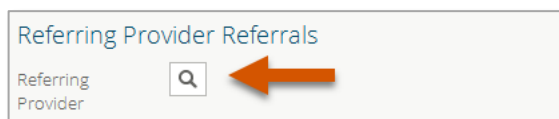


eREFERRAL QUICK REFERENCE: How to Create/Review a Consult Request

Configuring My Details

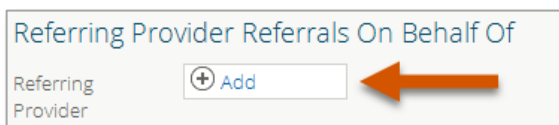
By adding yourself as a Referring Provider you will be able to see your referrals in *My Referrals*.

1. Click on **My Details** below the **Common** folder in the top left hand column on your **Homepage**.
2. If you are the referring provider, scroll down to the **Referring Provider Referrals** section. Click on the magnifying glass.

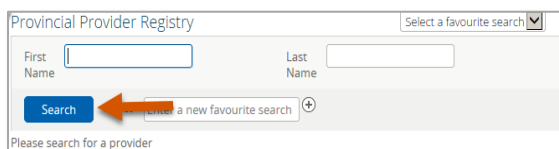


OR

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.



3. 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**.
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.

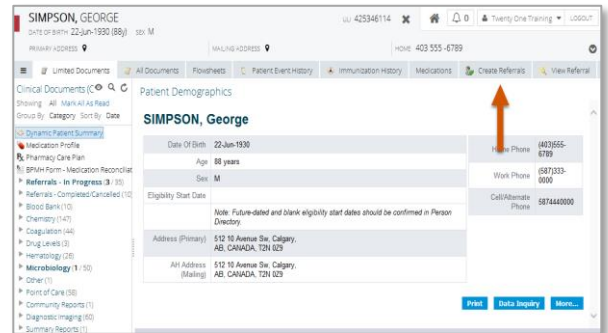


5. At the bottom of the page click **Update Preferences** to validate your updates.
6. Click the **Home** icon in the top right corner to return to your homepage.

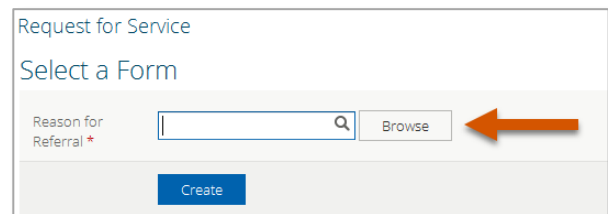
Creating a Consult Request

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

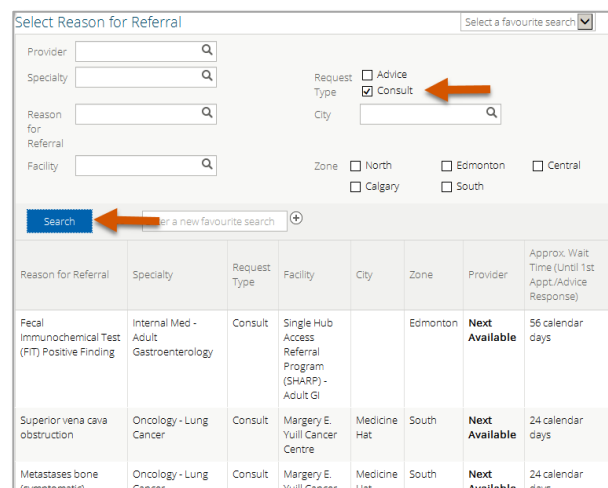
1. Open the patient's record and click **Create Referrals** on the Patient Context Menu.



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

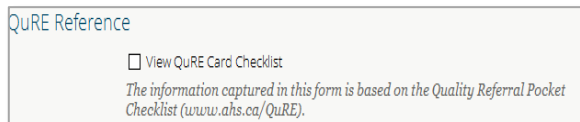


3. Click **Browse** (see above) then click **Request Type Consult**. You can further sort by **Specialty, Reason for Referral and or Zone**. Select from the list that populates.



4. Click **Create** to open the Consult Request form.

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



7. Complete **Patient Details**, including **Additional Information** and **Special Considerations**.
8. 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: <http://www.albertanetcare.ca/1285.htm>

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.
11. 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**.

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

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** 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.

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:

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

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



4. 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.



5. 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**.

