

## Create an eConsult

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a non-urgent question or when they are unsure if a referral would be appropriate. An eConsult is often all you may need to manage your patient in their medical home. Before you submit a request, your [Referring/Referring on Behalf of](#) information must be completed in your My Details.

- 1 From the [Clinical Portal Menu](#), go to [Searches](#). You can search for your patient using their first and last name, their Personal Health Number (PHN), or their Unique Lifetime Identifier (ULI). Press [Search](#) to bring up a list.

**Patient Search**

Identifier: 974253514  
Identifier Type: PHN / ULI

Last Name: ereferral  
First Name: two  
Middle Name/Initial: [Empty]

Search [Clear] [Enter a new favourite search +]

- 2 Click the patient from the populated list to open the patient's Electronic Health Record (EHR).
- 3 Click [Create Referrals](#) from the [Context Menu](#).

**EREFERRAL, TWO B** ULI 100008114

DATE OF BIRTH [Redacted] (54y) SEX F

NO CPAR PRIMARY PROVIDER PATIENT PRIMARY ADDRESS PATIENT MAILING ADDRESS PATIENT HOME

All Documents | Flowsheets | Patient Event History | Immunization History | Medications | **Create Referrals** | View Referral


Clinical Documents  
Showing All Mark All As Read  
Group By Category Sort By Date

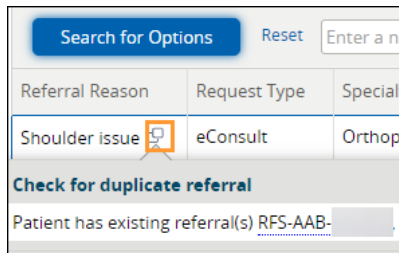
Read Unread

Dynamic Patient Summary  
Medication Profile  
Pharmacy Care Plan  
BPMH Form - Medication Reconciliation  
Referrals - In Progress (14 / 15)  
Consultations (1 / 1)  
Diagnostic Imaging (4 / 4)  
Discharge/Transfer Summaries (1 / 1)  
Progress Notes (2 / 2)

**Patient Demographics**  
**EREFERRAL, Two B**

Date Of Birth	[Redacted]	H
Age	54 years	V
Sex	F	Cell/Alter
Eligibility Start Date	Note: Future-dated and blank eligibility start dates should be confirmed in Person Directory.	
Address (Primary)	[Redacted]	
AH Address (Mailing)	[Redacted]	

- 4 Enter a reason in the **Referral Reason** field. You can start typing the reason to see what selections are available.
- 5 Select **eConsult** as the **Request Type**.
- 6 Enter the **Specialty**. You can start typing the name of the specialty to see a list.
- 7 Enter the **Zone(s) Served**. This is the Zone(s) that the specialty provides services to. Some specialties offer services to multiple Zones.
- 8 Enter the **City** if necessary.
- 9 Click **Search for Options** to see a list matching your **Referral Reason** criteria. If the eConsult is a duplicate the **Check for duplicate referral(s)** icon  is shown. If you are unsure of the Referral Reason you can also search by Specialty.
- 10 Hover over the symbol to see the duplicate eConsult. A list of **Drafts, In Progress** and **Completed/Cancelled/Declined** eConsults and Referrals are also shown. Check for duplicate Referrals here as well to ensure that a duplicate eConsult doesn't exist in another Zone.



Create Request Select a favourite search

Referral Reason:       Speciality:

Request Type:       Zone(s) Served:

Triage Site:       City:

Referral Reason	Request Type	Specialty	Triage Site	City	Clinical Pathways	Approximate Wait Time	Zone(s) Served
Shoulder issue	eConsult	Orthopaedic Surgery	Orthopaedic Surgery - Provincial			5 Calendar Days	Calgary, Central, Edmonton, North, South

Results 1-1

**Drafts**  
No Results Found

**In Progress**

Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target	Approx. Wait Time	Flag for Refl
Referral RFS-AAB	10-Jan-2024	Redirected Assigned to next available service	Dyspepsia	Urgent	Single Hub Access Referral Program (SHARP) - Adult GI				09-Jan-2024		2 days	90	Y
Referral RFS-AAB	08-Jan-2024	Redirected Assigned to local service based on patient address	Bladder stone		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre			27-Mar-2024 09:00	10-Jan-2024		4 days	90	Y
Referral RFS-AAB	10-Jan-2024	Waiting for Appointment	Instability of knee		Calgary FAST Orthopaedics CAT		Receiving Provider II		10-Jan-2024		2 days		Y
Referral RFS-AAB	05-Jan-2024	Clerical Triage in Progress	Hip dysplasia		South FAST Orthopaedics CAT						1 week		Y

Results 1-4

**Completed/Cancelled/Declined**

Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target	Last Modified/Last Modified By
Referral RFS-AAB	08-Jan-2024	Cancelled Referral no longer needed	Instability of knee		Calgary FAST Orthopaedics CAT		Receiving Provider I				4 days	10-Jan-2024 / Three Training

- 11 Click the **Clinical Pathway** icon to view detailed information to help support care decisions. If no **Clinical Pathway** icon is showing, it indicates a pathway is not available at this time.
- 12 Click the appropriate **Referral Reason**. Ensure that the **Request Type** field indicates **eConsult**.
- 13 Select **Flag Referral (For Referring Provider use)** if you want to be notified of the eConsult.
- 14 Select the **Received Date (T2) (For Receiving Office use only)**. If you are a not receiving office, leave this blank. It will default to the current date and time. All fields marked with a red asterisk (\*) are mandatory and must be completed to submit an eConsult.

### Orthopaedic Surgery Request for Service

Flag Referral (For Referring Provider use)

Received Date (T2) (For Receiving Office use only): 28-Dec-2023 07:00

For urgent/time-sensitive help, DO NOT submit a Referral or eConsult. Instead, please call: RAAPID North @ 1-800-282-9911 / 780-735-0811 @ 1-800-661-1700 / 403-944-4486 (Red Deer, and south).

eConsult requests are for **clinical** advice only. For information on an eConsult's status or a patient's appointment please contact the **eConsult requests will be responded to within five days.**

- 15 Enter your **Clinical Question**.

16 Select the **Reason**.

17 Enter any **Pertinent Information** that may help the specialist answer your clinical question.

18 Attach any **Relevant Documentation** if applicable (e.g., diagnostic imaging/labs) or link documents that are already available in Alberta Netcare in the **Clinical Document Viewer (CDV) Tree**.

**NOTE:**

Note: To learn more about adding an external document to eReferral from your computer or EMR, visit the [Helpful Resources](#) page.

Request Details

**Clinical Question \*** Enter the clinical question you wish to have addressed

**Reason \***  I am unsure if this patient requires a referral  
 I am seeking advice

**Pertinent Information**

**Relevant Documentation**

File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.

Link to document(s) in the patient's clinical document tree

- To include a document from your computer, select **Choose a file** for external attachments. This will allow you to search on your computer. *Note that the maximum file size is 100MB per file.*
- To include a document available in Alberta Netcare, select **Link a document**. A pop-up will open that will allow you to search for the document you want to attach. You can search by **Report Name** or **Category** and dictate the date range to search within.

Get Netcare Documents

Report Name  Category

Date Range

**Note:** If the report you are looking for does not appear in the search results then increase the date range.

**Warning:** Reports that have a Demographics Mismatch are not accessible through this search and cannot be linked to a referral.

Enter search criteria above and click 'Search'

19 Confirm that the **Referring Provider Information** section is complete with the referring provider's name. The clinic's details will auto-populate from **My Details** (if added) and can be changed if needed.

20 Scroll to the bottom of the page and click **Submit** to send the eConsult. Select **Save as Draft** if the eConsult is incomplete or you want to return to it later. Press **Cancel** if you want to stop completing the eConsult.

**Referring Provider Information**  
 Complete the Referring Provider Referrals or Referring Provider Referrals On Behalf Of section on your My Details to display referrals on the My Referrals dashboard and to auto complete this section each time a referral is created.

Referring Provider \*

Phone Number \*

Fax Number

Address

Line 1

Line 2

City

Province

Postal Code

## Review a Response from the Specialty

When the specialty responds to an eConsult, you can open it in the *My Referrals* dashboard.

- 1 From the *Clinical Portal Menu*, go to *My Referrals*. Click on the *Completed* worklist and filter on *eConsult* as the *Request Type*.
- 2 To view the response, navigate to the *Activity* section on the *Right Panel* of the eConsult. The response can also be viewed at the bottom of the eConsult. The arrow located on the *Summary Bar* can be used to expand/collapse the referral header to see more details.

**Completed** eConsult **Shoulder Issue** Orthopaedic Surgery  
 Triage Site Orthopaedic Surgery - Provincial Submitted < 15 minutes ago eReferral ID RFS-AAB-

Status Reason	Continue Managing Within Your Scope of Practice	Referred For Submitted By	eConsult Three TRAINING
		Flagged for Referrer	Yes

### Orthopaedic Surgery Request for Service

Patient Information PHN/UL: 4 Name: Sex: F DOB: 15-Mar-

Request Created For Shoulder Issue - Orthopaedic Surgery - Provincial

#### Request Details

Clinical Question Enter the clinical question you wish to have addressed

Reason I am seeking advice

Pertinent Information Testing

Relevant Documentation No Files Get Netcare Documents No documents

The advice provided is based on the information that the requesting provider has submitted. It is one piece of information that contributes to the overall care of the patient. It is the responsibility of the requesting provider to incorporate this information into the broader knowledge of the patient context.

#### Referring Provider Information

Referring Provider Dr.

Phone Number	1 777 Test	Address
Fax Number	1 888 Test	Line 1 Testing
		Line 2 1
		City Calgary
		Province Alberta
		Postal Code xxx xxx

#### Respond with Advice

REASON Continue Managing Within Your Scope of Practice  
[Hide Form](#)

Set Service Provider Receiving Provider I

Advice/Response A referral is not required at this time. Continuing managing within your scope of practice.

Attach External Document(s) No Files

Netcare Document(s) No documents

Complete Reason Continue Managing Within Your Scope of Practice

Last updated by Three TRAINING on 12-Jan-2024 10:26 AM

#### Activity

Show Notes Only

**Respond with Advice**

REASON Continue Managing Within Your Scope of Practice  
[Hide Form](#)

Set Service Provider Receiving Provider I

Advice/Response A referral is not required at this time. Continuing managing within your scope of practice.

Attach External Document(s) No Files

Netcare Document(s) No documents

Complete Reason Continue Managing Within Your Scope of Practice

Last updated by Three TRAINING on 12-Jan-2024 10:26 AM

**Received**

ORGANIZATION Alberta Health Services  
 TRIAGE SITE Orthopaedic Surgery - Provincial  
 SPECIALTY Orthopaedic Surgery  
 STATUS Waiting for Clinical Triage  
 FLAG REFERRAL (FOR REFERRING PROVIDER USE) Yes  
 ACTION Submit  
 DATE 28-Dec-2023 7:00 AM  
 Last updated by Three TRAINING on 12-Jan-2024 10:21 AM

#### People

Referrer Dr.

Service Provider Receiving Provider I

#### Linked Referrals

There are no linked referrals for this referral.

Hide this patient's other referrals

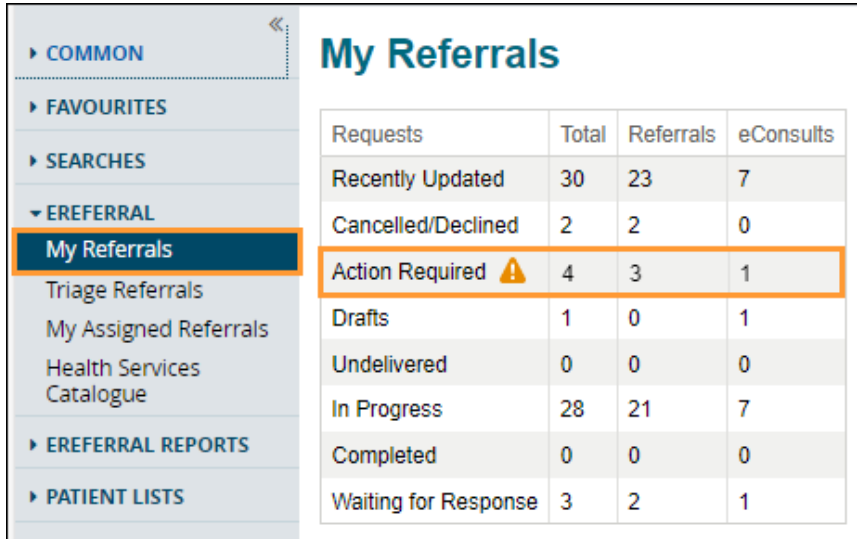
- RFS-AAB- Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre  
 REDIRECTED
- RFS-AAB- Single Hub Access Referral Program (SHARP) - Adult GI  
 REDIRECTED
- RFS-AAB- Calgary FAST Orthopaedics CAT  
 WAITING FOR APPOINTMENT
- RFS-AAB- Calgary FAST Orthopaedics CAT  
 CANCELLED
- RFS-AAB- South FAST Orthopaedics CAT  
 CLERICAL TRIAGE IN PROGRESS

3 Review the response provided and any attachments.

## Respond to a Request for Additional Information/Action Required

A triage centre or receiving provider may require additional information from you (the referring provider) before they can complete the eConsult. Follow these instructions to add more information:

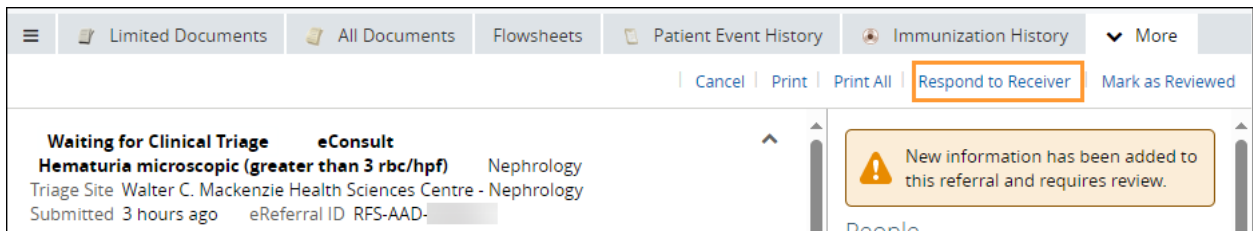
- 1 From the *Clinical Portal Menu*, go to *My Referrals* and open the *Action Required* worklist.



The screenshot shows the 'My Referrals' dashboard. On the left is a navigation menu with categories: COMMON, FAVOURITES, SEARCHES, EREFERRAL (expanded), and PATIENT LISTS. Under EREFERRAL, 'My Referrals' is selected. The main area displays a table with the following data:

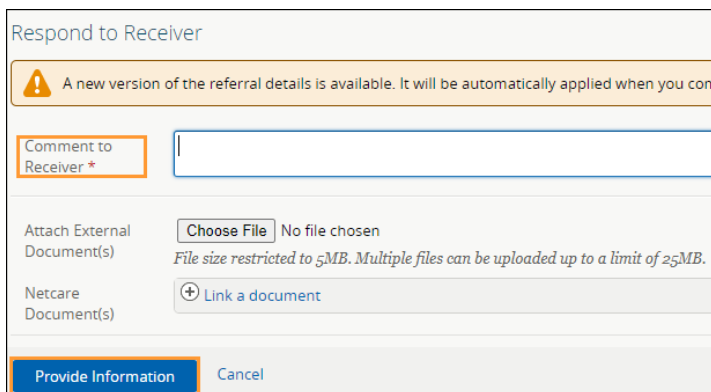
Requests	Total	Referrals	eConsults
Recently Updated	30	23	7
Cancelled/Declined	2	2	0
<b>Action Required</b> ⚠️	4	3	1
Drafts	1	0	1
Undelivered	0	0	0
In Progress	28	21	7
Completed	0	0	0
Waiting for Response	3	2	1

- 2 Select *eConsult* for *Request Type* and press *Search*.
- 3 Review the *Activity* section located on the *Right Panel* of the eConsult and read the question/request from the specialist.
- 4 Click *Respond to Receiver* from the *Workflow Bar* when you are ready to respond.



The screenshot shows the eConsult interface for a patient with 'Hematuria microscopic (greater than 3 rbc/hpf)'. The 'Workflow Bar' at the top right contains buttons for 'Cancel', 'Print', 'Print All', 'Respond to Receiver' (highlighted), and 'Mark as Reviewed'. A notification box on the right states: 'New information has been added to this referral and requires review.'

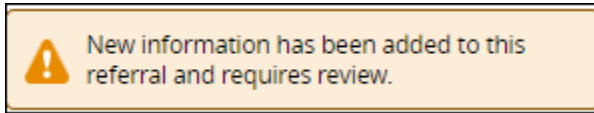
- 5 Type your response/additional information into the *Comment to Receiver* box, add any attachments and click *Provide Information*.



The screenshot shows the 'Respond to Receiver' form. It includes a notification at the top: 'A new version of the referral details is available. It will be automatically applied when you come back.' Below this is a text input field for 'Comment to Receiver \*'. There are sections for 'Attach External Document(s)' with a 'Choose File' button and 'Netcare Document(s)' with a 'Link a document' button. At the bottom, the 'Provide Information' button is highlighted.

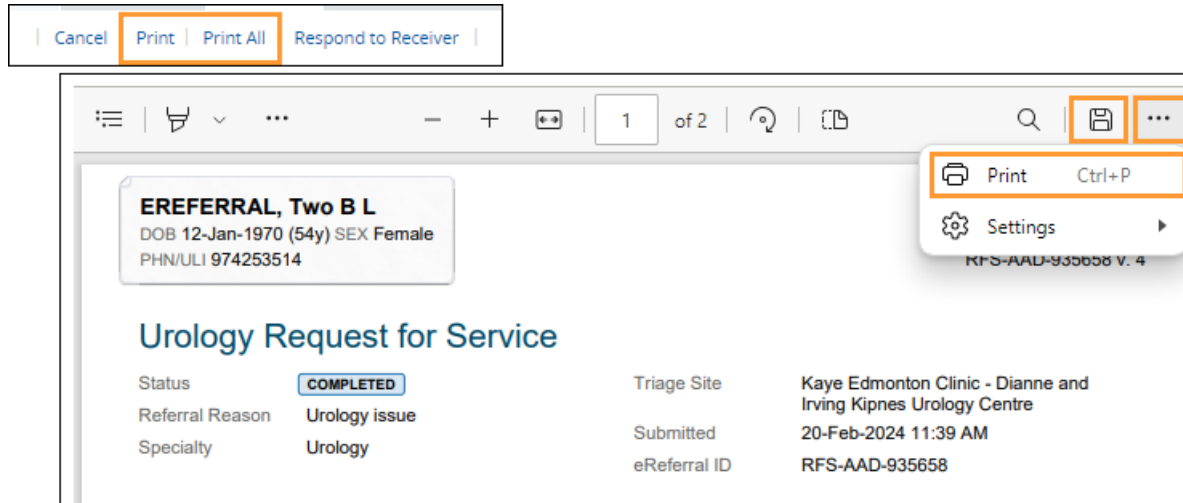
- The eConsult will then be removed from your *Action Required* worklist within the *My Referrals* dashboard.

- For the receiving provider, a panel is displayed at the top of the **Right Panel** with a note identifying that new information has been added to the eConsult.



## Print/Save a Copy of an eConsult

- 1 Locate the eConsult on the **My Referrals** dashboard or **Triage** dashboard and open it. Click **Print** or **Print All**. You can also save the PDF file.



**Print All:** Generates a print-out of the following sections in the following order:

- eConsult Contents – The entire eConsult form will print except for free text fields that are blank.
- Support Documents – This section lists the titles of all the attached documents. This includes external documents attached in the **Right Panel** or within the eConsult. It does not include linked Alberta Netcare documents.
- **Notes** and **Activity** – All the notes (General, Clinical or Clerical) and activity that appear in the **Right Panel**.
- **Referral Attachments** – This section displays copies of all the attached documents. This includes external documents attached in the **Right Panel** or the eConsult. It does not include linked Alberta Netcare documents.

**Print:** Generates a print-out of the following sections in the following order:

- eConsult Contents – See above.
- Support Documents – See above.
- **Notes** – All the notes (General, Clinical or Clerical) that appear in the **Right Panel**.