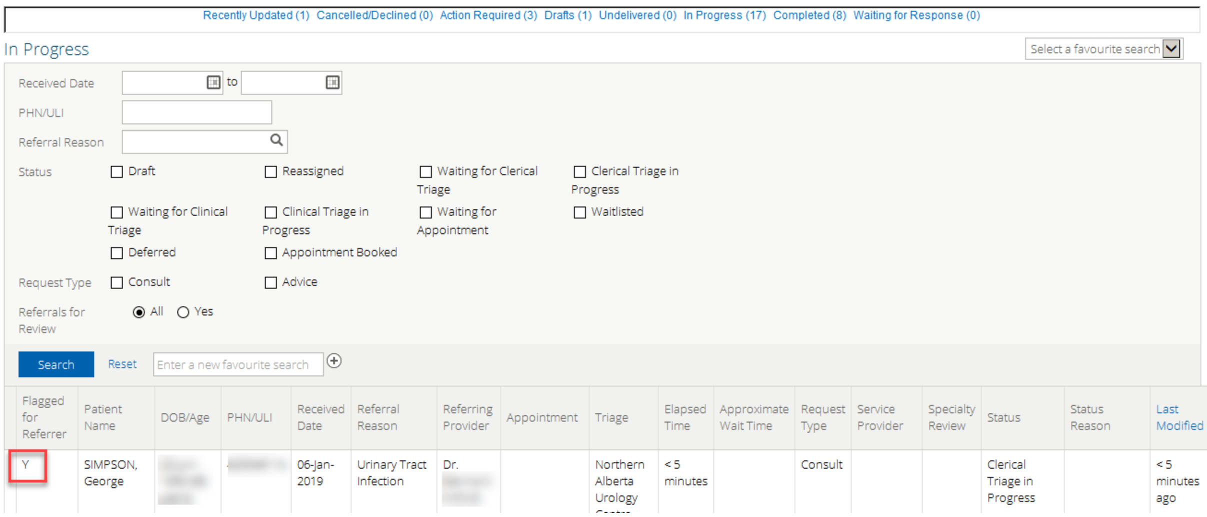


Orthopaedic Surgery Consult Requests

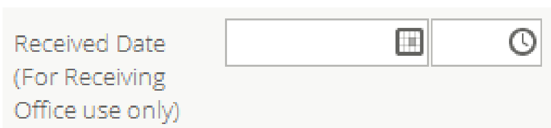
- **Flag Referral**- check this box as the provider if you want the referral to be flagged on your **My Referrals** dashboard worklists.



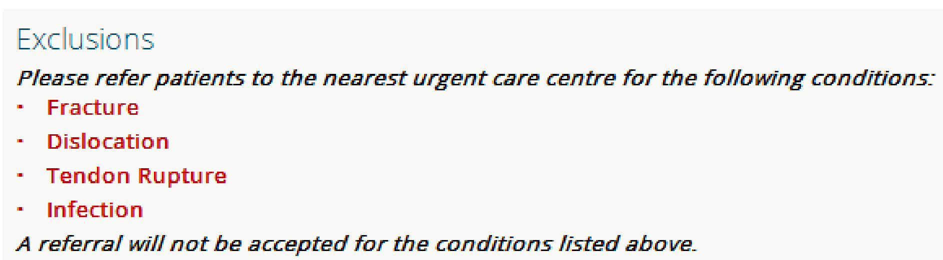
*Note the following is an example of the flag that will appear on your worklists.



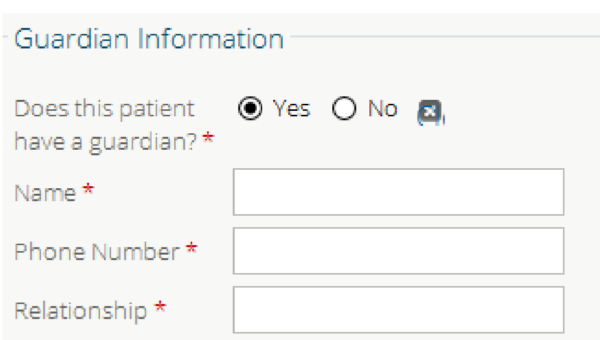
- **Received Date** (for receiving office use only) - used at a Triage Centre to record this information when a faxed or mailed referral is received.



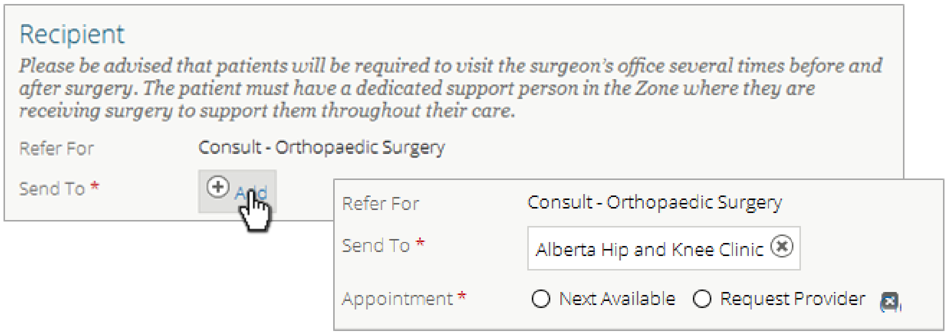
- Review the **Exclusions** to ensure that this referral is appropriate and is not of a more urgent nature.



- **Patient Information** – review the patient information and confirm it is current and correct, update as necessary. Additional required fields will present based on selections.
- **Contact Information** and **Alternate Contact Information** – complete with up to date phone number(s).
- **Guardian Information** – select **Yes** or **No.** If **Yes** is selected, additional required fields will present.



- **Appointment**

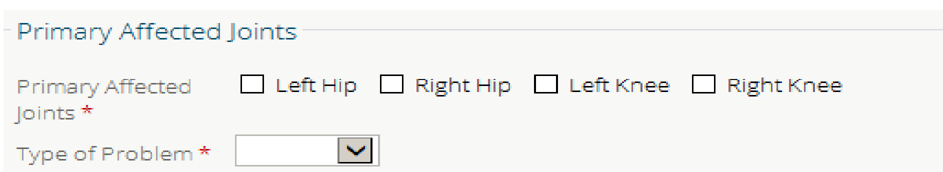


  - **Next Available** – the patient and provider are satisfied to accept the next available specialist as the one who will action this referral. This choice means the shortest possible wait time is being specified.
  - **Request Provider** the patient and provider wish to identify a specific provider to see the patient.

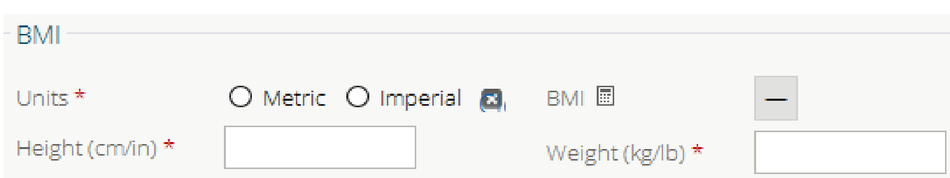
    Selecting this option may mean that the wait time will be longer than if the next available appointment is chosen; you will need to identify that either the patient or provider is ***Willing to Wait****.

- **Triage Requirements**
  - **Referral Form Source –** choose the **Source** of either completed **eReferral Form** or **Attach Provincial Standard Hip and Knee Replacement Form.** The Provincial Standard Hip and Knee Replacement Form can be found in most EMRs.

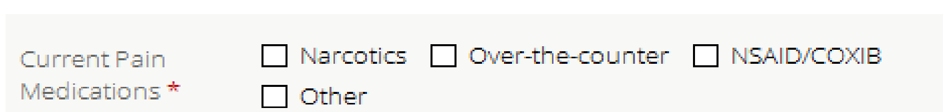
  - **Primary Affected Joints** – identify the problem source, then link or attach the relevant X-Ray Reports.



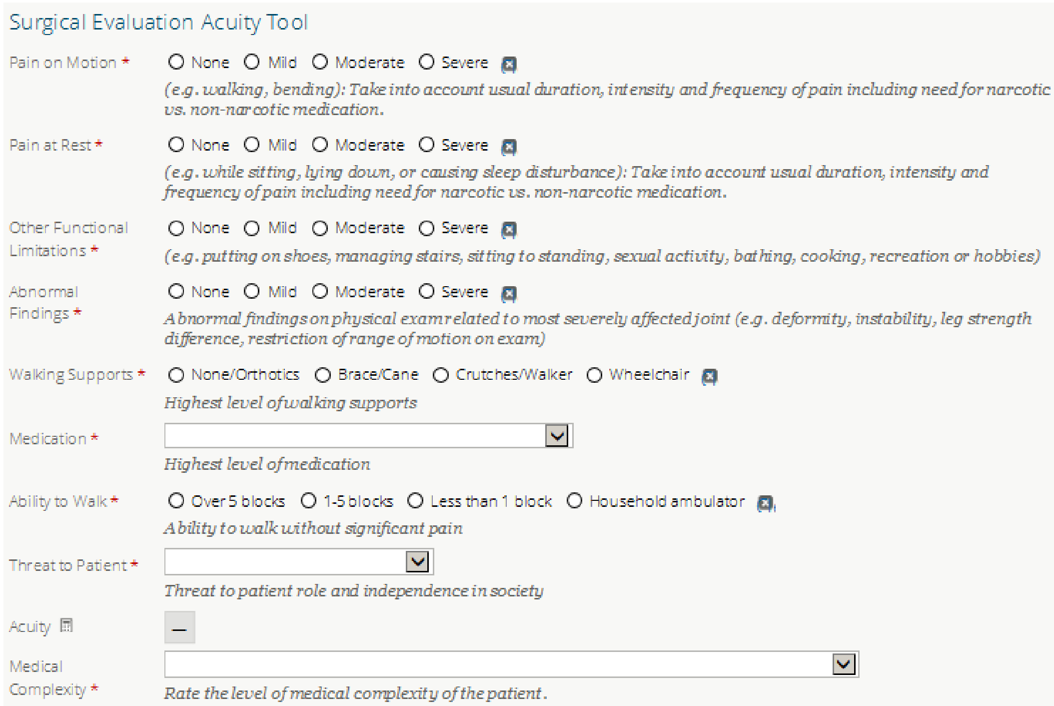
  - **BMI** – automatically calculated from the patient's height and weight values.



  - **Current Pain Medications** - select the type of meds patient is currently taking for pain management of condition



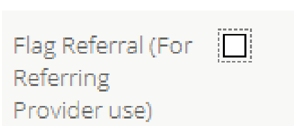
  - **Surgical Evaluation Acuity Tool** – enter your observations to help determine the urgency of this referral. The Acuity Score is automatically calculated.



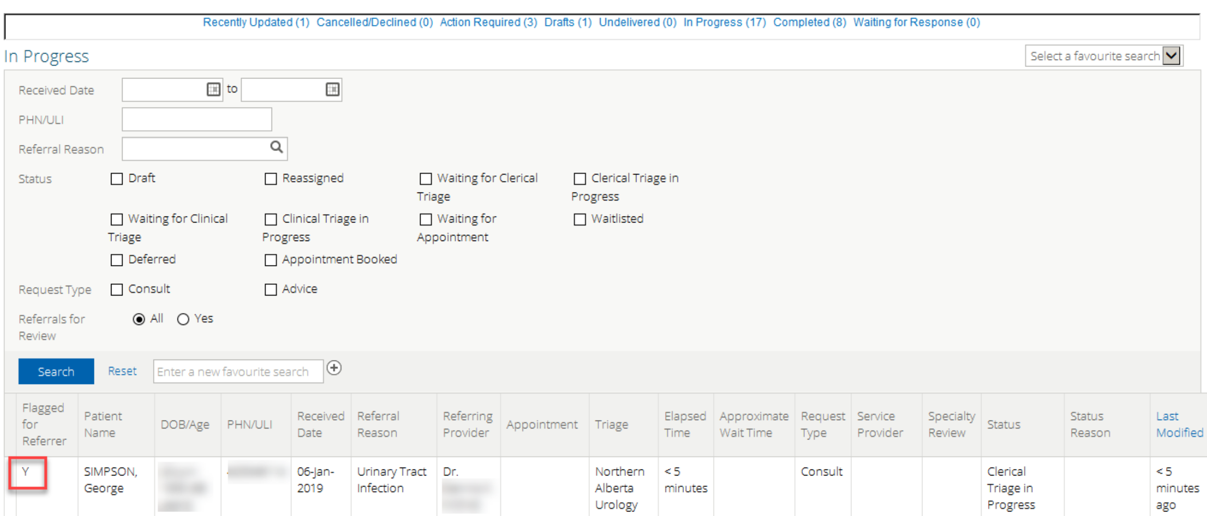
- Continue completing the **Orthopaedic Consult** request steps by skipping to the section of this document: ***"Sections Common to Both Orthopaedic Surgery and Oncology Referrals"*** on page 23.

Oncology Consult Request

- **Flag Referral**- check this box as the provider if you want the referral to be flagged on your **My Referrals** dashboard worklists.

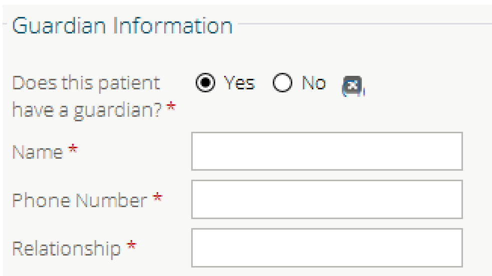


*Note the following is an example of the flag that will appear on your worklists.

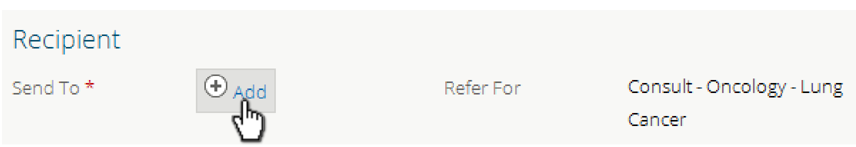


- **Received Date** (for receiving office use only) - used at a Triage Centre to record this information when a faxed or mailed referral is received.

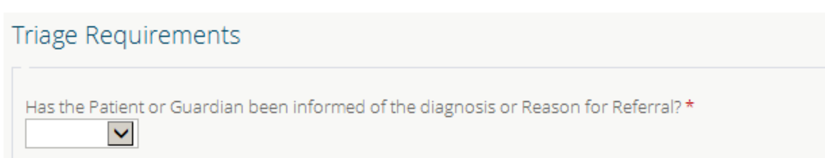
- Review the **Exclusions** to ensure that this referral is appropriate and is not of a more urgent nature.
- **Patient Information** – review the patient information and confirm it is current and correct, update as necessary. Additional required fields will present based on selections.
- **Contact Information** and **Alternate Contact Information** – complete with up to date phone number(s).
- **Guardian Information** – select **Yes** or **No.** If **Yes** is selected, additional required fields will present.



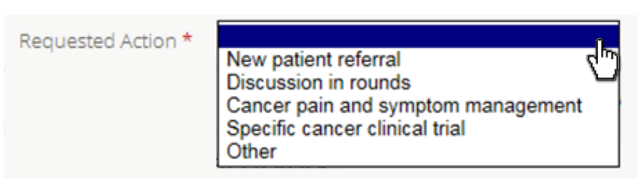
- **Refer For** – (read only) the reason and specialty associated with this referral.
- **Send to** – click the **Add** icon to identify the facility to which this referral will be sent. Oncology referrals do not include the option to select an individual provider.



- **Triage Requirements**
  - Identify whether the patient has been informed as to the diagnosis or reason for this referral. The referral may not proceed if this is *No*.



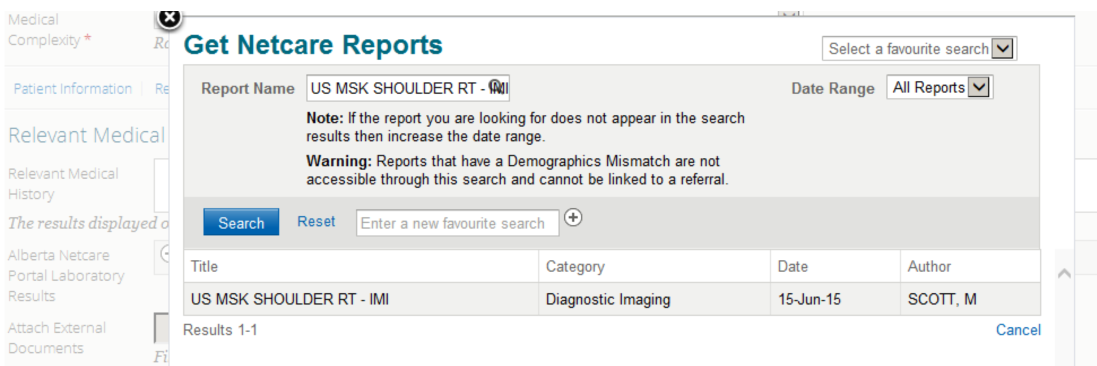
  - Identify the status of all tests and reports as listed /required; attach links or files as required.
  - **Comorbidities** – select all that apply.
  - **Requested Action** – select requested action.



Sections Common to Both Orthopaedic Surgery and Oncology Referrals

- **Relevant Medical History** – enter a description and/or upload links or external documents.

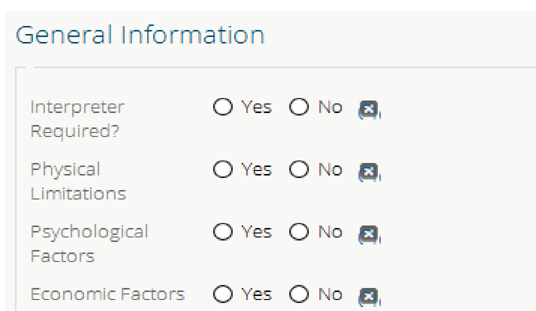
- **Attachments**
    - **Link Alberta Netcare Portal Laboratory Results or Reports** – increase the **Date Range** to list more documents. A **Report Name** is required if ***All Reports*** or ***2 Years*** is selected. If the user is looking for a transcribed report they must look for the name of the doctor who dictated the letter rather than the name of the letter.



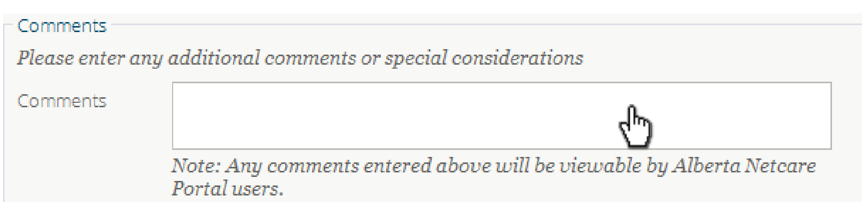
A combined report or individual test result can be linked. Opening a test result displays the entire report. Select a document from the referral from the drop-down list.

    - **Attach External Document** – there is a 1 MB limit for individual documents, or 10MB for all files in total.

- **General Information** – select as appropriate. Additional required fields will present based on selection.

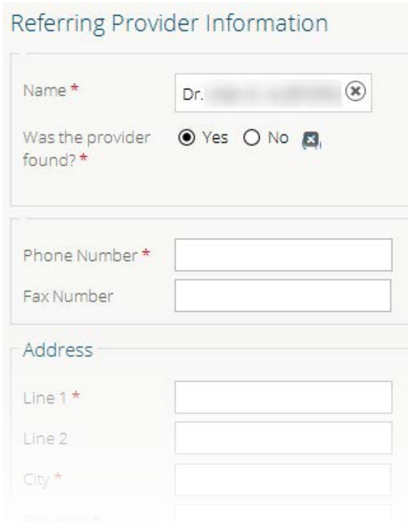


- **Comments –** enter additional comments or special considerations in this area.

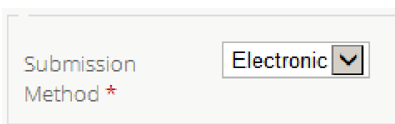


- **Referring Provider Information** – this section is automatically populated with information entered on the *My Details* screen. Click the Delete icon beside the Provider name to add a different provider from your *On Behalf Of* list; you can carry out a provider search from this screen.

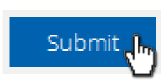
If the provider you want to select cannot be listed, select **No** next to ***Was the provider found?**** then enter his or her name and contact details. Only triage sites entering in referrals should use the Out of Province Provider option.



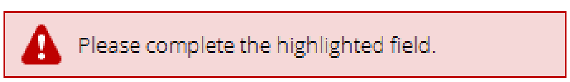
- **Submission Method** – select **Electronic**. Alternatives are only used when a fax or mailed referral is being processed by the triage centre.

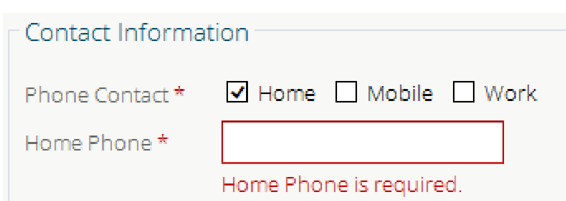


- Click the **Submit** button to create the referral;



You will be alerted if you have missed any required fields marked by a red asterisk *.

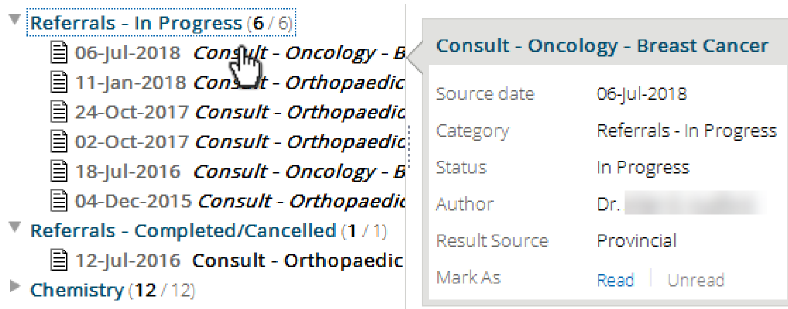




Viewing a Consult Request in the Clinical Document Viewer

Open the Electronic Health Record (EHR) of the patient for whom you wish to view a consult request.

- Select **Searches → Search for a Patient**. Search for a patient and select the desired patient from the list. Confirm the patient's identity by reviewing the patient's demographics.
- Select **Referrals → In Progress** or **Completed/Cancelled** or in the Clinical Document Viewer to list matching consult requests. View a referral's tooltip by hovering your mouse over the link. Click to open the consult request.



- Other Clinical Document Viewer functionality relating to consult requests:
  - Click 🔍 to enter text to search for a document in the Clinical Document Viewer.
  - Select an alternative patient from the Contexts list.
  - Add the patient to a **Worklist** so their record is readily available.
- Select **Referrals → In Progress** in the Clinical Document Viewer. Select a consult request. Click the **Notes, Events** or **Activity** links to advance to the matching sections.

  Notes (1) | Events (2) | Activity (3)

- Scroll or click a navigation link to advance to a specific section in the consult request.

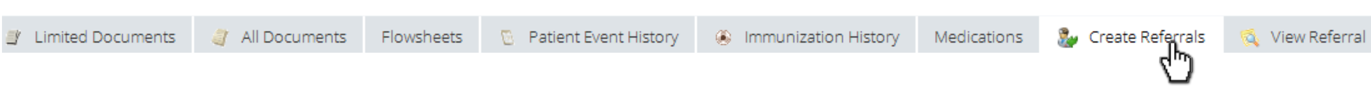
  QuRE Reference | Patient Information | Referral Destination | Referral Details | Referral Requirements | Providers

- Click the **Print** button at the top of the consult request. Provided the appropriate software is installed on your computer, this action generates a PDF which can then be printed or saved.

  Print

Viewing Consult Requests from the Context Menu

Within the patient's Electronic Health Record (EHR), click the **View Referral** tab in the Context Menu. This displays a list of the patient's **Draft, In Progress** and **Completed/ Cancelled/Declined** consult requests.



A referring clinician can only edit a referral created by a second clinician if he or she has been identified as an *On Behalf Of* clinician on that clinician's ***My Details*** screen. Otherwise all referrals accessed from the Clinical Document Viewer or the patient referral lists can be opened by clicking the **Create Referral** or **View Referral** icons in the patient Context Menu as read-only.

- Sort the consult requests by clicking a column title and click twice to reverse the sort.
- Click a consult request to open it in read-only mode.
- Click the **Print** button to generate a PDF of the consult request which can then be printed or saved.

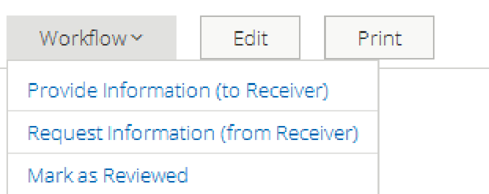
Reviewing Consult Requests

A newly created (or any) referral can be reviewed from your **My Referrals** dashboard. See ***Viewing the My Referrals Dashboard*** on page 8 for an explanation of the dashboard worklists.

My Referrals

Referrals	Total	Consults	Advice
Recently Updated	9	3	6
Cancelled/Declined	10	10	-
Action Required	55	14	41
Drafts	21	11	10
Undelivered	0	0	0
In Progress	227	145	82
Completed	116	6	110
Waiting for Response	7	7	0

- Click either the **Recently Updated** or **In Progress** worklist to open a search screen that will include a list of referrals.
- Click on the desired consult request to open it. Once the consult request is open options include:



  - **Workflow** – the workflow options are
    - **Provide Information (to Receiver)**
    - **Request Information (from Receiver)**
    - **Mark as Reviewed**
  - **Edit** – click to redisplay the referral in editable form.
  - **Print** – generate a printable PDF of the referral.

Action Required Worklist

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

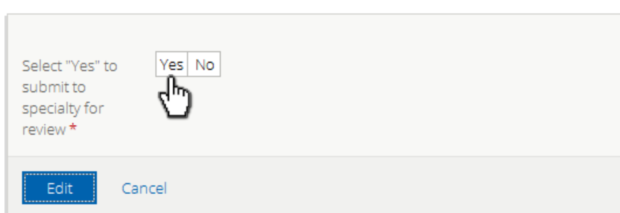
- Click the **Action Required** worklist from the **My Referrals** dashboard. Select **Consult** for ***Request Type*** and **Search**. Click the consult request from the list to open it.

My Referrals

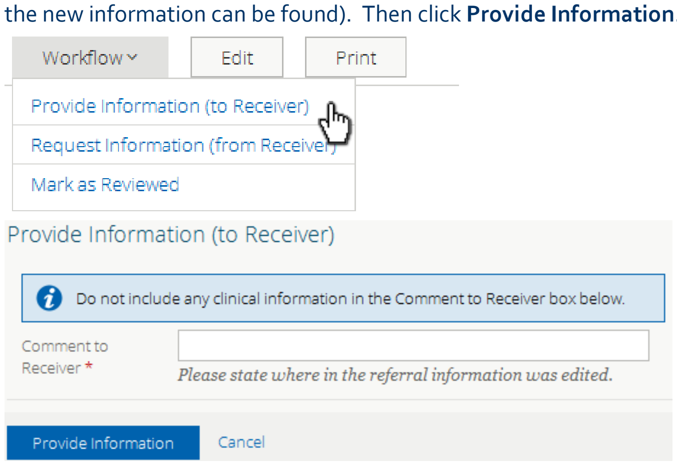
Referrals	Total	Consults	Advice
Recently Updated	9	3	6
Cancelled/Declined	10	10	-
Action Required	55	14	41
Drafts	21	11	10
Undelivered	0	0	0
In Progress	227	145	82
Completed	116	6	110
Waiting for Response	7	7	0

- 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 bottom of the page, click the **Save** button and click **Yes** in the ***Select "Yes" to submit to specialty for review**** section and click **Edit** to save the action and send back to the specialist for review. The consult request is then removed from your action required worklist.



- From the Workflow menu, click **Provide Information (to Receiver)**. Enter a **Comment to Receiver** as applicable (ie. comment where the new information can be found). Then click **Provide Information**.

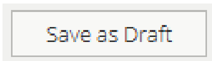


- The consult request will then be removed from the **Action Required** worklist and can be found in the **In Progress** and **Recently Updated** worklists.

Draft Referrals

A referral can be saved as a draft for completion at a later date. There is no expiry period for a draft referral. These are only accessible to the user who created them or to their work colleagues who create referrals on their behalf.

- Click the **Save as Draft** button at the bottom of an eReferral form to save entered content as a draft. The save will be successful even if required information is missing from the referral.



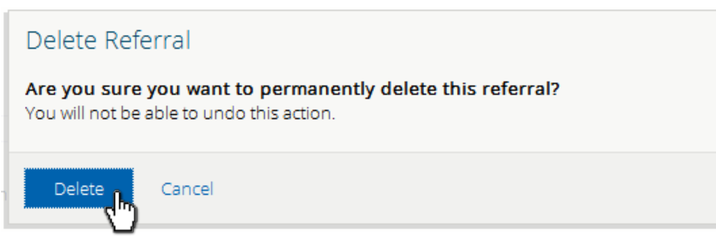
Draft referrals are not listed in a patient's Clinical Document Tree. View, update or complete a draft referral by:

- Selecting **eReferral → My Referrals → Drafts**
- Select the appropriate referral
- Continue to complete the required sections of the referral.

A referral can be saved in **Draft** format multiple times at any stage during its creation process. Amendments to a completed referral must, however, be saved as a new version.

Draft referrals can be removed by:

- Clicking the **Delete Draft** button at the bottom of the referral to permanently remove it from the patient's record. This action must be confirmed.

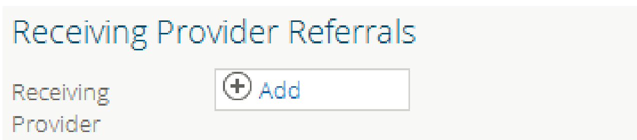


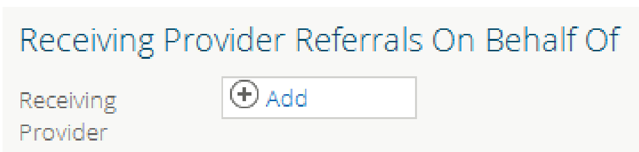
Triage

Triage is the process of checking a referral to ensure that all required information is present and that an appointment can be booked according to patient clinical needs. The 3 types of triage (clerical, clinical, booking) may, depending on the size of clinic, be performed by the same person or different people.

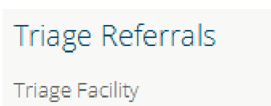
Alberta Netcare Portal users tasked with triaging referrals must have a Clinical 1, 2 or 5 Alberta Netcare Portal user role and belong to the **Triage Referrals** group with receiving or receiving on behalf of permissions. This adds the following sections to the user's ***My Details*** screen:

- **Receiving Provider** or **Receiving Provider on Behalf Of** section**.** Click **Add** and type in the receiving provider's full name (as per CPSA).

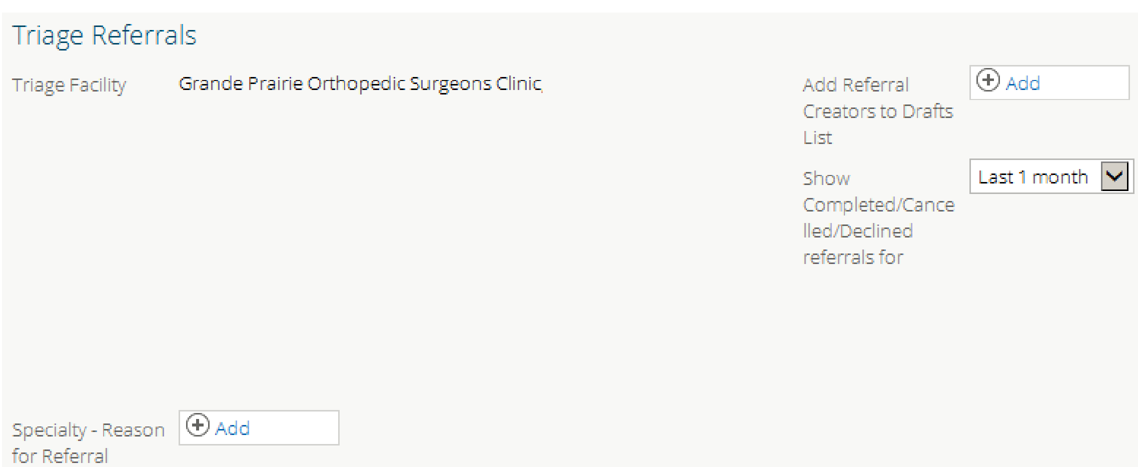




- **Triage Facility** – (required, requested by an administrator based on the eReferral Access Forms that all triage users complete).

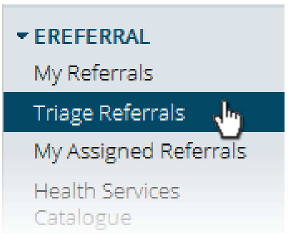


- **Specialty – Reason for Referral** – set to the type of referrals processed by you (e.g. Lung Cancer vs Breast Cancer reasons for referral).
- **Add Referral Creators to Drafts List** – if you are creating eReferrals from faxes received at your triage centre, you can add the Alberta Netcare users who you would like to also view your draft referrals.
- **Show Completed/Cancelled/Declined Referrals for** – set to match the frequency with which you create referrals.

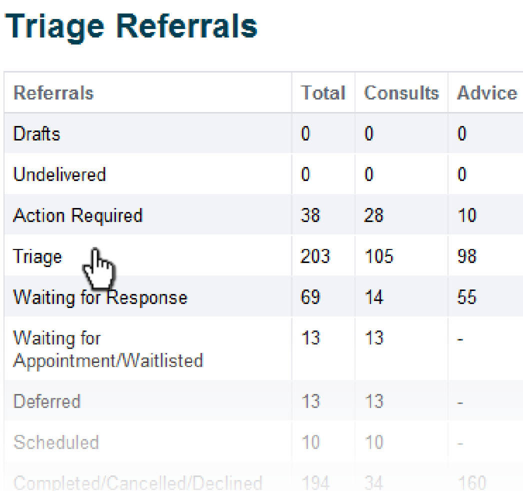


Triage Advice Requests

Select the **eReferral** folder on the left side menu and then select **Triage Referrals** to view your triage dashboard. Users can add/configure the **Triage Referrals** dashboard to their homepage by selecting configure layout. See section ***Setting Up the Homepage to Include Referral Information*** on page 8.



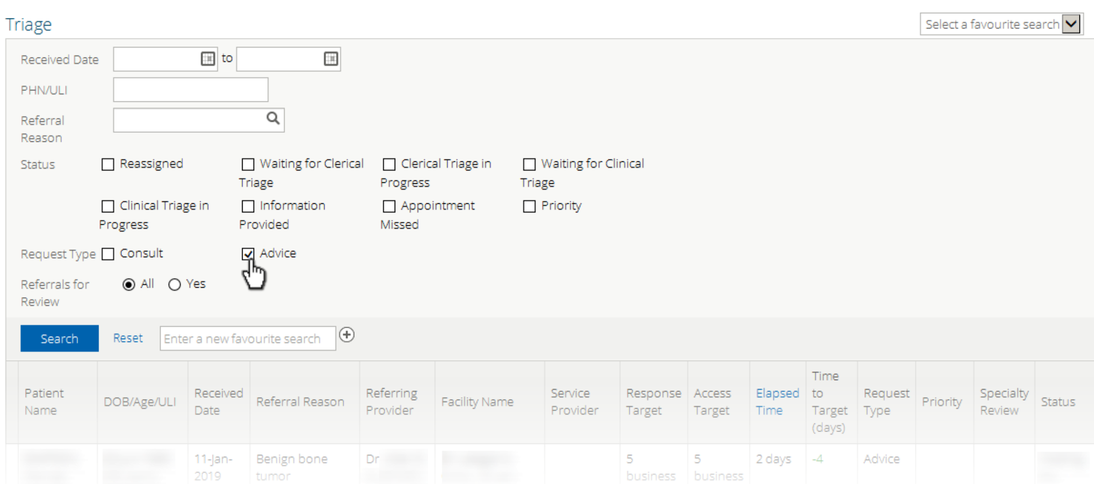
- Select **Triage** to display a list of referrals awaiting triage.



Triage Referrals

Referrals	Total	Consults	Advice
Drafts	0	0	0
Undelivered	0	0	0
Action Required	38	28	10
Triage	203	105	98
Waiting for Response	69	14	55
Waiting for Appointment/Waitlisted	13	13	-
Deferred	13	13	-
Scheduled	10	10	-
Completed/Cancelled/Declined	194	34	160

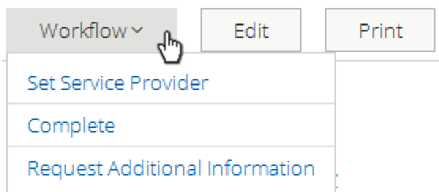
- Sort by ***Received Date*** to list the most recent referrals first. Note the links at the top of the screen to sort by other categories. Further narrow the search by selecting **Advice** for ***Request Type*** and then select **Search**.



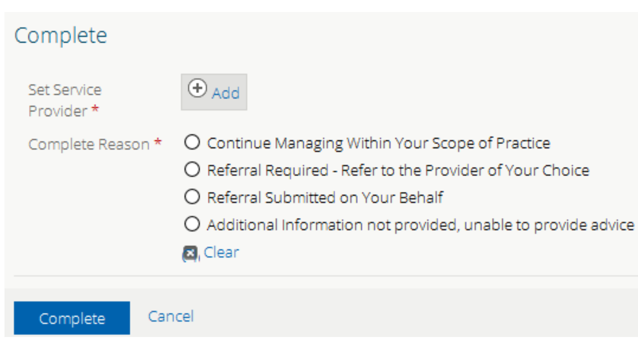
- Select an advice request from this list.

- The options at the top of the screen include **Workflow, Edit** and **Print**.

  - **Workflow:** Use to change the referral status.
  - **Edit:** Use to put the advice request into editable format and provide a response to the referring provider.
    - Scroll down to review the question and request for advice and then click **Add Conversation Entry**.
    - Click **Add** to add yourself as the respondent/author of the conversation entry (your name will auto populate based on your ***My Details*** configuration).
    - Provide your response in the text box and include any attachments such as a clinical pathway.
    - Click **Save** and **No** (to submit to specialty for review) and then click **Edit**.
  - **Print:** Use to print from a local printer or save as a document to your computer
- Advice Request **Workflow** includes **Set Service Provider, Complete** and **Request Additional Information**.

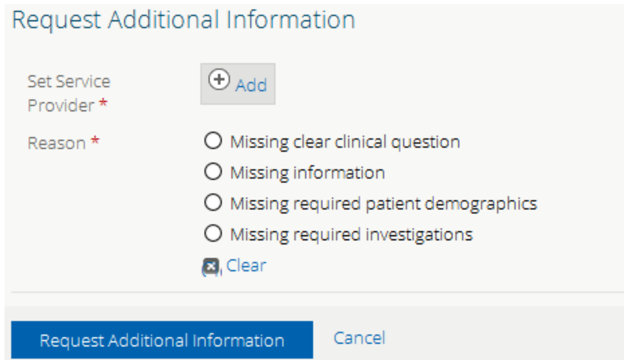


  - **Set Service Provider –** select this workflow action and type in the service provider's name**.**
  - **Complete –** status of the advice request will change to **Completed**.
    - Prior to selecting this workflow action, click **Edit** from the top menu bar to put the advice request into editable format. Provide your response to the referring provider. See steps above under **Edit**.
    - Select **Complete** from the workflow menu. Click **Add** and type in the service provider's name. Select the ***Complete Reason*** and click **Complete**.



  - **Request Additional Information –** Use if you are not able to provide a response and require more information to complete the advice request.
    - Prior to selecting this workflow action, click **Edit** from the top menu bar to put the advice request into editable format. Provide your response to the referring provider. See steps above under **Edit**.
    - Select **Request Additional Information** from the workflow menu. Click **Add** and type in the service provider's name. Select the ***Reason*** for requesting additional information and click **Request Additional Information**.

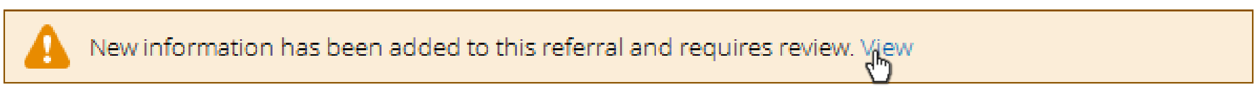
- Now the advice request will appear on the referring provider's **Action Required** worklist and the receiving provider's **Waiting for a Response** worklist.



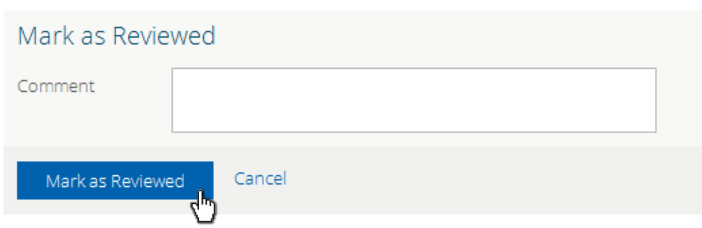
Reviewing the Action Required Worklist

When a Referring Provider updates a referral using **Edit** he or she can specify that the update content should be reviewed by Triage.

- Select **eReferral → Triage Referrals** on the left side menu or from dashboard on you homepage
- Select the **Action Required** worklist.
- Select a referral awaiting review and note the **New information** panel. Click the **View** link to view its details.



- Click the **Mark as Reviewed** button at the top of the Referral and add an optional ***Comment***. Click **Mark as Reviewed.**

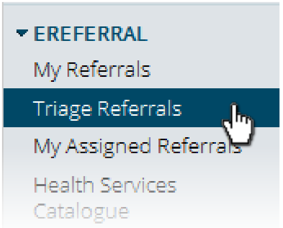


If the referral contains a mismatched attachment (a document or test result that does not belong to this patient), call the creating person (referring site):

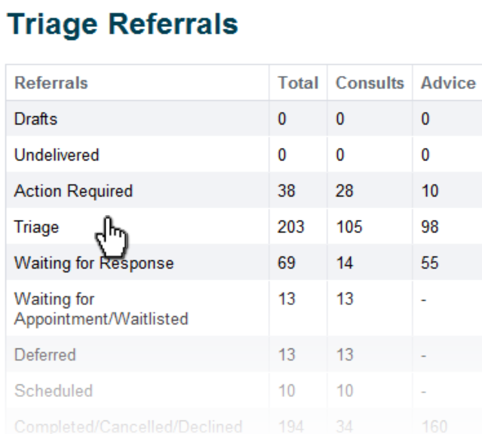
- o Ask the referring site to edit the referral and delete the attachment, or notify the referring site that the triage site is going to delete the attachment and why
- o Report the mismatch to HIM using the current process.

Triage Consult Requests

Select the **eReferral** folder on the left side menu and then select **Triage Referrals** to view your **Triage Referrals** dashboard. Users can add/configure the **Triage Referrals** dashboard to their homepage by selecting configure layout. See steps in section ***Setting Up the Homepage to Include Referral Information*** on page 8**.**



- Select **Triage** to display a list of referrals awaiting triage.



Triage Referrals

Referrals	Total	Consults	Advice
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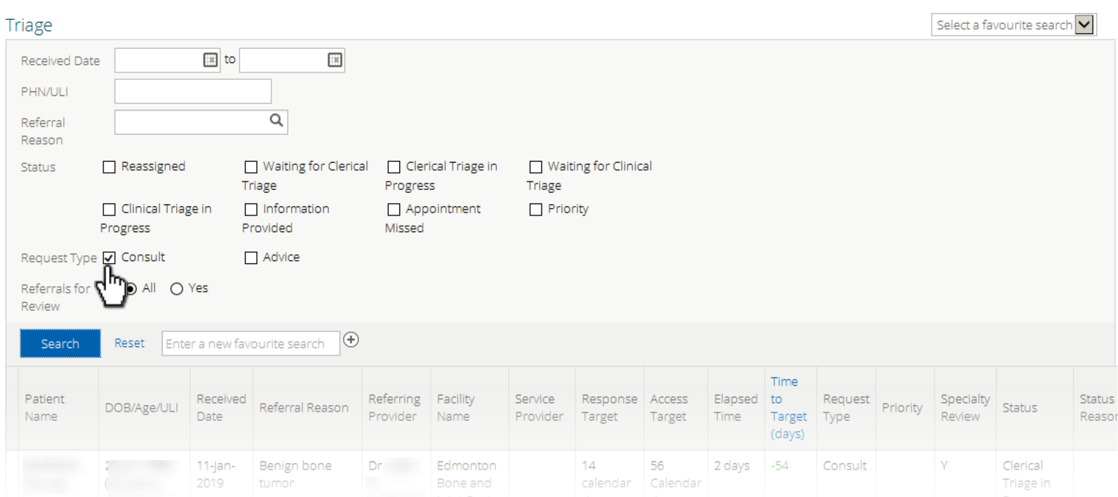
Deferred	13	13	-
Scheduled	10	10	-
Completed/Cancelled/Declined	194	34	160

- Sort by ***Received Date*** to list the most recent referrals first. Note the links at the top of the screen to sort by other categories. Further narrow the search by selecting **Consult** for ***Request Type*** and then select **Search**.

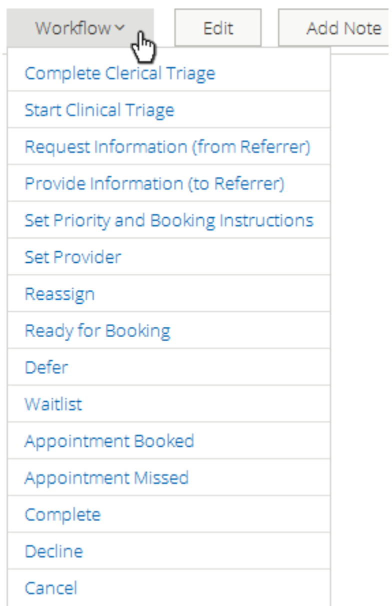


- Select a consult request from this list.

- The options at the top of the screen for a consult request include **Workflow, Edit, Add Note,** and **Print**.

  - **Workflow**: Use to change the referral status.
  - **Edit:** Use to make changes to the referral such as update address or add documents/attachments.
  - **Add Note**: Use to add notes (ie. general, clinical or clerical).
  - **Print:** Use to print from a local printer or save as a document to your computer

- Consult Request **Workflow** is selected to identify the progress of the referral, which begins with **Complete Clerical Triage** through to **Cancel.**



  - **Complete Clerical Triage** – select to identify the completion of the clerical triage. Status of the consult request will change to Waiting for Clinical Triage.
  - **Start Clinical Triage** – status of the consult request will change to Clinical Triage in Progress.
  - **Request Additional Information (from Referrer) –** if required information is found to be missing this workflow action places the consult request on the **Action Required** worklist of the referring provider. It will appear on the receiving provider's **Triage** dashboard on the **Waiting for Response** worklist. Once this workflow action is selected, a pop-up will appear. Select a ***Reason*** for requesting information:
    - Missing clear clinical question.
    - Missing information.
    - Missing required patient demographics.
    - Missing required investigations
  - **Provide Information (to Referrer) –** this workflow action allows you to provide information and enter a **Comment** (required) as needed to the referring provider. The consult request will then appear on the **Action Required worklist** of the referring provider. It will appear on the receiving provider's **Triage** dashboard on the **Waiting for Response** worklist.

- **Set Priority and Booking Instructions –** based on the consult request's clinical content, you will be able to set the priority of the consult request. There may be a situation where a referring provider contacts the Triage Centre and states the patient's condition has worsened and as a result, the priority needs to be set to a higher priority. Select priority: **Routine, Semi Urgent**, or **Urgent** and enter a **Comment** (optional).
- **Set Provider** – select this workflow action and type in the service provider's name. Provide a **Comment** (optional). This option is not used for Oncology referrals.
- **Reassign –** this workflow action changes the status of the consult request to **Reassigned**. Once the **Reassign** workflow action is selected, a pop-up will appear. Assign the consult request to another triage facility. Select a **Reason** for reassigning the consult request and enter a **Comment** (optional):
    - Referral assigned to next available site/provider
    - Referral assigned to requested site/provider
    - Referral reassigned to another provider due to shorter wait time.
    - Requested provider does not see this type of referral.
    - Requested provider is not accepting new patients at this time.
- **Ready for Booking –** status of the consult request will change to **Waiting for Appointment**. This action will be used by facilities and specialties that do not have a waiting list and an appointment is scheduled as soon as triage is completed.
- **Defer –** changes the status of the request for service to **Deferred**. Once the **Defer** action is selected, a pop-up will appear. Select a **Review Date**. Select a **Reason** for deferring the referral and enter a **Comment** (optional):
    - Patient medically not ready.
    - Patient functionally not ready.
    - Patient socially not ready.
- **Waitlist –** status of the consult request will change to **Waitlisted**. Best Practice Point: As a comment box is not available for changing the status to waitlisted, select **Add Note** and choose **Clerical** to enter a note regarding the patient's waitlist status.
    - Only applicable for Orthopaedic Surgery referrals:

      A referral is waitlisted by either Triage or the Receiving Provider when the selected provider or a suitable replacement is not available to see the patient. Example; the number of Orthopaedic Surgery referrals that come in generally exceeds the number of available Orthopaedic Surgeons, with the result that the wait for an appointment can be several months.

      Appointments are booked no more than 2 months into the future. Referrals for which an appointment cannot be made are placed on a waitlist for future booking in the order they were received.
- **Appointment Booked –** status of the consult request will change to **Appointment Booked**. Select the date and time of the appointment. It will then appear in the header of the referral. Enter a **Comment** (optional).
- **Appointment Missed –** status of the consult request will change to **Appointment Missed**. Select a **Reason** for missed appointment and enter a **Comment** (optional):
    - Will contact patient to rebook

- Re-refer patient to rebook
- Patient will not be rebooked and is returned to your care
- Fee required to rebook patient

- **Complete –** status of the consult request will change to **Completed**. Complete the consult request and enter a **Comment** (optional).
  - Enter Date Consult Letter Sent
  - Select a Reason
  - Select an Outcome
- **Decline –** changes the status of the request for service to **Declined**. Once the **Decline** action is selected**,** a pop-up will appear. Select a **Reason** for declining the referral and enter a **Comment** (optional).
  - Duplicate Referral
  - Incomplete – mandatory information has not been provided
  - Referral does not meet criteria appropriateness

  The default age for referrals in the **Completed/Cancelled/Declined** list is one month. This value is set by the **Show Completed/Cancelled/Declined** referrals in the **Triage Referrals** panel on your *My Details* screen.
- **Cancel –** changes the status of the consult request to **Cancelled**. Once the **Cancel** action is selected**,** a pop- up will appear. Select a **Reason** for cancelling the referral and enter a **Comment** (optional):
  - Patient has been unsuccessful attending appointments.
  - Unable to contact patient.
  - Patient has declined service.
  - Referral no longer needed.
  - Patient deceased.
  - Incorrect referring provider added to form.
  - Referral created against incorrect patient.
    - A referral that has been **Cancelled** with a reason of '**Referral created against incorrect patient**' should be:
    - Displayed with a strike-through in the CDV Tree (both Limited and All Documents), but still be visible for viewing when clicked on. The status of 'Cancelled' and the reason of 'Referral created against incorrect patient' should be visible in the CDV Tree tool tip and on the referral itself when viewed.
    - Displayed in the following referrals lists, but without a strike-through. The Cancelled referral should display the status and the reason in the list as well as on the referral itself when viewed:
      - ✓ My Referrals – Cancelled/Declined referral list
      - ✓ Triage Referrals – Completed/Cancelled/Declined referral list
      - ✓ My Assigned Referrals – Completed/Cancelled/Declined referral list
      - ✓ Create Referrals – Completed/Cancelled/Declined referral list
    - If a Source System is able to send a Cancel message for a report that is associated with the wrong

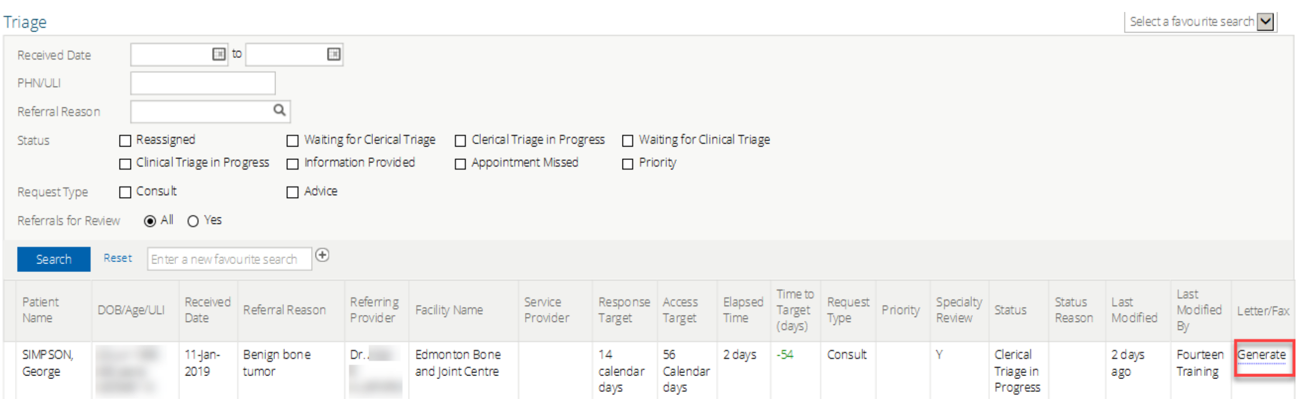
patient, this is displayed in the CDV Tree with a strike-through and the report itself is still visible. If a Source System is unable to send a Cancel message for a report that is associated with the wrong patient, the Data Integrity Unit (DIU) manually flags the report in Alberta Netcare and the report is displayed with a strike-through in the CDV Tree, however, the report is replaced with a message indicating it has been removed by the DIU team. Since, Referrals is a source system and can send a Cancel message, the referral will be displayed in the CDV Tree with a strike-through with the content of the referral still viewable.

If the referral contains a mismatched attachment (a document or test result that does not belong to this patient), call the creating person (referring site):

- o Ask the referring site to edit the referral and delete the attachment, or notify the referring site that the triage site is going to delete the attachment and why
- o Report the mismatch to HIM using the current process.

Triage Letters

There is an option in the final column of a Triage list to generate a number of letters relating to the associated referral. An appropriate letter can be generated to inform the patient's provider whenever a change has been made to their referral.



- Click the **Generate** link to display a drop-down list of letter type options. The options available include *Appointment Details Confirmation of Referral Receipt, Reassigned Referral, Referral Declined, and Request for Required Triage Information*.
- Once a letter type has been selected, click the **Generate** button to display the letter, for which a **Print** button is available at the top of the screen. The letter can be printed on your clinic's letterhead paper which can then be mailed or faxed to the facility from which the referral was created.

A letter cannot be edited before sending but its content could be copied and pasted into Microsoft Word.

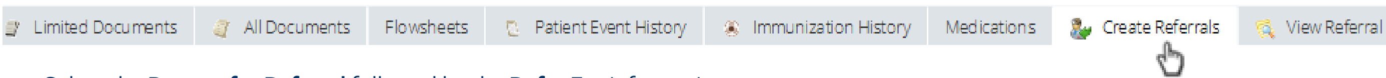
- Click the **Back** button to return to the **Generate Fax/Letter** screen and again to return to the Triage List.

Manual Referral Creation

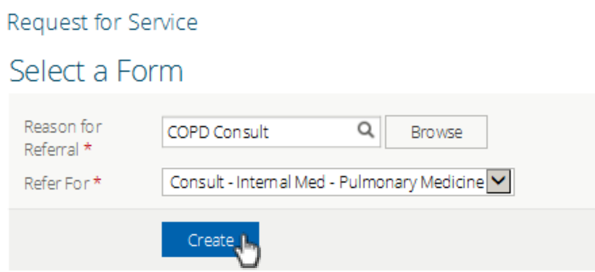
A referral in Alberta Netcare can be created by triage based on information received by non-electronic means; for example by mail or fax.

To create a manual referral as a triage user:

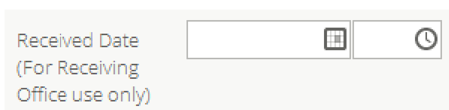
- Search for and select the patient identified in the manual referral.
- Click the **Create Referrals** tab in the Context Menu.



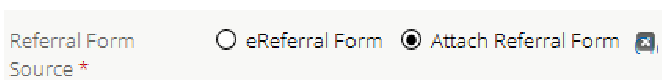
- Select the **Reason for Referral** followed by the **Refer For** information.
  Click the **Create** button.



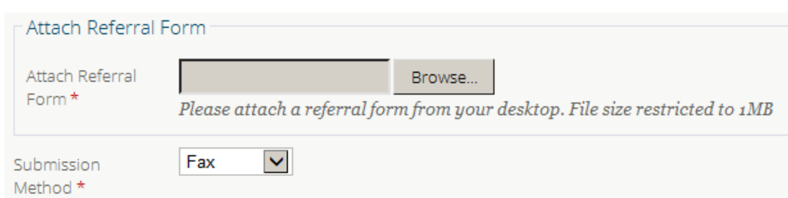
- In the **Receiving Date** (For Receiving Office use only) field, enter the date and time that the referral was manually received. Complete the remaining fields with appropriate information.



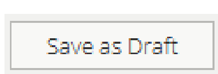
- Select **Attach Referral Form** in the **Referral Form Source** section.



- In the **Submission Method** field, at the bottom of the **Attach Referral Form** section, change the value to how the referral was received; *Fax, Mail or Phone*. If Fax is selected, the original fax can be attached.



- Click **Save as Draft** if additional information is required.



- Click **Submit** if all information is available.

- Select **eReferral → Triage Referrals → Triage** to reopen the referral so that the clerical and clinical steps can be completed.

Reports

The Alberta Netcare eReferral application includes a number of reports that extract and record selected data from the system. Users accessing these reports must belong to one of the following groups:

- **Referrals Operations Reports (Provincial)** – returns province-wide data; intended for the eReferral project team.
- **Referrals Operations Reports (Triage Facility)** – returns data relating to a specific facility only; intended for the nominated administrators at that facility.

The reports are accessed from the eReferral Reports menu:

- Referrals
- Referrals by Status
- Referrals by Reason for Referral
- Referrals by Referring Provider
- Referrals by Referring Provider and Reason for referral
- Advice Requests
- Health Services Catalogue (HSC) Facility Listing *(Provincial user group only)*
- Health Services Catalogue (HSC) Provider Listing *(Provincial user group only)*

These reports are subject to change as new reporting requirements are identified and implemented. To gain access to these reports submit an eReferral Access Form to an Access Improvement team member.

Running a Report

Select a report by clicking its entry in the menu, entering selection criteria and clicking the **Search** button. The wider the selected criteria, the longer the report will take to generate and display.

Results are returned in read-only format but can be downloaded in CSV format for analysis in, for example, Microsoft Excel or saved as a PDF for subsequent saving or printing.