eReferral Quick Reference

How to Manage My Assigned Referrals/eConsults

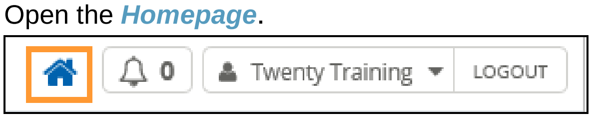
The ***My Assigned Referrals*** dashboard displays all Referrals (previously called Consults) and eConsults (previously called Advice Requests) that are assigned to a specific receiving provider This dashboard is only available to Alberta Netcare users who have a Receiving Provider role.

The ***My Assigned Referrals*** dashboard includes the following worklists assigned to the receiving provider:

- ***Action Required:*** Referring provider has requested or provided additional information for you to review.
- ***Open eConsult:*** Any open eConsults.
- ***Waiting for Appointment/Waitlisted:*** Referrals waitlisted and waiting for an appointment.
- ***Scheduled:*** Referrals with a booked appointment.
- ***Completed/Cancelled/Declined:*** Referrals and eConsults that have been completed, cancelled or declined.
- ***New Requests:*** Referrals that have not been actioned. Once actioned with a workflow it will move to another worklist based on the action that was selected.
- ***Redirected:*** Referrals redirected to your triage site from another triage site.
- ***Triage:*** Referrals or eConsults in queue to be triaged.
- ***Waiting for Response:*** Referrals or eConsults that have been sent to the referring provider to provide information.
- ***Deferred:*** Referrals that have been deferred due to the patient not being ready to book medically, functionally, or socially.

Adding My Assigned Referrals to Your Homepage

1 Open the ***Homepage***.



2 Scroll down to the bottom of the ***Homepage*** and click ***Configure Layout***.

3 Choose how you want the windowlet to be displayed on the ***Homepage*** by selecting ***New Section to the Right*** or ***New Section Below***. Click the ***Add*** ⊕ button.

4 Click the drop-down arrow to show a list of configurable options. Select ***My Assigned Referrals*** from the list.

5 Click ***Update Layout*** at the bottom of the page to save the changes.

6 Confirm the Homepage is now displaying the ***My Assigned Referrals*** dashboard.

Managing My Assigned Referrals

1 Confirm the Homepage is now displaying the ***My Assigned Referrals*** dashboard.

My Assigned Referrals

Requests	Total	Referrals	eConsults
Action Required ⚠	18	5	13
Open eConsults ⚠	15	-	15
Waiting for Appointment/Waitlisted	8	8	0
Scheduled	3	3	-
Completed/Cancelled/Declined	16	10	6
New Requests	1	1	-
Redirected	7	7	0
Triage	13	9	4
Waiting for Response	2	0	2
Deferred	1	1	-

2 Click on any of the worklists on the ***My Assigned Referrals*** dashboard, located under the ***Clinical Portal Menu*** or on the ***Homepage***, to view a summary of referrals.

3 Click on a Referral/eConsult in the list to access the applicable patient Referral/eConsult.

4 Within the referral form, you will have access to the workflow and be able to apply triage workflow actions to assigned Referrals/eConsults.

NOTE:	For further information on triage workflow and actions, review the eReferral Quick Reference documents: <u>How to Manage/Triage a Referral</u> or <u>How to Manage/Triage an eConsult</u>.