

**Alberta Netcare Portal – Enhancements - eReferral Release 5.0**  
[Learning Centre - eReferral](#)

This document outlines Alberta Netcare Portal changes available in Production on  
 June 28, 2024

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## Known Issues

### 1. Workflow Actions Not Visible Unless Browser Cache is Cleared

<b>Description:</b>	<b>Only the 'Print' Workflow Action displays, and other Workflow Actions are not visible if the cache needs to be cleared</b>
<b>Details:</b>	<p>Clearing the browser cache displays all the Workflow Actions for any eReferral Permissions Group using any of the eReferral Dashboards.</p> <p><a href="#">Click here</a> to access the instructions on how to clear browser cache.</p>

### 2. Screen Flickering

<b>Description:</b>	<b>Edge and Chrome Browsers may cause eReferral Worklist flickering.</b>
<b>Details:</b>	<p>Changing the zoom or the window size (either increasing or decreasing) will stop the flickering. This must be done each time the browser is re-opened.</p>

### 3. Draft Referrals Deleted During Data Conversion

<b>Description:</b>	<b>Data conversion from eReferral Version 4 to eReferral Version 5 will remove all referral drafts from the platform.</b>
<b>Details:</b>	<p>All drafts need to be submitted prior to 16:00 on June 27. Any draft referral past that time will not be found after the software upgrade is completed.</p>

## General

<i>1. Referral Type Name Changes</i>	
<b>Description:</b>	The names 'Consult Request' and 'Advice Request' are deprecated.
<b>Details:</b>	New names are:  'Consult Request' = 'Referral' 'Advice Request' = 'eConsult'  This will align with the international nomenclature as standard terminology.

## Referral View

<i>1. Left and Right Panel Display</i>	
<b>Description:</b>	<b>Referral displays in Left Panel and five Panes display in Right Panel.</b>
<b>Details:</b>	<p>The Right Panel includes five Panes:</p> <ul style="list-style-type: none"> <li>• People Pane</li> <li>• Linked Referrals Pane</li> <li>• Referral Attachments Pane</li> <li>• Referral Notes Pane</li> <li>• Activity Pane</li> </ul> <p>The Activity Pane filter is dynamic. Options for filtering display based on the type of activity available in the Pane.</p>

<i>2. Referral Header and Summary Bar</i>	
<b>Description:</b>	<b>New Summary Bar displays above Header and Header can be collapsed.</b>
<b>Details:</b>	<p>Summary Bar displays key referral metadata.</p> <ul style="list-style-type: none"> <li>• The Header is collapsed by default. It can be opened using the down arrow in the left corner. The setting last used will then apply to all referrals for that user.</li> <li>• Action Required banners are inside the Header and are only visible when the Header is open.</li> <li>• All Headers display extraneous metadata until a workflow action has been executed on the referral (due to the data conversion process from Version 4 to Version 5).</li> </ul>

### 3. Workflow Bar

<b>Description:</b>	<b>Workflow Actions display horizontally instead of vertically.</b>
<b>Details:</b>	<p>My Referrals Dashboard displays all Workflow Actions horizontally as single buttons.</p> <p>Triage Dashboard and My Assigned Referrals Dashboard display all Workflow Actions horizontally either as single buttons, or in mini-drop-down menus.</p>

The screenshot displays a referral details page in the Alberta Netcare Portal. At the top, there is a navigation bar with options: Add Note, Edit Referral, Print, Print All, Advice, Closing, Communication, Intake, Scheduling, and Triage. The main content area shows the following information:

- Accepted Referral:** Arthritis of hip, Orthopaedic Surgery. Triage Site: Edmonton FAST Orthopaedics CAT. Submitted: 13-Mar-2024 10:41 AM. eReferral ID: RFS-AAD-938541.
- Status Reason:** —
- Accepted (T3):** 05-Mar-2024
- External Triage Site:** Orthopaedic Screening Clinic (Edmonton)
- Referred For:** Referral
- Submitted By:** [Redacted]
- Flagged for Referrer:** Yes

The title of the page is "Orthopaedic Surgery Request for Service". Below this, there are tabs for Patient Details, Referral Details, Referral Requirements, and Providers. The "Exclusions" section lists:

- Infection
- Dislocation

**Patient Information:** PHN/ULI: 97425-3514 Name: EREFERRAL, Two b Sex: F DOB: 12-Jan-1970  
**Request Created For:** Arthritis of hip - Edmonton FAST Orthopaedics CAT  
**Clinical Pathway URL:** -  
**Who has been informed?:** Patient

On the right side, there are several sections:

- People:** Referrer: Out of Province Provider; Service Provider: —
- Linked Referrals:** There are no linked referrals for this referral. A button "Show this patient's other referrals" is present.
- Referral Attachments:** There are no attachments for this referral. A "Choose a file..." button is present.
- Referral Notes:** There are no notes for this referral.
- Activity:** A "Show Notes Only" dropdown menu is visible.

The "Activity" section shows:

- Accept (T3):** Hide Form
- Accepted Date (T3):** 05-Mar-2024
- Attachments:** No Files
- Netcare Document(s):** No documents

## Worklists

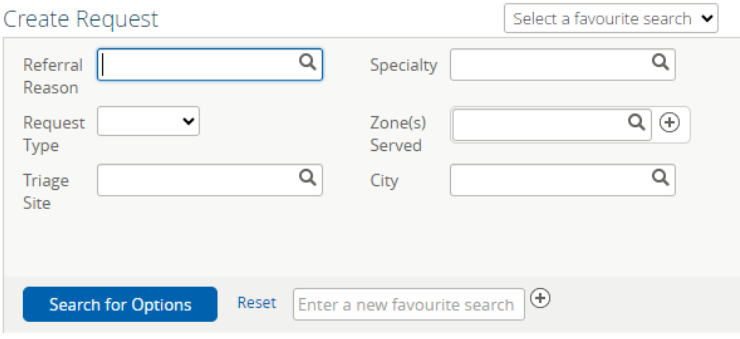
<i>1. Search / Filter</i>	
<b>Description:</b>	<b>Search / filter fields and search results columns are standardized with sticky search functionality.</b>
<b>Details:</b>	<p>The layout of search / filter fields and the search result columns are more similar amongst all of the Worklists. Some columns have combined elements.</p> <p>The last search / filter is retained even after navigating away from the Worklist.</p>

## Printing

<i>1. Print</i>	
<b>Description:</b>	<b>Changed 'Print' functionality.</b>
<b>Details:</b>	<p>The 'Print' button now includes:</p> <ul style="list-style-type: none"> <li>• Referral content (including 'Discussion')</li> <li>• Supporting documents (a list of attachment names)</li> <li>• Notes</li> </ul>

<i>2. Print All</i>	
<b>Description:</b>	<b>New 'Print All' functionality.</b>
<b>Details:</b>	<p>The 'Print All' button includes:</p> <ul style="list-style-type: none"> <li>• Referral content (including 'Discussion')</li> <li>• Supporting documents (a list of attachment names)</li> <li>• Notes</li> <li>• Activity</li> <li>• Attachment details (copies of the attachments)</li> </ul>

## Create / Submit a Referral

1. Create Referral Screen	
<b>Description:</b>	<b>New screen for creating and submitting eConsults and Referrals has more search / filter options, and a duplicate referral alert.</b>
<b>Details:</b>	<p>Search / filter options when creating a referral are:</p> <ul style="list-style-type: none"> <li>• Referral Reason</li> <li>• Specialty</li> <li>• Request Type</li> <li>• Zone(s) Served</li> <li>• Triage Site</li> <li>• City</li> </ul> <p>A potential duplicate icon is displayed if the search result and an existing referral have the same following four criteria:</p> <ul style="list-style-type: none"> <li>• Referral Reason, and</li> <li>• Request Type, and</li> <li>• Specialty, and</li> <li>• Triage Site</li> </ul>
<b>Screenshot:</b>	 <p>The screenshot shows the 'Create Request' interface. At the top right, there is a dropdown menu labeled 'Select a favourite search'. Below this, the form is organized into two columns. The left column contains: 'Referral Reason' with a search input field and a magnifying glass icon; 'Request Type' with a dropdown menu; and 'Triage Site' with a search input field and a magnifying glass icon. The right column contains: 'Specialty' with a search input field and a magnifying glass icon; 'Zone(s) Served' with a search input field, a magnifying glass icon, and a plus icon; and 'City' with a search input field and a magnifying glass icon. At the bottom of the form, there is a blue button labeled 'Search for Options', a 'Reset' button, and a text input field labeled 'Enter a new favourite search' with a plus icon. Below the form, a note reads: 'Enter search criteria above and click 'Search''.</p>



## 2. Selection of Provider, Triage Site, and Central Access and Triage (CAT)

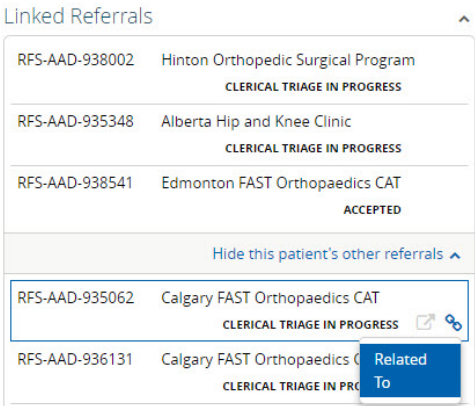
<b>Description:</b>	<b>Search results limited to Central Access and Triage facilities only.</b>
<b>Details:</b>	Search / filter results will no longer display: <ul style="list-style-type: none"><li>• Provider</li><li>• Facilities that are not Central Access and Triage.</li></ul>

## 3. Referral Submission

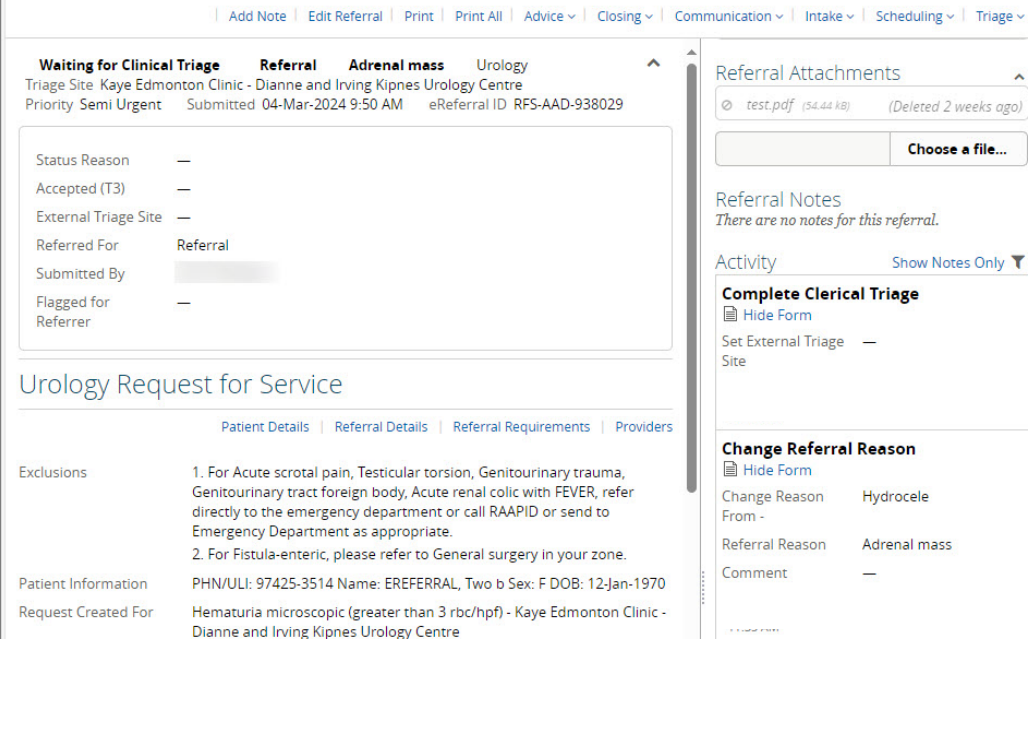
<b>Description:</b>	<b>New eConsult and Referral form display and access to workflow actions.</b>
<b>Details:</b>	Dashes display for null elements instead of empty fields.  The title is the Specialty instead of the Referral Reason.  Upon submission, the user's appropriate workflow actions display based on configuration in My Details.



## Triage / Receiver Workflow Actions

1. Link Referrals																						
<b>Description:</b>	<b>New functionality to link two referrals.</b>																					
<b>Details:</b>	Related referrals can be linked or unlinked using the icons in the Linked Referrals Pane in the Right Panel.																					
<b>Screenshot:</b>	 <p>The screenshot shows a 'Linked Referrals' pane with the following data:</p> <table border="1"> <thead> <tr> <th>Referral ID</th> <th>Clinic Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>RFS-AAD-938002</td> <td>Hinton Orthopedic Surgical Program</td> <td>CLERICAL TRIAGE IN PROGRESS</td> </tr> <tr> <td>RFS-AAD-935348</td> <td>Alberta Hip and Knee Clinic</td> <td>CLERICAL TRIAGE IN PROGRESS</td> </tr> <tr> <td>RFS-AAD-938541</td> <td>Edmonton FAST Orthopaedics CAT</td> <td>ACCEPTED</td> </tr> <tr> <td colspan="3" style="text-align: center;">Hide this patient's other referrals ^</td> </tr> <tr> <td>RFS-AAD-935062</td> <td>Calgary FAST Orthopaedics CAT</td> <td>CLERICAL TRIAGE IN PROGRESS</td> </tr> <tr> <td>RFS-AAD-936131</td> <td>Calgary FAST Orthopaedics CAT</td> <td>CLERICAL TRIAGE IN PROGRESS</td> </tr> </tbody> </table> <p>A blue button labeled 'Related To' is positioned to the right of the RFS-AAD-936131 entry.</p>	Referral ID	Clinic Name	Status	RFS-AAD-938002	Hinton Orthopedic Surgical Program	CLERICAL TRIAGE IN PROGRESS	RFS-AAD-935348	Alberta Hip and Knee Clinic	CLERICAL TRIAGE IN PROGRESS	RFS-AAD-938541	Edmonton FAST Orthopaedics CAT	ACCEPTED	Hide this patient's other referrals ^			RFS-AAD-935062	Calgary FAST Orthopaedics CAT	CLERICAL TRIAGE IN PROGRESS	RFS-AAD-936131	Calgary FAST Orthopaedics CAT	CLERICAL TRIAGE IN PROGRESS
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2. Delete Attachments and Notes																						
<b>Description:</b>	<b>New functionality allows Attachments and Notes to be deleted.</b>																					
<b>Details:</b>	<p>In the Attachments Pane, the trash icon deletes an attachment. A permanent record of the deletion is in the Attachments Pane and the Activity Pane.</p> <p>In the Notes Pane, the trash can icon deletes a note. A permanent record of the deletion is in the Activity Pane.</p>																					

### 3. Change Referral Reason

<b>Description:</b>	<b>New Workflow Action Form to change the referral reason.</b>
<b>Details:</b>	<p>The Referral Reason can be changed without changing the Specialty or Triage Site.</p> <p>The Referral Reason is updated on the Referral Summary Bar, but not on the originally submitted referral form.</p> <p>There is no status change or Provider Email Notification associated with this Workflow Action.</p>
<b>Screenshot:</b>	 <p>The screenshot displays a web interface for a referral form. At the top, there are navigation links: Add Note, Edit Referral, Print, Print All, Advice, Closing, Communication, Intake, Scheduling, and Triage. The main header shows the referral status as 'Waiting for Clinical Triage' and the specialty as 'Urology'. The patient's name is 'Adrenal mass' and the referral is from 'Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre'. The priority is 'Semi Urgent' and it was submitted on '04-Mar-2024 9:50 AM'. The eReferral ID is 'RFS-AAD-938029'. Below this, there is a table with fields: Status Reason (—), Accepted (T3) (—), External Triage Site (—), Referred For (Referral), Submitted By (redacted), and Flagged for Referrer (—). A section titled 'Urology Request for Service' contains 'Exclusions' and 'Patient Information'. The 'Exclusions' list two conditions: 1. For Acute scrotal pain, Testicular torsion, Genitourinary trauma, Genitourinary tract foreign body, Acute renal colic with FEVER, refer directly to the emergency department or call RAAPID or send to Emergency Department as appropriate. 2. For Fistula-enteric, please refer to General surgery in your zone. The 'Patient Information' shows PHN/ULI: 97425-3514, Name: EREFERRAL, Two b, Sex: F, DOB: 12-Jan-1970. The 'Request Created For' is 'Hematuria microscopic (greater than 3 rbc/hpf) - Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre'. On the right side, there are sections for 'Referral Attachments' (with a file 'test.pdf (54.44 KB)' deleted 2 weeks ago), 'Referral Notes' (no notes), 'Activity' (with a 'Show Notes Only' link), 'Complete Clerical Triage' (with a 'Hide Form' link and 'Set External Triage Site'), and 'Change Referral Reason' (with a 'Hide Form' link and a table showing 'Change Reason' as 'Hydrocele', 'From -', 'Referral Reason' as 'Adrenal mass', and 'Comment' as '—').</p>

#### 4. Redirect (formerly Reassign)

<b>Description:</b>	<b>New Workflow Action Form to redirect a referral to another Specialty or Triage Site, change the referral reason, and set / change the provider.</b>
<b>Details:</b>	<p>All referrals in the former status of 'Reassigned' are automatically converted to the new status of 'Redirected.'</p> <p>The Redirect Workflow Action Form has four purposes:</p> <ul style="list-style-type: none"> <li>• Send a Referral or eConsult to any other Facility available within the eReferral platform, regardless of the Specialty/Sub-Specialty that the Facility belongs to. This does not include External Triage Facilities.</li> <li>• Change the Reason for Referral.</li> <li>• Change the Service Provider.</li> <li>• Change the Specialty / Sub-Specialty.</li> </ul> <p>When the Redirect Form is submitted:</p> <ul style="list-style-type: none"> <li>• The referral Header and Summary Bar are updated with the new Reason for Referral, new Facility/Service and new Specialty / Sub-Specialty.</li> <li>• The Status changes to 'Redirected.'</li> <li>• Functionality to change the Reason for Referral does not change the originally submitted referral on the Standard Form.</li> <li>• The Received Date does not change. T2 is measured as the date the referral arrived into the Health Care System.</li> </ul> <p>There are six Provider Email Notifications which replace the Reassigned Provider Notifications:</p> <ol style="list-style-type: none"> <li>1) eReferral Receiver – Advice: Redirected</li> <li>2) eReferral Receiver – Consult: Redirected</li> <li>3) eReferral Triage – Advice: Redirected</li> <li>4) eReferral Triage – Consult: Redirected</li> <li>5) eReferral Referrer – Advice: Redirected</li> <li>6) eReferral Referrer – Consult: Redirected</li> </ol>