Manage Referrals

The user role you have been assigned in eReferral will dictate what dashboards and associated workflow items you can access. Regardless of your assigned role, the same process is used to filter and find referrals.

- Referring providers have access to the *My Referrals* dashboard.

- Receiving providers can access the *My Assigned Referrals* dashboard and the *Triage Referrals* dashboard. Sometimes, they may also have access to the *My Referrals* dashboard.

- Triage users will have access to all dashboards.

1   Select *eReferral* from the *Clinical Portal Menu*, then *Triage Referrals*.

2   Select *Triage* to display a list of referrals awaiting triage in the *Triage* worklist.

3   Filter on *Referrals* from this list. You can also filter by *Referral Reason*, *Specialty*, *Triage Site*, *Service Provider*, *External Triage Site* and *Priority*. Use the *Received Date* to narrow down and focus on newly received referrals to ensure they are triaged on time.

4   Click *Exclude Waiting for Response* to exclude all referrals that are still waiting for responses.

5   You can further refine your search results by filtering on referral status:

- *Accepted*: Referrals that have been accepted by the specialty and are pending further processing. This may also be required when the specialist/clinic does clinical triage, and the referral has been accepted by the specialist/clinic.

- *Appointment Missed*: Referrals with previous appointment booked dates that the patient missed. The reason for missing can also be selected, and notes can be added to further clarify.

- *Clerical Triage in Progress*: New referrals that are pending initial review or referrals requiring additional information before assigning to a provider.

- *Clinical Triage Progress*: Clinician/specialist has started a clinical review of the referral.

- *Redirect*: New referrals redirected to your triage site from another triage site.

- ***Response in Progress***: Advice has been provided on the referral and is pending a review from a clinician/specialist.
- ***Waiting for Clinical Triage***: Clerical triage has been completed and is awaiting clinical review by a specialist/clinic.
- ***Information Provided***: Requested information from the referring provider has been received, and the referral has been updated.
- The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).
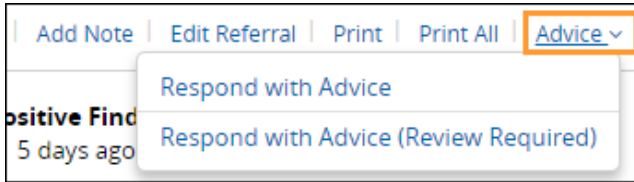
6   When a referral is opened, the *Workflow Bar* and other actions are located at the top right of the referral.

- *Add Note*: Used to add notes (i.e., General, Clinical or Clerical).

- *Edit Referral*: Used to make changes to the referral, such as to add/modify an address or phone/fax number.

- *Print* and *Print All*: Used to print to a local printer or save as a PDF document.

  - (*Print All* & *Print*) Referral Contents – The entire Referral form will print except for free text fields that are blank.

  - (*Print All* & *Print*) Support Documents – This section lists the titles of all the attached documents. This includes external documents attached in the *Right Panel* or within the Referral. It does not include linked Alberta Netcare documents.

  - (*Print All*) *Notes* and *Activity* – All the notes (General, Clinical or Clerical) and activity that appear in the *Right Panel*.

  - (*Print All*) *Referral Attachments* – This section displays copies of all the attached documents. This includes external documents attached in the *Right Panel* of the Referral. It does not include linked Alberta Netcare documents.

  - (*Print*) *Notes* – All the notes (General, Clinical or Clerical) that appear in the *Right Panel*.

- *Workflow Bar*: Used to change the referral status. Each of these items has options that can be accessed by clicking the drop-down arrow. The *Workflow Bar* is selected to identify the progress of the request, which begins with *Update Received Date (T2)* through to *Cancel*. The items displayed on the *Workflow Bar* are dictated by the user role you have been assigned in eReferral.
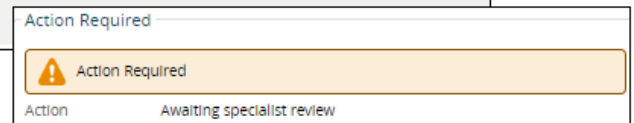
  Triage Referrals & My Assigned Referrals Workflow Bar

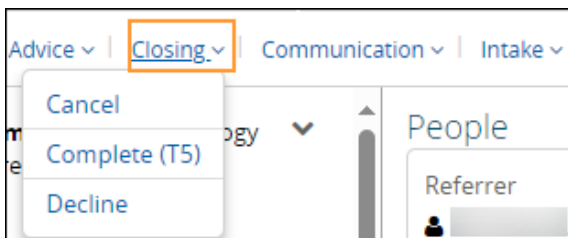 | Add Note | Edit Referral | Print | Print All | Advice ⌄ | Closing ⌄ | Communication ⌄ | Intake ⌄ | Scheduling ⌄ | Triage ⌄ |
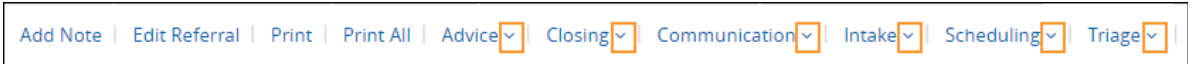
Workflow Bar Options

Advice

- *Respond with Advice* – Select this option if this referral requires advice/further investigation (i.e., missing required information, continuing to manage the patient in the scope of practice, informing the receiving provider/clinic that a referral has been submitted on their behalf, etc.). Provide the advice in the comment box, choose the *Complete Reason*, and click *Complete*. The referral is now complete and will appear on the *Completed* worklist of the *My Referrals* dashboard of the referring provider and the *Completed/Cancelled/Declined* worklist on the *Triage Referrals* dashboard and *My Assigned Referrals* dashboard.

- *Respond with Advice (Review Required)* – Select this option to provide advice that requires a review by a specialist before it is provided to the referrer (i.e., if a fellow or other staff member composes the response). Provide the advice in the comment box, choose the *Complete Reason*, and click *Submit for Review*. The referral is now awaiting specialist review and will appear on the *Action Required* worklist on the *Triage Referrals* dashboard and *My Assigned Referrals* dashboard.

Closing

- *Cancel* – Select this option to change the referral status to *Cancelled*. Select the *Reason* for cancelling the referral. The request will now move to the *Completed/Cancelled/ Declined* worklist for referring and receiving providers.

Cancel

Reason *

Comment

Apply   Cancel

Referral no longer needed
Patient has been unsuccessful attending appointments
Unable to contact patient
Patient has declined service
Patient deceased
Incorrect Referring Provider added to form
Referral created against incorrect patient

- *Decline* – Select this option to change the referral status to *Declined*. The request will now move to the *Completed/Cancelled/ Declined* worklist for referring and receiving providers.
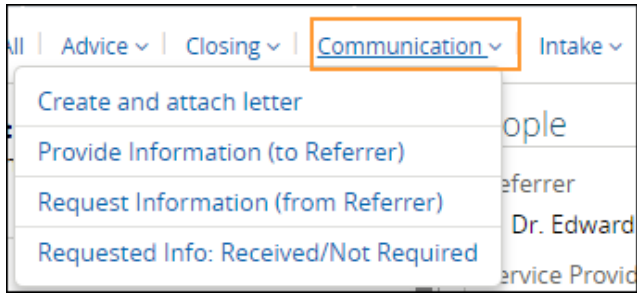
Decline

Reason *

Attach External Document(s)   Choose File   No file chosen
File size restricted to 5MB. Multiple files can be uploaded up to a limit of 25MB.

Netcare Document(s)   ⊕ Link a document

Comment

Decline   Cancel

- *Complete (T5)* – Select this option to change the referral status to *Complete*. The request will now move to the *Completed* worklist for the referring provider on the *My Referrals* dashboard and the *Completed/Cancelled/Declined* worklist on the *Triage Referrals* dashboard and *My Assigned Referrals* dashboard.

    If the patient attended the appointment, make sure to select *Patient attended appointment*. This will cause the *Date Appointment Attended (T5)* to appear.

    Enter the *Date Appointment Attended (T5)*. This will be used along with the *Received Date (T2)* and *Accepted Date (T3)* to calculate the patient's referral wait time.

    The default selection for referrals in the *Completed/Cancelled/Declined* list is one (1) month. This value is set by the *Show Completed/Cancelled/Declined* referrals in the *Triage Referrals* panel on your *My Details* screen.

Complete (T5)

Accepted Date (T3)   13-Dec-2023
Priority   Routine
Set Service Provider   Dr _____ ⊗
Reason *   ● Patient attended appointment
             ○ Consult Letter Sent
             ○ Consult Letter Sent and Available on Alberta Netcare Portal
             ○ Lab results sent
             ○ Lab results sent and available on Alberta Netcare Portal
             ☒ Clear
Date Appointment Attended (T5) *   14-Feb-2024
Outcome *   ○ Patient discharged from our care, as per consult letter
             ○ We will continue ongoing patient care
             ○ Booking the patient for procedure
             ○ Pre-screening completed and patient will be booked to see specialist
             ○ Pre-screening completed; patient discharged as per consult letter
             ○ Information Not Provided by Service
             ☒ Clear

Attach External Document(s)   Choose a file...
File size restricted to 100MB. Multiple files can be uploaded up to a limit of 300MB.

Netcare Document(s)   ⊕ Link a document

Comments

Complete (T5)   Cancel

Communication

- *Create and attach letter* – This option is for the Facilitated Access to Specialized Treatment (FAST) team to generate and send a letter to the referring provider. Each letter has drop-down fields available to customize the content depending on the referral status (i.e., Accepted, Incomplete, Declined, etc.).
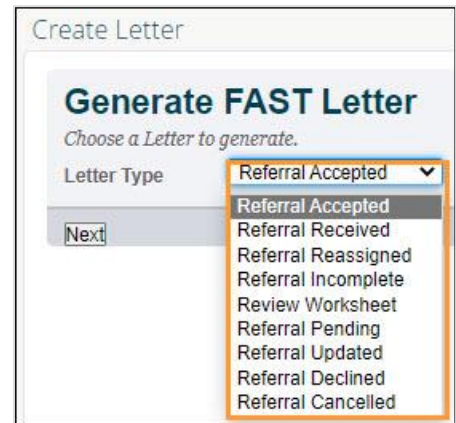
- *Provide Information (to Referrer)* – Select this option to provide information to the referring provider. If selected, the referral will then appear on the *Action Required* worklist of the referring provider's *My Referrals* dashboard.
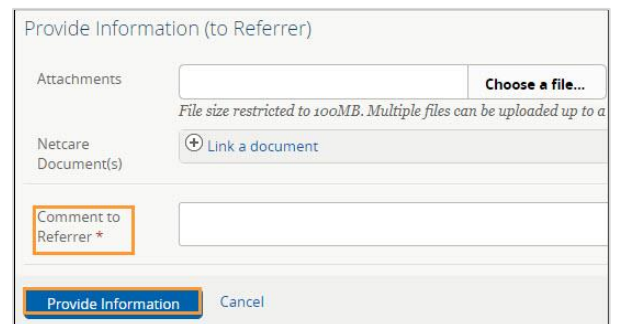
- *Request Information (from Referrer)* – Select to ask for more information from the referring provider. The referral will appear on the receiving provider's *Triage Referrals* dashboard on the *Waiting for Response* worklist and the referring provider's *Action Required* worklist.

- *Requested Info: Received/Not Required* – Select this option if a referring provider submitted the requested information via fax or the information is found elsewhere or is no longer required (i.e., the referral is no longer required because it has been cancelled or declined). Attach the requested information to clear all flags (i.e., *Waiting for Response* and *Action Required*). There is no status change.

Intake

- *Change Referral Reason* – The *Change Referral Reason* workflow can be used to enter a more specific *Referral Reason* or correct a *Referral Reason* that may have been entered incorrectly (for both eConsults and Referrals). Only users who have access to the *Triage* dashboard or the *My Assigned Referrals* dashboard have access to this function. Referring providers do not have access to this function. This action does not change the referral status or generate any notifications. For example, a referral is submitted for the Adult Gastroenterology Specialty with *Adult gastroenterology issue* as the *Referral Reason*. The triage centre changes the *Referral Reason* to a more specific Gastroenterology reason, such as Gastroesophageal reflux disease (GERD).

- *Complete Clerical Triage* – Select this option to complete clerical triage. This will change the status to *Waiting for Clinical Triage*. External triage sites can be added here (not mandatory) to complete clinical triage.

- *Redirect* (previously named Reassign)– Select this option to redirect the referral to another triage facility. The referral status will change to *Redirected* and appear on the newly assigned facility's *Triage Referrals* dashboard. Redirect does not update mandatory requirements. Only users who have access to the *Triage* dashboard or the *My Assigned Referrals* dashboard have access to this function. Referring providers do not have access to this feature.

- *Set Service Provider* – Select this workflow action to assign a service provider to the referral. In the pop-up, type the service provider's name and select it from the list. Click *Set Service Provider* to finish.

- *Update Received Date (T2)* – Used to update the received date of the referral. The wait for surgical consultation is calculated and reported on for the period between *Received Date (T2)* and *Completion (T5).* Referral Wait is calculated for all patients that have their referral processed through the FAST (Facilities Access to Specialized Treatment) Program. If a referral is redirected to another service provider do not change the received date.

Scheduling

Workflow items that are italicized indicate that there is no form to enter information in but the referral status will change.

- *Appointment Booked* – Select this option to add an appointment date and select the *Appointment Type* – *Screening* or *Consult*.

- *Appointment Missed* – Select this option to change the referral status to *Appointment Missed*. If the referring provider has their eReferral *Provider Notifications* set up with the default options, this will trigger an email to them.

- *Defer* – Select this option to show that a request is not ready to be booked. The referral will move to the *Deferred* worklist. You need to check this list regularly, as no alerts are associated with it.

- *Waitlist* – Select this option to change the referral status to *Waitlisted*. As a comment box is unavailable for changing the status to *Waitlisted*, select *Add Note* and choose *Clerical* to enter a note regarding the patient's waitlist status if required.

Triage

Workflow items that are italicized indicate that there is no form to enter information in, but the referral status will change.

- *Accept (T3)* – Select this option to enter the accepted date of the referral. The status of the referral will change to *Accepted*. Accepted status indicates the referral has been accepted by the specialist/clinic. The referral stays on the receiving provider's *Triage* worklist on the *Triage Referrals* dashboard and *My Assigned Referrals* dashboard.

- *Ready for Booking* –Select this option to change the referral status to *Waiting for Appointment*. This action can be used by specialties that do not have a waiting list, and an appointment can be scheduled as soon as triage is complete. This also moves the referral from the *Triage* to the *Waiting for Appointment/Waitlisted* worklist.

- *Set Priority and Booking Instructions* – Select this option to set the priority of the referral (based on the request's clinical content). Select priority: *Routine*, *Semi Urgent*, or *Urgent*.

- *Start Clinical Triage* – Select this option to start clinical triage. This will change the status to *Clinical Triage in Progress*. There is no form associated with this action.