Alberta Netcare Portal

eReferral

User Guide

5.0
Updated: June 2024

Table of Contents

For eReferral training support, please contact the eHealth Services team by email (eHealthProviderSupport@gov.ab.ca) or telephone: 1-855-643-8649 (Monday - Friday; 8:15 a.m. – 4:30 p.m.).

If you are a community user and need Alberta Netcare Portal support, contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638. *Important note*: The Alberta Netcare Provincial Help Desk is only for Alberta Netcare Portal technical support and password resets.

If you are an Alberta Health Services (AHS) user, contact the AHS IT Service Desk at 1-877-311-4300.

For general eReferral inquiries, please contact the AHS Access Improvement team by email (access.ereferral@ahs.ca).

Are we missing something in this user guide? Email access.ereferral@ahs.ca with your suggestions for future additions.

Important note: *All patient information included in this User Guide is fictional and for example purposes only.*

Anything accessed under YOUR Alberta Netcare Portal user name and password is your responsibility. Remember that it is important to ONLY access the patient data you need to complete your job; you should not access your family, friends, neighbours, coworkers or even your own data.

1.0 Welcome to eReferral

Alberta Netcare eReferral, known as eReferral for short, is a paperless referral management system within the Alberta Netcare Portal that allows physicians and their support staff to create, submit, track, and manage referral requests electronically. eReferral started in 2014 with three early adopter groups and has grown to more than 40 specialty areas across Alberta.

With eReferral, referring providers can:

- Create eConsults (previously called Advice Requests), which are non-urgent requests for advice answered by specialists within five calendar days.
- Create Referrals (previously called Consult Requests), which are non-urgent requests for an in-person specialist appointment.
- Provide Clerical and Clinical Triage to ensure the referral is complete and all required patient information is contained within the referral.
- Manage Appointments and track booked, attended, and missed appointments.

For more information about eReferral, go to the eReferral website.

RESOURCES	• eReferral Program Features • eReferral User Benefits • List of specialties accepting eConsults & Referrals

1.1 Accessing eReferral - Alberta Netcare Portal Basics

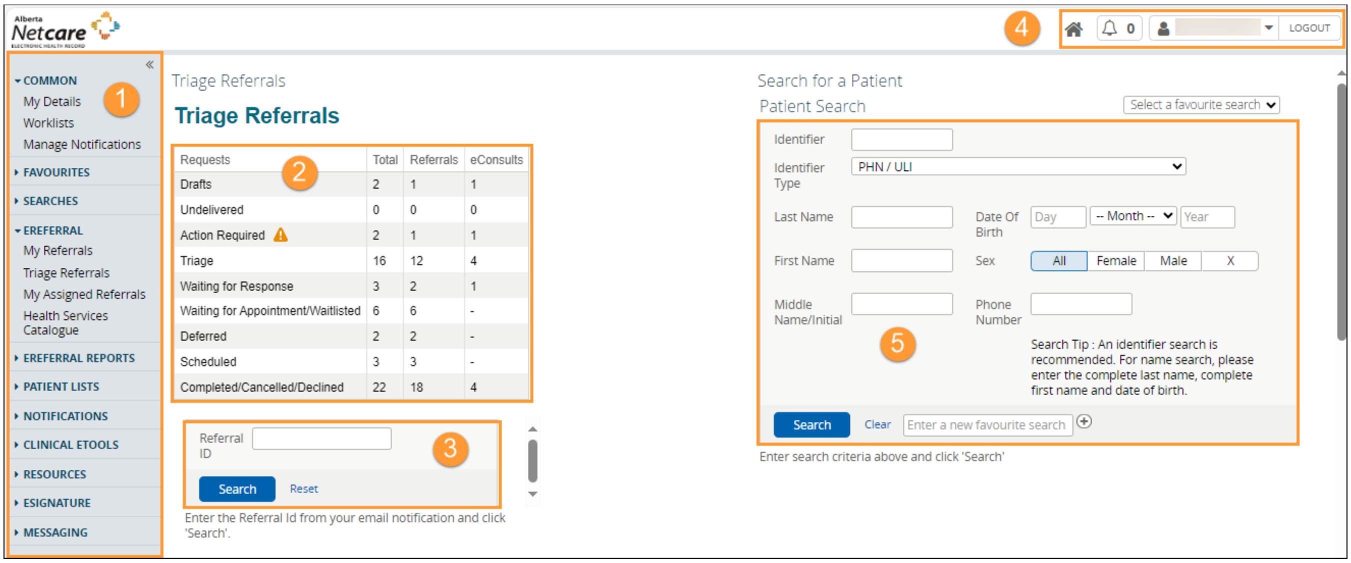
- To login to the Alberta Netcare Portal from an Alberta Health Services (AHS) facility, go to: https://portal.albertanetcare.ca/cha/NetcareLogin.htm. Enter your username and password and click ***Login***.

TIP	For additional Alberta Netcare Portal instructions, visit the Learning Centre.

- To login from a remote site using a fob, go to: https://access.albertanetcare.ca. Enter your username and passcode (PIN+Tokencode) and press ***Logon***.

2.0 Getting Started with eReferral

Login to the Alberta Netcare Portal to access the eReferral homepage from the menu on the left side.



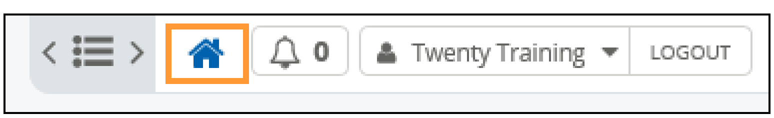
The elements below are visible on the eReferral homepage:

1. ***Clinical Portal Menu*** – Access information like ***My Details***, patient searches and eReferral.
2. ***Referral Dashboards*** – Shows a running total of eReferral requests by state.
3. ***Referral ID Search*** – Search for a specific eReferral request.
4. Login/Logout Information and ***Homepage*** through the ***Global Menu*** – Including login name, notifications, ***Homepage*** link, ***Global Menu***.
5. ***Patient Search*** – Search for a patient using their name, Unique Lifetime Identifier (ULI) or Personal Health Number.

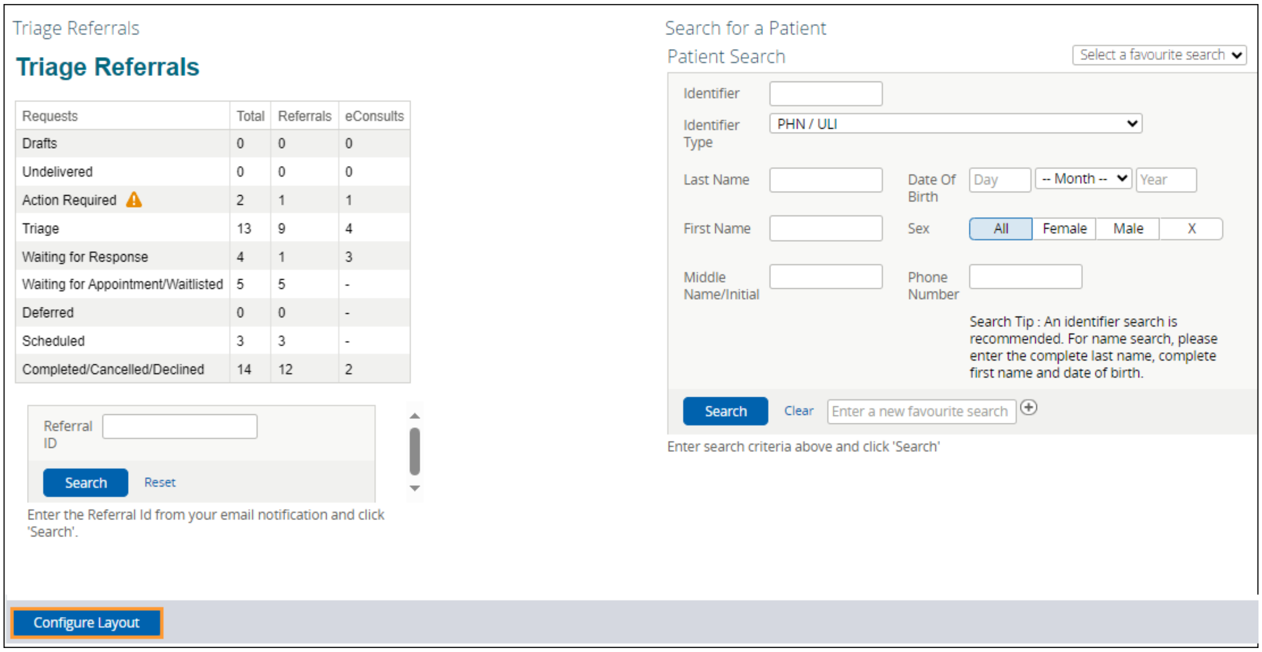
2.1 Customizing the Homepage

Your ***Homepage*** can be customized to view your most frequently used dashboards immediately when you log into the Alberta Netcare Portal:

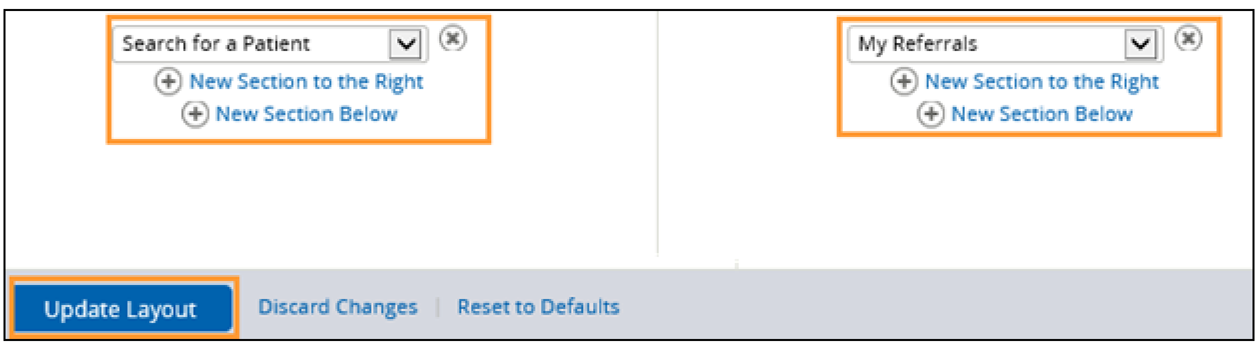
a. Click the ***Home*** icon in the ***Global Menu***.



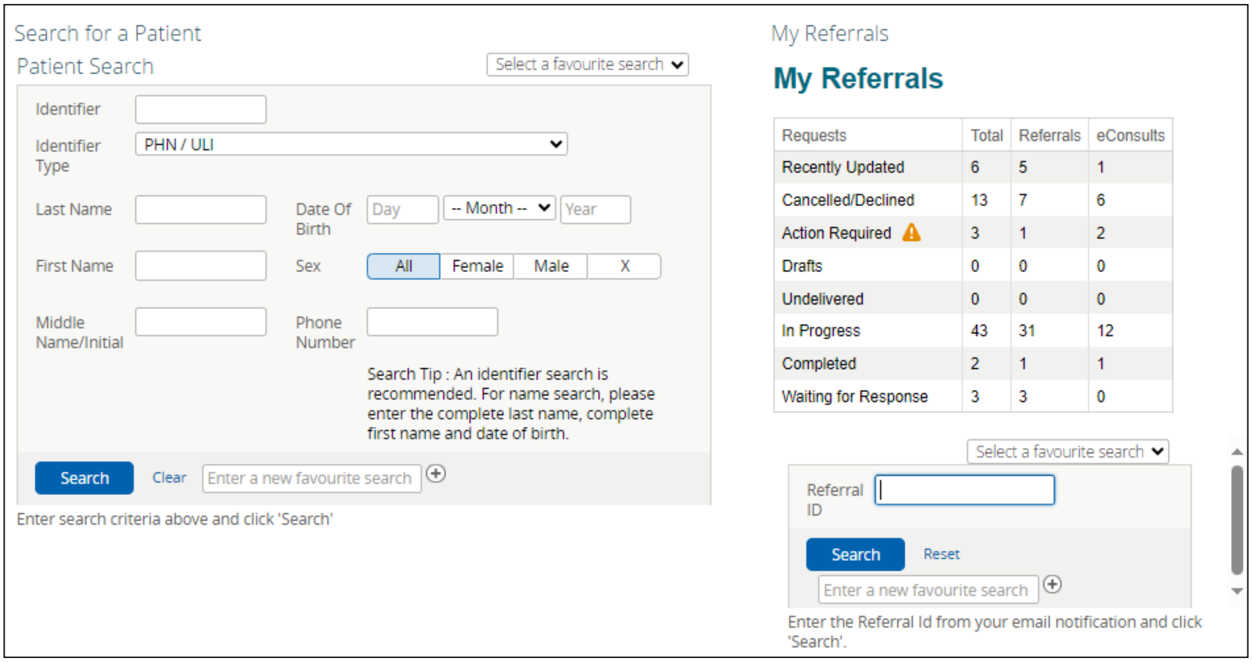
b. Scroll to the bottom of the ***Homepage*** and click ***Configure Layout***.



c. Divide the ***Homepage*** into the desired sections. Add a new section to the right or below. For example, you can select ***Search for Patient*** and ***My Referrals***.



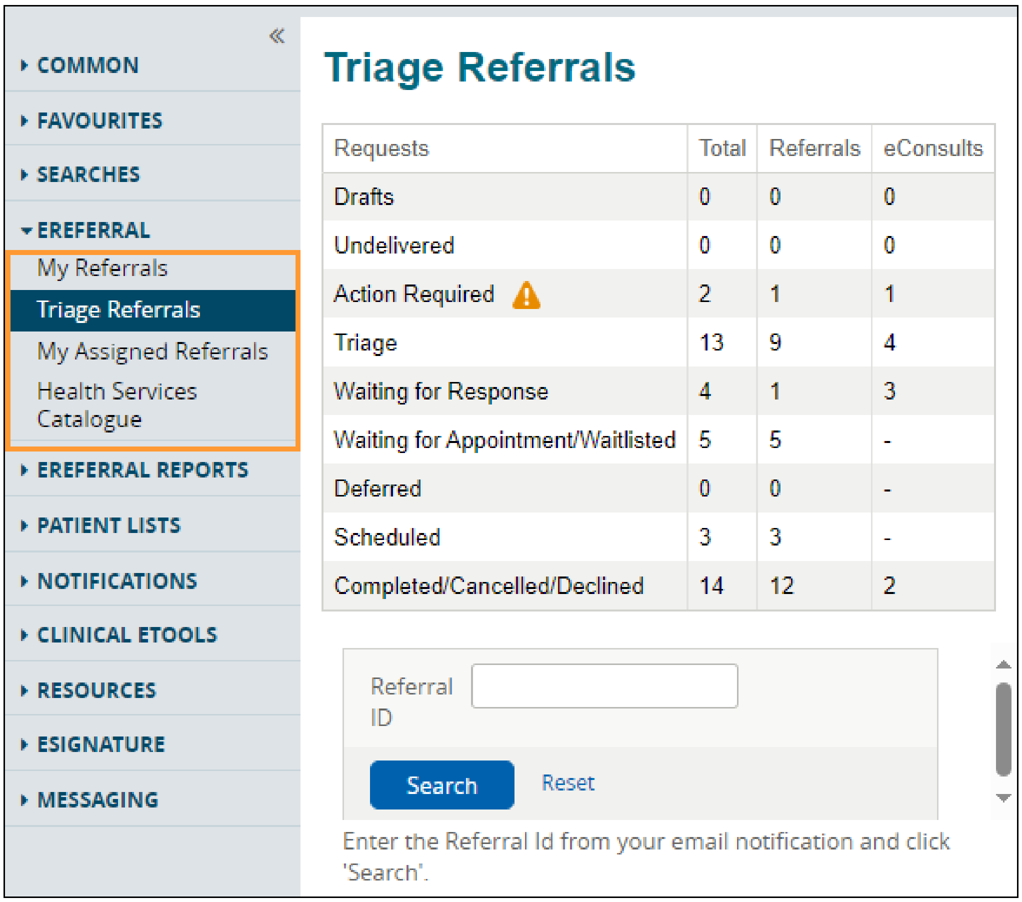
d. Scroll to the bottom of the page and click ***Update Layout*** to save the configuration. Then confirm that the ***Homepage*** appears with the new configuration by clicking on the ***Home*** icon from the ***Global Menu***. A sample layout is shown below:


Search for a Patient
Patient Search
Select a favourite search
Identifier
Identifier Type
PHN / ULI
Last Name
Date Of Birth
Day
-- Month --
Year
First Name
Sex
All
Female
Male
X
Middle Name/Initial
Phone Number
Search Tip : An identifier search is recommended. For name search, please enter the complete last name, complete first name and date of birth.
Search
Clear
Enter a new favourite search
Enter search criteria above and click 'Search'
My Referrals
My Referrals
Requests
Total
Referrals
eConsults
Recently Updated
6
5
1
Cancelled/Declined
13
7
6
Action Required
3
1
2
Drafts
0
0
0
Undelivered
0
0
0
In Progress
43
31
12
Completed
2
1
1
Waiting for Response
3
3
0
Select a favourite search
Referral ID
Search
Reset
Enter a new favourite search
Enter the Referral Id from your email notification and click 'Search'.

2.2 eReferral Menu and Dashboards

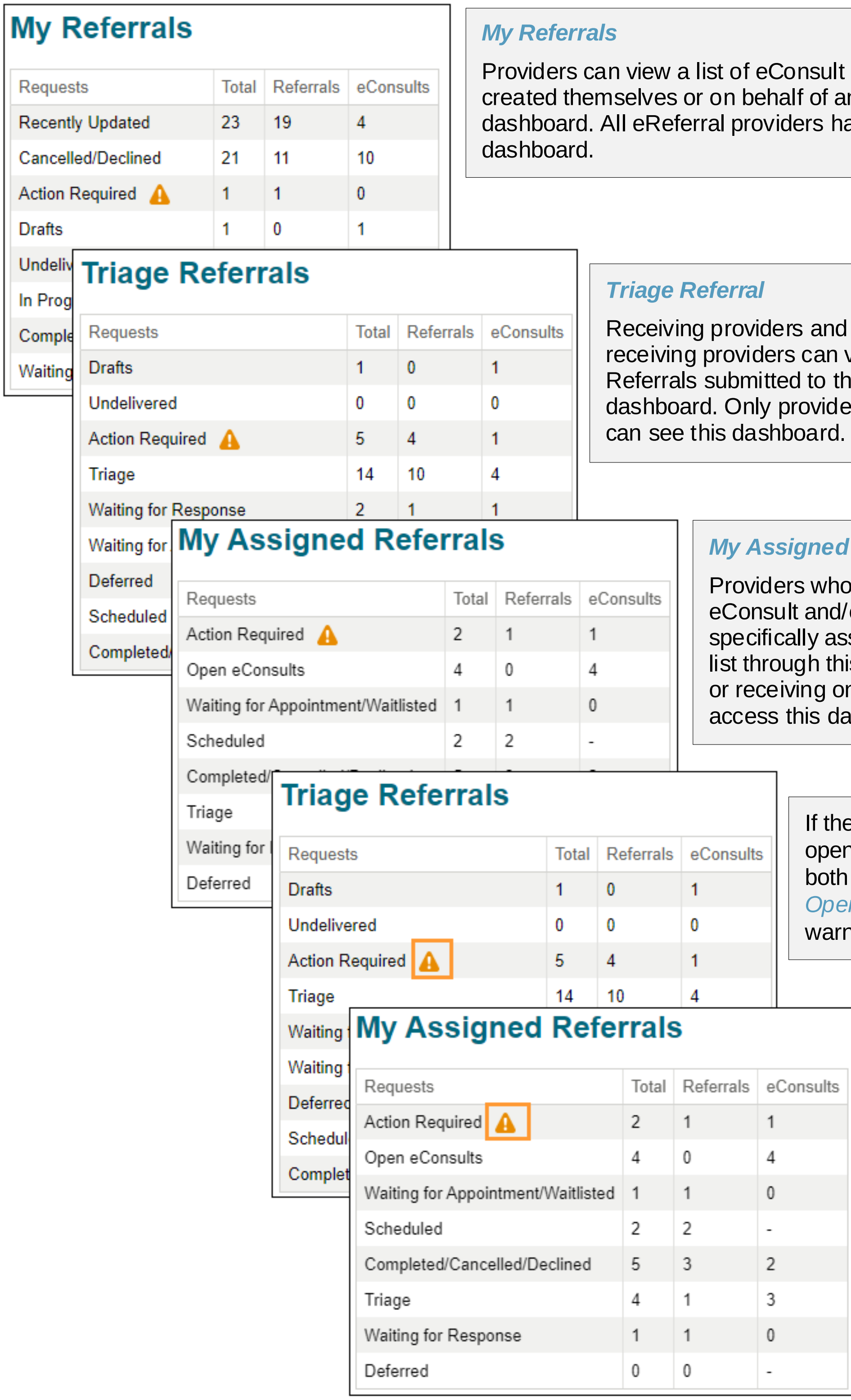
eReferral functions are listed in the ***Clinical Portal Menu*** on the left-hand side of your screen. Items listed vary depending on your user role; you may see some or all the following items.

Providers can view a list of eConsults and Referrals they have created themselves or on behalf of another provider through the dashboards within eReferral. The ***Triage Referrals*** dashboard shown below is an example. Triage users can view all eReferral requests in all the dashboards.



Within each dashboard, there are worklists that can be used to view or add more referral details, see status, assigned to, etc.

2.3 Types of eReferral Dashboards



My Referrals

Providers can view a list of eConsult and/or Referrals they have created themselves or on behalf of another provider through this dashboard. All eReferral providers have access to this dashboard.

Triage Referral

Receiving providers and those working on behalf of receiving providers can view all the eConsult and/or Referrals submitted to their site using this dashboard. Only providers set up with triage access can see this dashboard.

My Assigned Referrals

Providers who need to respond to an eConsult and/or Referrals that has been specifically assigned to them can view a list through this dashboard. Only receiving or receiving on behalf of providers can access this dashboard.

If there is an eConsult that is still open or needs attention, then both the *Action Required* and *Open Advice Requests* will show warning signs as a reminder.

2.4 Referral Worklists

Each dashboard is broken down into worklists based on the status of each request. Each worklist has the same headings (e.g., Total, Referrals and eConsults) but the items found in each list will vary.

My Referrals

Requests	Total	Referrals	eConsults
Recently Updated	6	5	1
Cancelled/Declined	13	7	6
Action Required ⚠	3	1	2
Drafts	0	0	0
Undelivered	0	0	0
In Progress	43	31	12
Completed	2	1	1
Waiting for Response	3	3	0

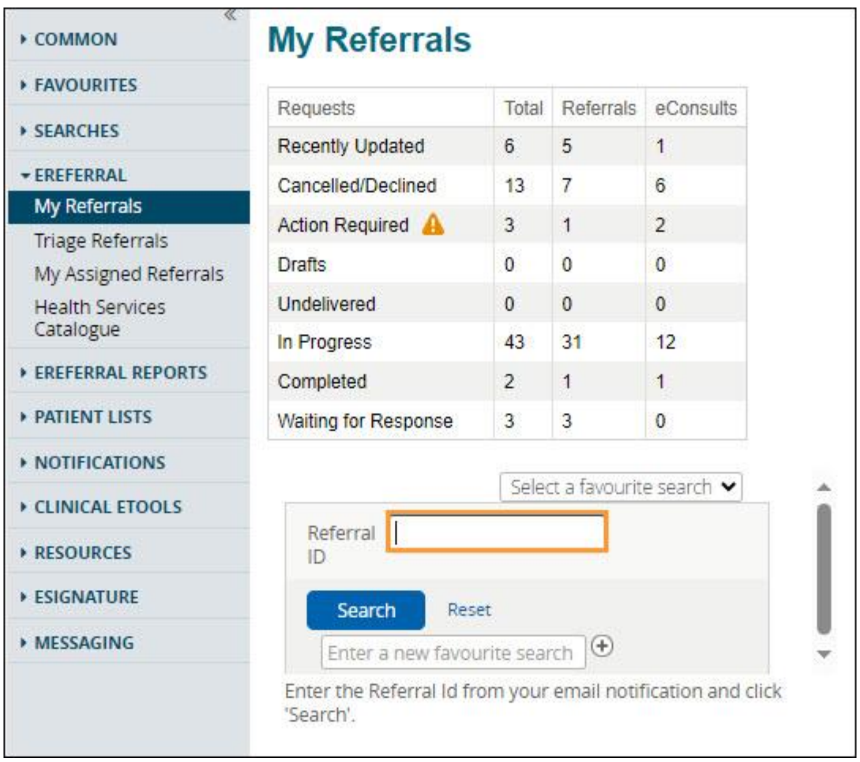
Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required ⚠	2	1	1
Triage	13	9	4
Waiting for Response	4	1	3
Waiting for Appointment/Waitlisted	5	5	-
Deferred	0	0	-
Scheduled	3	3	-
Completed/Cancelled/Declined	14	12	2

My Assigned Referrals

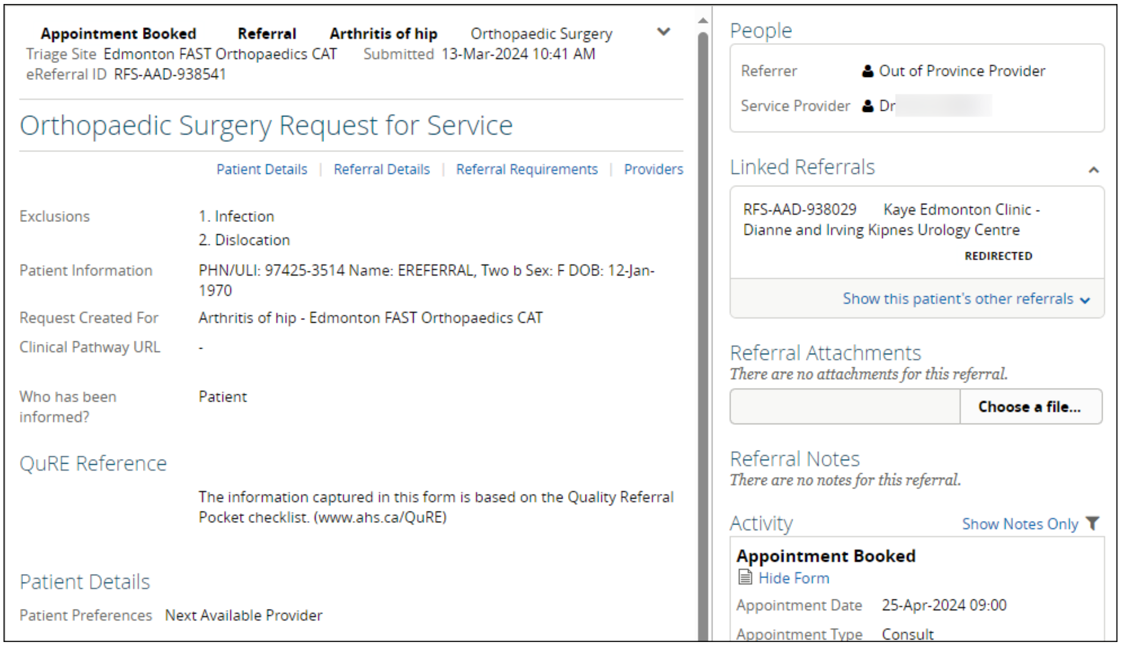
Requests	Total	Referrals	eConsults
Action Required ⚠	1	0	1
Open eConsults	1	0	1
Waiting for Appointment/Waitlisted	1	1	0
Scheduled	2	2	-
Completed/Cancelled/Declined	1	1	0
Triage	2	1	1
Waiting for Response	1	1	0
Deferred	0	0	-

Each worklist has a ***Referral ID*** feature:



Each referral request submitted is given a unique 12 letter/number identifier (e.g., RFS-AAB-000000) which is helpful when looking for a specific eConsult or Referral for a patient or when using your eReferral Provider Notifications.

To use this feature, enter the 12 letter/number ***Referral ID*** into the search box and click ***Search***. The referral will open in a new window.



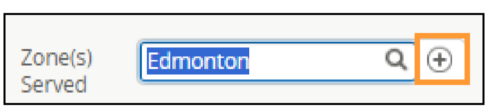
2.5 Health Services Catalogue

The ***Health Services Catalogue*** (HSC) provides detailed information about available eReferral specialties and their accepted ***Referral Reason***. A customized clinical pathway may also be available for each specialty/referral reason. You can search the HSC when creating an eConsult or a Referral. Approximate wait times can be viewed here if available.

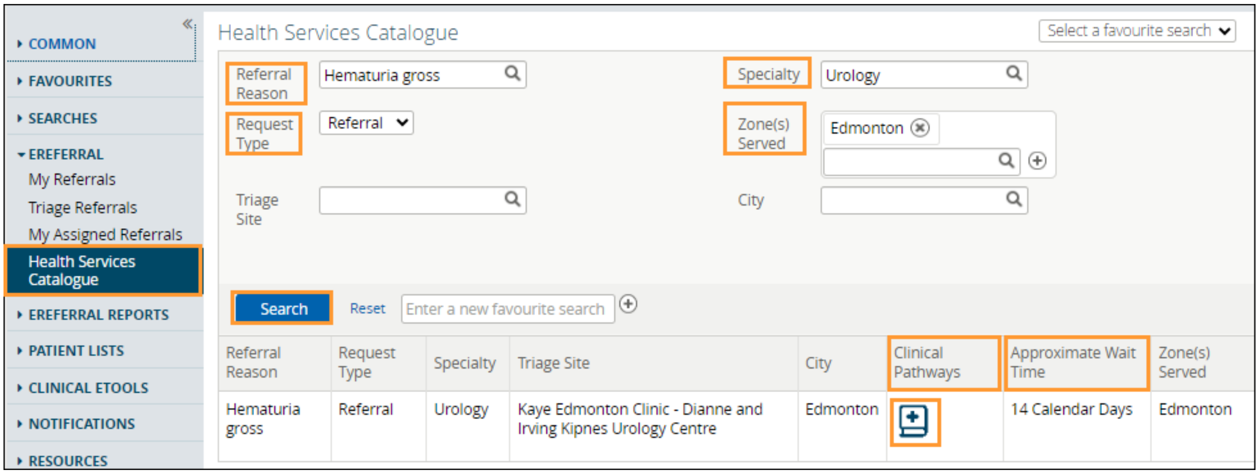
a. Open the ***Clinical Portal Menu.*** Click on ***eReferral*** then ***Health Services Catalogue***.

b. Search or use the filter options as per the example below or when creating an eConsult and/or a Referral. To search, enter three (3) or more characters and choose an option from the drop-down list.

c. You can browse the HSC to select a ***Referral Reason*** when creating a referral. You can further refine your search by ***Request Type***, ***Specialty***, ***Referral Reason***, ***Triage Site*** and Zone(s) Served. Click  next to the Zone(s) Served to ensure options displayed are for the correct zone.

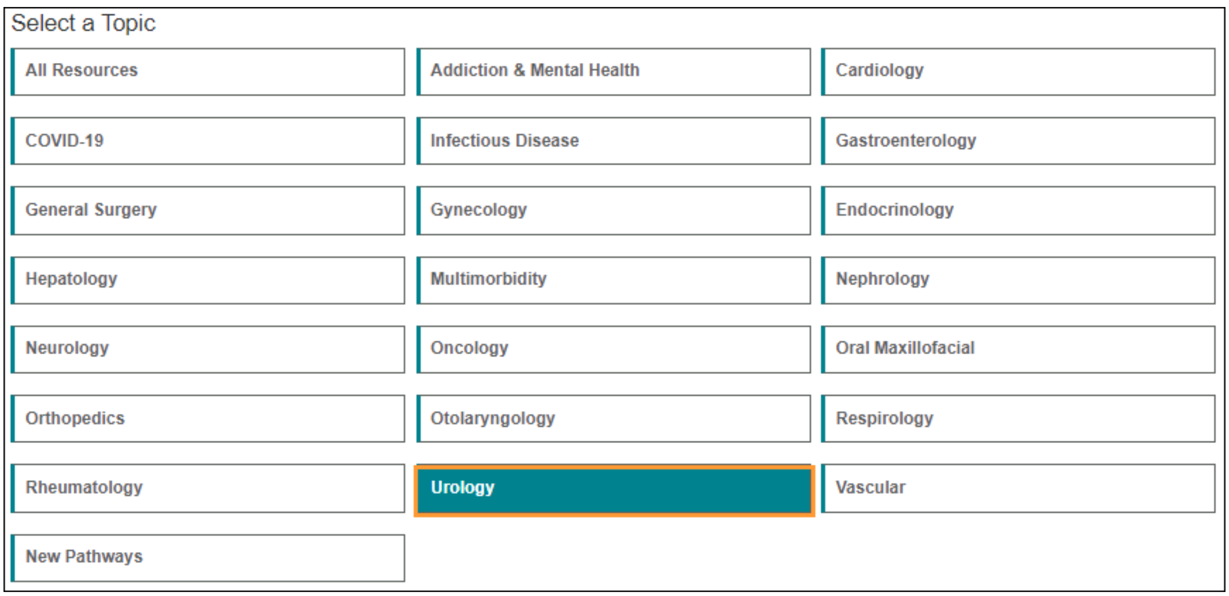


d. Approximate Wait Time (if available) is displayed. For eConsults, this is within five (5) calendar days. For Referrals, this date is self-reported by the specialist and/or service and will vary by specialty and referral reason.



e. Click the ***Clinical Pathway*** icon. Clinical Pathways are trusted, evidence-informed clinical, patient and referral pathways. These pathways are co-designed by patients, primary care, and specialty care providers.

f. Scroll down to the ***Select a Topic*** section.



g. Scroll through the results to locate the pathway you require.

h. Click the button located on the right to view the pathway.

i. Note that many pathways contain multiple ***Referral Reasons***. You may need to scroll through the pathway to find the ***Referral Reason*** you require.

j. Clinical Pathway links that have not been updated for specific ***Referral Reasons*** will display a popup window with a link to access the Clinical Pathway.

> **Clinical Pathways Have Moved!**
>
> Clinical pathways help provide a set of actions for primary care providers to manage care options in the community. To find a clinical pathway, go to Alberta's Pathway Hub at albertapathways.ca.
>
> If you have any questions, or need support, please email access.ereferral@ahs.ca.

NOTE: Go to albertapathways.ca for a list of clinical pathways.

2.7 Setting a Favourite Search

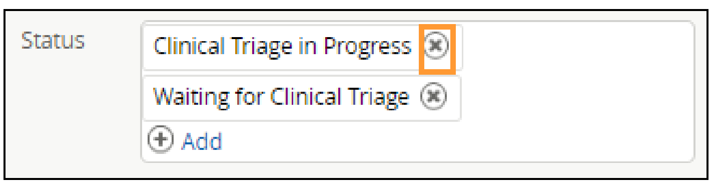
When using the Alberta Netcare Portal and eReferral, you can save a favourite search to access information quickly. For example, if you are a triage user who triages Referrals, you can set up the following favourite search:

a. Open the ***Triage*** worklist from the ***Triage Referrals*** dashboard.

Triage Referrals

Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	2	1	1
Triage	13	9	4
Waiting for Response	4	1	3
Waiting for Appointment/Waitlisted	5	5	-
Deferred	0	0	-
Scheduled	3	3	-
Completed/Cancelled/Declined	14	12	2

b. Click the beside the status types you do not want to be included in your search.

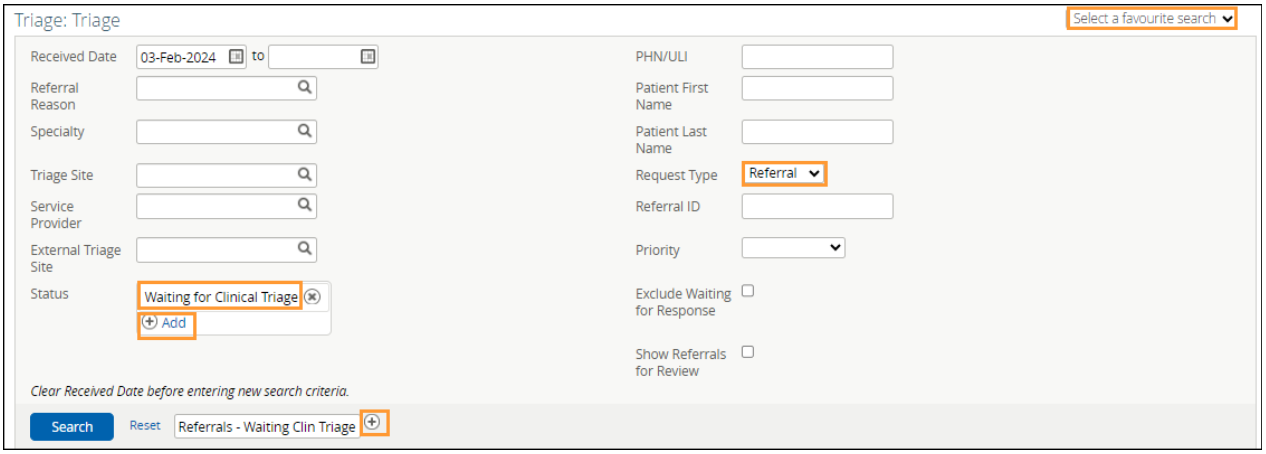


c. Select ***Waiting for Clinical Triage*** as the status and ***Referral*** as the ***Request Type***. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

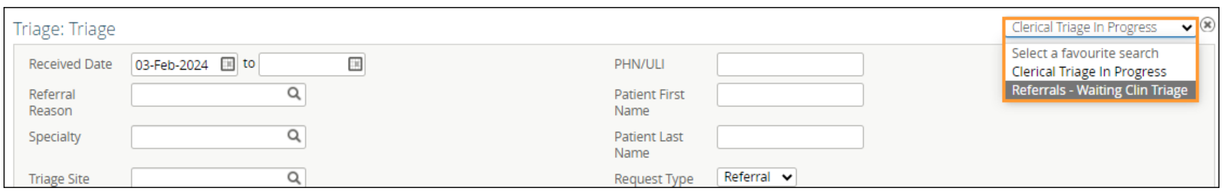
d. Click ***Search.***

e. In the ***Enter a new favourite search*** field, use the text box to give the search a name (i.e., Waiting for Clinical Triage search).

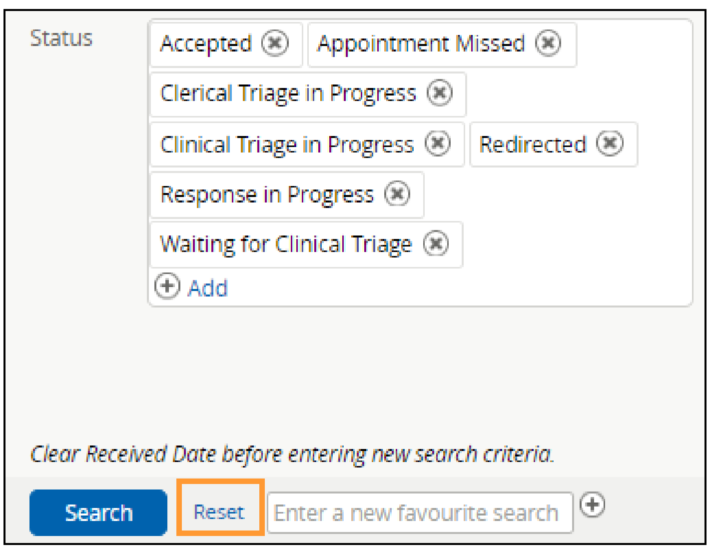
f. Click the icon to save your favourite. Now, when you open your ***Triage*** worklist, you can select your favourite search from the drop-down menu in the top right-hand corner to execute a search using those criteria.



g. Click the drop-down menu in the top right-hand corner to execute a search with those criteria.



h. Click ***Reset*** to all filters.



2.8 Accessing Netcare from Connect Care

Connect Care users accessing Netcare through Connect Care have full use of their assigned Netcare user role permissions. Access via Connect Care is no longer restricted to view-only. This new function allows for full access to the patient's record in Netcare, including referrals.

a. Login to Connect Care.

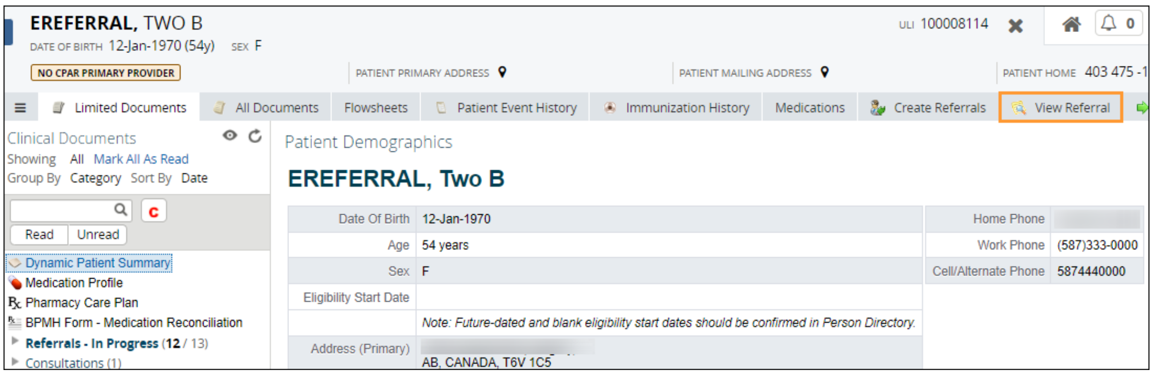
b. Access your ***Patient List***.

c. Double click on the patient's name to open the chart.

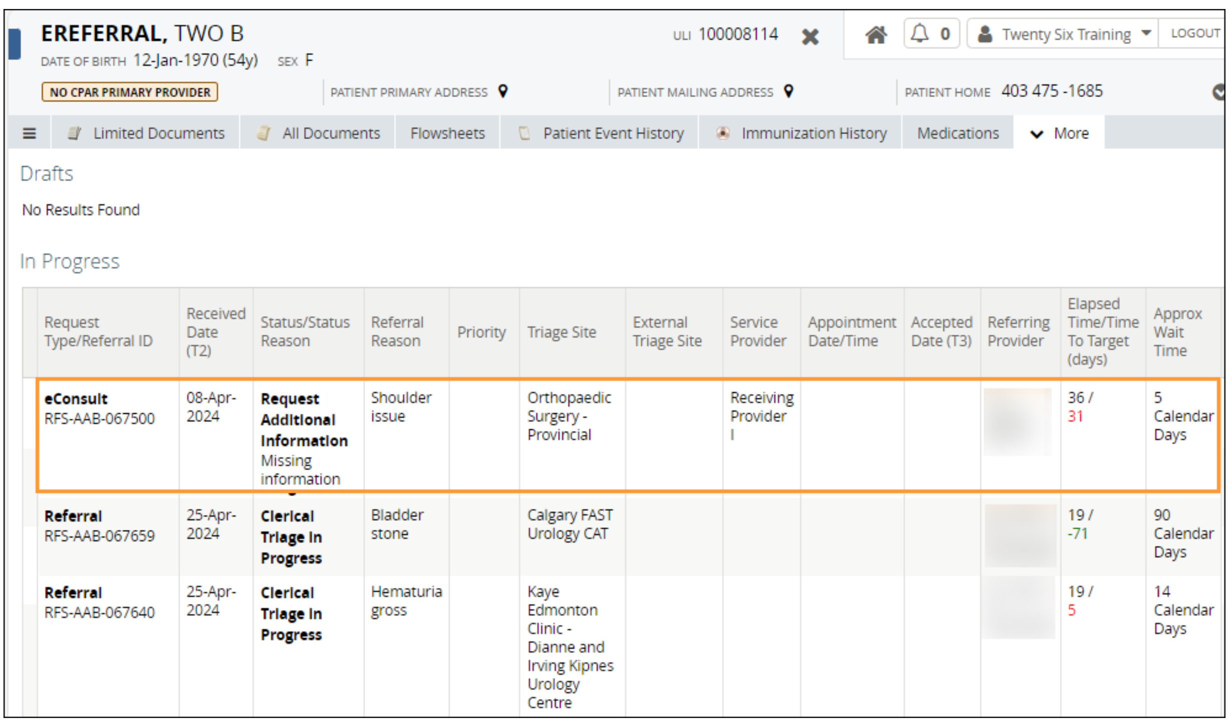
d. Hover over ***Other Clinical Systems*** located on the ***Storyboard*** (left hand panel) and click ***Launch Netcare***.

TIPS	
	• You can also access Netcare by clicking ***More*** located on the main toolbar and selecting ***Launch Netcare*** then click on the patient's name displayed. • Your screen view may vary depending on your Netcare configuration.

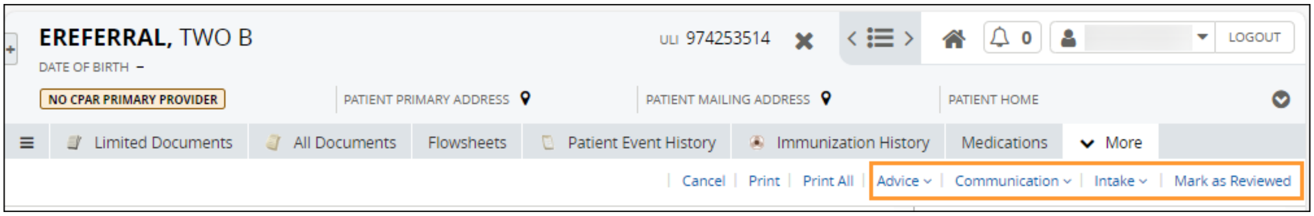
e. Click ***View Referral*** to see the patient's referrals (Draft, In Progress, Completed/Cancelled/ Declined.



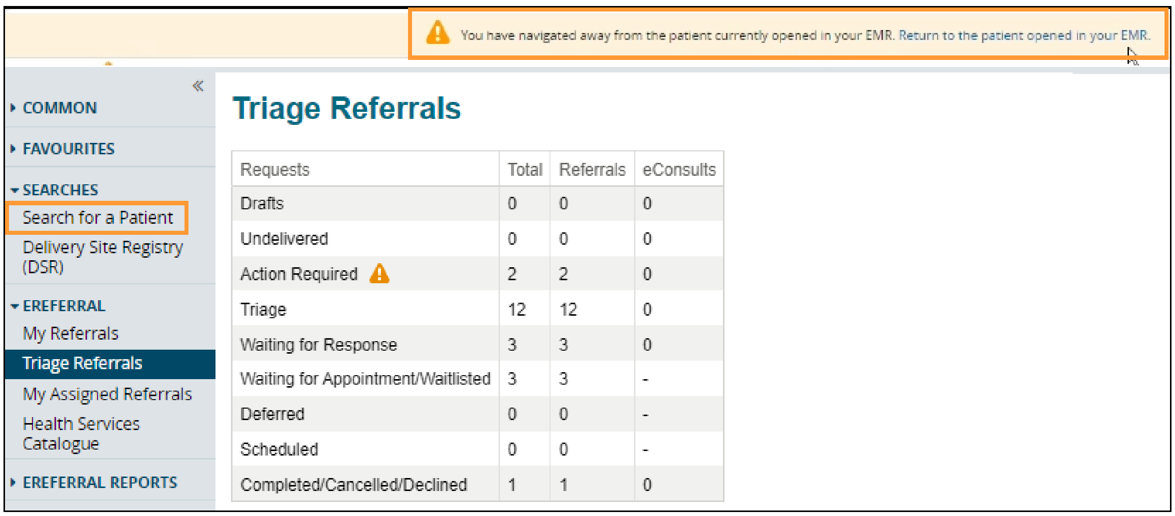
f. Click on an eConsult or a Referral to open it to access the workflow. This example is using an eConsult (previously called an Advice Request).



The workflow is available as soon as the eConsult is opened making it easy to action an eConsult without logging into Netcare.



To protect patient records, Netcare will display the following warning if you navigate away from the patient accessed via Connect Care: ***"You have navigated away from the patient currently open in your EMR. Click Return to the patient opened in your EMR"*****.** To clear the warning, click ***Return to the patient opened in your EMR*** or click ***Search for a Patient*** to find the patient and return to their EMR.



RISKS

- If you choose not to return to your EMR there is a risk of losing information entered in Netcare.
- Opening another patient in Netcare with the original patient open in Connect Care creates an opportunity for error. Close your Netcare session when you are finished working on the patient before accessing another patient in Connect Care and launching Netcare.

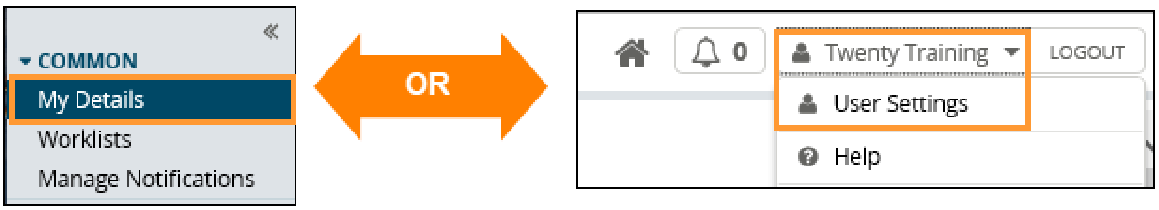
3.0 Setting Up My Details (For Referring and Referring On Behalf Of Providers)

Alberta Netcare Portal providers with Clinical 1, Clinical 2, Clinical 5, Clinical 10, and Clinical 12 user roles will have access to ***eReferral*** within the ***Clinical Portal Menu***. However, not all user roles can access all eReferral dashboards.

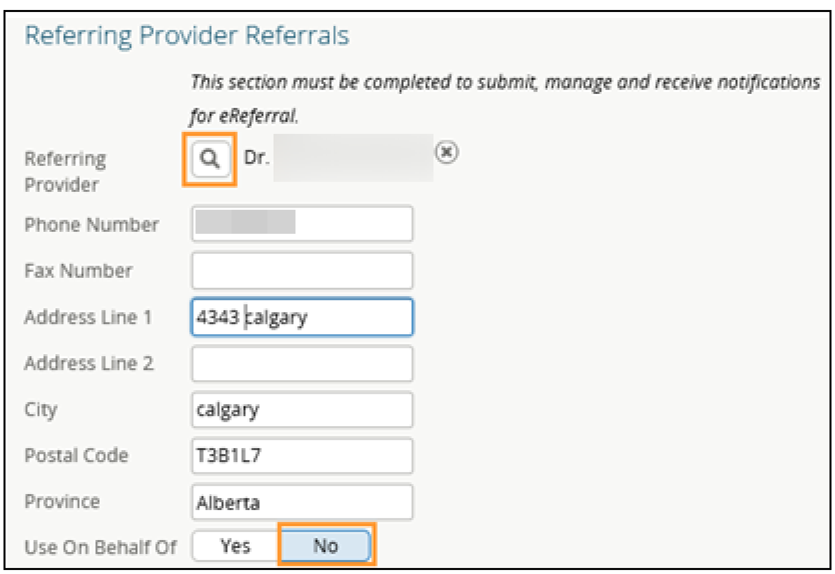
3.1 Providers Submitting Referrals Themselves

If you have access to the ***eReferral*** menu and the ***My Referrals*** dashboard from the ***Clinical Portal Menu***, you can create/submit Referrals (previously called Consults) and eConsults (previously called Advice Requests). Before you submit a Referral or an eConsult, your provider information must be completed in your ***My Details.***

a. From the ***Clinical Portal Menu,*** select ***Common,*** then ***My Details,*** or click ***User Settings*** from the ***Global Menu***.



b. Scroll down to the ***Referring Provider Referrals*** section. Click the magnifying glass and search for your full name as per your health profession college registration. **(Optional)** Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created eConsult or Referral. If the provider works at multiple sites, the clinic details (e.g., address, phone, and fax number) can be left blank in ***My Details*** and then added manually on each request. You can also manually change the default demographics within a request as needed.



Entering clinic demographics (e.g., phone number, address, etc.) is optional but could help the responding clinic to send patient materials to you.

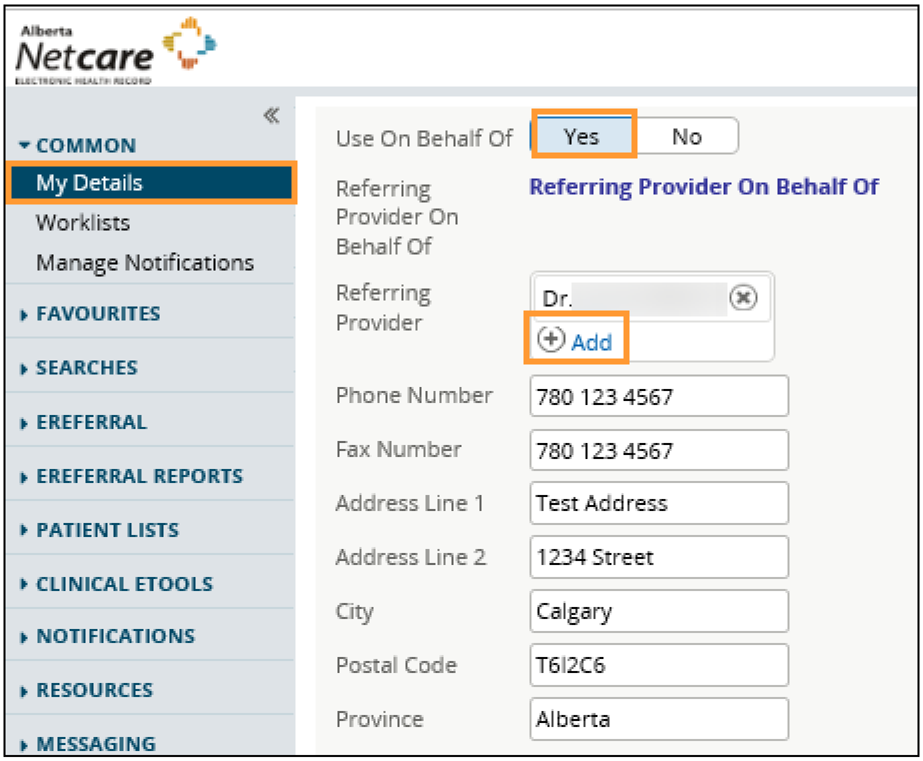
c. Click ***Update Preferences,*** located at the bottom at the page to save your changes.

3.2 Submitting a Referral on Behalf of a Provider

If you are creating/submitting referrals on behalf of a provider (e.g., another physician), you must set up your ***My Details*** with the provider's information.

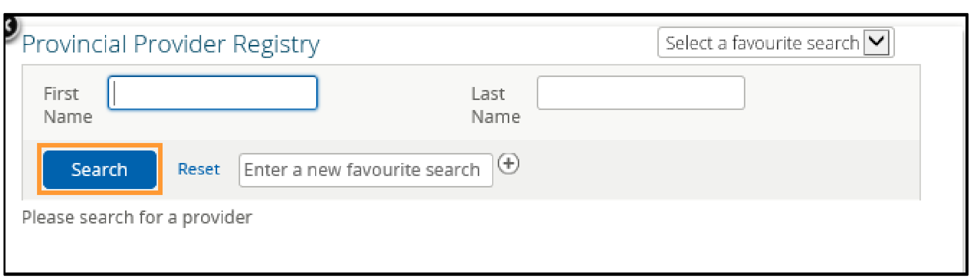
a. Click ***My Details*** from the ***Clinical Portal Menu*** and scroll down to the ***Referring Provider On Behalf Of*** section.

b. Click ***Yes*** next to ***Use on Behalf Of***.



c. Click the ***Add*** button.

d. Enter ***First Name*** and ***Last Name*** of the provider (as per their college registration), then click ***Search***. The search will return selections that include ***Name***, ***Provider Type***, ***City***, and ***Status***.



e. Select the appropriate provider from the list. This information will automatically populate the ***Referring Provider*** field.

f. **(Optional)** Enter clinic demographics. If entered, clinic demographics will automatically populate for your default provider into each created eConsult or Referral. If the provider works at multiple sites, the clinic details (e.g., address, phone, and fax number) can be left blank in ***My Details*** and then added manually on each request. You can also manually change the default demographics within a request as needed.

g. Repeat this process for each provider you submit requests on behalf of. The first provider you have inputted in your ***My Details*** will be the default in any future eConsults or Referrals. If you have multiple providers entered in ***My Details***, you can specify the appropriate provider during the request creation process.

> **NOTE:** The first provider you enter will be the default when you create a Referral or eConsult.

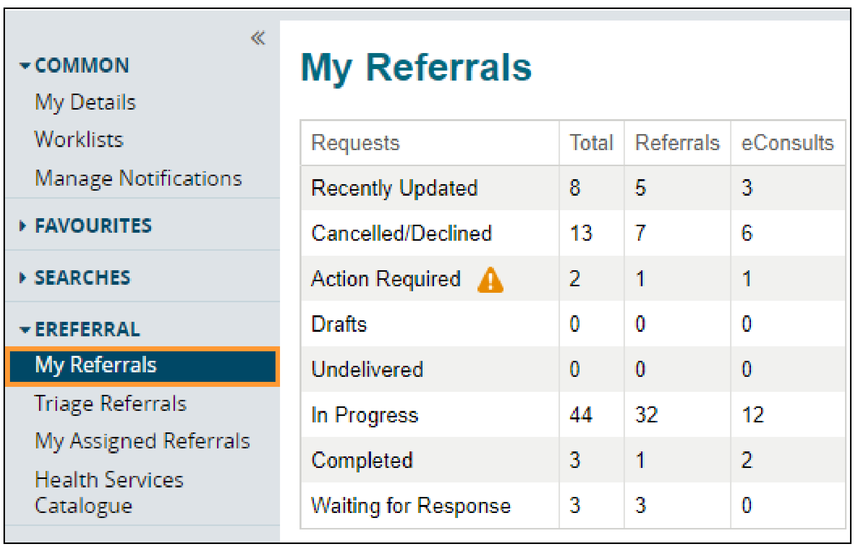
h. Click ***Update Preferences*** to save your changes.

3.4 Viewing Worklists from the My Referrals Dashboard

The ***My Referrals*** dashboard has worklists with eConsults and Referrals that have been created by a referring provider or referring provider on behalf of.

> **NOTE:** This dashboard is visible to anyone with the same providers entered in their ***My Details***.

a. Select ***eReferral*** from the ***Clinical Portal Menu,*** then ***My Referrals*** to display the dashboard.

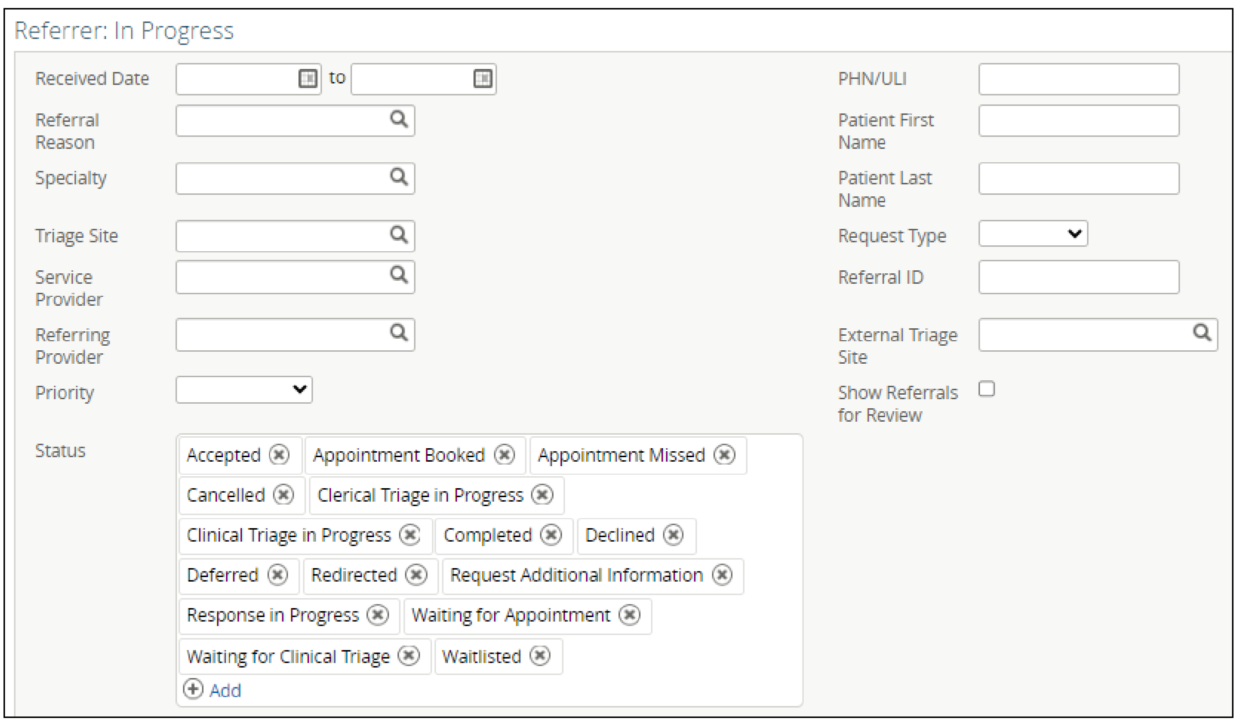


b. From there, click to access any of the following worklists:

- ***Recently Updated*** – These are requests that have had recent activity. You can set the date ranges you wish to filter for ***Recently Updated***. You can also set the ***Show Recently Updated*** timeframe in ***My Details – Referring Provider Referrals*** and ***Referring Provider Referrals On Behalf Of.***
- ***Cancelled/Declined*** – These are requests that were not accepted by the specialty.
- ***Action Required*** – These are requests requiring information. This information can be requested by triage or by the receiving provider. If you are a triage user, this can also indicate that the referring provider has added new information to a request or asked for additional information.

- ***Drafts*** – These are incomplete requests (i.e., not submitted) that are a work in progress and may be shared with other members of a team who can also work on them.
- ***Undelivered*** – These are referrals that failed to be sent because of a technical problem. eReferral requests are normally delivered instantaneously. If you see a request on this list, you should contact the Alberta Netcare Provincial Help Desk at 1-877-931-1638 if you are a community user or the AHS IT Service Desk at 1-877-311-4300 if you are an AHS employee to investigate.
- ***In Progress*** – These are requests that have been submitted and are being processed by the specialty.
- ***Completed*** – These are requests that the specialty has finished processing and has marked as complete.
- ***Waiting for Response*** – These are requests that are waiting for a response. If you have sent an eConsult or a Referral requesting additional information from the specialty, the request will stay on the ***Waiting for Response*** worklist until it has been replied to. The request will also appear on the receiving providers ***Waiting for Response*** worklist.

c. Sort or search a worklist to find specific referrals. This includes by ***Referral Reason***, ***Specialty, Triage Site, Service Provider, Referring Provider, Priority***, and the patient's name and/or their ***PHN/ULI***.



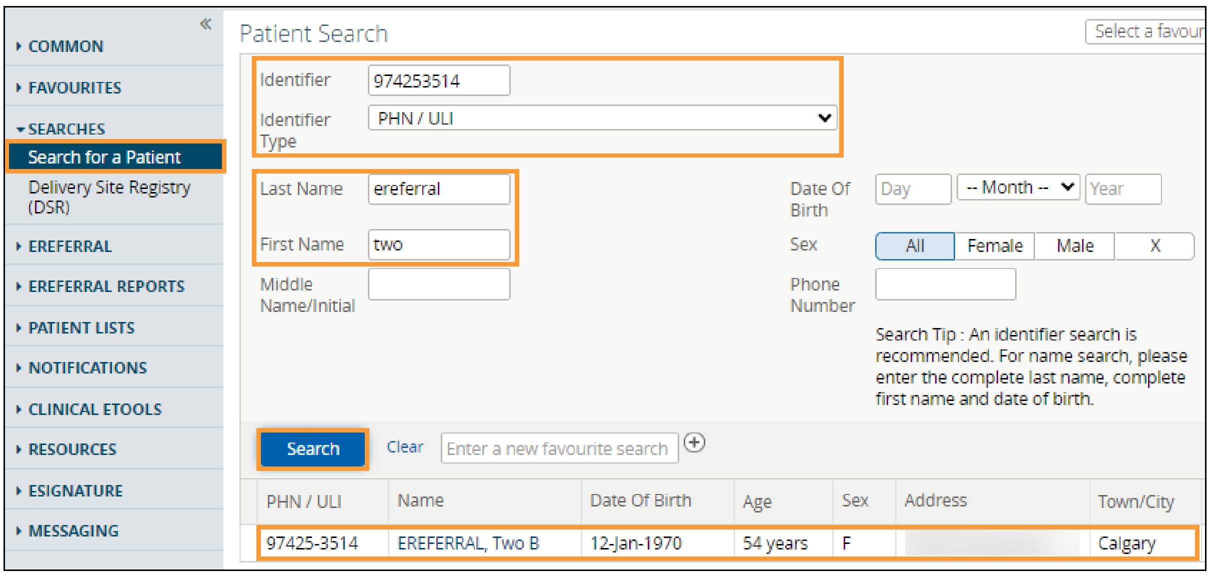
4.0 eConsult Actions (For Referring & Referring On Behalf Of Providers)

4.1 Create an eConsult

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a non-urgent question or if they are unsure if a referral would be appropriate. In many cases, an eConsult may be all you 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.

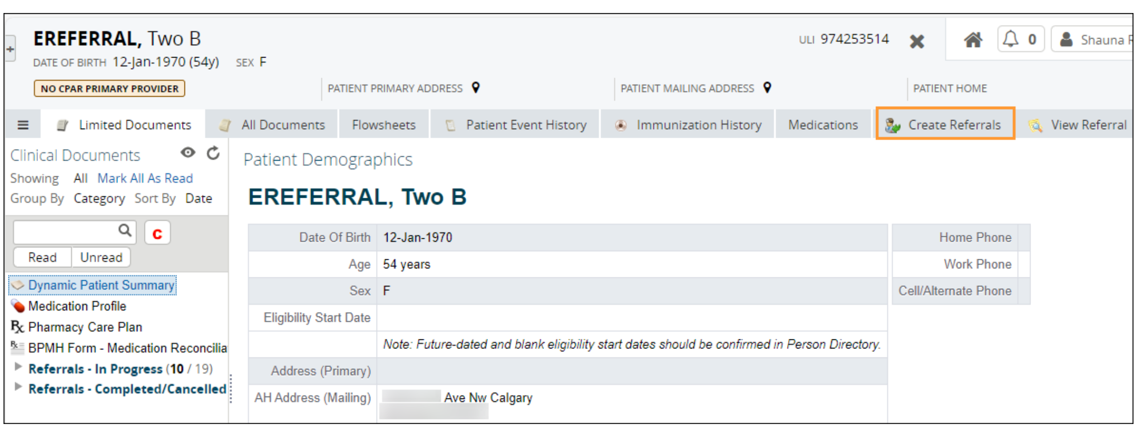
a. From the ***Clinical Portal Menu***, go to ***Searches***. You can search for your patient using their first and last name or their Personal Health Number (PHN) or their Unique Lifetime Identifier (ULI).

b. Press ***Search*** to bring up a list.



c. Click the patient from the populated list to open the patient's Electronic Health Record (EHR).

d. Click ***Create Referrals*** from the ***Context Menu***.



e. Enter a reason in the ***Referral Reason*** field. You can start typing the reason to see what selections are available.

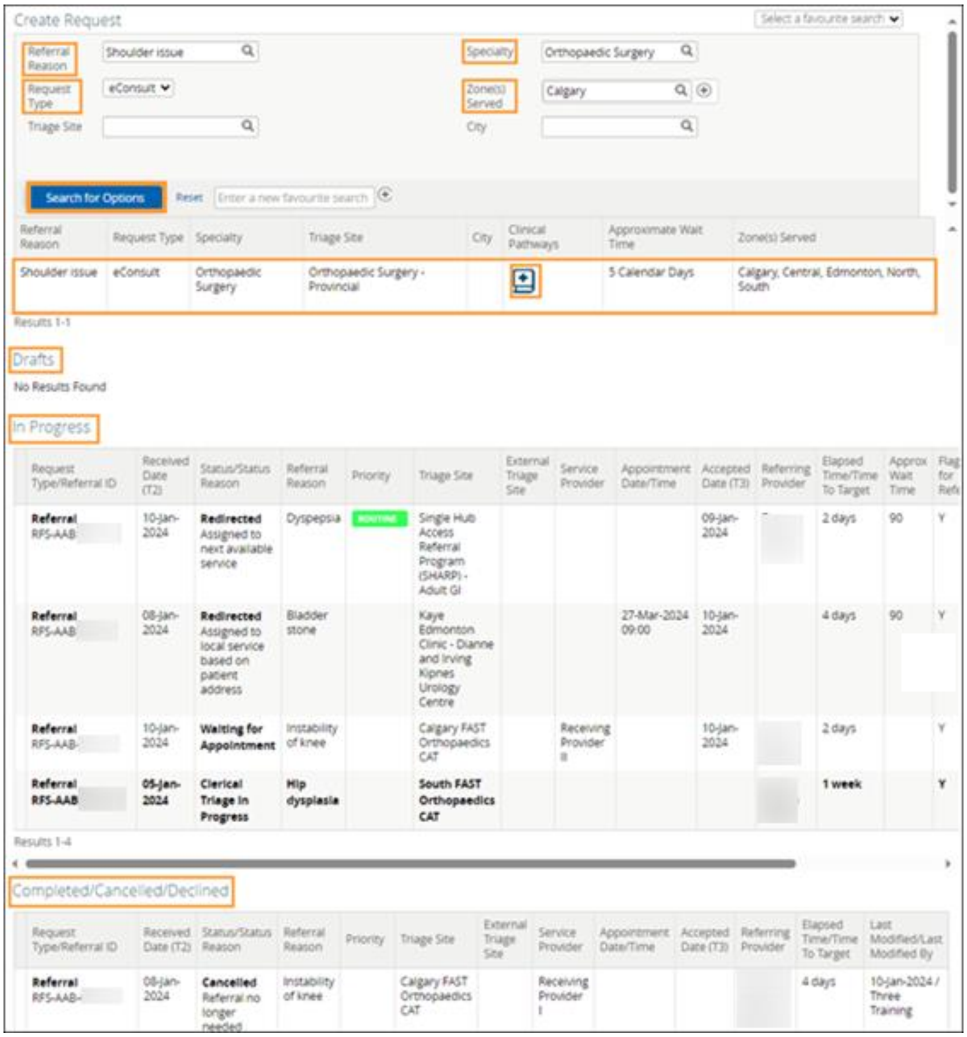
f. Select ***eConsult*** as the ***Request Type***.

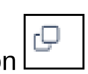
g. Enter the ***Specialty***. You can start typing the name of the specialty to see a list.

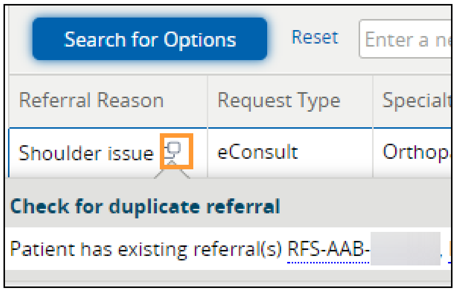
h. Enter the ***Zone(s) Served***. This is the Zone(s) that the specialty provides services to. Some specialties offer services to multiple Zones.

i. Enter the ***City*** if necessary.

j. Click ***Search for Options*** to see a list matching your ***Referral Reason*** criteria. A list of ***Drafts***, ***In Progress*** and ***Completed/Cancelled/Declined*** eConsults and Referrals are also shown.



If the eConsult is a duplicate, the ***Check for duplicate referral(s)*** icon  is shown. Hover over the symbol to see the duplicate eConsult.

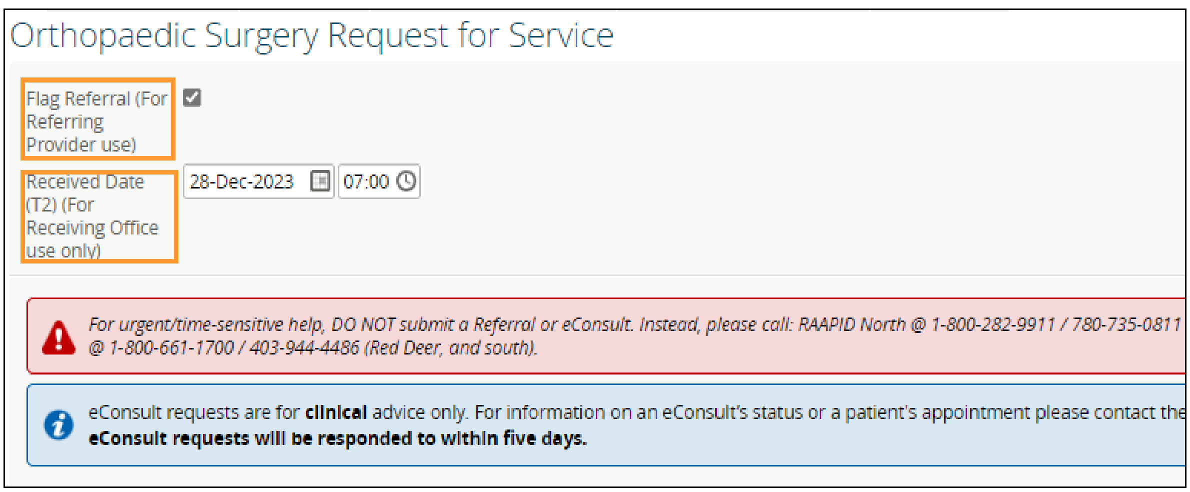


k. Click the ***Clinical Pathway*** icon to view detailed information to help support care decisions. If no ***Clinical Pathway*** icon is showing, it indicates a pathway is currently not available.

l. Click the appropriate ***Referral Reason***. Ensure that the ***Request Type*** field indicates ***eConsult***.

m. Select ***Flag Referral (For Referring Provider use)*** if you want the referring provider to be notified of the eConsult.

n. 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.

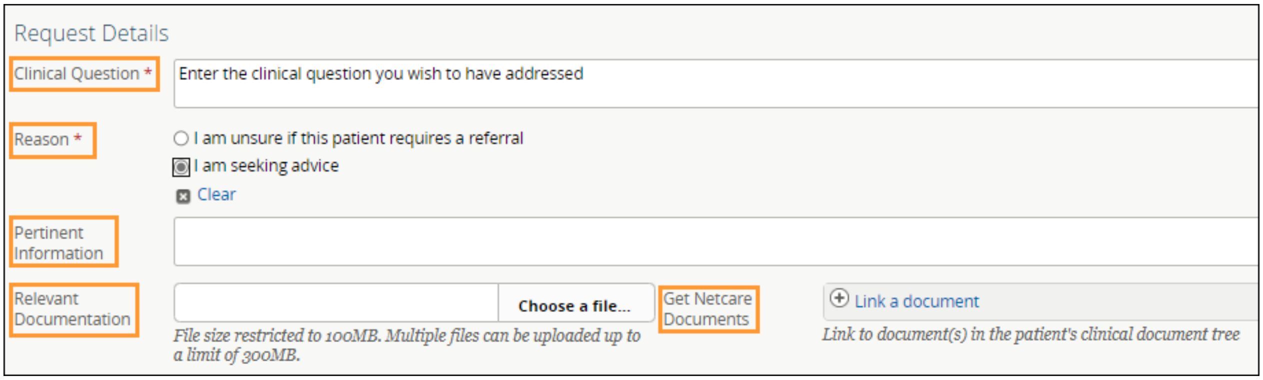


o. Enter your ***Clinical Question***.

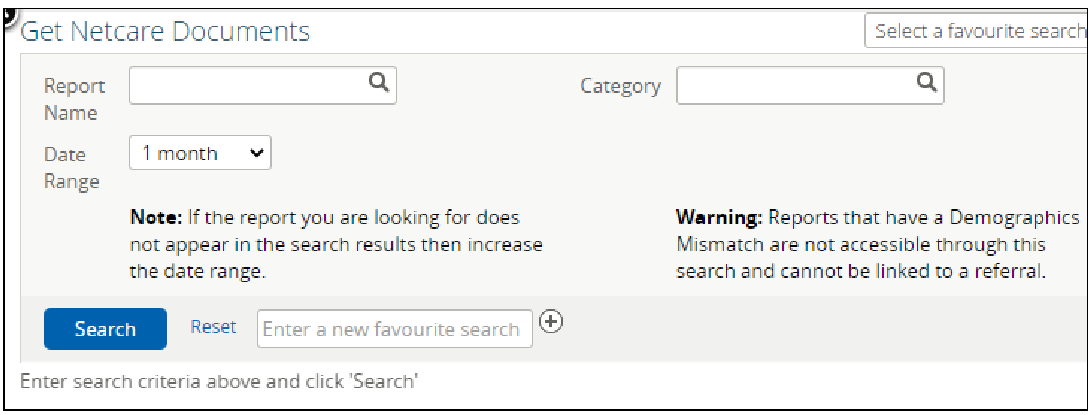
p. Select the ***Reason***.

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

r. 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***.

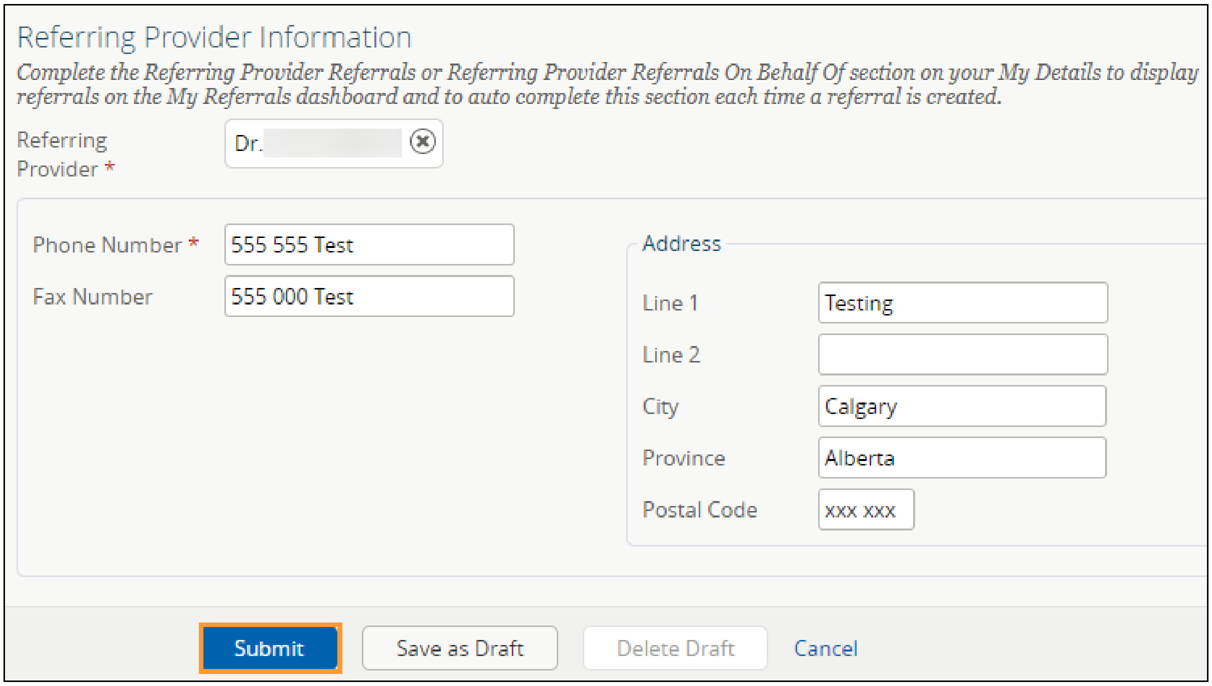


- To include a document from your computer, select ***Choose a file*** for external attachments. This will allow you to search on your computer. *Note that the maximum file size is 100MB per file*.
- To include a document available in Alberta Netcare, select ***Link a document****.* A pop-up will open 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.



s. 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.

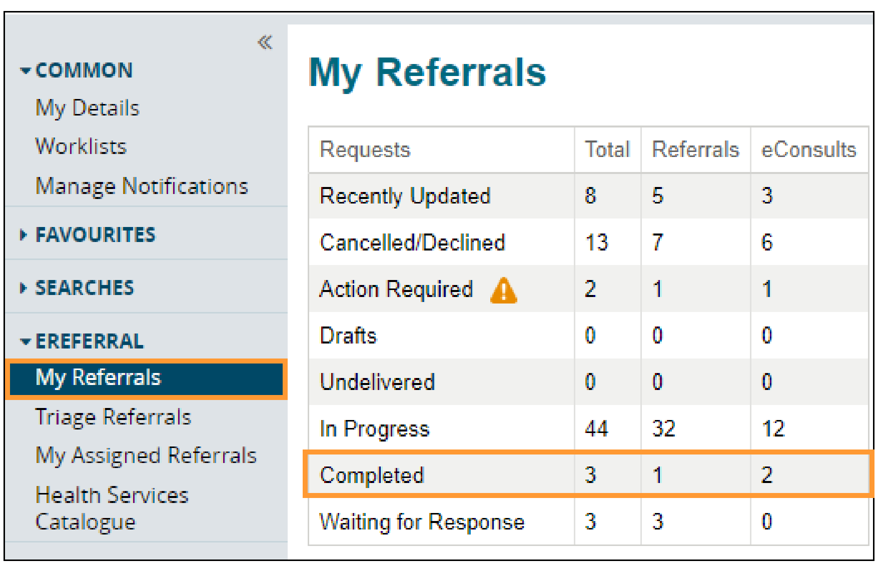
t. Scroll to the bottom of the page and click ***Submit*** to send the eConsult. Select ***Save as Draft*** if the eConsult is incomplete or you want to return to it later. Press ***Cancel*** if you want to stop completing the eConsult.



4.2 Reviewing a Response from the Specialty

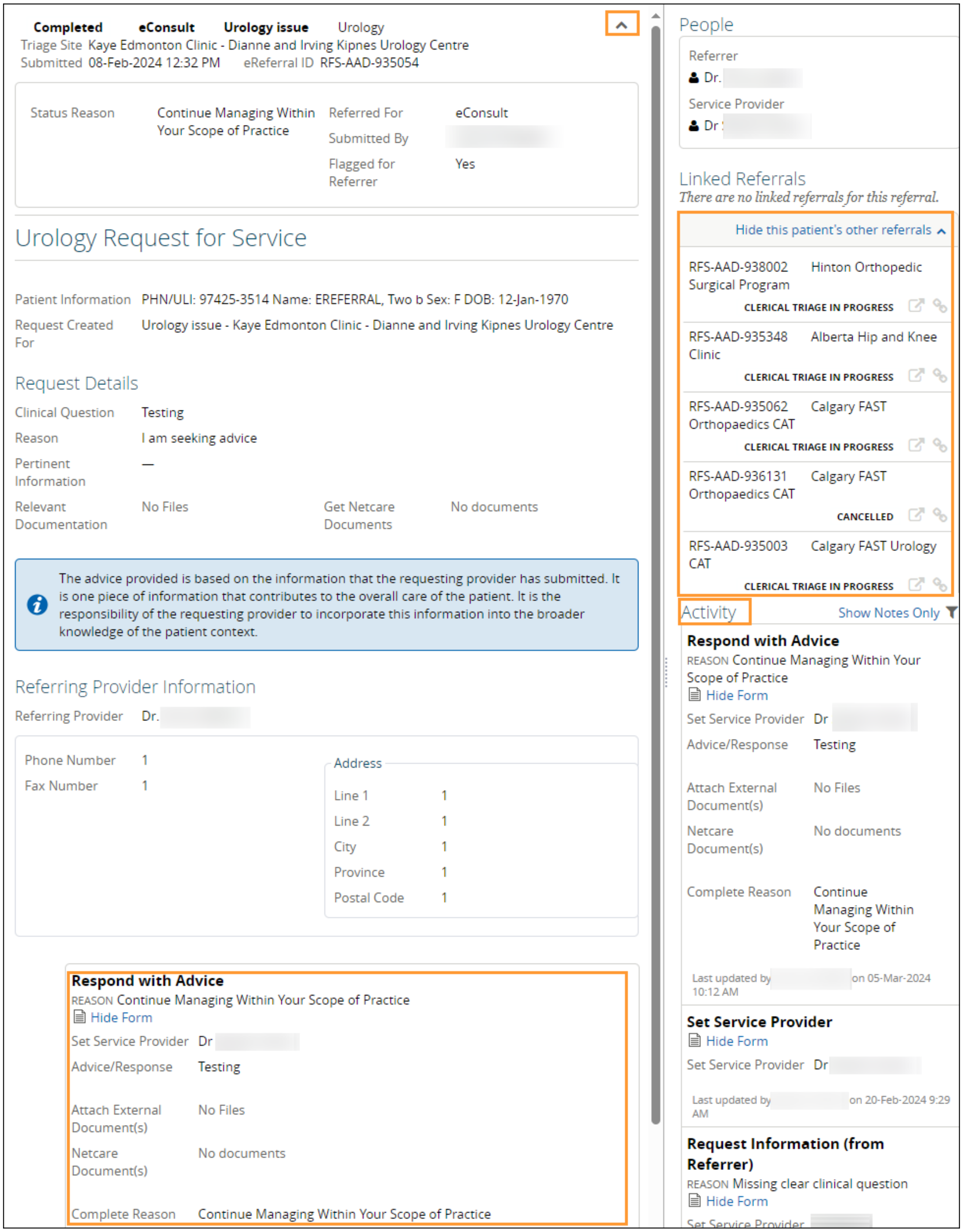
When a specialty responds to an eConsult, you can open it in the ***My Referrals*** dashboard. The response will appear in the ***Activity*** section of the eConsult.

a. From the ***Clinical Portal Menu***, click ***My Referrals***. Click on the ***Completed*** worklist and filter on ***eConsult*** as the ***Request Type***



b. Scroll through the list or search for the patient.

c. 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.

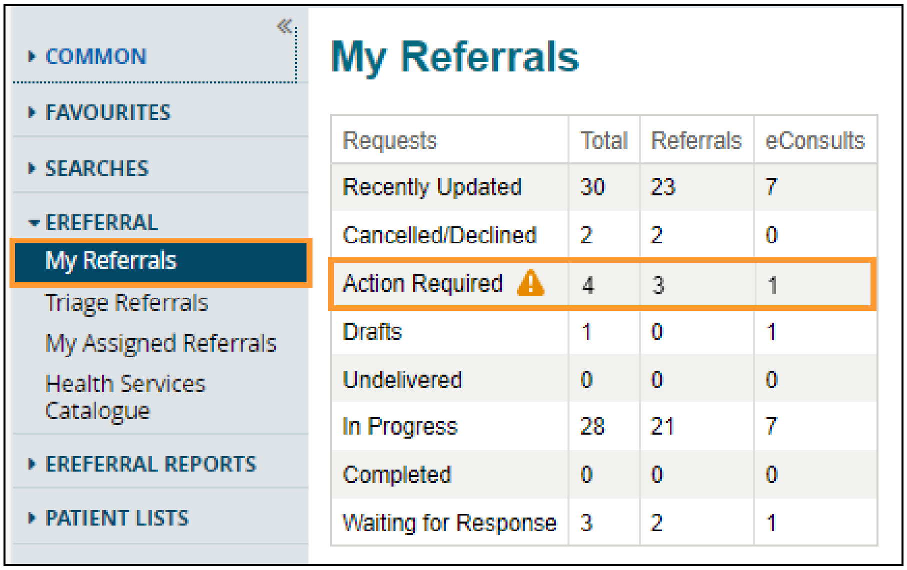


d. Review the advice/response provided and any attachments.

4.3 Responding 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 information:

a. From the ***Clinical Portal Menu***, go to ***My Referrals***. Then open the ***Action Required*** worklist.



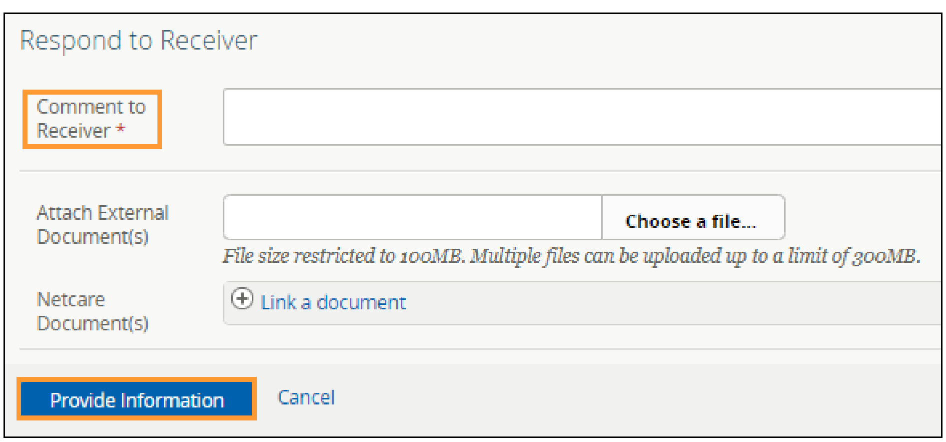
Requests	Total	Referrals	eConsults
Recently Updated	30	23	7
Cancelled/Declined	2	2	0
Action Required	4	3	1
Drafts	1	0	1
Undelivered	0	0	0
In Progress	28	21	7
Completed	0	0	0
Waiting for Response	3	2	1

b. Select ***eConsult*** for ***Request Type*** and press ***Search***. Click the appropriate eConsult from the list.

c. Review the ***Activity*** section located on the ***Right Panel*** of the eConsult and read the question/request from the specialist.

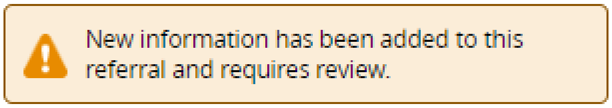
d. When you are ready to respond click ***Respond to Receiver***.

e. Type your response/additional information into the comment box, add any attachments, and click ***Provide Information***.



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

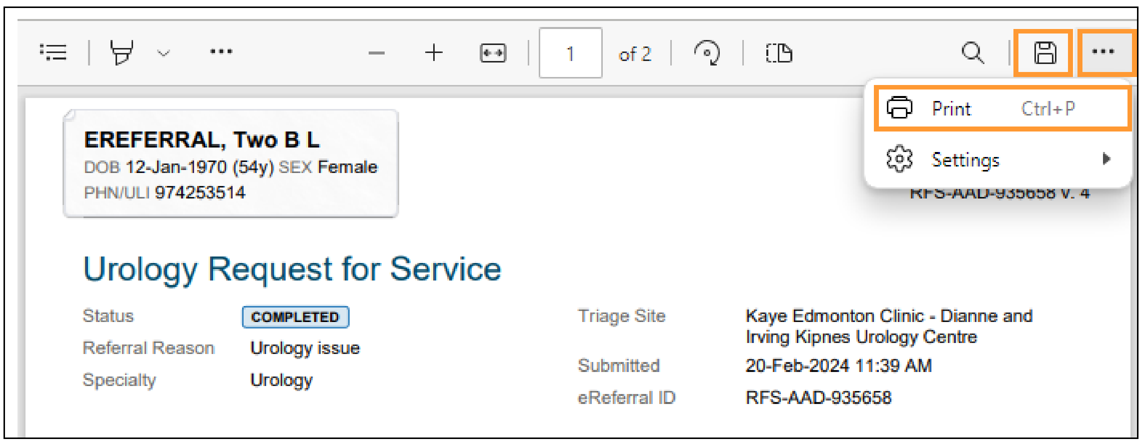
- For the receiving provider, a panel is displayed at the top of the ***Right Panel*** with a note identifying that new information has been added.



4.4 Print a Copy of an eConsult

a. Locate the eConsult on the ***My Referrals*** dashboard or ***Triage*** dashboard and open it.

b. 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***.

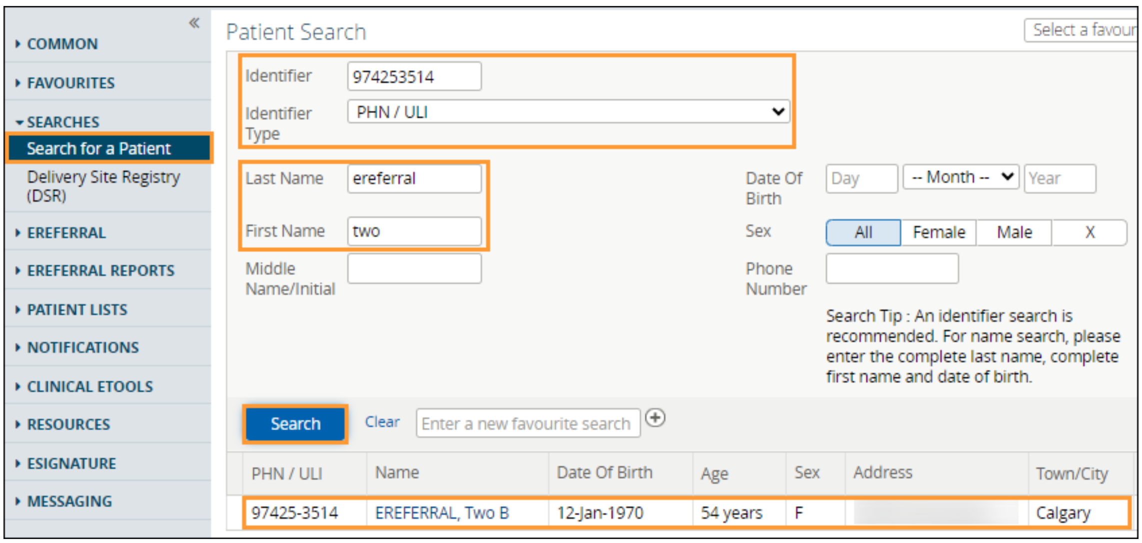
5.0 Referral Actions (For Referring & Referring On Behalf Of Providers)

5.1 Viewing Referrals

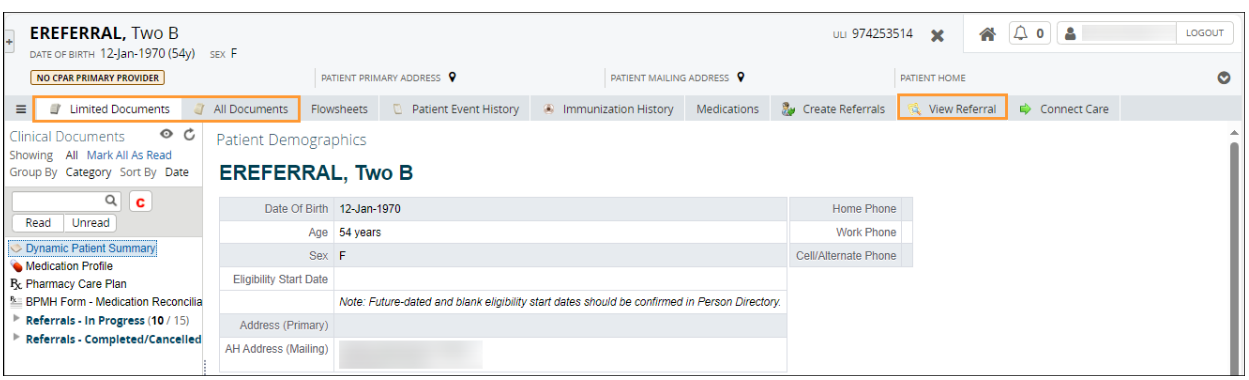
A Referral is a request for an in-person specialist appointment. A Referral form is used for most specialties to create a consistent referral experience.

Before submitting a referral, check to see if a similar request has already been submitted. All referrals in eReferral are visible to authorized users within the Alberta Netcare Portal.

a. 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). Click ***Search*** to bring up a list.



b. Select the patient from the populated list. Once the patient's Electronic Health Record (EHR) opens, you will see the ***Context Menu*** running along the top of the screen.

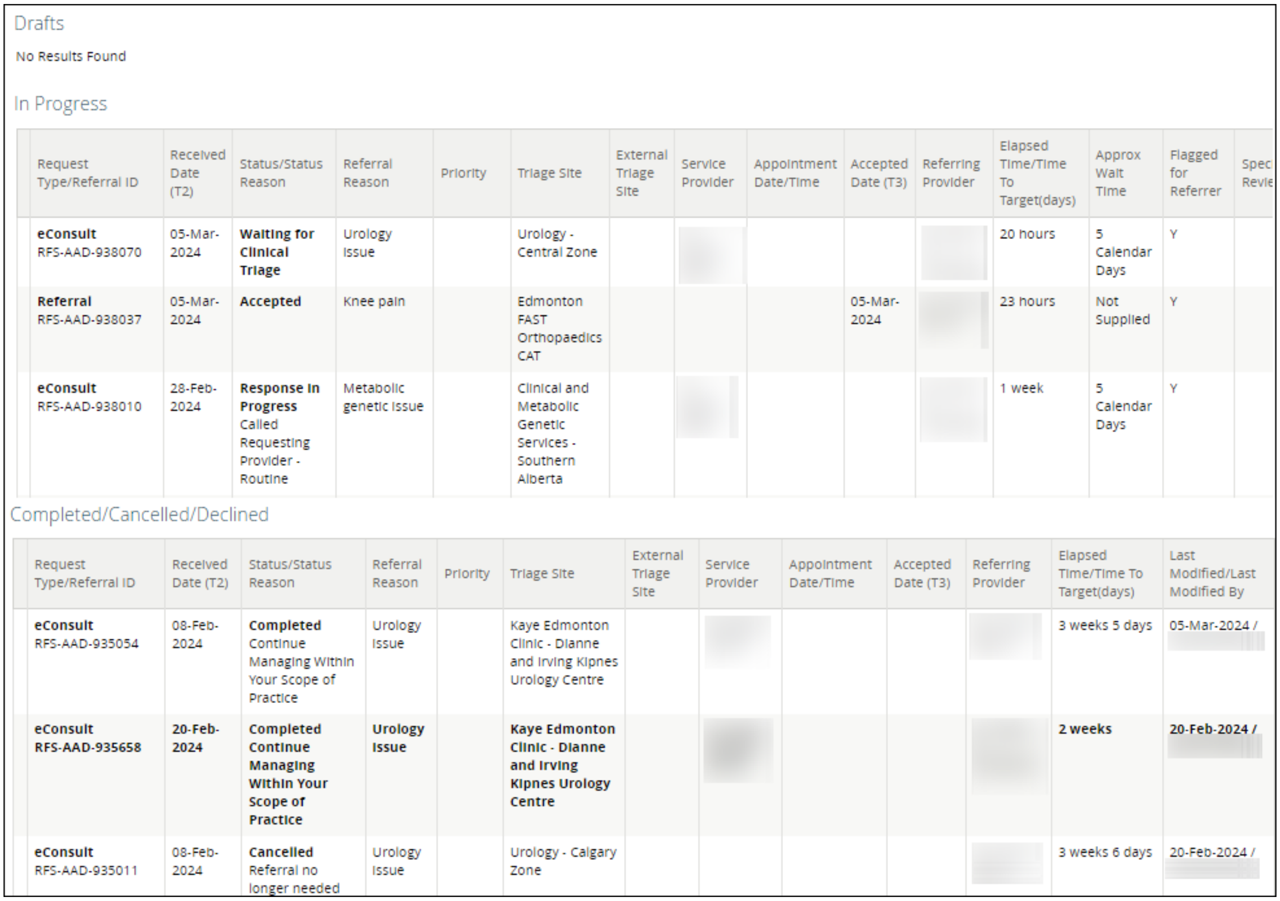


There are two ways to view referrals from the ***Context Menu***:

- ***View Referral*** tab (Referrals only).
- ***Clinical Document Viewer (CDV) Tree*** located in the ***Limited*** or ***All Documents*** folders.

View Referral Tab

Click ***View Referral***. This displays a list of the patients ***In Progress*** and ***Completed/Cancelled/Declined*** Referrals. These are editable by referring providers and referring providers on behalf of that created them and are read-only for all other Alberta Netcare Portal users. Draft requests are also visible, but only to those who created them.



Drafts

No Results Found

In Progress

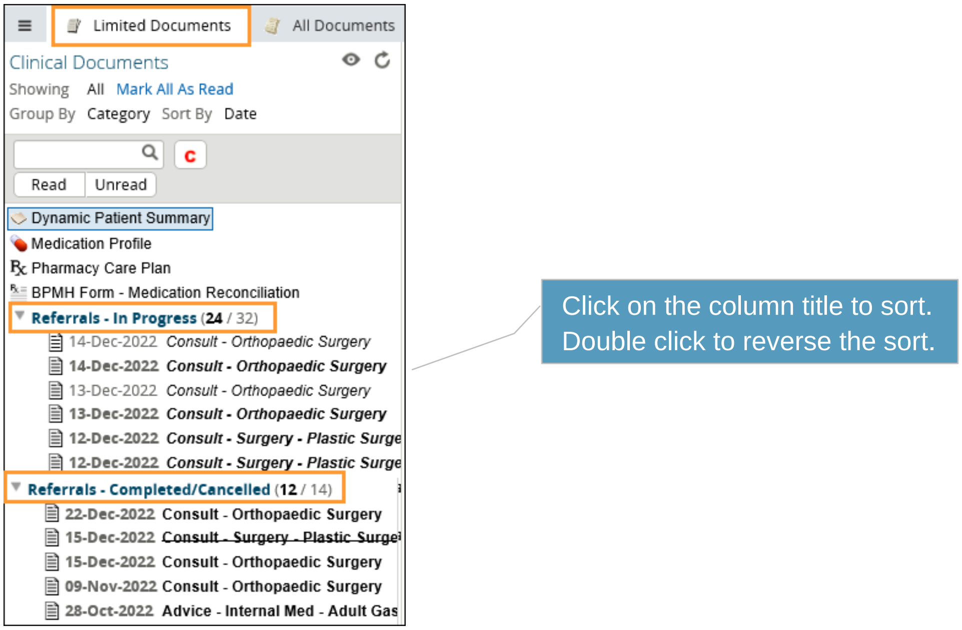
Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target(days)	Approx Wait Time	Flagged for Referrer	Spec Revie
eConsult RFS-AAD-938070	05-Mar-2024	**Waiting for Clinical Triage**	Urology issue		Urology - Central Zone		[illegible]			[illegible]	20 hours	5 Calendar Days	Y	
Referral RFS-AAD-938037	05-Mar-2024	**Accepted**	Knee pain		Edmonton FAST Orthopaedics CAT				05-Mar-2024	[illegible]	23 hours	Not Supplied	Y	
eConsult RFS-AAD-938010	28-Feb-2024	**Response in Progress** Called Requesting Provider - Routine	Metabolic genetic issue		Clinical and Metabolic Genetic Services - Southern Alberta		[illegible]			[illegible]	1 week	5 Calendar Days	Y	

Completed/Cancelled/Declined

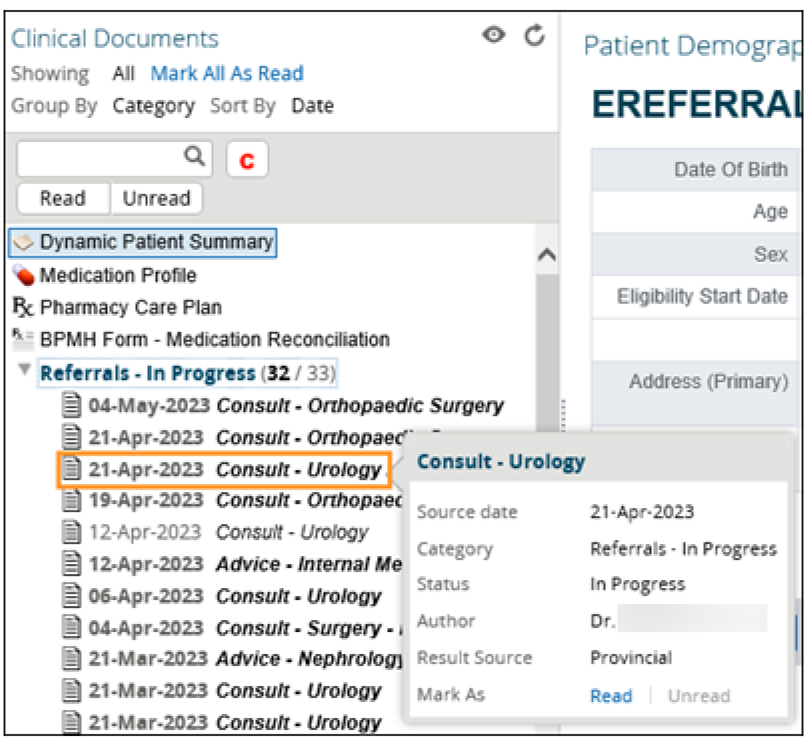
Request Type/Referral ID	Received Date (T2)	Status/Status Reason	Referral Reason	Priority	Triage Site	External Triage Site	Service Provider	Appointment Date/Time	Accepted Date (T3)	Referring Provider	Elapsed Time/Time To Target(days)	Last Modified/Last Modified By
eConsult RFS-AAD-935054	08-Feb-2024	**Completed** Continue Managing Within Your Scope of Practice	Urology issue		Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre		[illegible]			[illegible]	3 weeks 5 days	05-Mar-2024 / [illegible]
eConsult RFS-AAD-935658	**20-Feb-2024**	**Completed Continue Managing Within Your Scope of Practice**	**Urology issue**		**Kaye Edmonton Clinic - Dianne and Irving Kipnes Urology Centre**		[illegible]			[illegible]	**2 weeks**	**20-Feb-2024 /** [illegible]
eConsult RFS-AAD-935011	08-Feb-2024	**Cancelled** Referral no longer needed	Urology issue		Urology - Calgary Zone					[illegible]	3 weeks 6 days	20-Feb-2024 / [illegible]

Clinical Document Viewer (CDV) Tree

a. Click either ***Limited Documents*** or ***All Documents*** to view the ***Clinical Document Viewer (CDV) Tree***. You can find referrals that are ***In Progress*** or have been ***Completed/Cancelled*** from the menu here.



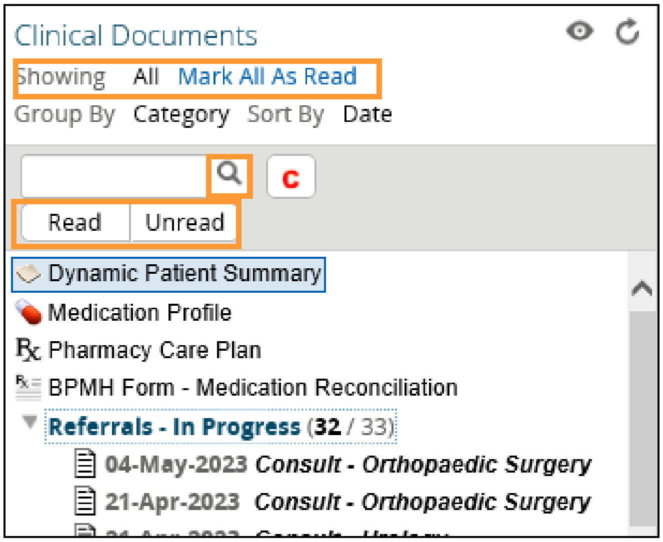
Each folder contains links to the patient's eConsults and Referrals. Any eConsult or Referral that has been ***Cancelled/Declined*** will have a strike through the middle of the text. Any eConsult or Referral ***In Progress*** will have its text italicized – Bold means the referral is unread. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. You can also view a short summary by hovering your mouse over the referral link for eConsult and/or Referral.



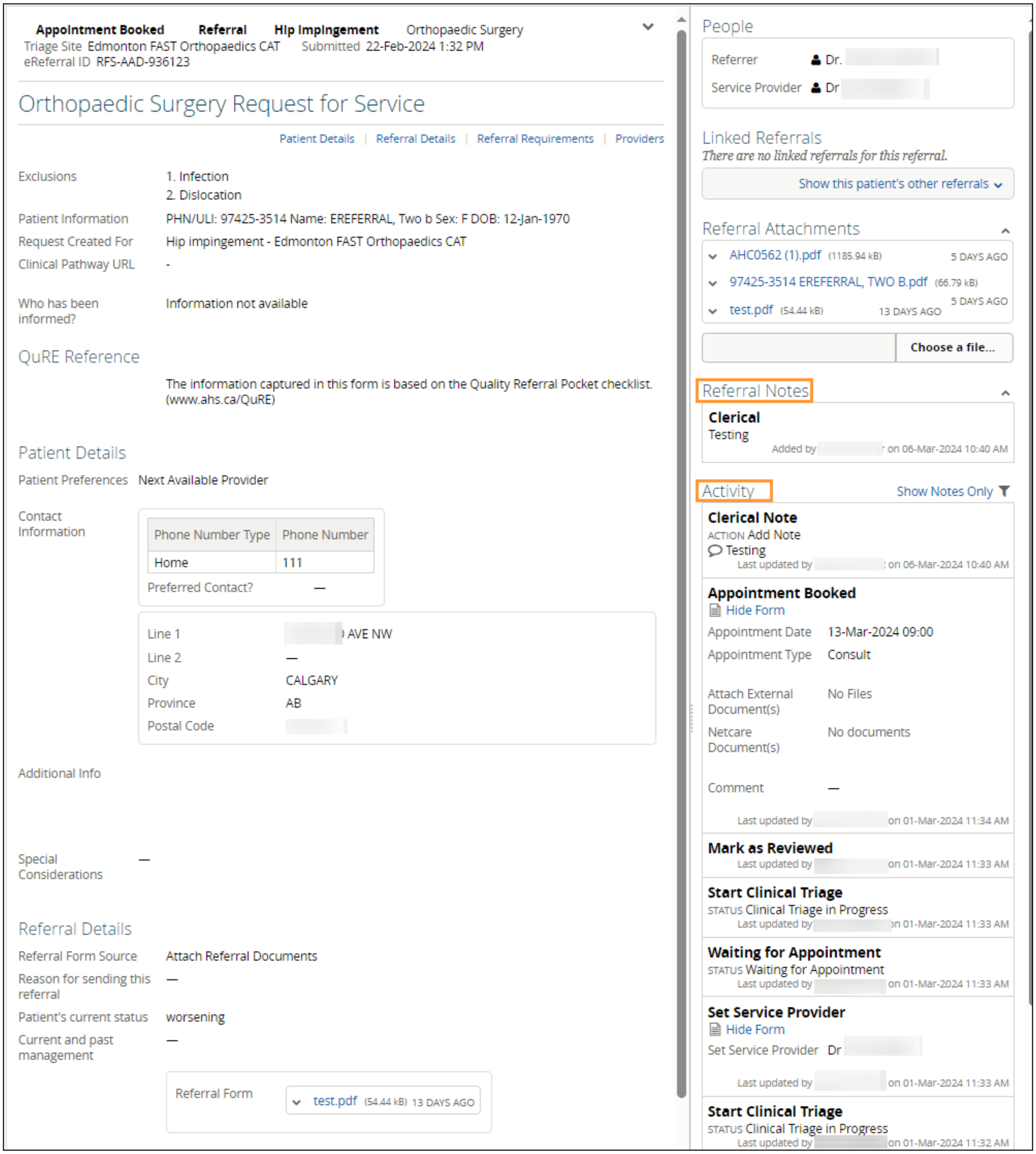
b. Click ***Read*** to open and read the referral or click on the referral to open it.

Other ***Clinical Document Viewer (CDV) Tree*** functionality relating to Referrals includes:

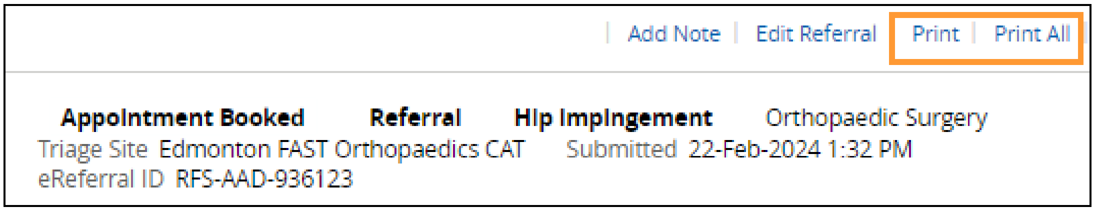
a. Click the magnify button ( ), then enter text in the text box. Press ***Enter*** to search for a document in the ***Clinical Document Viewer (CDV) Tree***.



b. Select ***Referrals - In Progress*** to view eConsults and Referrals in progress. In the ***Right Panel*** you can review the ***Status***, ***Notes*** and ***Activities*** occurring on the eConsult and/or Referral to track its life cycle.



c. Click the ***Print*** or ***Print All*** button at the top of the page. Provided the appropriate software is installed on your computer, this action generates a PDF, which can then be printed or saved.



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.

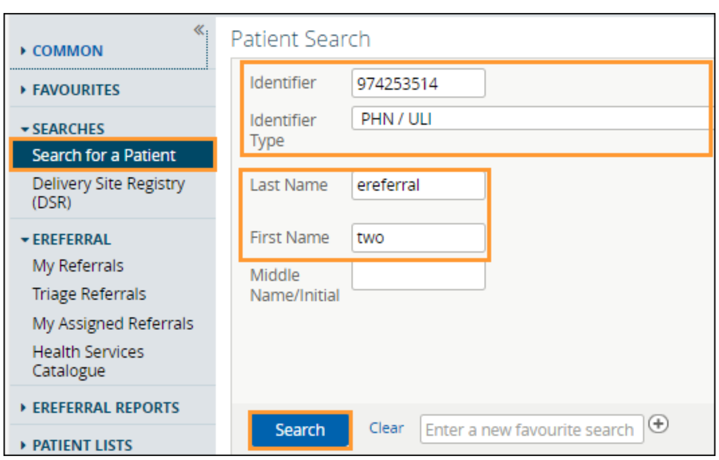
Print: Generates a print-out of the following sections in the following order:

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

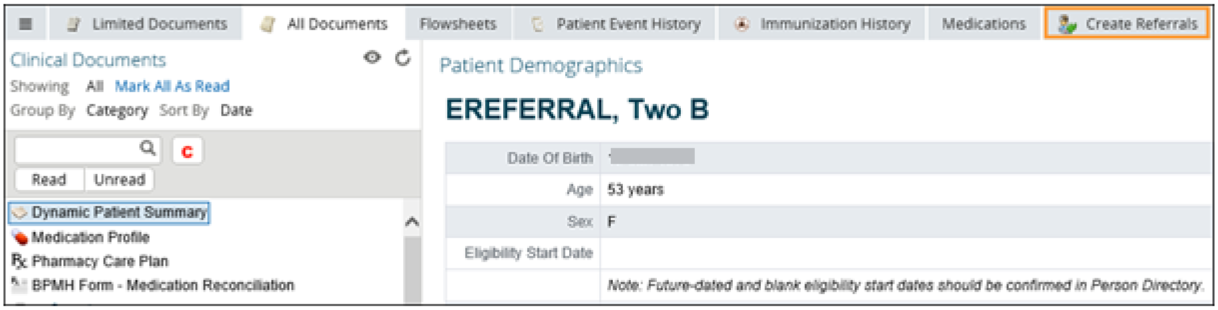
5.2 Create a Referral

A Referral (previously called a Consult Request) is a request for an in-person specialist appointment. A standard referral form is used for most specialties to create a consistent referral experience and to identify a specific ***Referral Reason.***

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



b. Open the patient's Electronic Health Record (EHR) and click ***Create Referrals***. Review the alert and information messages under ***Information*** at the top of the screen.



c. Enter a reason in the ***Referral Reason*** field. You can start entering the reason to see what selections are available. If you don't know the reason for referral or would like to see what options are available, click ***Browse*** to open the ***Health Services Catalogue***.

d. Enter a reason in the ***Referral Reason*** field. You can start typing the reason to see what selections are available

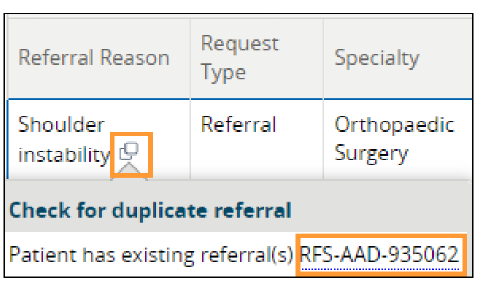
- If you don't know the reason or want to see what options are available, enter the ***Request Type*** and the ***Specialty*** to show what ***Referral Reasons*** are available by zone/city.
- If the ***Referral Reason*** is not on the list, select a reason that is closest to the reason for referral (e.g., Sciatica is not on the list – use Radiculopathy). The exact reason can be entered later in this process in the ***Referral Details*** section – ***Reason for sending this referral*** field.

e. Select ***Referral*** beside ***Request Type***.

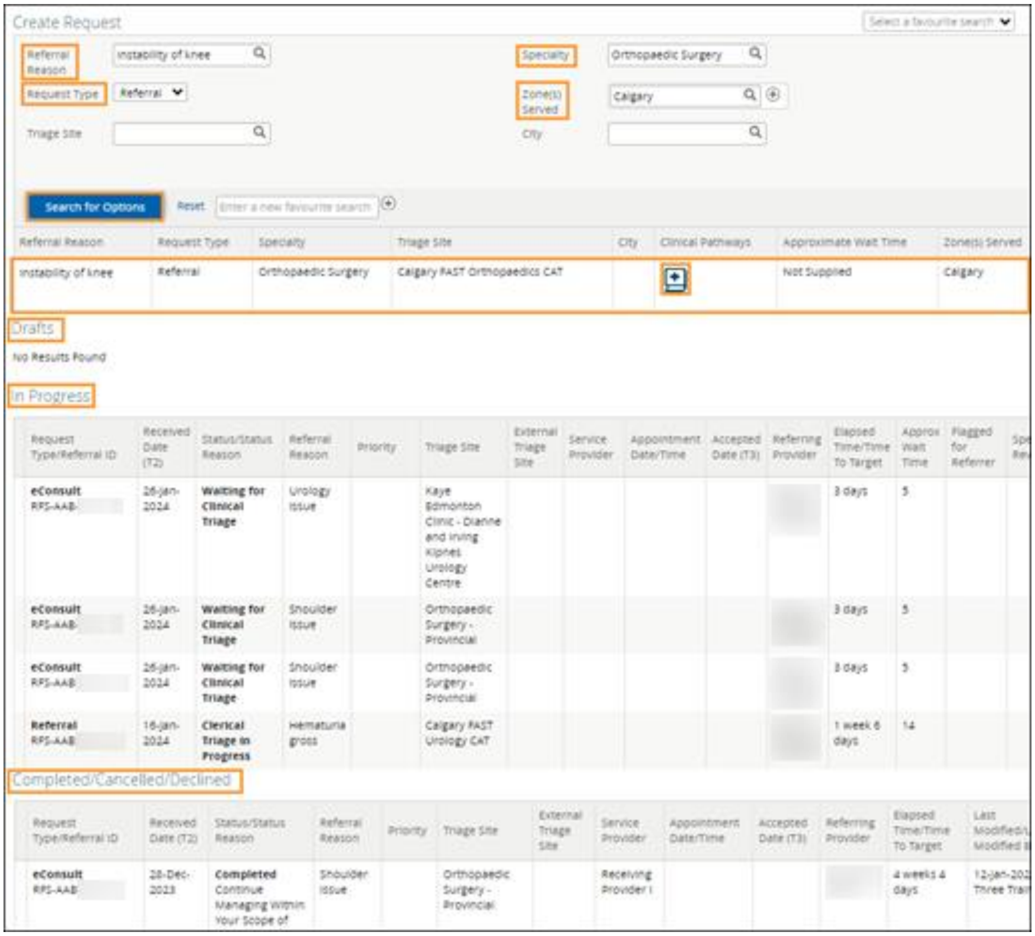
f. Select the ***Specialty*** and ***Zone(s) Served*** and/or ***City***. You can start typing the ***Specialty***, ***Zone(s) Served***, and ***City*** to show what is available (e.g. Ortho). These are not mandatory but will help narrow down the options you can select.

g. Click ***Search for Options*** and click on the appropriate option based on your search selections.

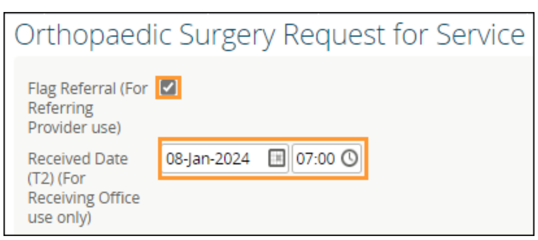
h. If the referral is a duplicate, the ***Check for duplicate referral(s)*** icon is shown. Hover over the symbol to see the duplicate referral. Check for duplicates in the ***Drafts***, ***In Progress*** and ***Completed/Cancelled/Declined*** list as well to ensure that a duplicate Referral doesn't exist in another Zone or a similar Referral such as Knee Issue - Right vs Knee Issue – Left..



i. Click the ***Clinical Pathway*** icon to view detailed information to help support care decisions. You can also view existing referral(s) for the patient. If the ***Clinical Pathway*** icon is showing, it indicates the pathway currently not available.



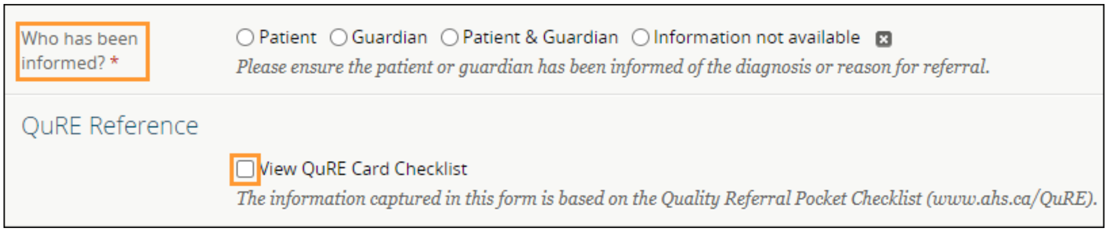
j. Select the ***Received Date (T2) (For Receiving Office use only).*** **Note**: If you are not a receiving office, leave this blank. The field will default to the current date and time. All fields marked with a red asterisk (*) are mandatory and must be completed to submit a Referral.



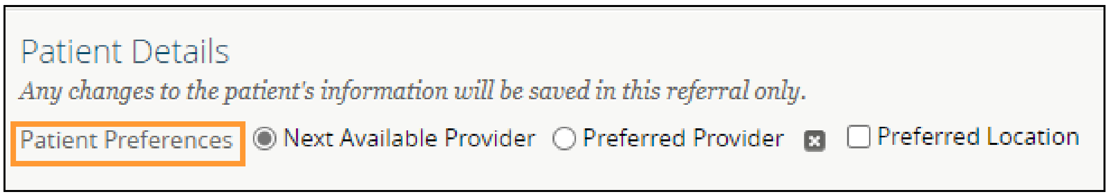
k. Review the ***Exclusions*** to ensure that this referral is appropriate. Exclusions are specialty and/or ***Referral Reason*** specific.

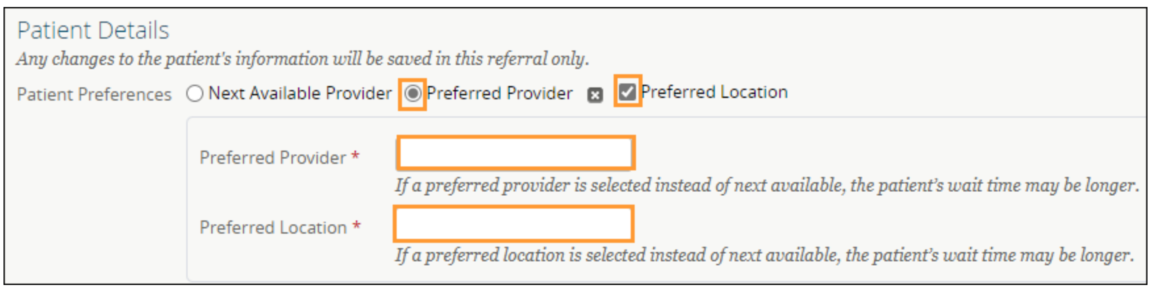
l. Select ***Who has been informed***.

m. For helpful information on completing the Referral, refer to the ***QuRE Card Checklist*** by clicking on the box beside ***View QuRE Card Checklist***.

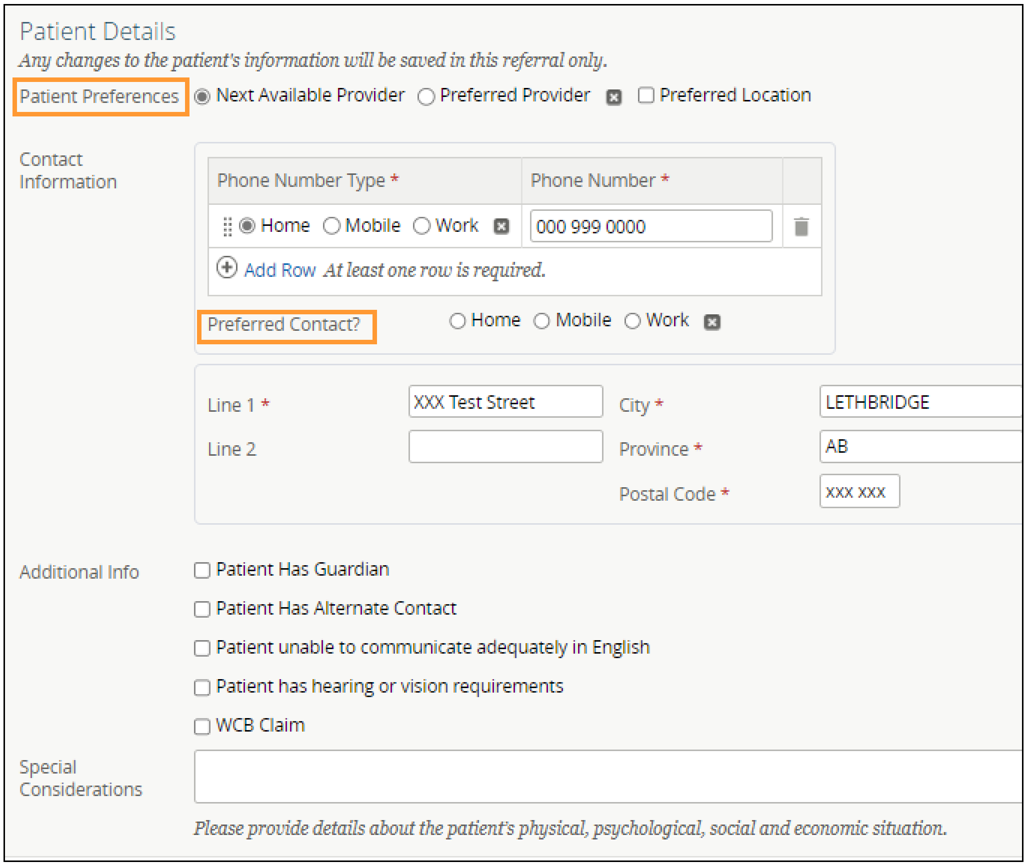


n. Scroll down to ***Patient Details*** and select the ***Patient Preference*** if indicated. Select ***Preferred Provider*** and/or ***Preferred Location*** if indicated by the patient.





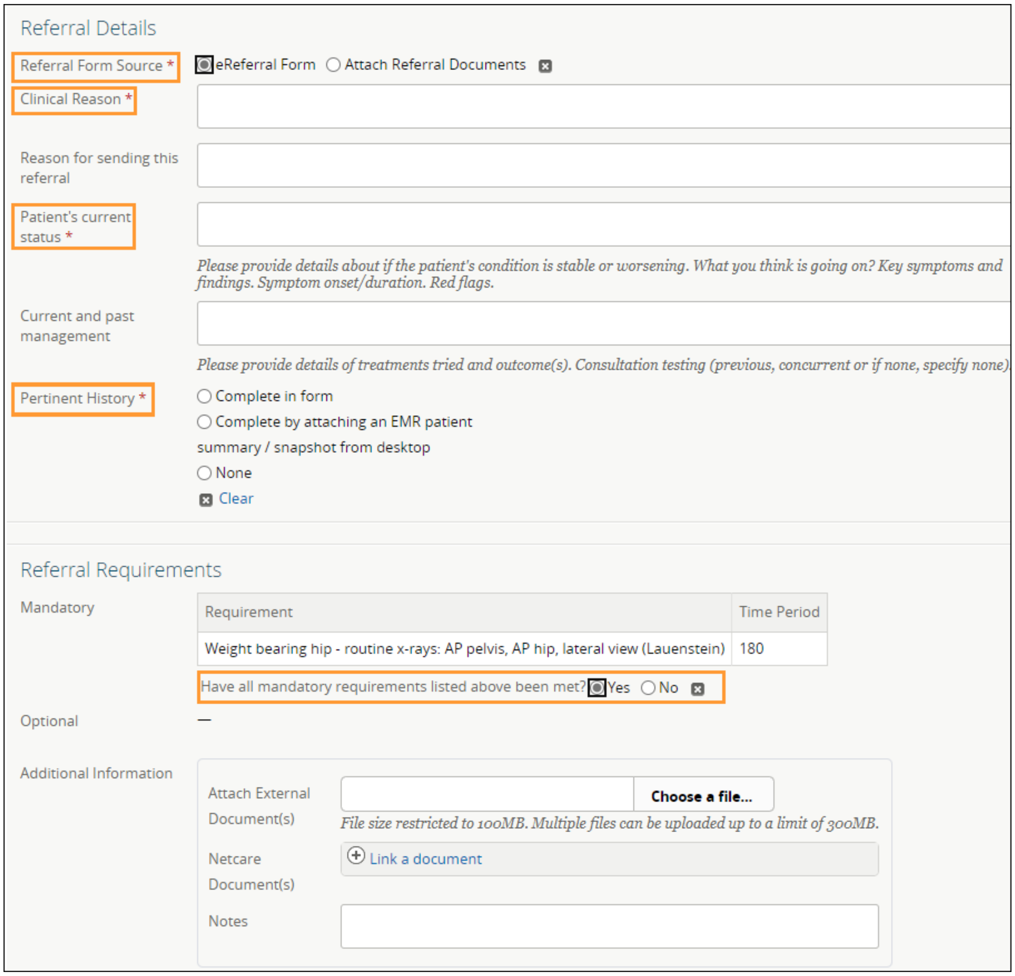
o. The patient's address and phone number will be auto populated from the patient's Electronic Health Record (EHR). You can modify it if needed. Use the option to indicate if there is a ***Preferred Contact***. Continue filling out ***Additional Info*** *and* ***Special Considerations*** (e.g., patient's physical, psychological, social and/or economic situation) sections.



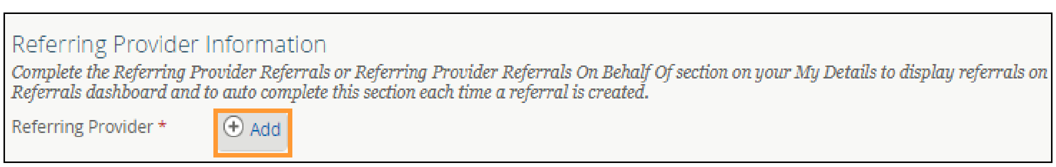
p. Complete the ***Referral Details*** section. There are two options: If the exact ***Referral Reason*** was not available (e.g., Sciatica), make sure to enter this in the ***Referral Details*** section – ***Reason for sending this referral*** field. If you are attaching an external referral form, locate the referral form by clicking ***Choose File*** beside ***Attach Referral Form***.

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

q. Complete the ***Referral Requirements*** section. Review the mandatory requirements. Attach or link the required investigations or images and check the ***Have all mandatory requirements listed above been met?*** box. Additional comments, if any, can be added to the ***Notes*** field.

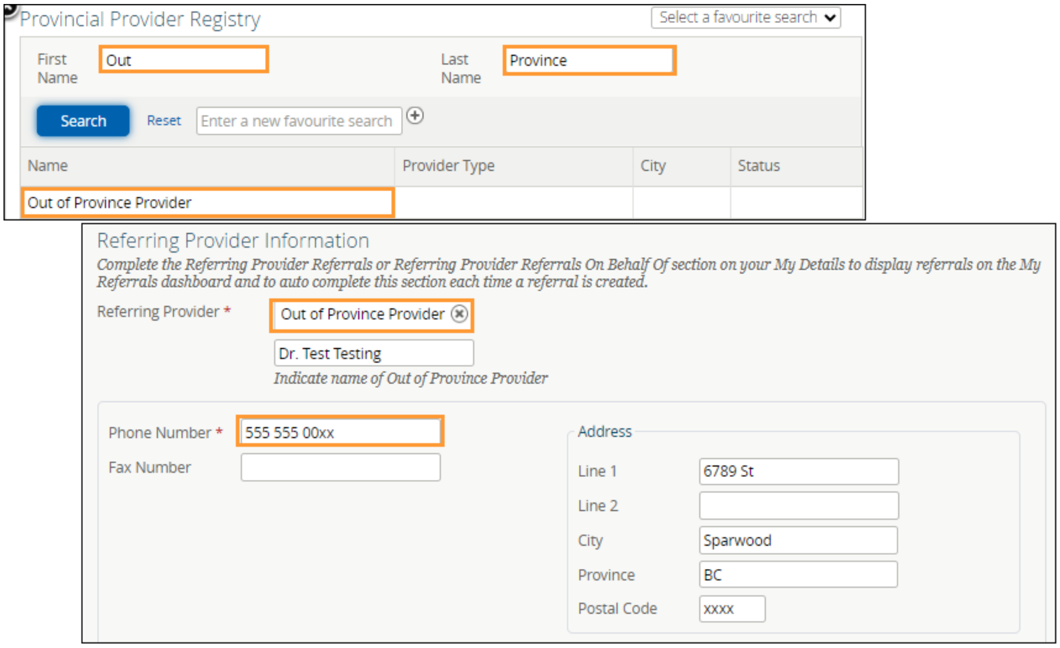


r. Confirm that the ***Referring Provider*** section is complete with the referring provider's name and clinic details. The clinic details will auto-populate from ***My Details*** (if available) and can be changed on this request if needed. **Note**: Click ***Add*** if the Referral is being created on behalf of another provider or the referring provider is from out of province.

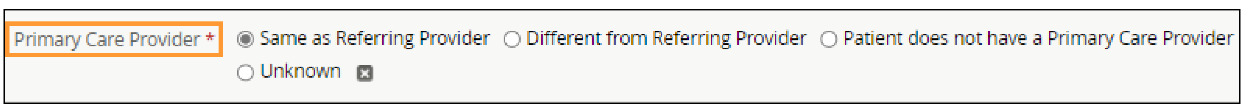


s. Search ***First Name*** – Out, ***Last Name*** – Province.

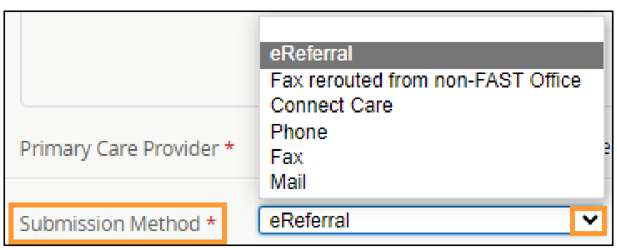
t. Select ***Out of Province Provider***. Enter the name of the referring provider and the phone number; these fields are mandatory.



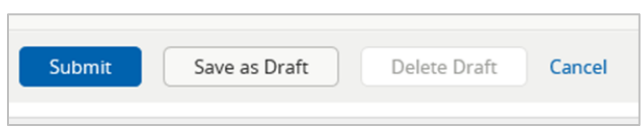
u. Click the appropriate option under ***Primary Care Provider***.



v. Select the ***Submission Method***.



w. Click ***Submit*** to send the Referral to the specialty. If you did not complete all mandatory fields marked by an asterisk (*), you will receive an error message. Review the Referral to locate any blank fields.



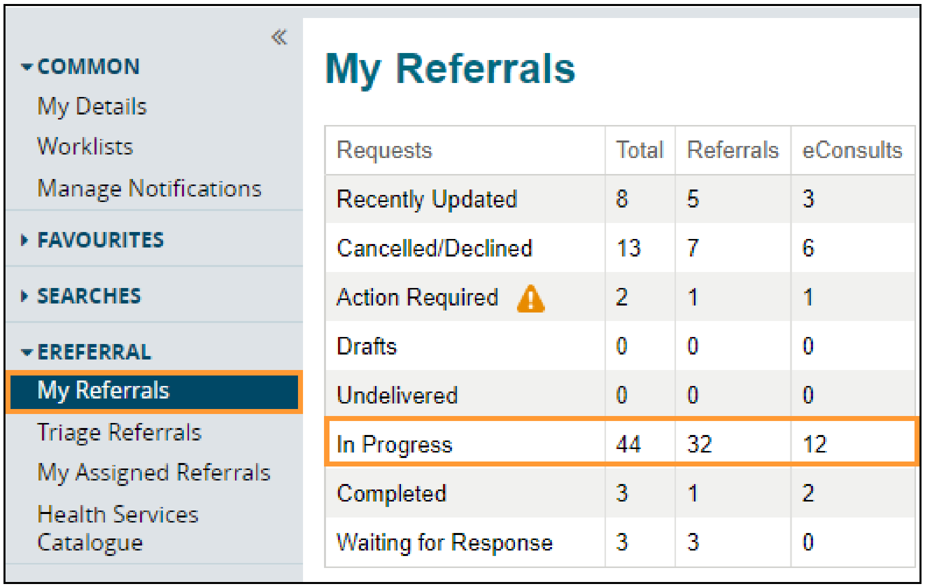
- If you want to save a draft of the Referral before submitting it, you can save it by clicking ***Save as Draft***. You can access the draft at any time in the ***Drafts*** worklist on the ***My Referrals*** dashboard. You can click ***Cancel*** if you want to stop completing the Referral.
- Once you click ***Submit***, the Referral will appear on your ***My Referrals*** dashboard on the ***In Progress*** and ***Recently Updated*** worklists with a status of ***Clerical Triage in Progress***.

NOTE:	If a referral has been declined because it did not meet the criteria appropriateness, do not edit the referral to include more information or attachments. Please create a new referral with the correct information.

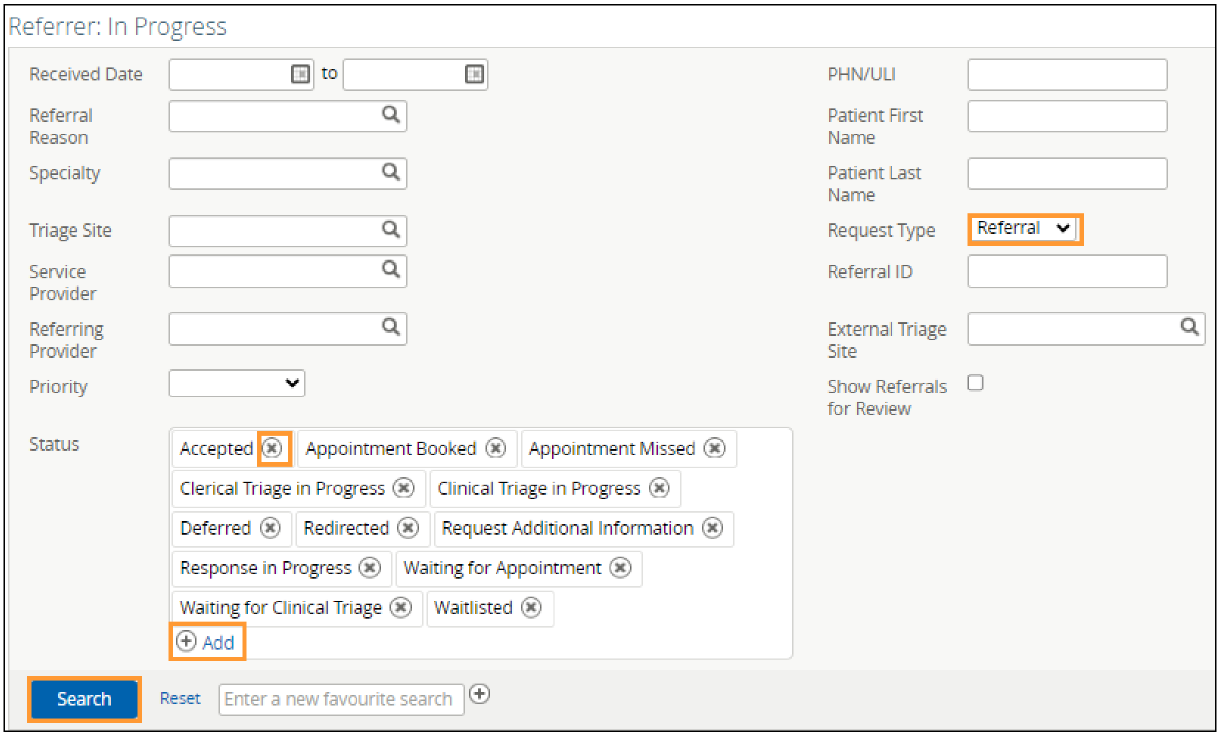
5.3 Reviewing a Submitted Referral

At any point, you can review a submitted Referral from the ***My Referrals*** dashboard.

a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and then the ***In Progress*** worklist.



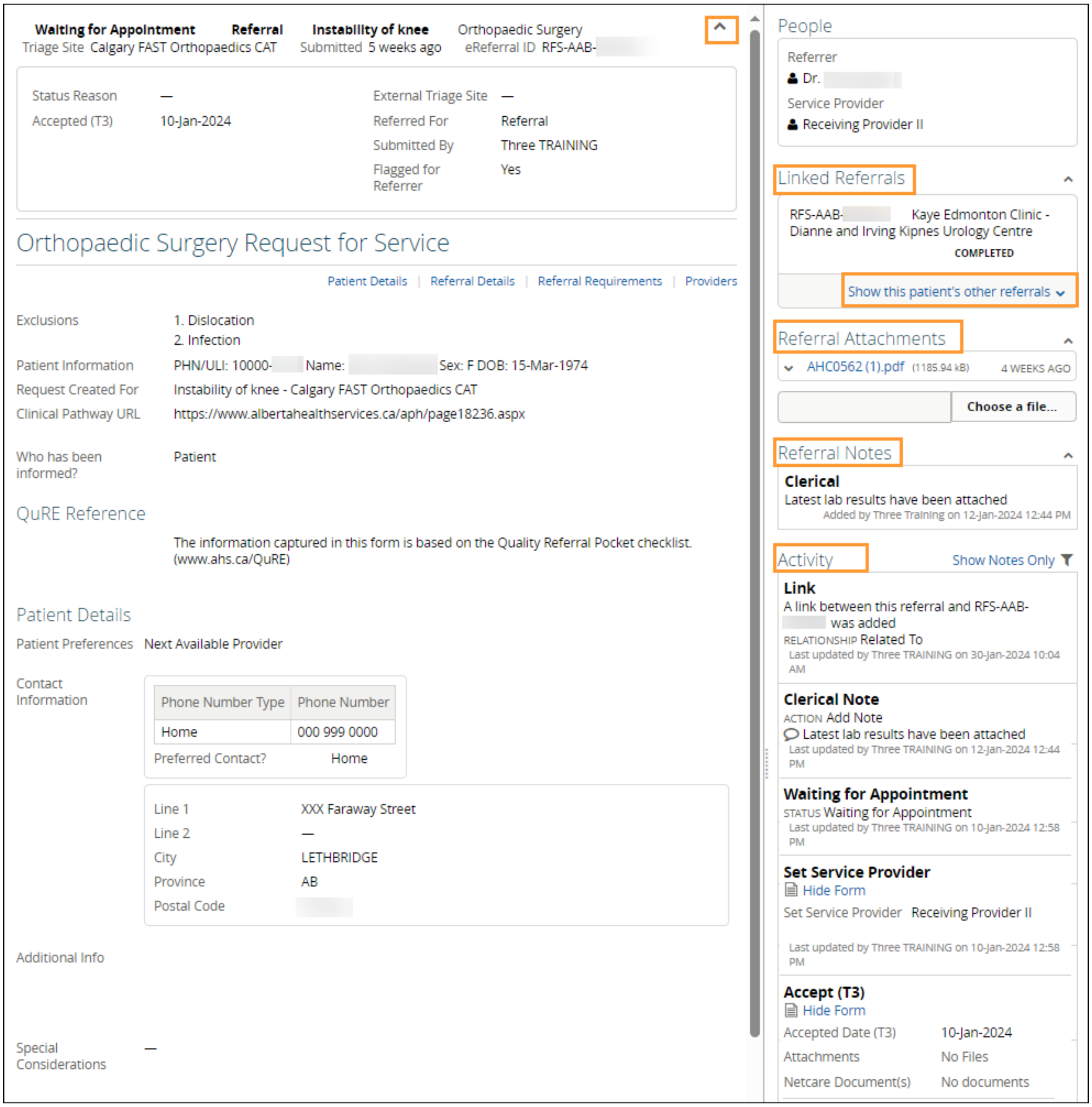
b. Select ***Referral*** for ***Request Type*** and click ***Search*** to generate a list of referrals. You can further define the search by choosing options like ***PHN/ULI***, ***Referral Reason***, or ***Status***. To remove a status, click the *X* to the right of the status; to add a status, click the ***Add*** button. Note that the status selections are "sticky", meaning that if you access this dashboard and worklist during your eReferral working session (have not logged out) the same items will be selected.



c. Select the appropriate Referral from the list. Click the arrow located on the ***Summary Bar*** to expand the referral header. The ***Status Reason*** field may be populated or blank. Only specific changes to the Referral will result in this field being populated (***Redirect***, ***Complete/Cancelled/Declined***, ***Missed Appointments***, ***Provide Information to Receiver***).

d. View the activity that has occurred on the Referral in the ***Right Panel*** in the ***Activity*** and ***Notes*** sections.

e. Click ***Show this patient's other referrals*** to view all referrals for this patient. All referrals are listed here regardless of the status. This is helpful if a screening Referral or eConsult needs to be linked to the procedural referral. Only receiving providers can link Referrals/eConsults.



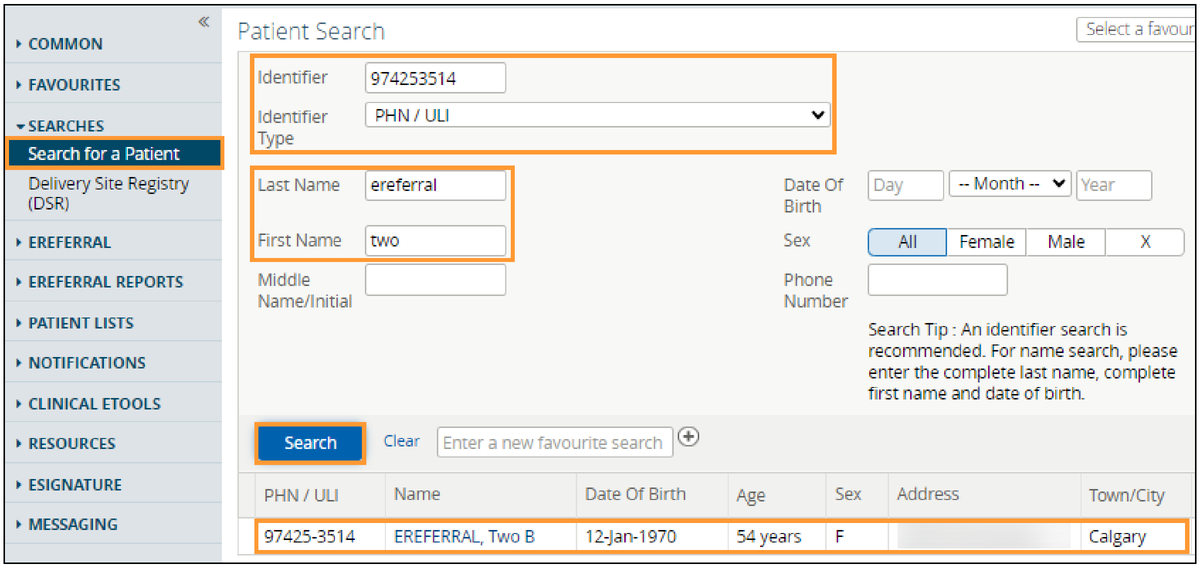
5.4 Referring & Referring on Behalf of Providers – Find a Referral Status

a. Click ***Searches*** from the ***Clinical Portal Menu***.

b. Click ***Search for a Patient***. Enter the patient's name or identifier.

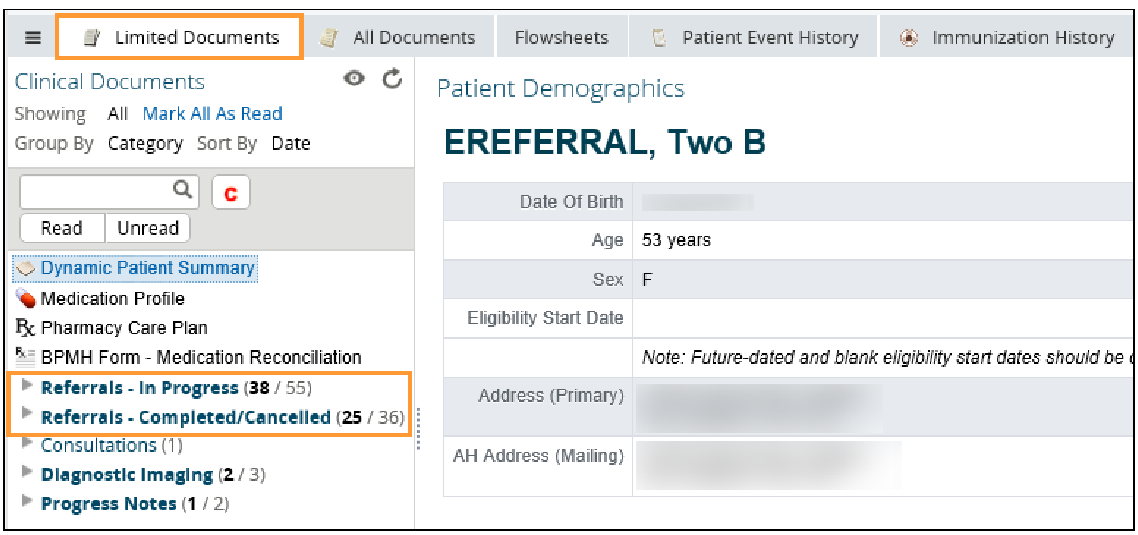
c. Click ***Search*** to locate your patient.

d. Click on the patient's name to open the patient's Electronic Health Record (EHR).

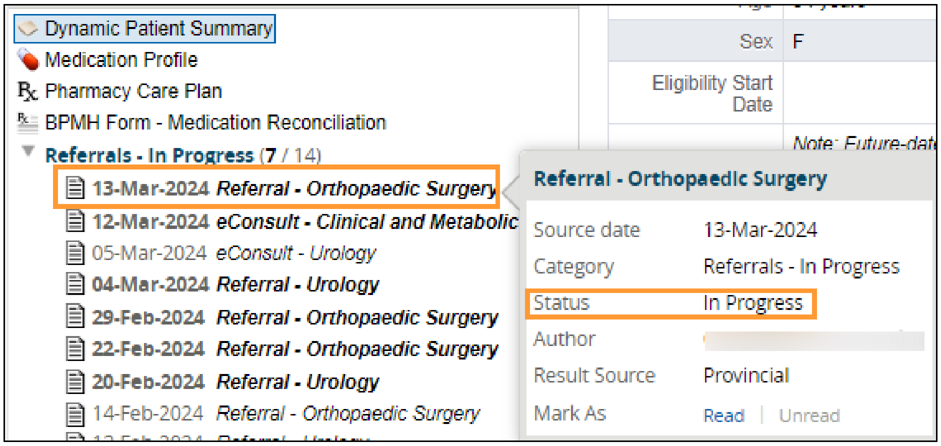


e. Click the ***Clinical Document Viewer (CDV Tree)*** located on the left-hand side of the screen. The ***Clinical Document Viewer (CDV tree)*** has two folders for eReferral activity:

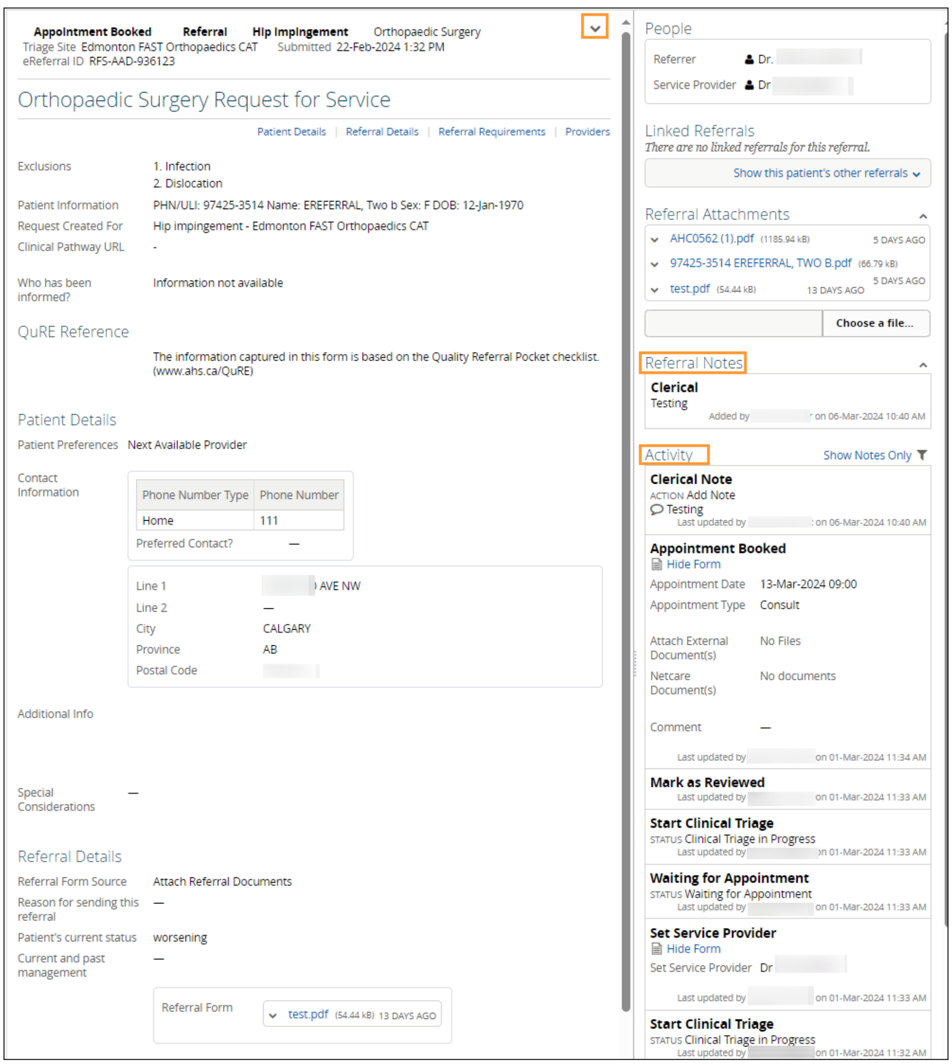
- Referrals – In Progress
- Referrals – Completed/Cancelled



Each folder contains links to the patient's eConsults and Referrals. Any eConsult or Referral that has been complete/cancelled will have a strike through the middle of the text. Any eConsult or Referral in progress will have its text italicized. By holding the mouse over any eReferral link, a tooltip will appear with a summary of the referral. The status will show up beside the ***Status*** field.



f. 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.

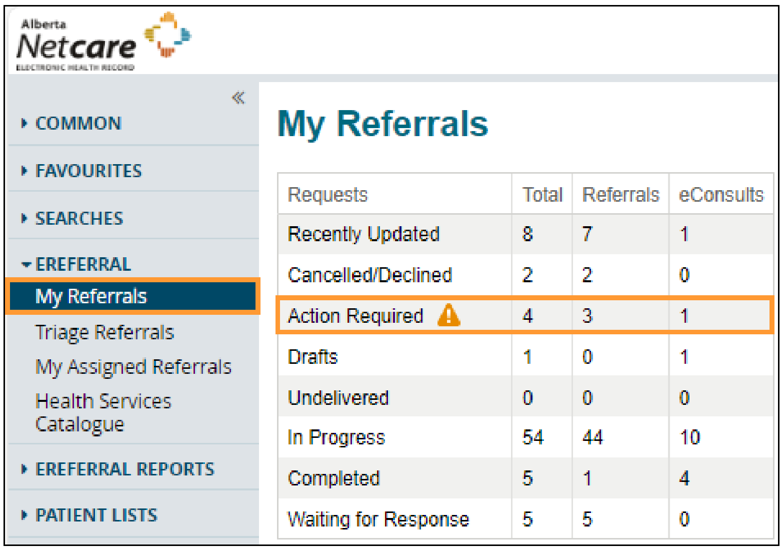


g. If you are the referring provider and would like to see all your referrals in one place, you must complete the ***Referring Provider Referrals*** section in ***My Details*** to see your submitted referrals on your ***My Referrals*** worklist. Instructions on how do to can be found here.

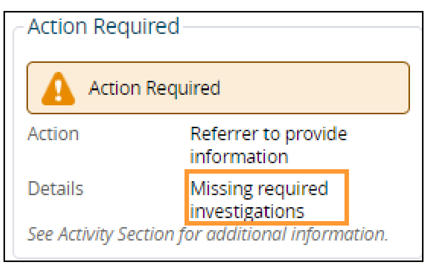
5.5 Responding to a Request for Additional Information

On occasion, the triage centre or responding provider may require additional information from you, the referrer. Follow these instructions to add more information.

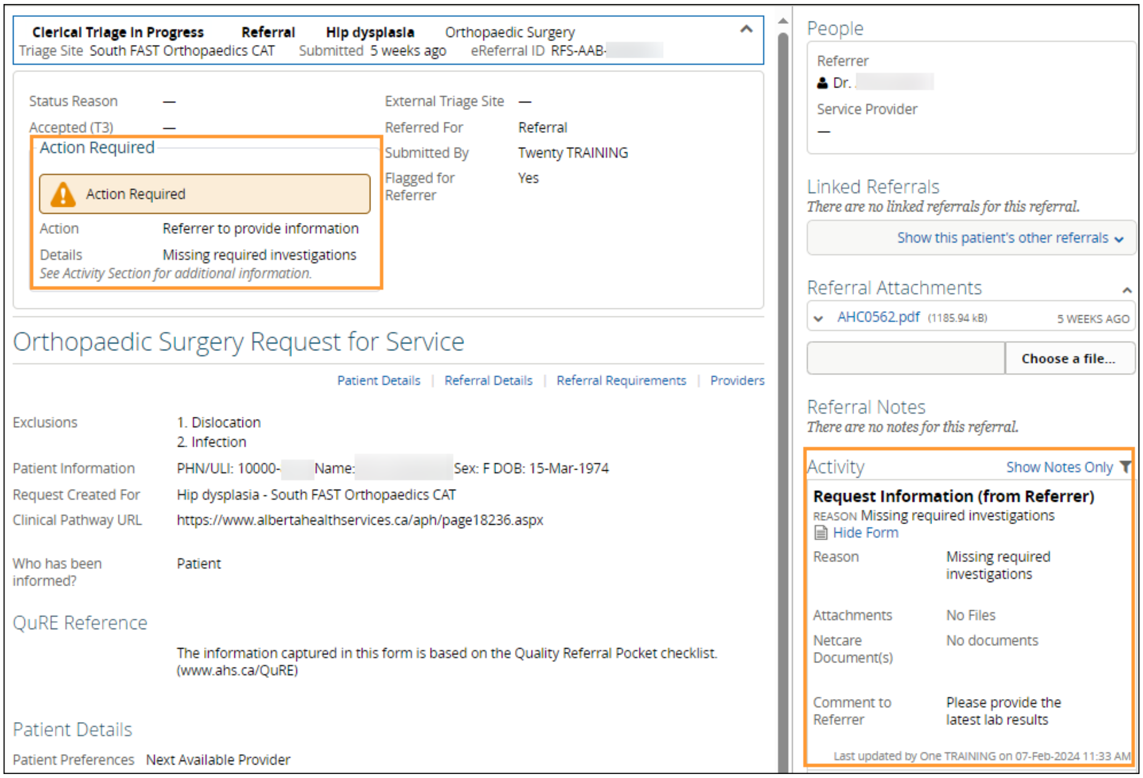
a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and select ***Action Required***. Choose the appropriate Referral.



b. Select ***Referral*** for ***Request Type*** and click ***Search***. You will notice ***Request Additional Information*** in the ***Status/Status Reason*** column. Click on the referral to view it. The ***Action Required*** notice is shown in the referral header.

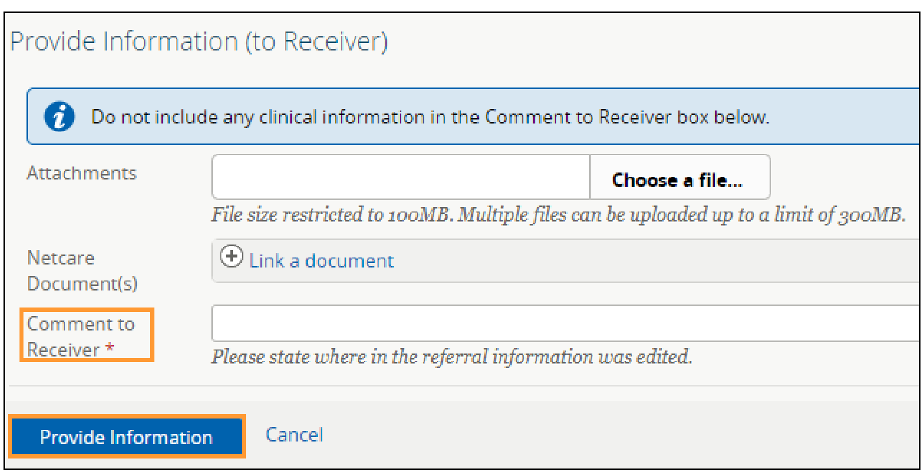


c. View the ***Activity*** section located on the ***Right Panel*** to see what information is being requested.



c. Click ***Provide Information (to Receiver)*** from the ***Workflow Bar***.

d. Attach or link the requested information if required and enter a ***Comment to Receiver*** (e.g., Requested x-rays attached). Click ***Provide Information***. Single files no larger than 100MB can be attached. Multiple files not exceeding 300MB in total can be added.

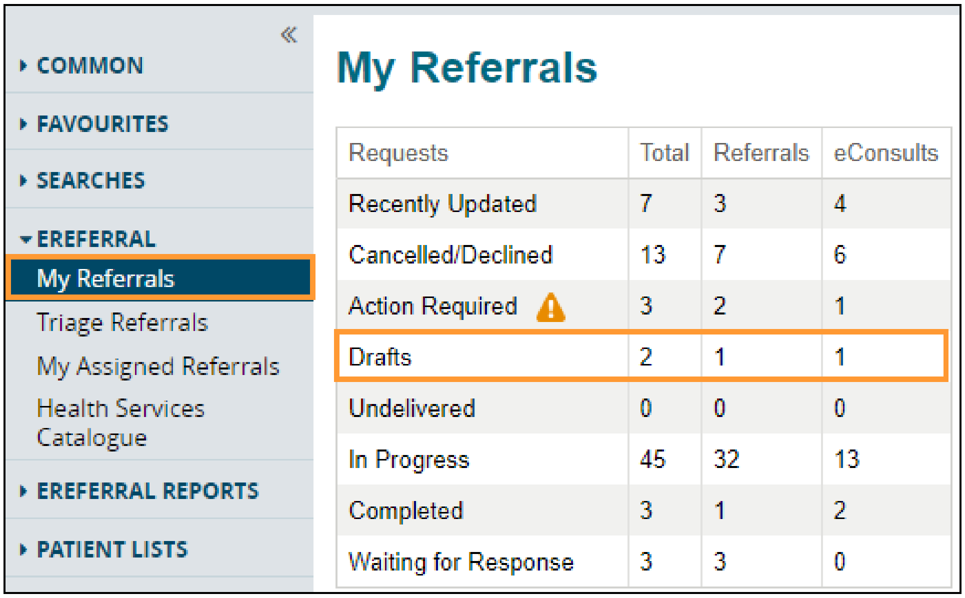


The Referral will then be removed from the ***Action Required*** worklist and moved to the ***In Progress*** and ***Recently Updated*** worklists.

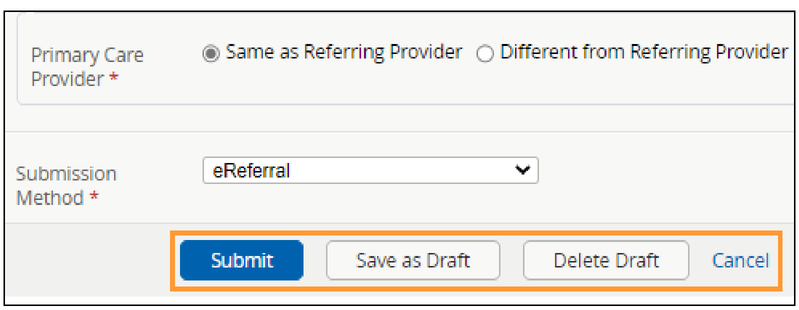
5.6 Opening a Draft Referral

A Referral can be saved as a draft for later completion. There is no expiry period for a draft Referral. Drafts are accessible to the user who created them or to the staff members who create referrals on their behalf. Drafts are also viewable by anyone who has the same providers added to their ***My Details***. Draft referrals are not listed in a patient's ***Clinical Document Viewer (CDV tree)***.

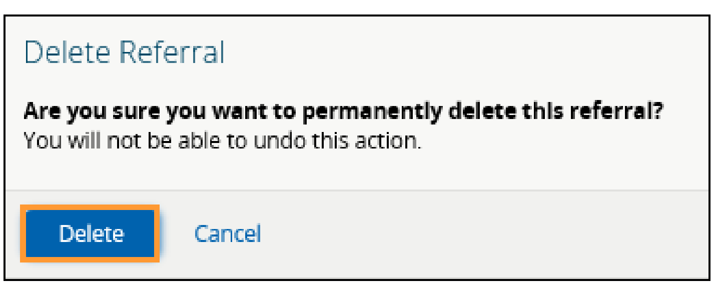
a. Click ***eReferral*** from the ***Clinical Portal Menu***. Click ***My Referrals*** and select ***Drafts***. Drafts can also be viewed from the ***Context Menu*** under ***View Referrals***.



b. Select the appropriate referral to review or continue completing the Referral form. A referral can be saved in draft format multiple times at any stage during the creation process.



c. Click ***Delete*** at the bottom of the referral to permanently remove it from the patient's Electronic Health Record (EHR). This action must be confirmed.



6.0 Triage Types and Roles

Triage is the process of checking a Referral or an eConsult to ensure that all required information is present and that an appointment can be booked (if required) according to the patient's clinical needs. There are three (3) types of triages: Clerical, Clinical and Booking. Depending on the size of clinic, triages may be performed by the same person or different people.

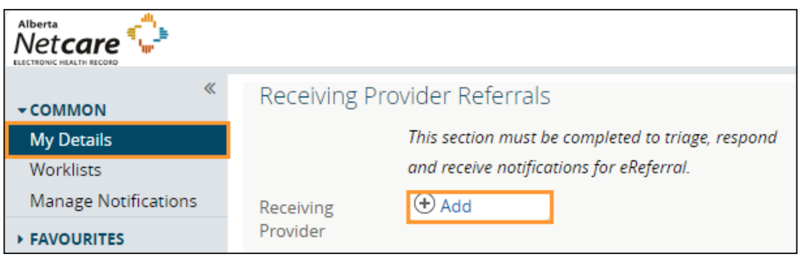
eReferral users tasked with triaging requests must have a Clinical 1, Clinical 2 or Clinical 5 Alberta Netcare Portal user role and belong to the ***Triage Referrals*** group with receiving or receiving on behalf of permissions. These users can view all requests on the ***Triage Referrals*** dashboard. If the ***My Assigned Referrals*** dashboard is needed as well, then users must add the specific provider's name(s) to ***My Details***. Referrals or eConsults assigned to the providers listed in ***My Details*** will populate onto the ***My Assigned Referrals*** dashboard.

TIP	Not sure what access level you have? Go to ***My Details*** from the ***Clinical Portal Menu***. Underneath your username, your assigned role will be listed. If it's not a Clinical 1, Clinical 2 or Clinical 5, ask your manager to contact the eHealth Services team to have this changed. Once this has been changed to the appropriate Alberta Netcare Portal user role (i.e., Clinical 1, Clinical 2, or Clinical 5), please ask your manager to email the AHS Access Improvement team at access.ereferral@ahs.ca to request triage access.

6.1 Customizing My Details – Receiving Providers Triage

If you are a receiving provider, such as a specialist, your Alberta Netcare Portal user role must be Clinical 1 to receive eReferral requests and your ***My Details*** needs to be set up as per the instructions below:

a. Click ***My Details*** from the ***Clinical Portal Menu***.
b. Scroll down to the ***Receiving Provider Referrals*** section and click ***Add***.



c. Type your full name in the box (as per your health profession college registration) and then click to display a list of names. Select your name.

d. Look at the ***Receiving Provider Referrals*** section and confirm that your full name has been added.
e. Click ***Update Preferences*** to save your updates.

6.2 Managing Referrals on Behalf of a Provider

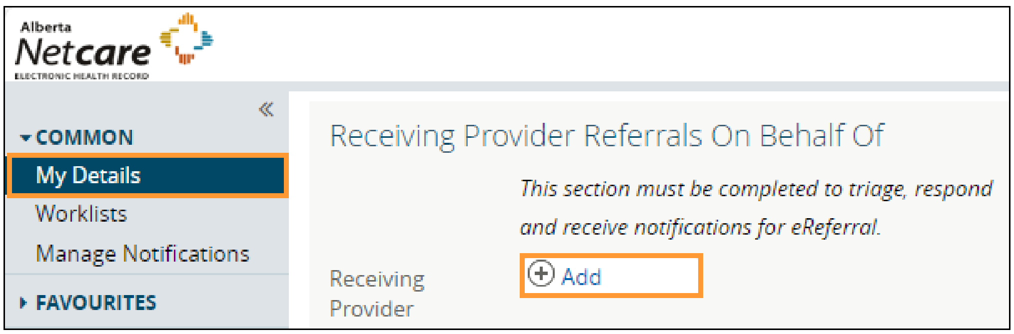
If you are managing referrals on behalf of a provider, you will need an Alberta Netcare Portal user role of Clinical 2 or Clinical 5.

Adding the receiving provider's name to your ***My Details*** is only necessary if you need to:

- Use the ***My Assigned Referrals*** dashboard.
- Respond to an eReferral request on behalf of a provider.

a. Click on ***My Details*** from the ***Clinical Portal Menu*** to add the receiving provider's name.

b. Scroll down to the ***Receiving Provider Referrals On Behalf Of*** section and click ***Add***.



c. Type the receiving provider's full name in the box and then click ***Search***.

d. Once the list displays, click on the receiving provider's name.

e. Confirm the ***Receiving Provider Referrals On Behalf Of*** section and confirm that the provider's full name has been added. You can add multiple providers if necessary.

f. Click ***Update Preferences*** to save your changes.

6.3 Saving and Sharing eReferral

Triage centres continue to receive faxes after adopting eReferral, and some opt to enter those faxes into the Alberta Netcare Portal. If you are creating Referrals from faxes received at your triage centre, you can add users who you want to view your draft referrals.

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll down to the ***Triage Referrals*** section.

c. Click on the ***Add*** button next to ***Add Referral Creators to Drafts List***.

d. Enter the name of any Alberta Netcare Portal user.

NOTE:	The referring provider who created the referral will be able to see it in their ***My Referrals*** dashboard.

e. Click ***Update Preferences*** to save your updates.

7.0 Responding to eConsults & Referrals

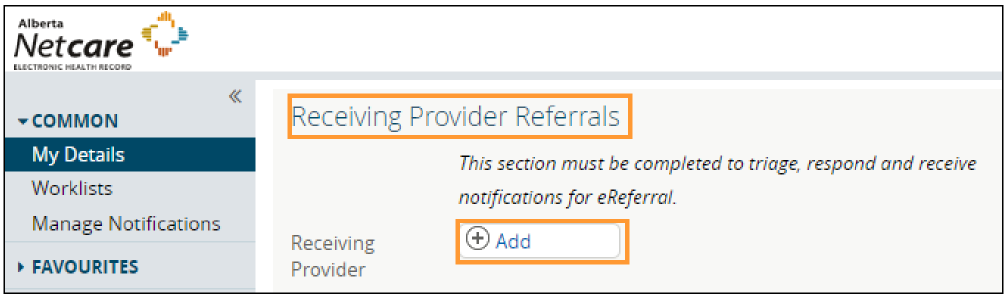
This section is for receiving providers who are responding to eConsults or managing Referrals.

7.1 Setting up your My Details as a Receiving Provider

You can see referrals in your My Assigned Referrals dashboard by adding yourself as a receiving provider.

a. Click on ***My Details***.

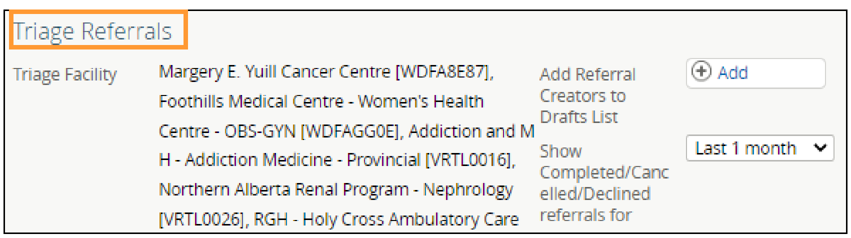
b. Scroll down to the ***Receiving Provider Referrals*** section. Click ***Add***.



c. Type your full name in the box and click ***Search***.

d. Click on your name.

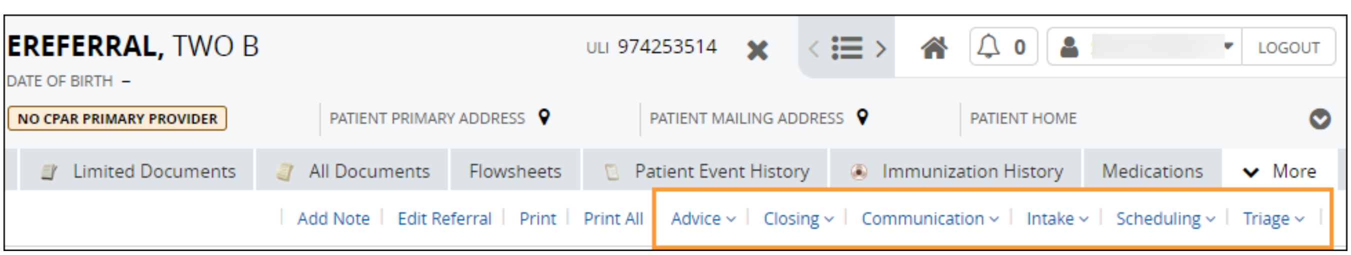
e. Scroll to the bottom of the page to the ***Triage Referrals*** section and confirm that the correct ***Triage Facility*** is listed.



f. Click the ***Update Preferences*** button to save your updates.

7.2 Referral – Workflow Options

Workflow actions are accessed using the mini menus located on the right side of the Referral. Actions are listed alphabetically.

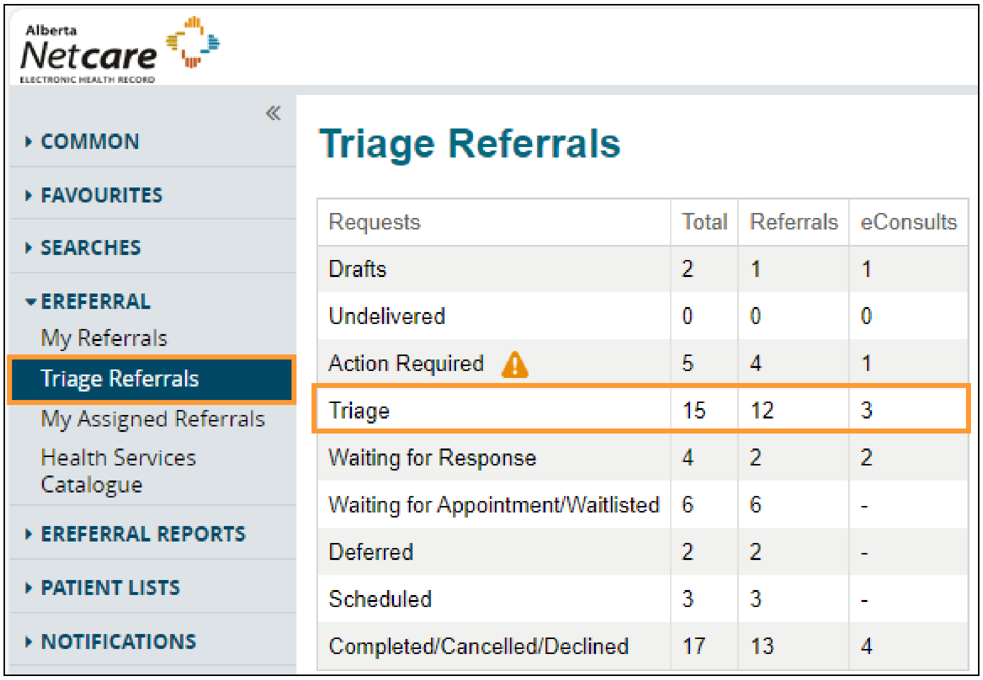


REFERRAL MENUS & WORKFLOW OPTIONS	**WHEN TO USE?**
Advice	
Respond with Advice	Select if the Referral is more appropriate for an eConsult than a Referral. Provide the advice in the comment box, attach relevant files if required and click ***Complete***. The referral is now complete and will appear on the ***Completed*** worklist on the ***My Referrals*** dashboard of the referring provider as well as the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.
Respond with Advice (Review Required)	Select if there is a need for a specialist to review the advice before it is provided to the referrer (e.g., if a fellow or other staff member composes the response). Provide the advice in the comment box, then 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 to change the status of the Referral to ***Cancelled***.
Complete (T5)	Select to change the status of the Referral to ***Completed***. The request will now move to the ***Completed*** worklist for referring and receiving providers. There is an option to enter the ***Accepted Date (T3)*** of the referral if it was not entered previously. There is also the option to enter the ***Priority*** and ***Service Provider***.
Decline	Select to change the status of the Referral to ***Declined***. The request will now move to the ***Declined*** worklist for referring and receiving providers.
Communication	
Create and Attach Letter	Used only by the FAST Program to send referral letters to referring/receiving providers. Letters include: ***Accepted, Received, Reassigned, Incomplete, Pending, Updated, Declined, Cancelled.***
Provide Information (to Referrer)	Select to provide information to the referring provider. If selected, the Referral will then appear on the ***Action Required*** worklist of the ***My Referrals*** dashboard of the referring provider.
Request Information (from Referrer)	Select to ask for more information from the referring provider. This will appear on the receiving provider's ***Triage Referrals*** dashboard on the ***Waiting for Response*** worklist, and on the referring provider's ***Action Required*** worklist.
Request Info: Received/Not Required	Select to indicate the information has been provided, is not required or the request for more information was made in error. This will remove the referral from the ***Triage Dashboard*** - ***Waiting for Response*** worklist, and on the referring provider's ***Action Required*** worklist.
Intake	
Change Reason for Referral	Select this to enter a more specific ***Referral Reason*** or correct a ***Referral Reason*** that may have been entered incorrectly (for both Referrals and eConsults). Only users who have access to the ***Triage*** dashboard or the ***My Assigned Referrals*** dashboard have access to this function.

Complete Clerical Triage	Select to identify the completion of clerical triage. This will change the status to ***Waiting for Clinical Triage***.
Redirect	Select 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.
Set Service Provider	Select to enter the service provider's name.
Update Received Date (T2) (For Receiving Office use only)	Select to update the received date of the Referral. Used if an incorrect received date was entered for a faxed referral that you created in eReferral and need to change the date.
Scheduling	
Appointment Booked	Select this option to enter the appointment date and details.
Appointment Missed	Select to change the status of the Referral 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 to show that a request is not ready to be triaged or booked. This option could be used if a patient needs to lose weight before their surgery, or an Oncology patient who has had a mastectomy needs to heal prior to getting radiation. The Referral will move to the ***Deferred*** worklist on the ***My Assigned Referrals*** dashboard, and you need to check this list regularly as no alerts are associated with it.
Waitlist	Select this option to change the status of the Referral to ***Waitlisted***. As a comment box is not available 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	
Accept (T3)	Select to enter the accepted date of the referral. The status of the Referral will change to ***Accepted***. The referral stays on the receiving provider's ***Triage*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.
Ready for Booking	Select to change the status of the Referral to ***Waiting for Appointment***. This action can be used by facilities and specialties that do not have a waitlist, and an appointment can be scheduled as soon as triage is complete. It can also move a referral from the ***Waitlist*** to the ***Waiting for Appointment*** worklist.
Set Priority and Booking Instructions	Select to set the priority of the Referral (based on the request's clinical content). There may also be a situation where a referring provider contacts the triage centre and states the patient's condition has worsened, and the priority needs to be changed. It can also be used if the previously set acuity may be lessened. Select priority: ***Routine***, ***Semi Urgent***, or ***Urgent***.
Start Clinical Triage	Select to start clinical triage. This will change the status to ***Clinical Triage in Progress***.

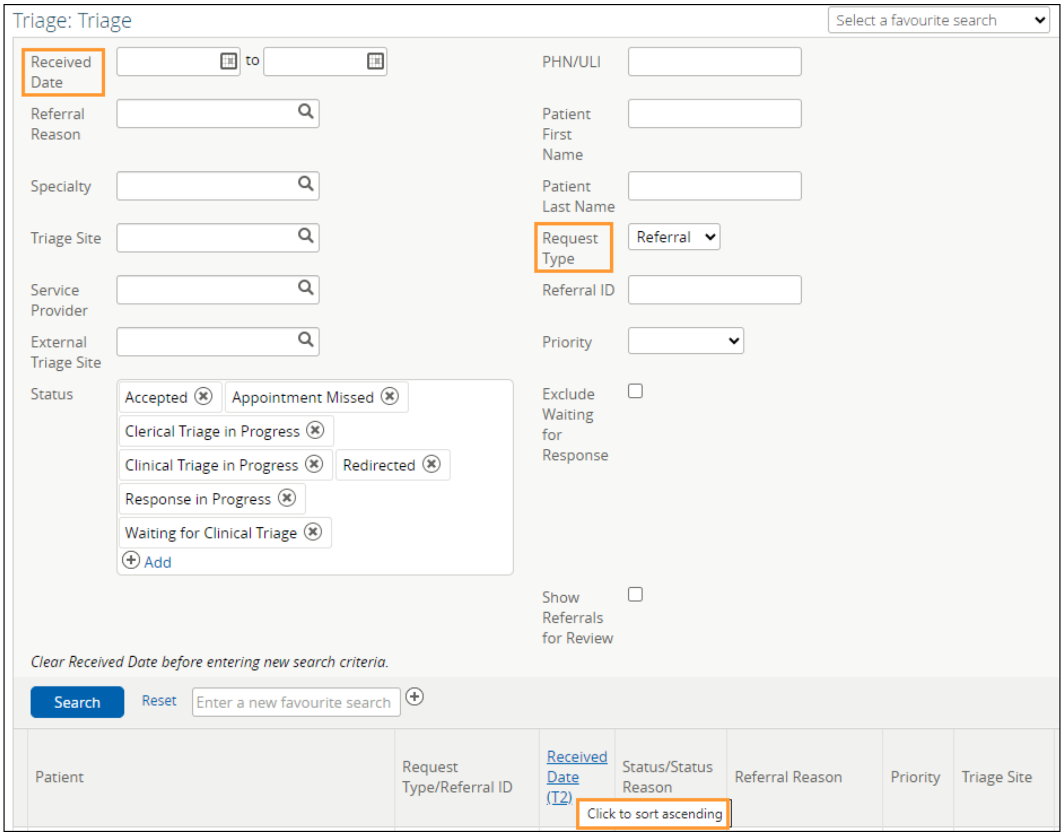
7.3 Managing Referrals

a. Click ***Triage Referrals*** – ***Triage*** from the ***Clinical Portal Menu***.



b. If you wish, narrow the search further by selecting ***Referral*** for ***Request Type*** and other filters. 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).

c. Click ***Search***. You can click ***Received Date*** to sort the requests by the newest or oldest received date.

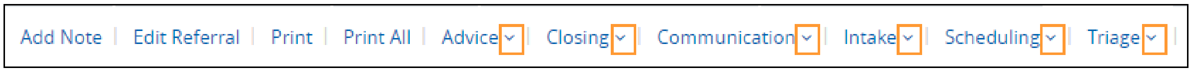


d. Select a Referral from this list. When the referral is opened, the ***Workflow Bar*** and other actions are located at the top right of the referral.

- ***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.

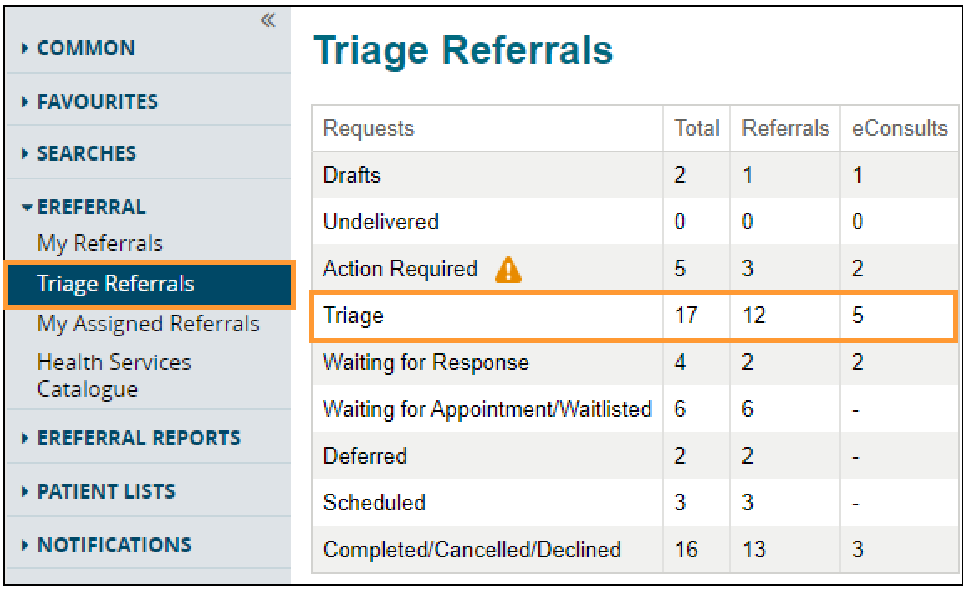
Triage Referrals & My Assigned Referrals Workflow Bar



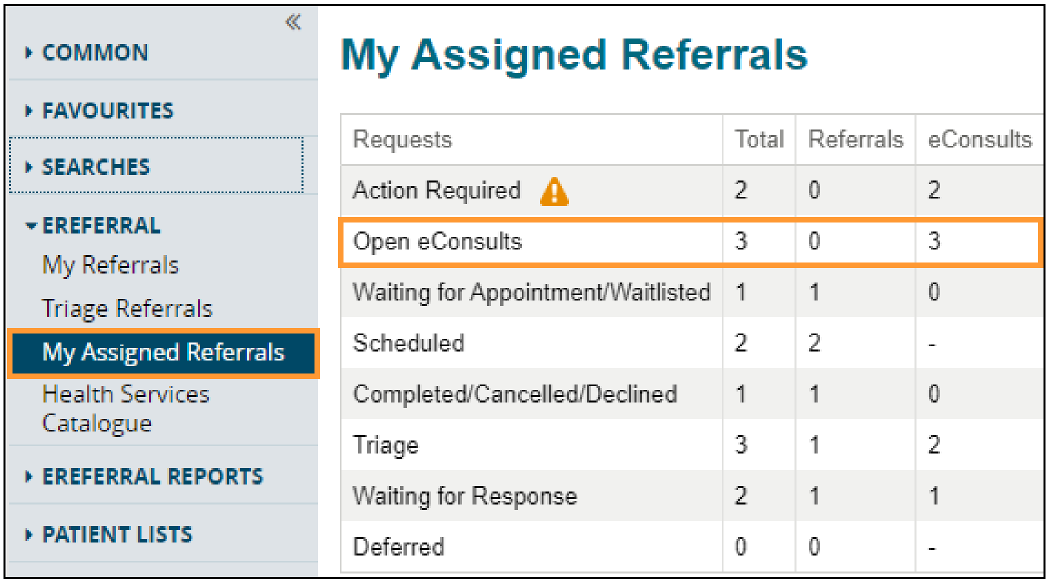
7.4 Responding to eConsults

There are two ways you can find and respond to a new eConsult:

- **Triage Users** - Click ***eReferral*** from the ***Clinical Portal Menu***. Go to the ***Triage*** worklist on the ***Triage Referrals*** dashboard.



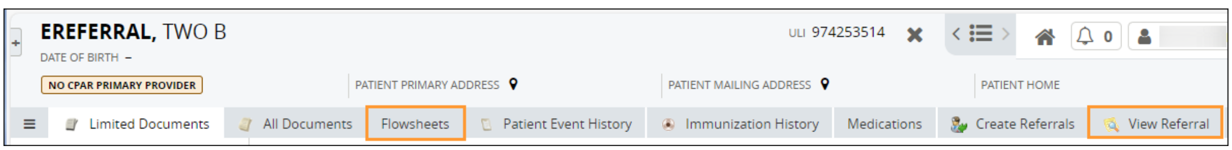
- **Non Triage Users –** If you only respond to eConsults, you may not have access to the ***Triage Referrals*** dashboard. In this case, you can view requests on your ***My Assigned Referrals*** dashboard after they have been assigned to you as the receiving provider by a triage user.



a. Open or search for the eConsult.

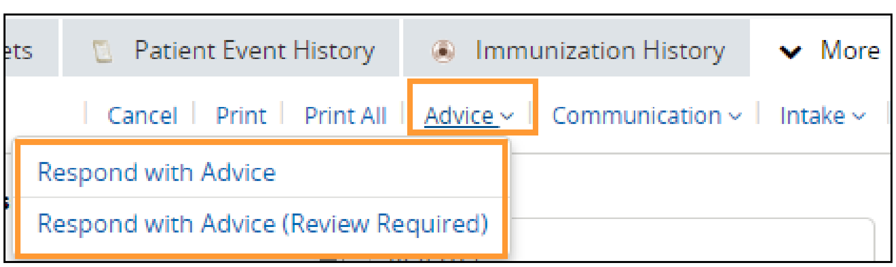
b. **(If required)** Reference back to the patient's Electronic Health Record (EHR) by clicking on the selection in the ***Context Menu*** such as ***Flowsheets***.

c. Return to the eConsult and select ***View Referral***.



d. Click ***Advice,*** then ***Respond with Advice*** from the ***Workflow Bar*** menu if the eConsult is appropriate. Select ***Respond with Advice (Review Required)*** if there is a need for a specialist to review the advice before it is provided to the referrer (i.e., if a fellow or other staff member composes the response).

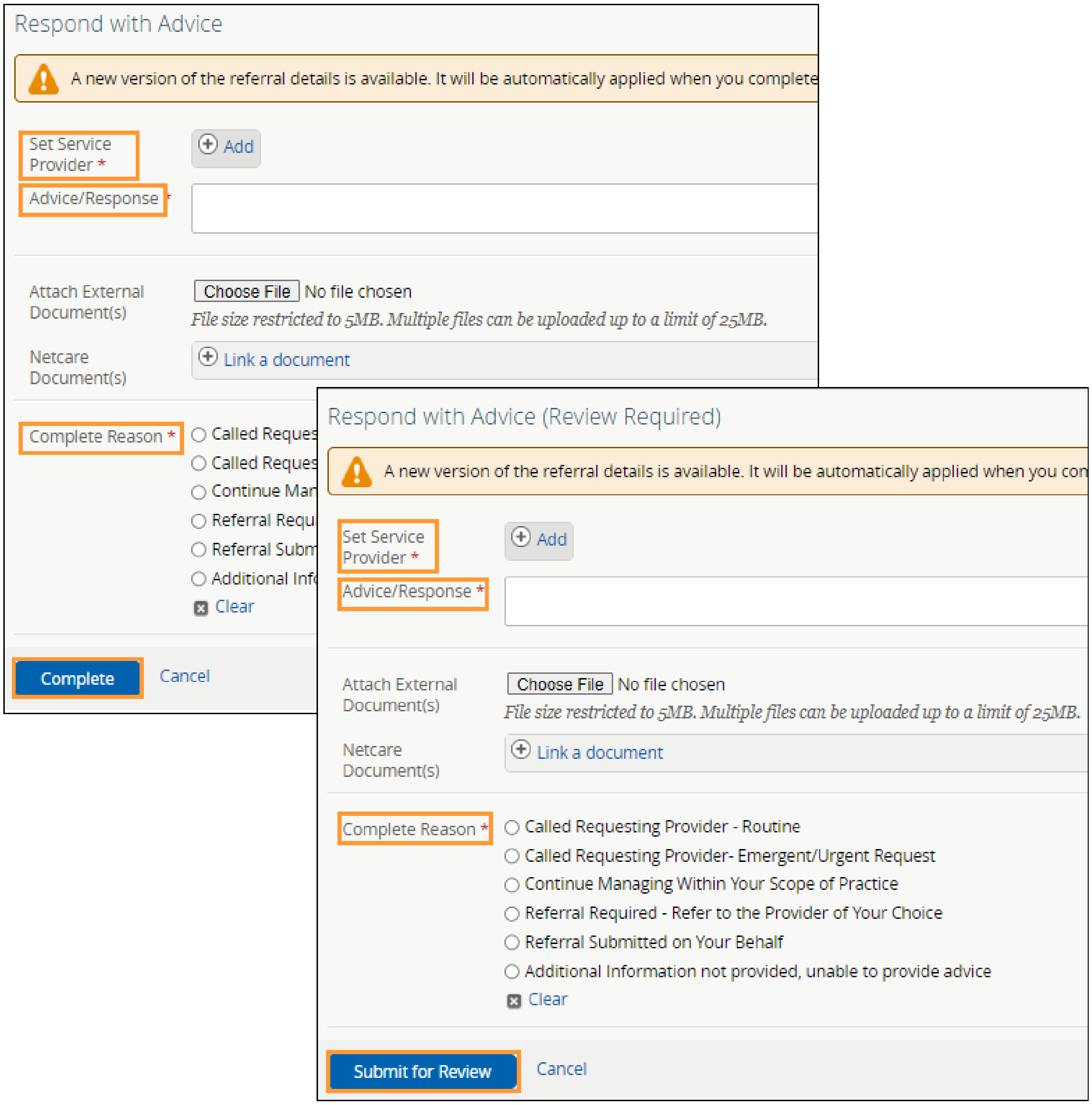
- If ***Respond with Advice (Review Required)*** is selected, then set the supervising specialist as the ***Service Provider***. Enter your response and add any attachments.
- Choose a ***Complete Reason*** from the list provided and click ***Submit for Review*** to finish. The referral is now awaiting specialist review and will appear on the ***Action Required*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.



e. Set yourself as the ***Service Provider***. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments.

f. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.

g. If ***Respond with Advice (Review Required)*** was selected, click ***Submit for Review***.

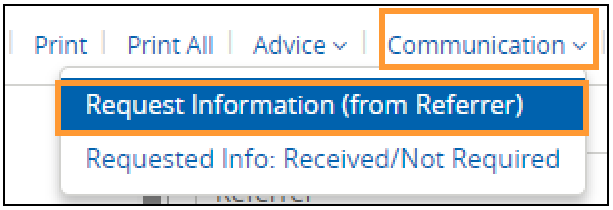


The eConsult will now appear on your ***Complete*** worklist on your ***My Assigned Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and the request will appear in their ***Completed*** worklist on their ***My Referrals*** dashboard.

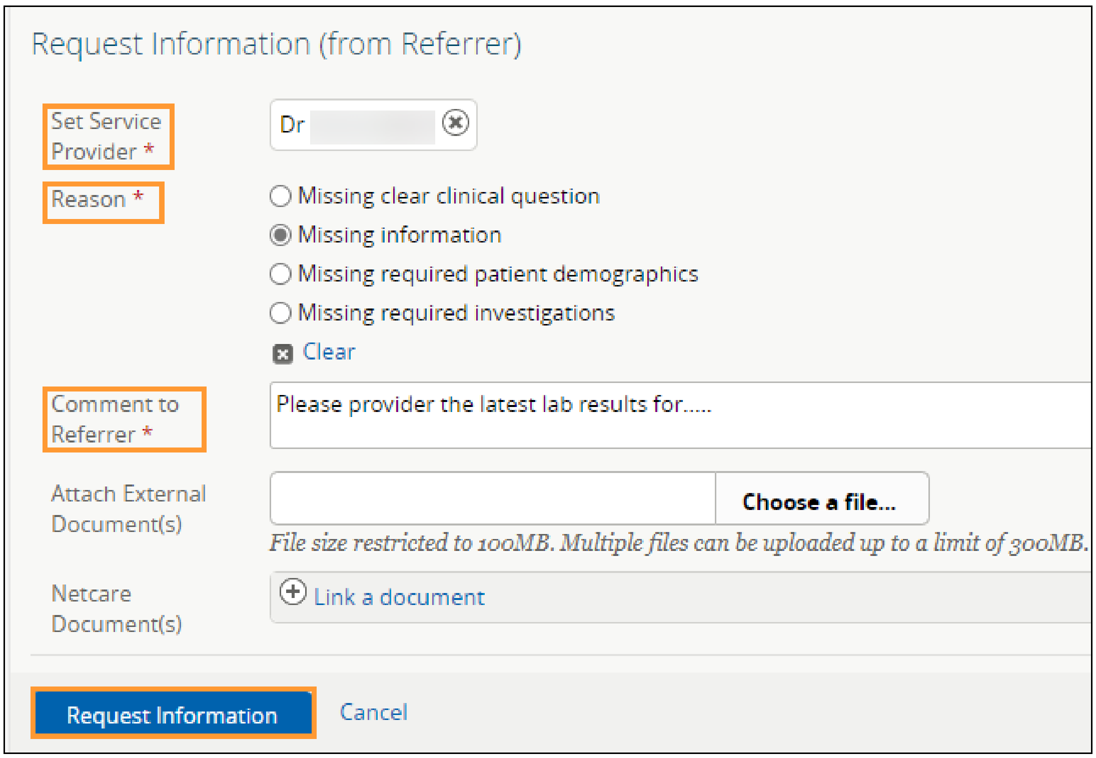
7.5 Requesting Additional Information from Referring Provider

On occasion, the FAST Program or a receiving provider may require additional information from you, the referring provider. To respond to a request for additional information, use the process below:

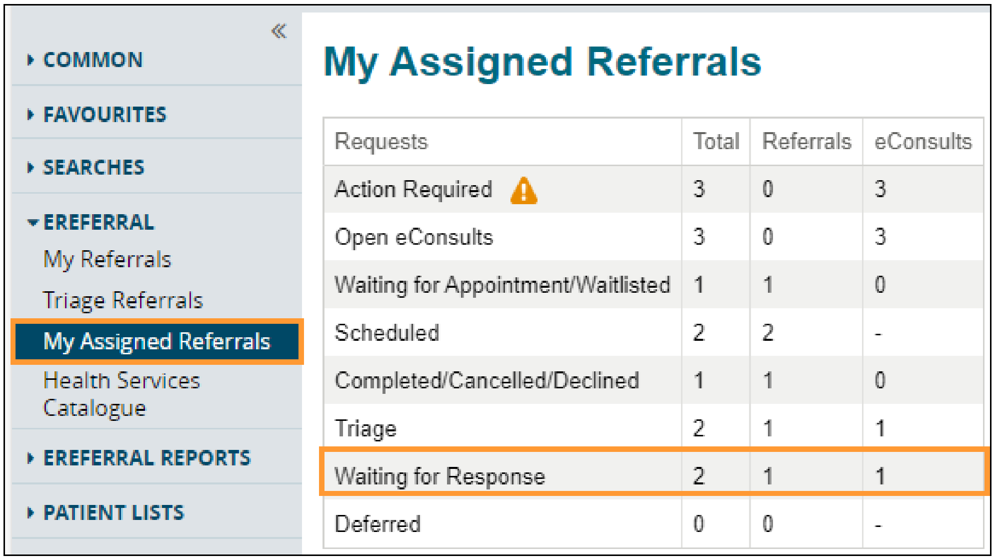
a. Go to the ***Workflow Bar***, click ***Communications***, then ***Request Information (from Referrer)***.



b. Click ***Add*** to set the ***Service Provider***. Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click ***Request Information***.



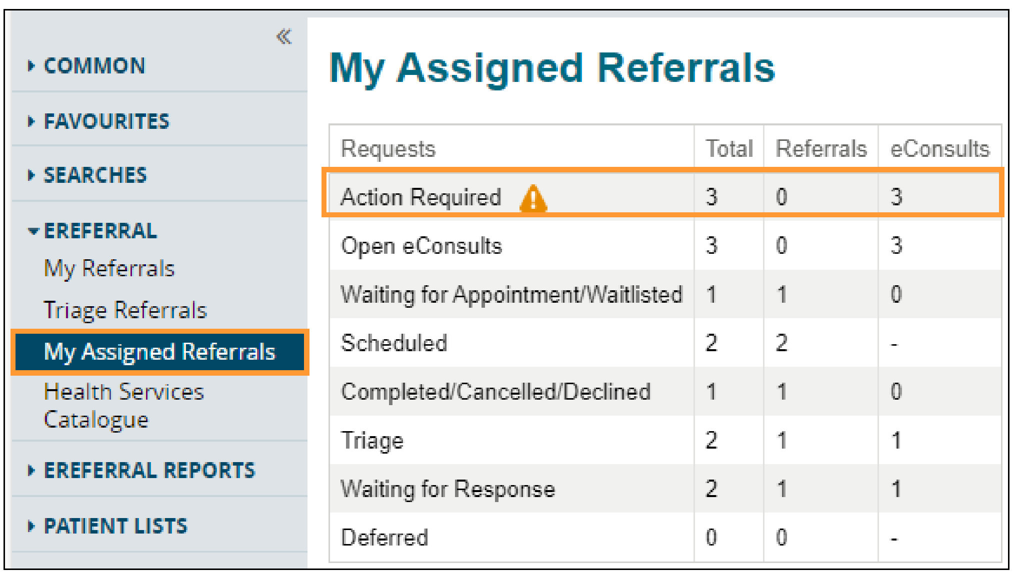
The eConsult will now appear on your ***Waiting for Response*** worklist on your ***My Assigned Referrals*** dashboard and ***Triage Referrals*** dashboard (if you have access to triage). If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have requested information, and the request will appear in their ***Action Required*** worklist on the ***My Referrals*** dashboard.



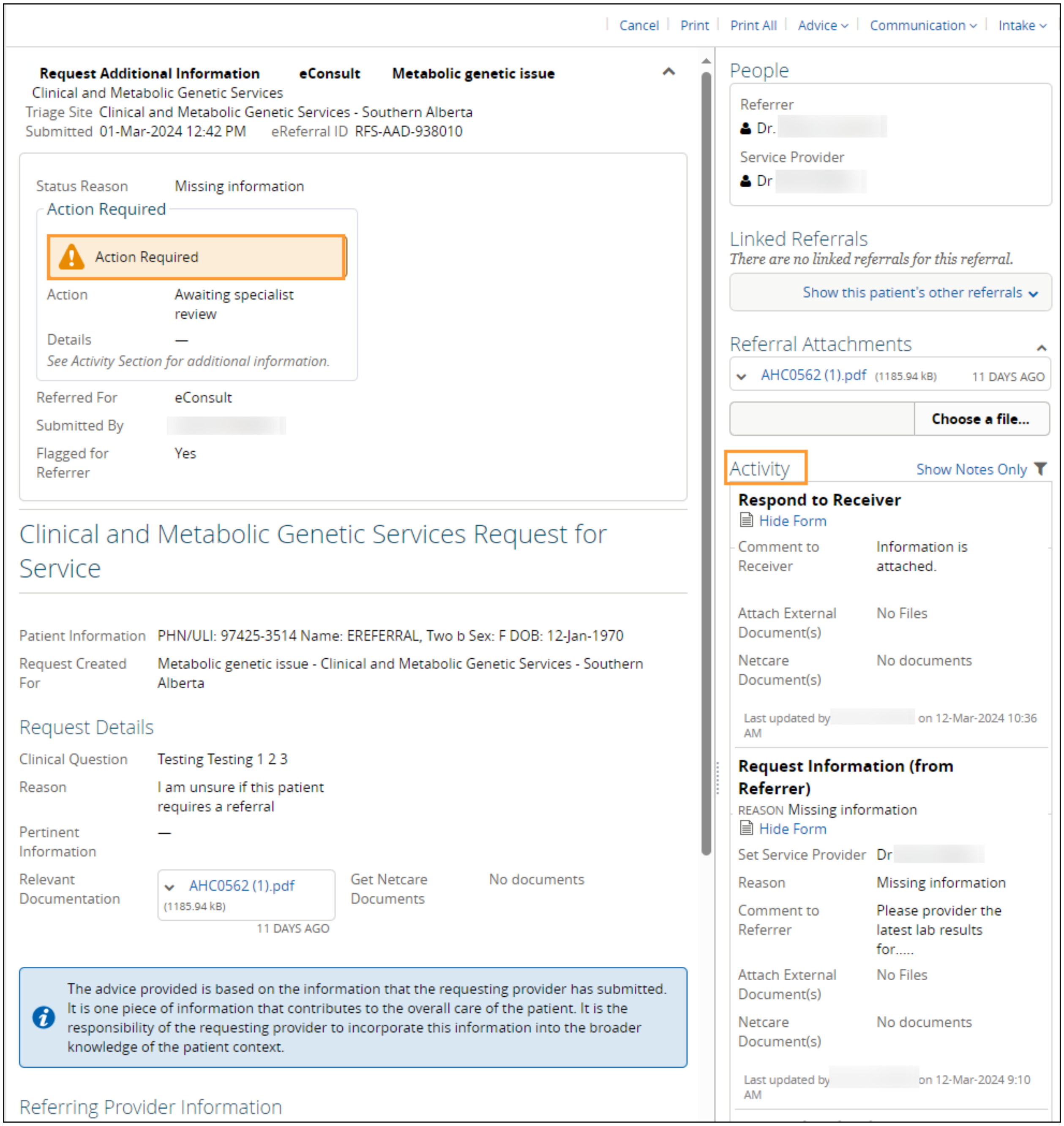
7.6 Reviewing Additional Information Provided by a Referring Provider

If a referring provider adds new information to an eConsult and it requires your review, the request will appear on your ***Action Required*** worklist.

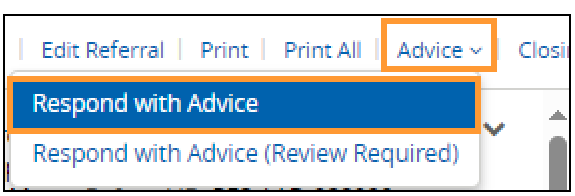
a. Click ***Action Required*** within the ***My Assigned Referrals*** dashboard and select the applicable eConsult. The eConsult will have a panel indicating that new information has been added to the referral and requires review.



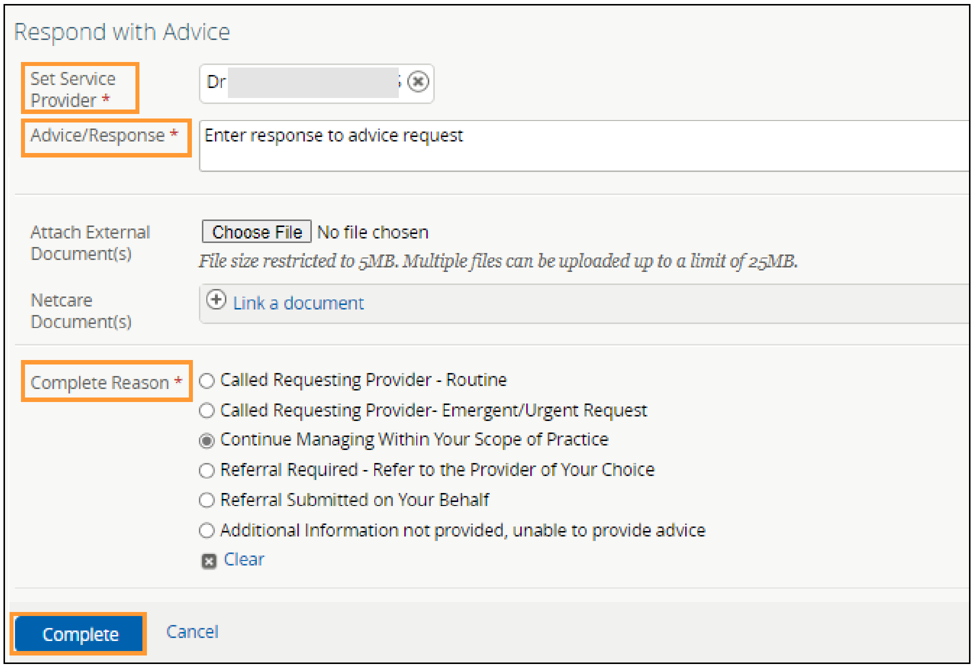
b. View all activity that has occur on the eConsult in the ***Right Panel***.



c. If you choose to respond after reviewing the information, click ***Advice,*** then ***Respond with Advice*** from the ***Workflow Bar*** menu.

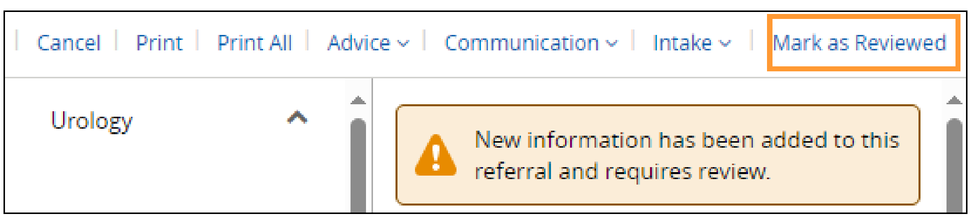


d. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.



e. The eConsult now appears on the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** and ***My Assigned Referrals*** dashboards and the ***Completed*** worklist on the ***My Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded.

g. Once done, click ***Mark as Reviewed*** on the top taskbar. Enter a comment, if desired, and click ***Mark as Reviewed*** to finish. The panel indicating that new information was added to the referral will now be removed.

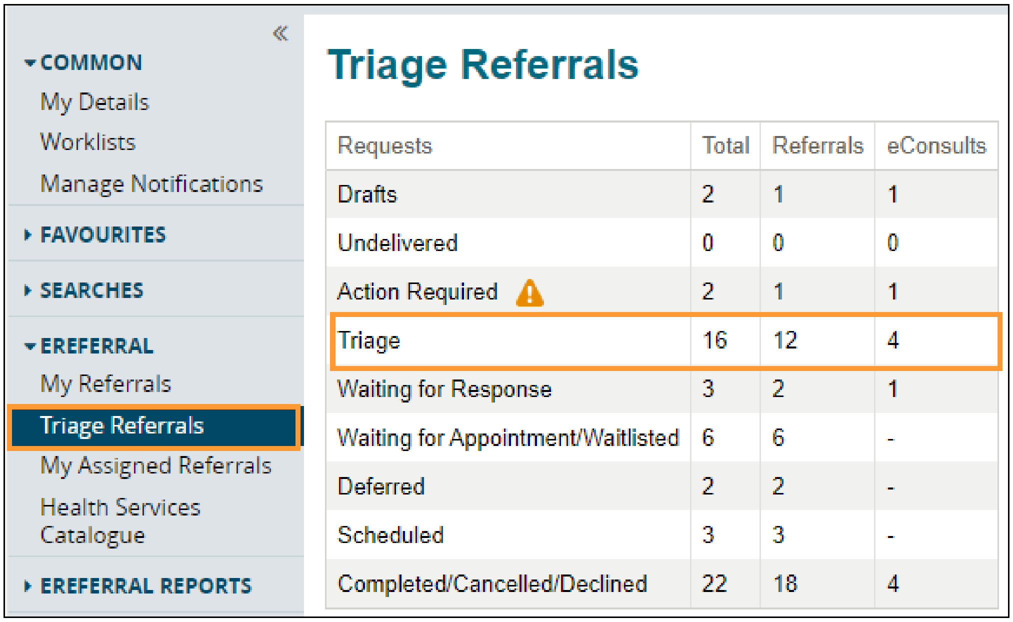


7.7 Triaging eConsults

If you have triage access, use the process below to triage eConsults.

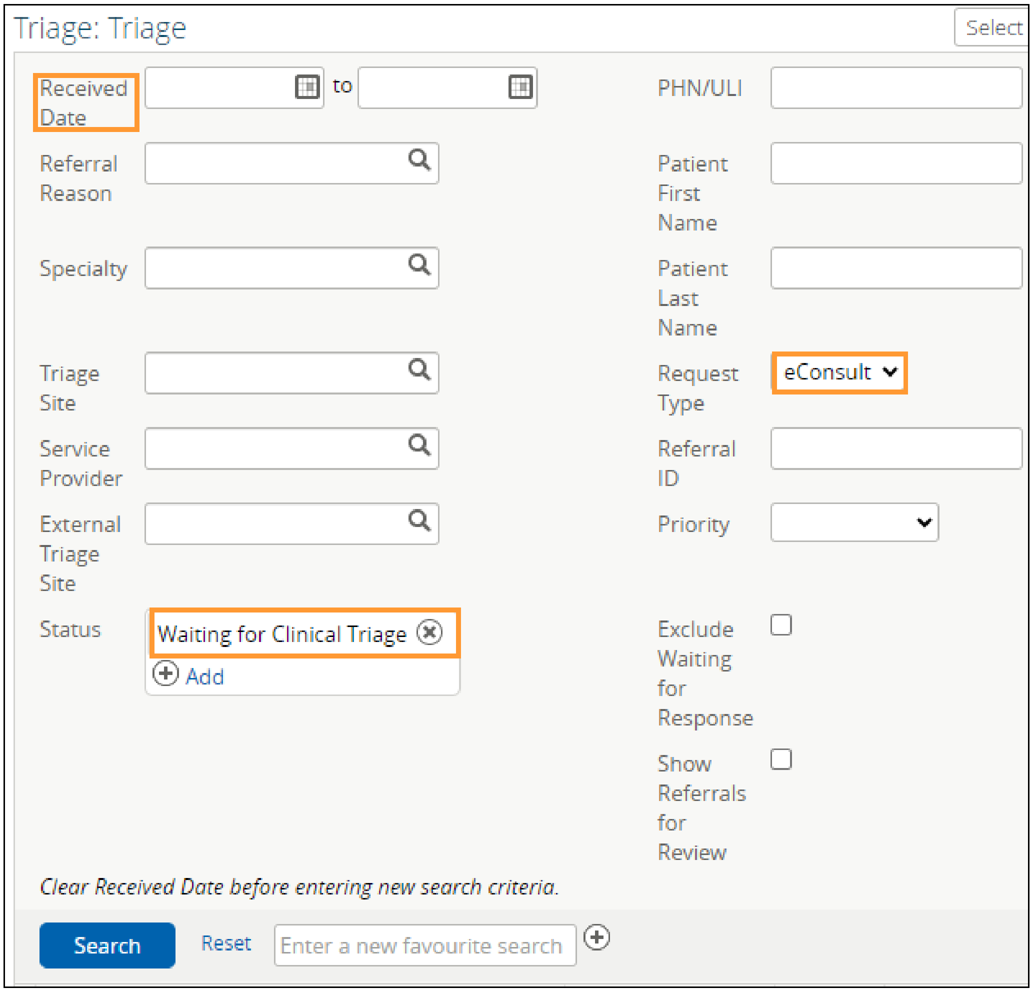
a. Select ***eReferral*** from the ***Clinical Portal Menu***, then ***Triage Referrals***.

b. Click on ***Triage***.



Requests	Total	Referrals	eConsults
Drafts	2	1	1
Undelivered	0	0	0
Action Required	2	1	1
Triage	16	12	4
Waiting for Response	3	2	1
Waiting for Appointment/Waitlisted	6	6	-
Deferred	2	2	-
Scheduled	3	3	-
Completed/Cancelled/Declined	22	18	4

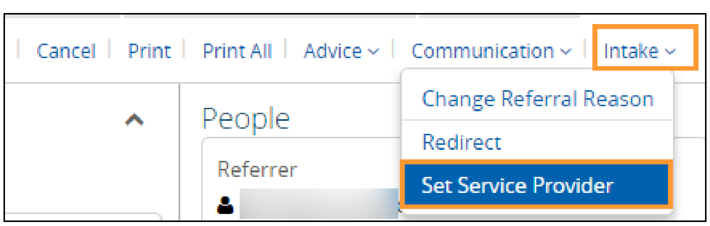
c. Filter on ***eConsults*** in the ***Request Type*** section and click ***Search***. When you receive a new eConsult, the status will be ***Waiting for Clinical Triage***. This status indicates that the referral is waiting for a specialist to review the referral. The referral ***Received Date*** has 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). You can also search for that status by using the ***Status*** check box.



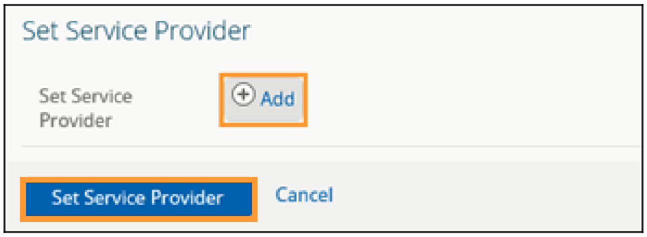
d. Click ***Search*** to filter the list, then click on eConsult to view it. Sort by ***Received Date*** to list the most recent referrals first.

e. Open the referral and click ***Intake***.

f. Select ***Set Service Provider***.



g. Click the ***Add*** button. In the pop-up, type your name (or receiving provider's name) and select it from the list. Then click ***Set Service Provider*** to finish.



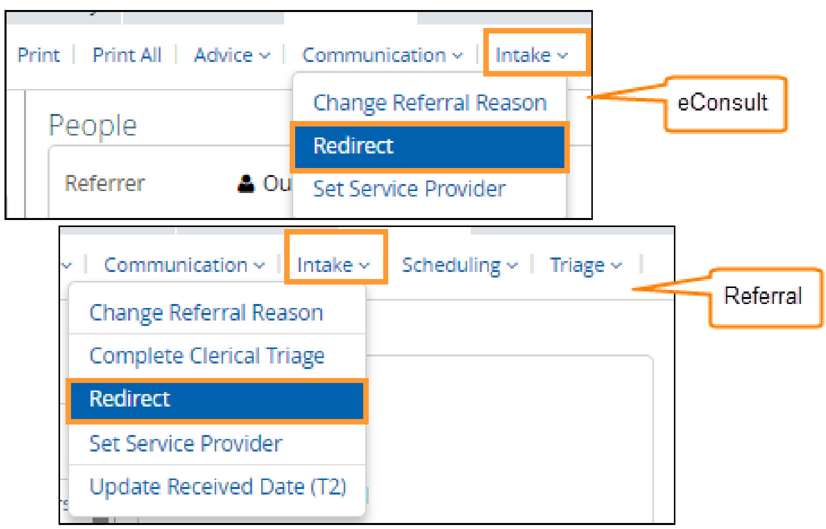
h. The request will now show up in the receiving provider's ***My Assigned Referrals*** dashboard provided the receiving provider added their name in their ***My Details***. If they have configured their eReferral Provider Notifications, they will receive an email telling them a request is in eReferral for them.

7.8 Redirecting an eConsult/Referral

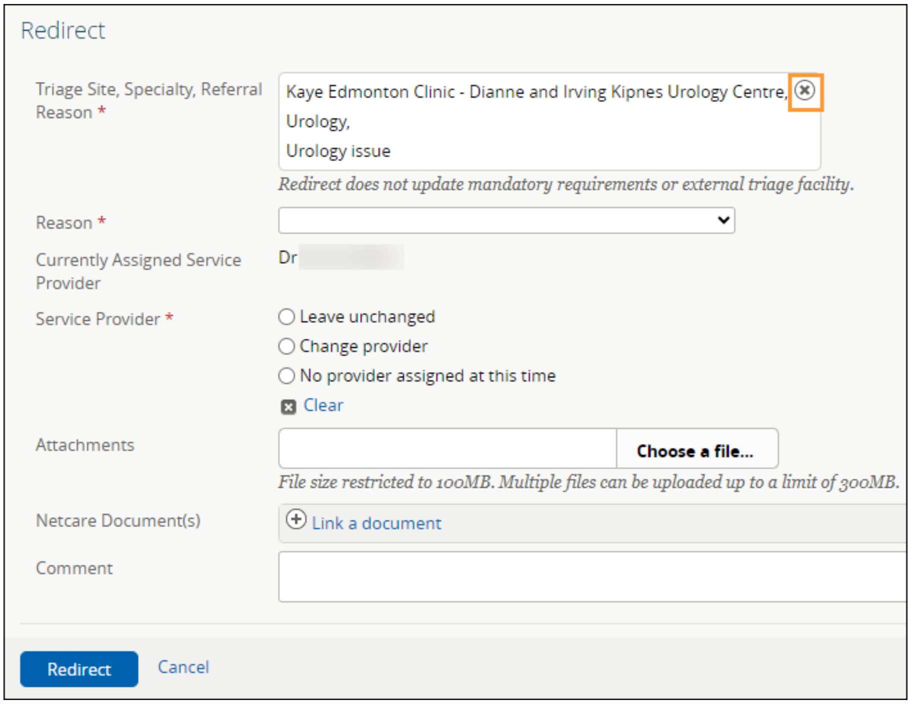
An eConsult can be redirected (previously called reassigning) to another facility if it is not appropriate based on the requested zone or if the assigned provider is not available to respond to the request within an acceptable time. This function is only available to users that have access to the ***My Assigned*** dashboard or the ***Triage*** dashboard.

a. Search for and open the eConsult.

b. Click ***Intake*** and select ***Redirect***.



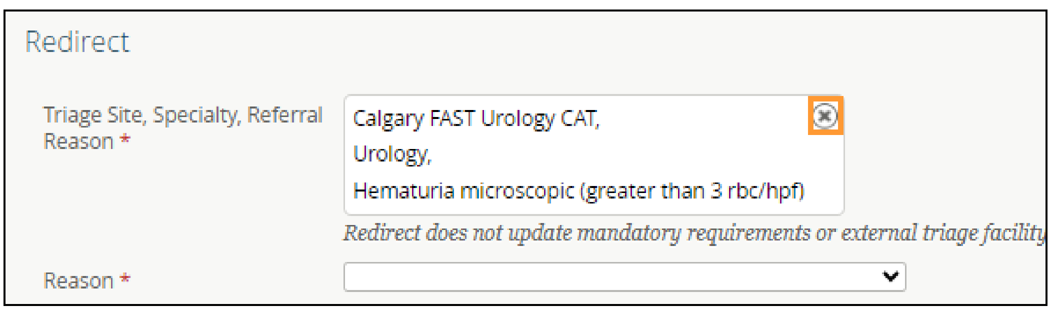
c. Click the ***X*** to clear the current information.



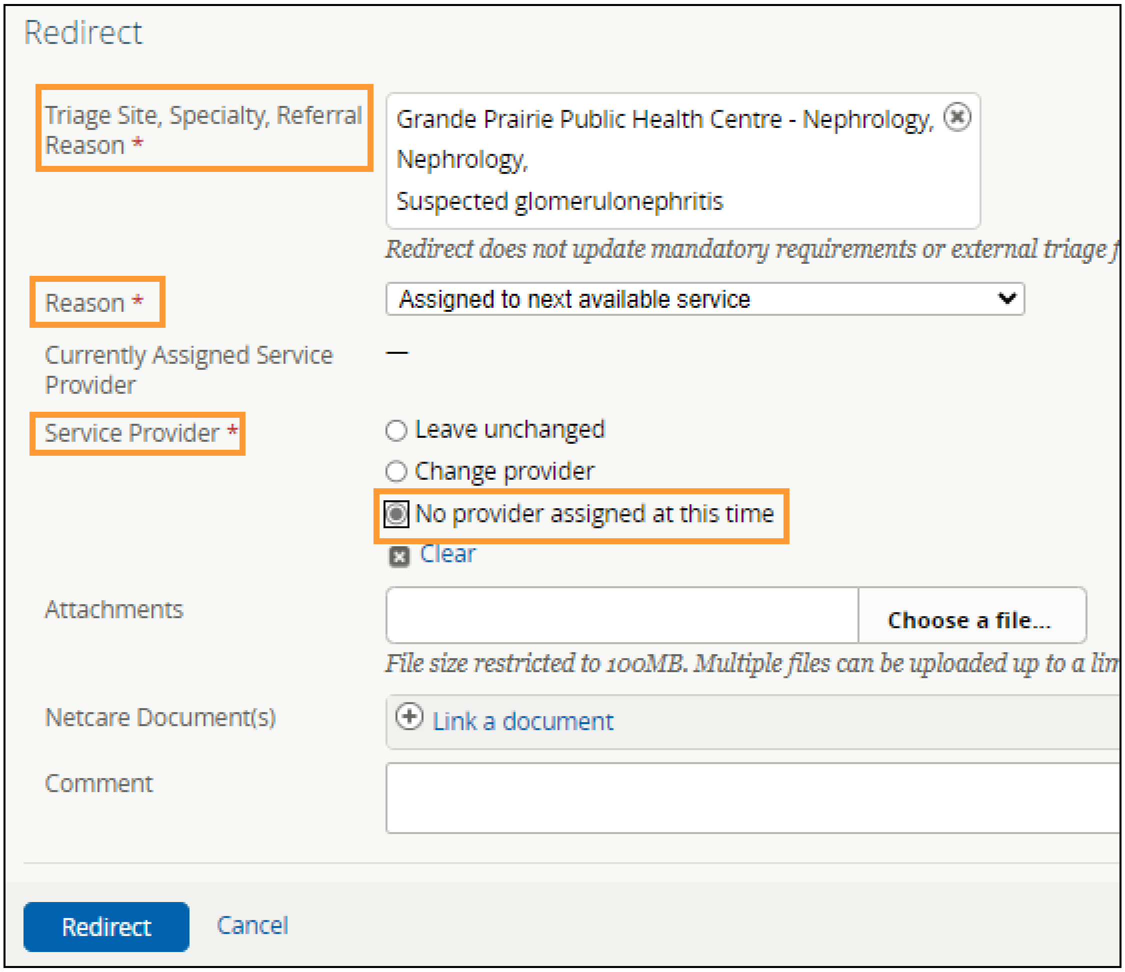
d. Click ***Add*** to select where to redirect the referral (e.g. another zone FAST CAT).

e. Enter the original ***Referral Reason*** or a new one if needed.

f. Enter the ***Triage Site*** to redirect the referral.



g. Select ***No provider assigned at this time***.



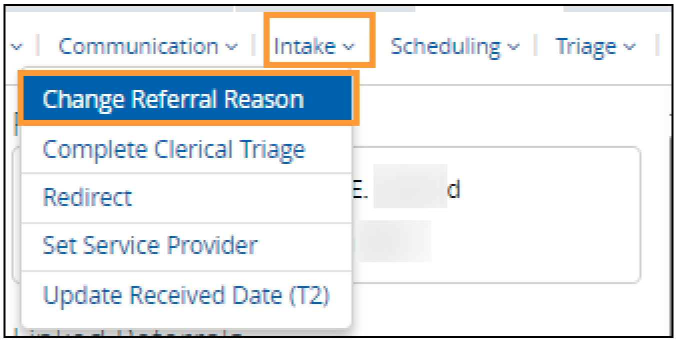
h. Click ***Redirect***. The eConsult will now appear on the chosen service provider's ***My Assigned Referrals*** dashboard on the ***Open eConsults*** worklist and will be removed from the original receiving provider's dashboard.

7.9 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 Referrals and eConsults). 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. This action does not change the referral status or generate any notifications.

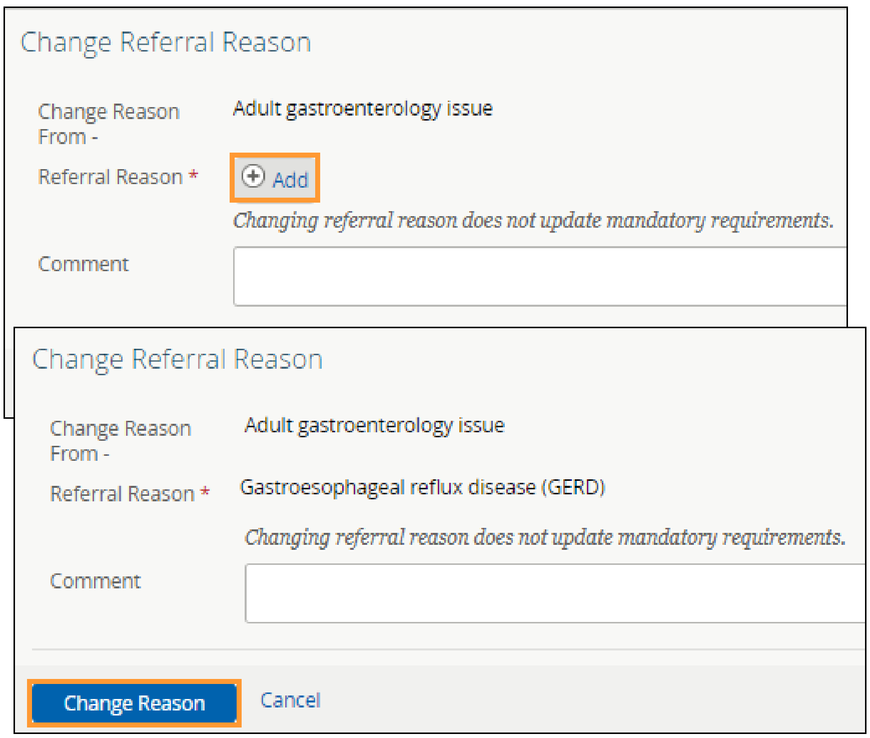
a. Open the appropriate referral.

b. Click ***Intake,*** then ***Change Referral Reason*** from the ***Workflow Bar.***



c. Click the ***Add*** button and select the appropriate referral reason from the list of ***Referral Reasons***.

d. Click ***Change Reason***.



7.10 Linking Referrals

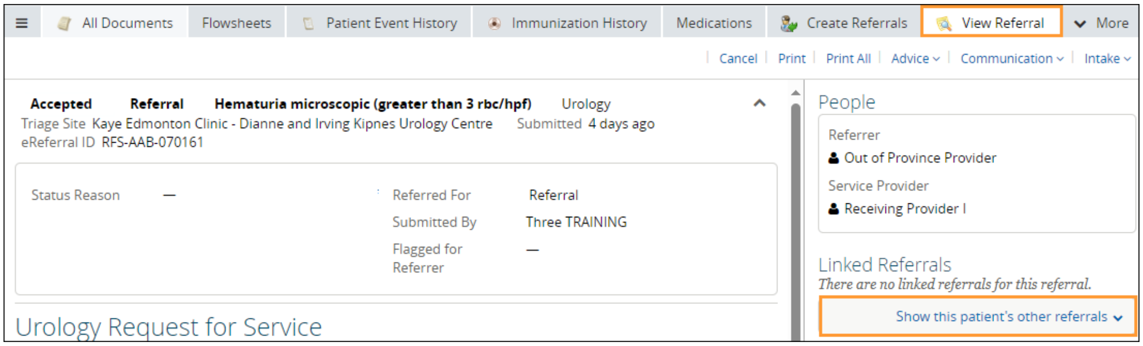
The ability to link referrals is helpful in cases where an eConsult was submitted and, upon review, it has been determined that a Referral is required. It can also be used when the first Referral was for a pre-screening appointment and a second Referral is required for the procedure. Only users who have access to the ***Triage*** dashboard and ***My Assigned Referrals*** dashboard can create and delete links. Referring providers do not have access to this feature.

a. 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.

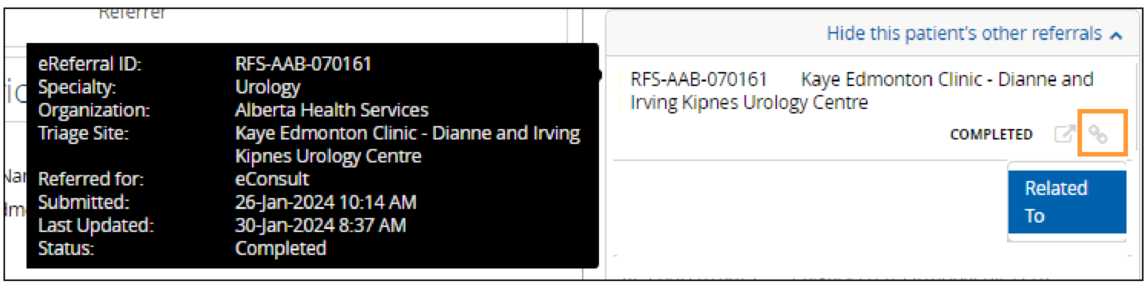
b. Open the patient's Electronic Health Record (EHR) and click the referral to open it.

c. Click ***View Referral***.

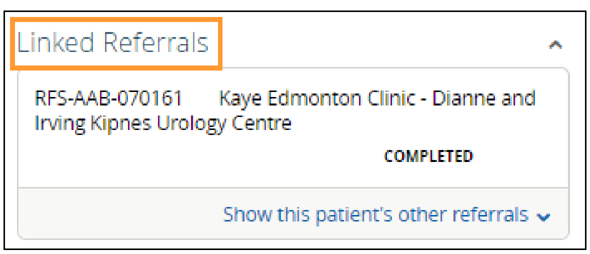
d. Click ***Show this patient's other referrals***. This will expand and show all referrals for the patient, regardless of status.



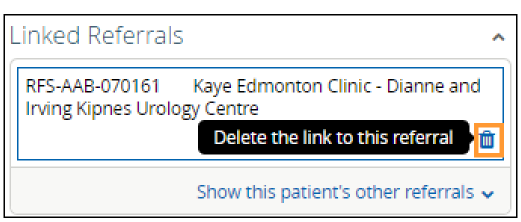
e. Hover over the Referral to view the ***Referral Card***. Click the ***Link*** icon, then click ***Relate To***.



The eConsult is now linked to the Referral and will appear in the ***Linked Referral*** section of the ***Right Panel***.



f. If you mistakenly linked a Referral or eConsult, you can remove it by clicking the ***Trash Can*** icon to delete this link. This function will not delete the original Referral or eConsult; it will just remove the incorrect link.



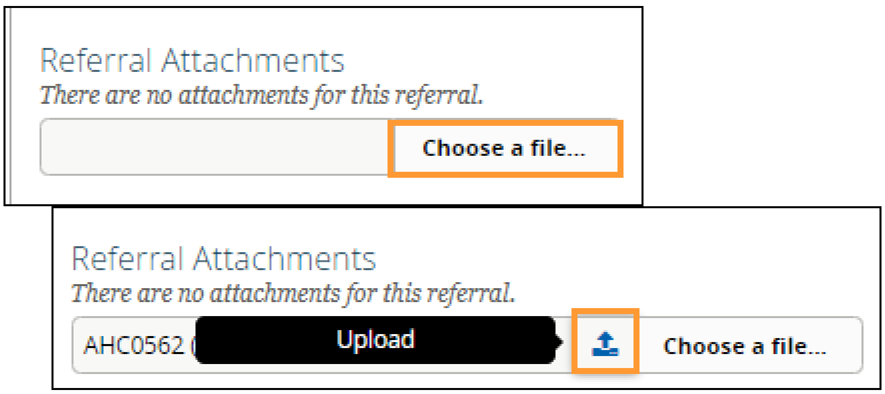
If an incorrect file has been attached, it can be deleted using the same process as deleting a linked eConsult or Referral. The name of the attachment will stay, but the attachment will be removed.

7.11 Attaching Files to a Referral/eConsult

a. Click ***Choose file…***

b. Navigate to the file you wish to upload.

c. Click the ***Upload*** icon.

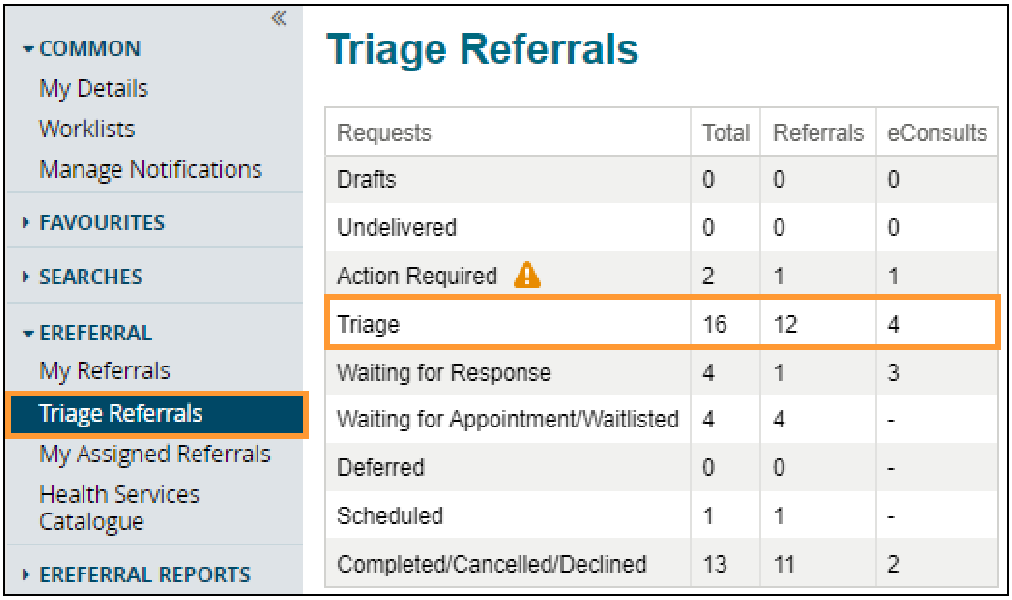


8.0 Appointment Management and Completion

During the clinical triage process when the referral status is in ***Waiting for Clinical Triage*** or ***Clinical Triage in Progress***, the receiving physician (if they have triage access) or clinic triage staff can waitlist or book appointments.

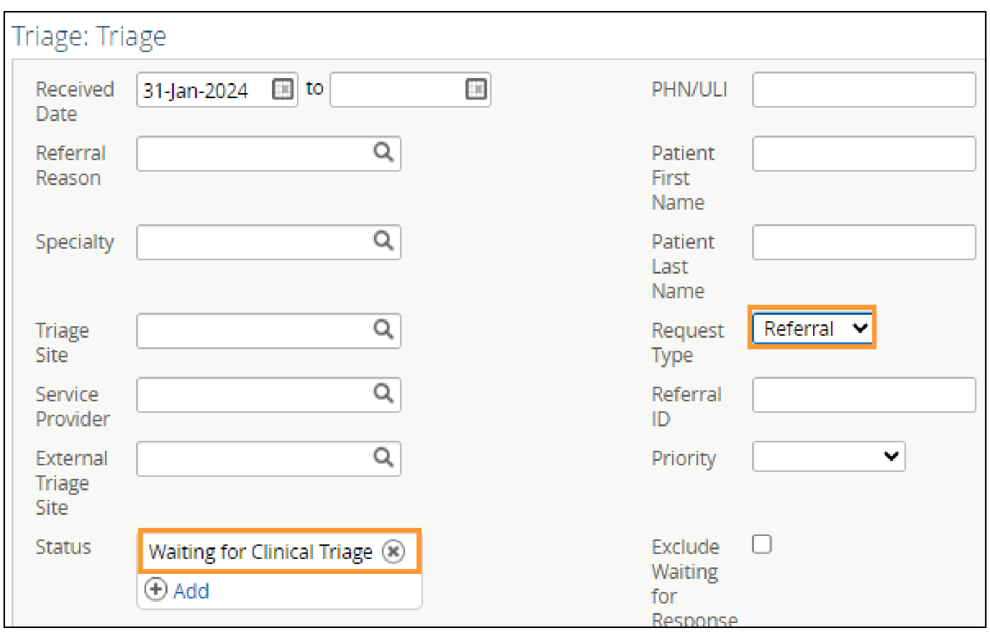
8.1 Change Referral Status to Waitlisted

a. Click ***eReferral*** from the ***Clinical Portal Menu,*** then the ***Triage*** worklist.



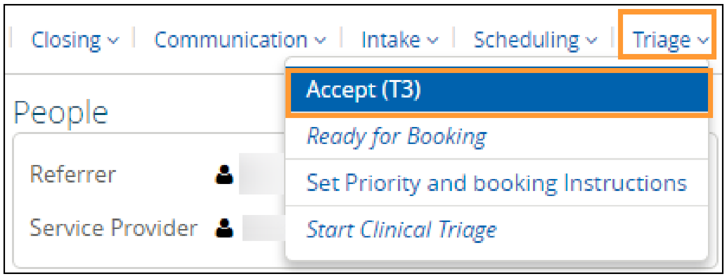
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	2	1	1
Triage	16	12	4
Waiting for Response	4	1	3
Waiting for Appointment/Waitlisted	4	4	-
Deferred	0	0	-
Scheduled	1	1	-
Completed/Cancelled/Declined	13	11	2

b. Filter on ***Waiting for Clinical Triage*** (and/or ***Clinical Triage in Progress***) and ***Consult*** beside ***Request Type*** or search for a specific patient. 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).

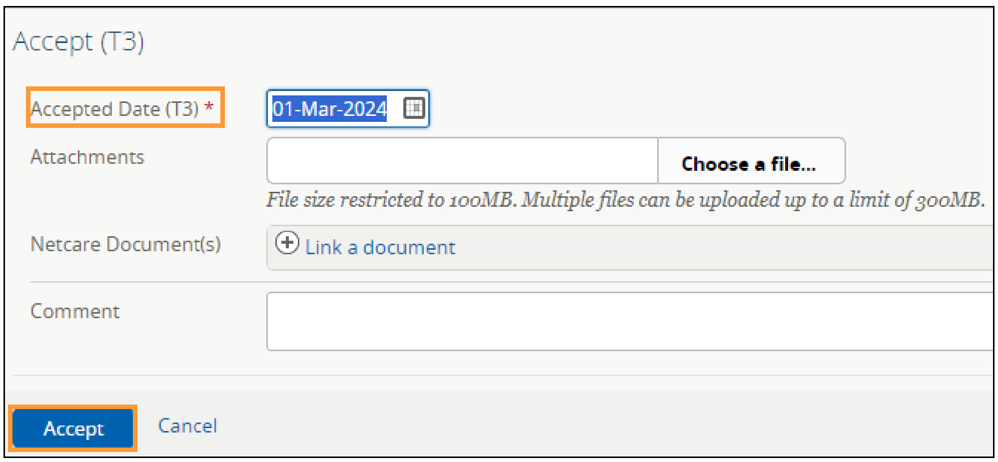


c. Open and review the referral to ensure it is complete. Also, check for duplicate referrals.

d. Click ***Triage*** and select ***Accept (T3)***.

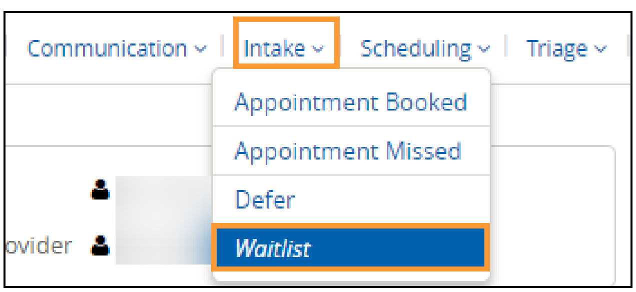


e. Enter the date and add attachments. Link Alberta Netcare Portal documents and add comments as required.



f. Click ***Accept***.

g. (**Optional**) Click ***Scheduling*** and select ***Waitlist***. Depending on who is doing this work, they will need to notify the referring provider that the patient has been added to the waitlist.

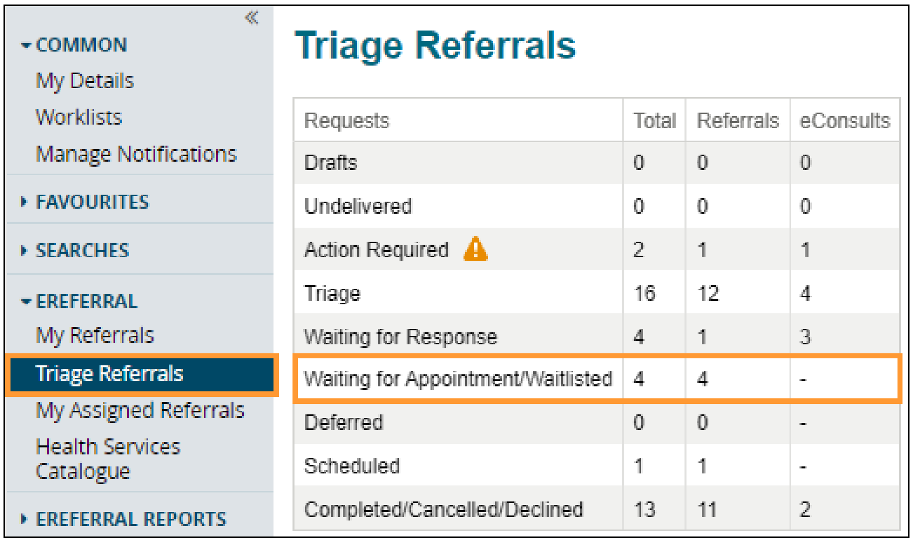


8.2 Appointment Management – Booking

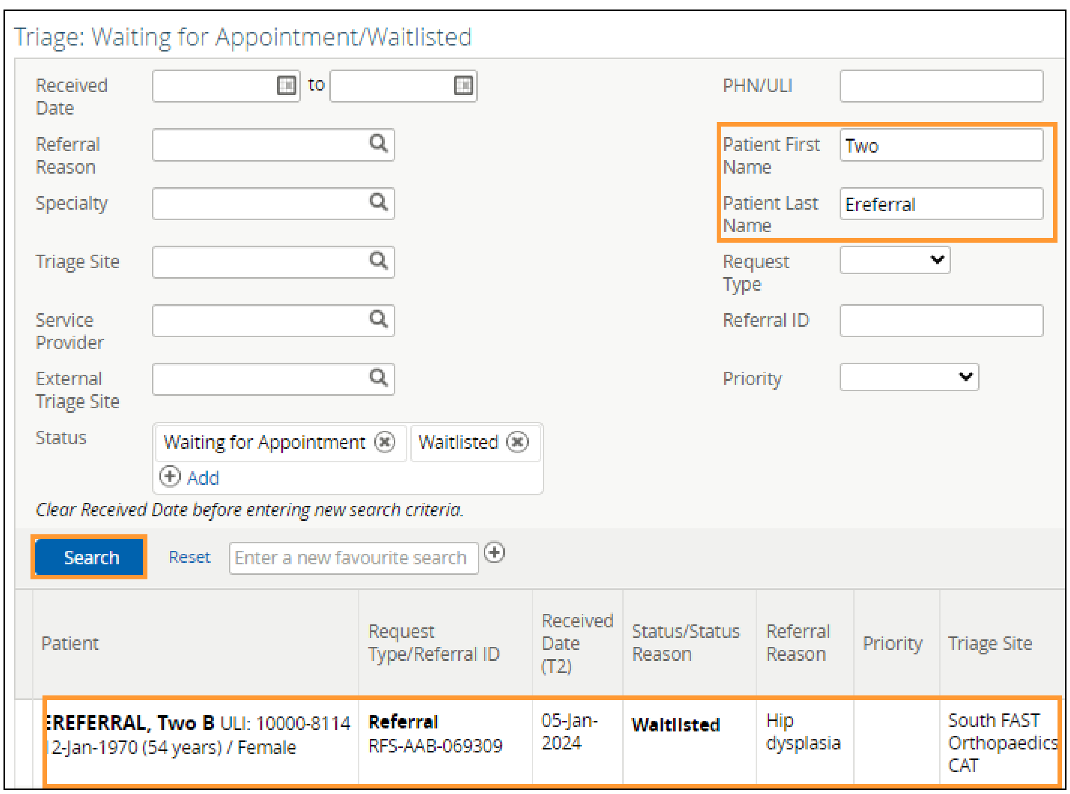
Now that the patient has been waitlisted, it's time to start booking an appointment. Once the appointment is booked the status of the referral will change to ***Appointment Booked***. The referral will appear on the ***Triage Referrals*** dashboard ***– Scheduled*** worklist.

a. Click ***Triage Referrals*** from the ***Clinical Portal Menu***.

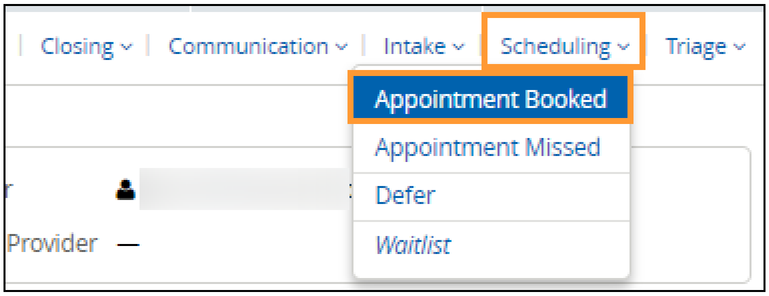
b. Click the ***Triage Referrals*** then ***Waiting for Appointment/Waitlisted*** worklist.



c. Search for the patient and click on the referral.

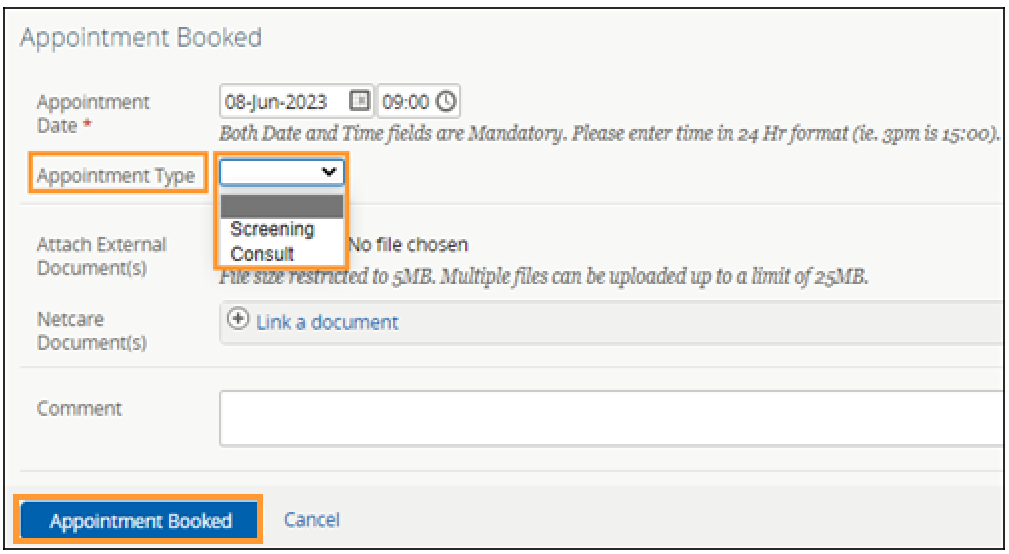


d. Click ***Scheduling*** and select ***Appointment Booked.*** The FAST team will update the referral with the information from the Clinic/Specialist/Surgeon.



e. Enter the date and time. Select either ***Screening*** or ***Consult***, attach any required documents, and click ***Appointment Booked***.

- ***Screening***: Choose this option if pre-screening is required before the patient is scheduled to see the surgeon.
- ***Consult***: Choose this option if it's an in-person appointment with the surgeon to assess the patient's condition.



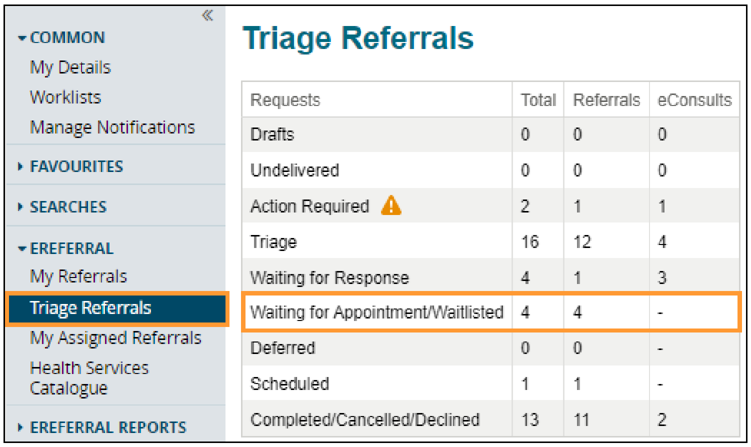
8.3 Appointment Management – Attended and Missed Appointments

Once the appointment has been booked, there are two possible scenarios: attended or missed. The scenarios require different actions.

Appointment Attended – Complete (T5) Referral

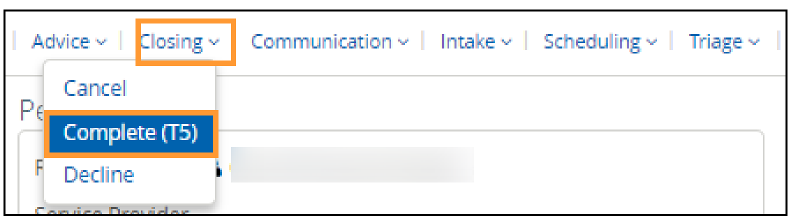
a. Click ***eReferral*** from the ***Clinical Portal Menu***.

b. Click ***My Assigned Referrals***, then ***Waiting for Appointment/Waitlisted***. The referral can be found in the ***Scheduled*** worklist if the appointment date has been entered.



c. Search for and open the Referral.

d. Click ***Closing*** and set the appointment status to ***Complete (T5)***.



e. Enter the ***Accepted Date (T3)*** if it is missing or incorrect.

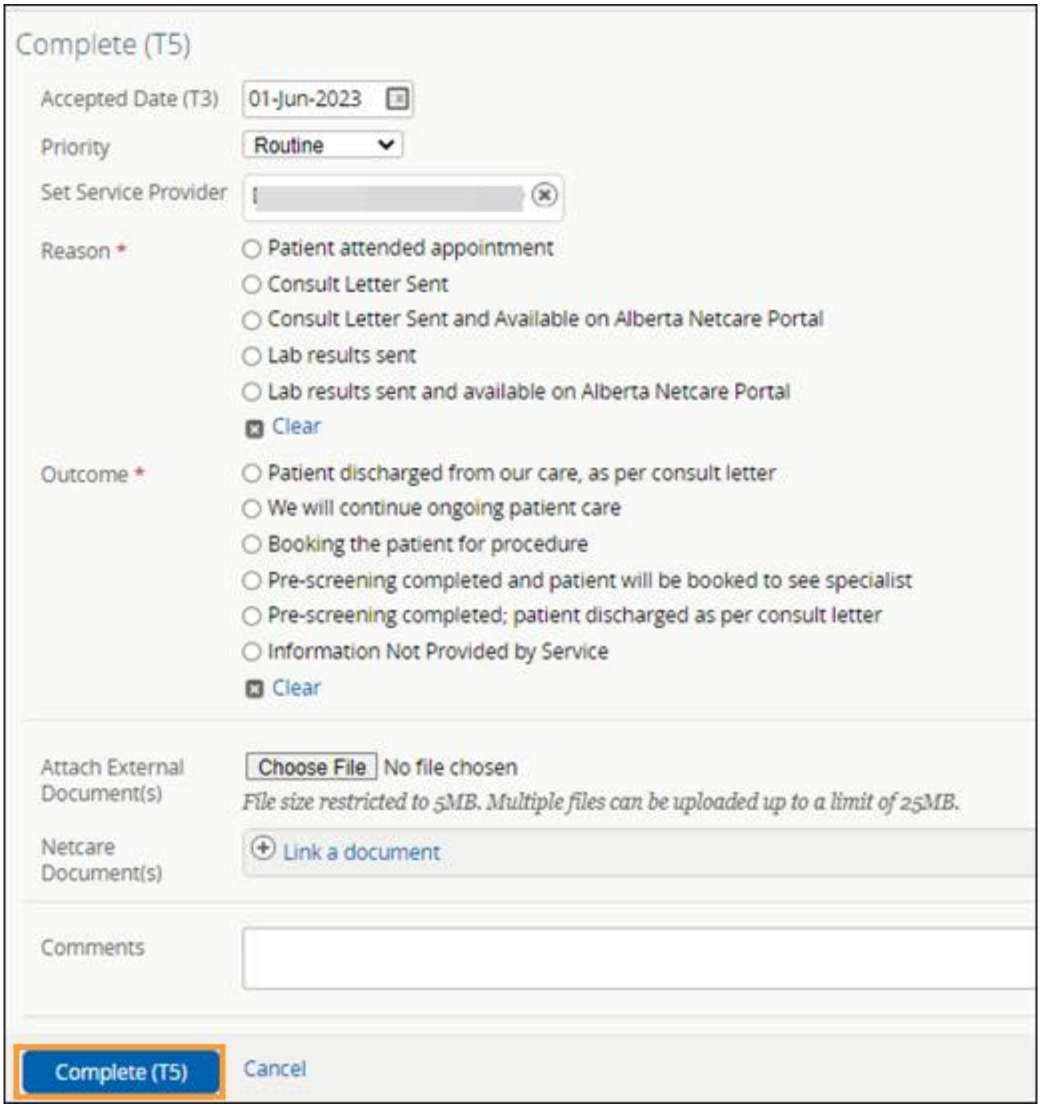
f. Set the ***Service Provider*** to who the patient saw for their appointment if known or incorrect.

g. Select ***Patient attended appointment*** as the ***Reason***. This will cause the ***Date Appointment Attended (T5)*** to appear below. Choosing any of the other reasons does not cause this option to appear.

h. 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.

i. Choose an ***Outcome***. The first three (3) outcomes are for surgical consult appointments. The screening outcomes are related to screening clinic appointments only. The last option - ***Information Not Provided by Service*** - is used by the FAST Program to complete referrals when they have not been provided with a specific outcome.

j. Click ***Complete (T5)***. This referral will now move to the ***Completed/Cancelled/Declined*** worklist.

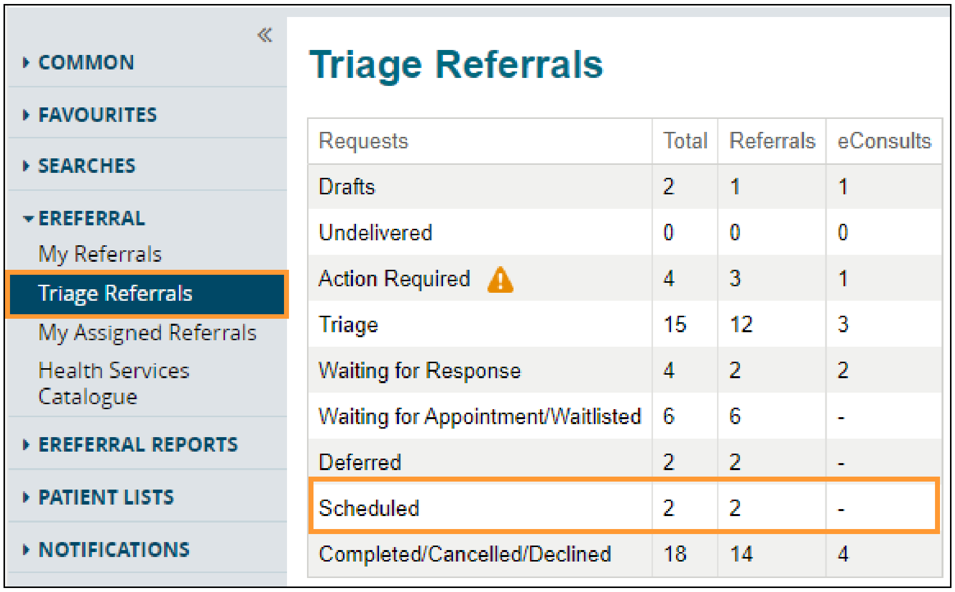


Appointment Missed

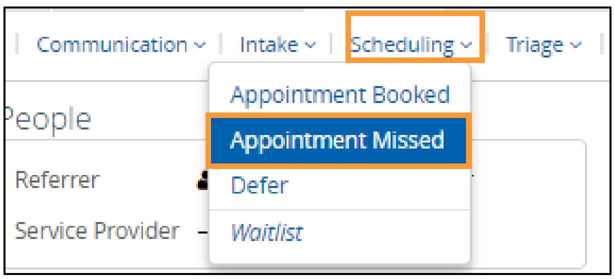
Specialties may rebook or cancel a referral when an appointment is missed based on their clinic policy.

a. Click ***eReferral*** from the ***Clinical Portal Menu***.

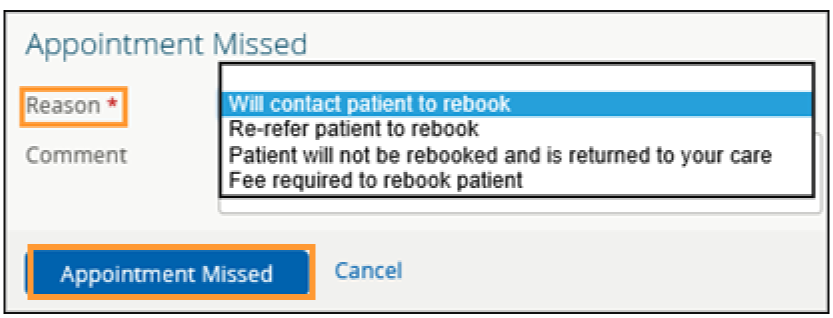
b. Click ***My Assigned Referrals***, then ***Scheduled***.



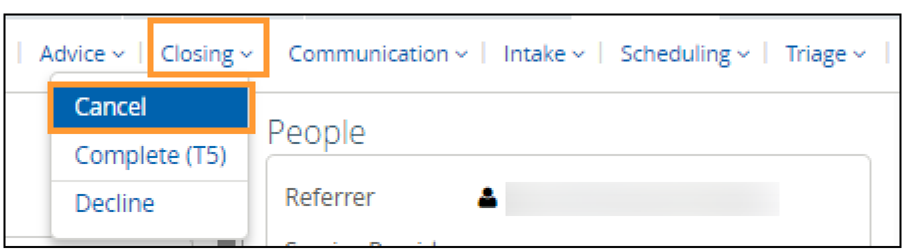
c. Click ***Scheduling*** and then ***Appointment Missed***.



d. Select the ***Reason*** and click ***Appointment Missed***.

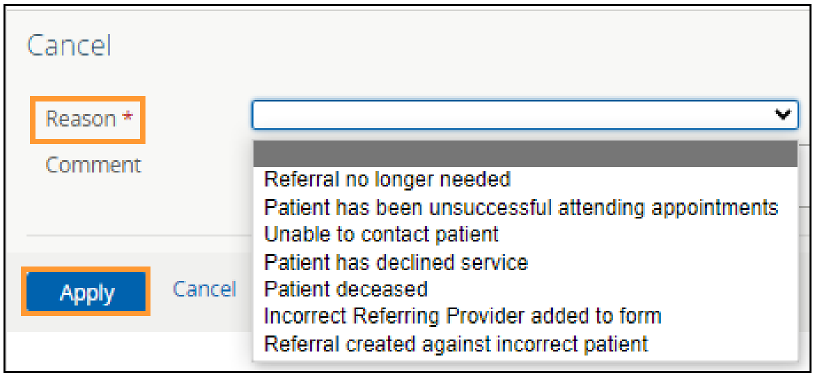


e. Click ***Closing*** and select ***Cancel***.



f. Select ***Reason*** (e.g., Patient has been unsuccessful in attending appointments) and, if required, enter a comment.

g. Click ***Apply***.



9.0 eReferral Provider Notifications

eReferral Provider Notifications allows users to track Referrals and eConsults through an immediate or daily summary email. Provider Notifications are subscription-based and managed by the user. There is no identifiable patient information in any provider notification email**.** All eReferral users can customize what type of notification they would like to receive.

Important note: Notifications are sent to the email entered in your ***My Details***, based on the system's default settings.

TIP For more information about eReferral Provider Notifications, go the Provider Notifications Portal.

9.1 Auto-Subscribed Notifications - Referring Provider & Referring On Behalf Of

Below is a list of **default** notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral These notifications can be customized to meet your needs.

NOTIFICATIONS – EREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Referrer - eConsult: Action Required	Notify Immediately by Email
eReferral Referrer - eConsult: Completed	Notify Immediately by Email
eReferral Referrer - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Action Required	Notify Immediately by Email
eReferral Referrer - Referral: Appointment Missed	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Declined	Notify Immediately by Email
eReferral Referrer - Referral: Completed	Notify Immediately by Email
eReferral Referrer - Referral: Deferred	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Waitlisted	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Appointment Booked	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Cancelled	Notify Immediately by Email
eReferral Referrer - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Referrer - Referral: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Referrer - eConsult: Action Required	Notify Immediately by Email

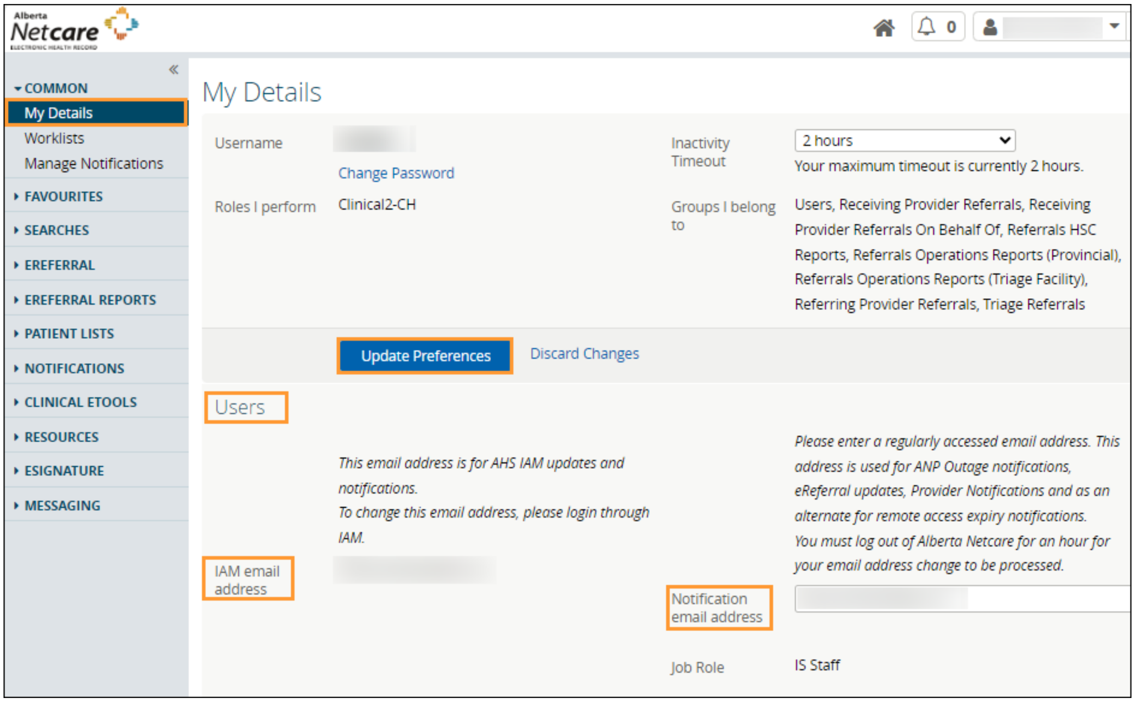
9.2 Register for Notifications - Referring Provider & Referring On Behalf Of

a. Click ***My Details*** from the ***Clinical Portal Menu****.*

b. Scroll to the section titled ***Users***. Beside the ***Notification email address***, enter your preferred email address that you use and check regularly (this can be an AHS email or another email address external to AHS). If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.

c. You will also notice an AHS IAM (Identify Access Management) email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

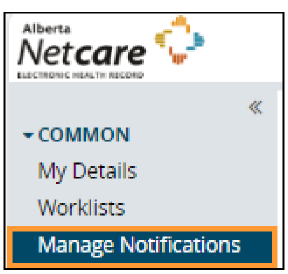
d. Click ***Update Preferences*** to save your changes.



9.3 Managing Notifications Subscriptions - Referring Provider & Referring On Behalf Of

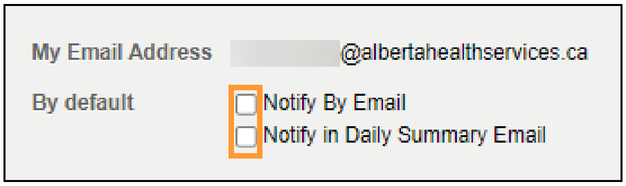
A user can customize their notifications and method of delivery:

a. Click on ***Manage Notifications*** from the ***Clinical Portal Menu***.



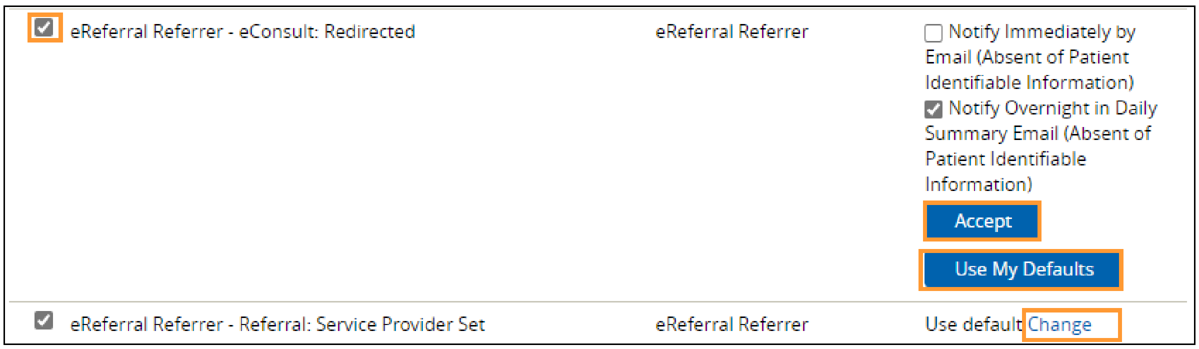
b. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

c. Choose your ***Default Delivery Method.***



d. In the ***My General Subscriptions*** section, as a referring provider or referring provider on behalf of user, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.

e. Click ***Change*** in the delivery method column and select the desired delivery method.



f. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you, and you will no longer receive that notification.

g. Click ***Accept*** or select ***Use My Defaults*** to reset the notification option to the default value.

g. To unsubscribe to ALL Provider Notifications from eReferral, click the box in front of ***Notification*** in the header until all boxes below are unchecked.

h. Scroll to the bottom of the page and click ***Save***.

Notification Emails

As a referring provider or referring provider on behalf of, you will receive emails notifying you that an activity has occurred on an eConsult or a Referral that has been submitted. See example of email sent immediately after an activity occurs:

The consult request, on which you are recorded as the Referrer, has had a recent event occur of 'Consult: Completed'.

Referral Id: [redacted]
Referring Provider: [redacted]
Submitted By: [redacted]

To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Steps to review a referral update received through Provider Notifications:

a. Login to the Alberta Netcare Portal and click ***My Referrals***.

b. Copy the complete ***Referral ID*** (including RFS-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. ***Referral ID*** is only available on emails sent as 'Notify Immediately by Email.'

c. Click ***Search*** and the specific referral will display. Daily summary emails do not contain the ***Referral ID***, only a brief activity summary.

Example of a Daily Summary Email:

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team
- [1 occurrence] Advice: Action Required (check your 'Action Required' worklist)
- [13 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' worklist)
- [4 occurrences] Consult: Completed (check your 'Completed/Cancelled/Declined' worklist)
- [7 occurrences] Consult: Clerical Triage in Progress (check your 'Triage' worklist)
- [2 occurrences] Consult: Action Required (check your 'Action Required' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer
- [5 occurrences] Consult: Appointment Booked
- [2 occurrences] Advice: Reassigned
- [3 occurrences] Consult: Service Provider Set
- [1 occurrence] Consult: Waitlisted
- [1 occurrence] Advice: Service Provider Set (check your 'Triage' worklist)
- [1 occurrence] Consult: Deferred

To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' worklist.

9.4 Auto-Subscribed Notifications - Receiving & Receiving On Behalf Of Providers

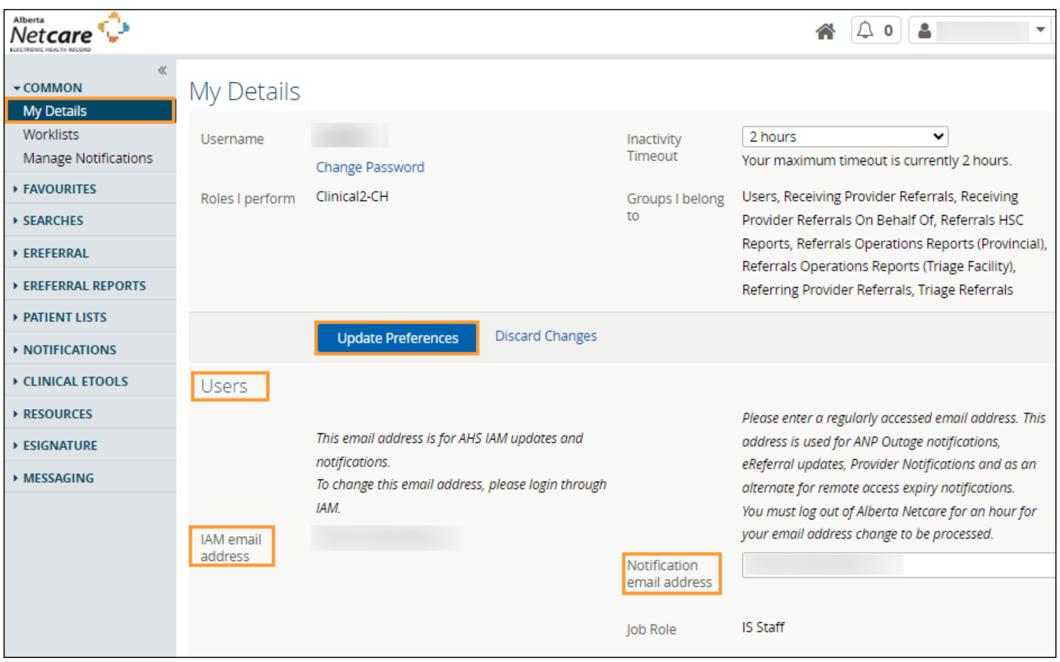
Below is a list of **default** notifications that all receiving provider or receiving provider on behalf of users will automatically receive when an activity occurs on an eConsult or a Referral These notifications can be customized to meet your needs.

NOTIFICATIONS – EREFERRAL RECEIVER	WHEN WILL THE EMAIL BE SENT?
eReferral Receiver - eConsult: Action Required	Notify Immediately by Email
eReferral Receiver - eConsult: Clinical Triage in Progress	Notify Immediately by Email
eReferral Receiver - eConsult: Service Provider Set	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Clerical Triage in Progress	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Action Required	Notify Immediately by Email
eReferral Receiver - Referral: Redirected	Notify Overnight in Daily Summary Email
eReferral Receiver - Referral: Service Provider Set	Notify Overnight in Daily Summary Email

9.5 Register for Notification - Receiving & Receiving On Behalf Of Providers

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

b. Scroll to the section titled ***Users***. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the ***Notification email address*** field. If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.



c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

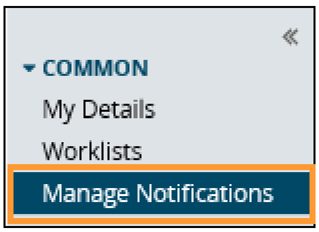
d. Click the ***Update Preferences*** button to save your changes.

NOTE:	While providers are auto-subscribed by default to eight (8) ***Receiver*** notifications (see above), there are other notifications that can be subscribed to.

9.6 Managing Notification Subscriptions - Receiving & Receiving On Behalf Of Providers

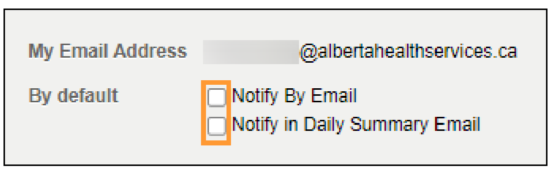
A user can customize their notifications and method of delivery:

a. Click ***Manage Notifications***.



b. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

c. Choose your ***Default Delivery Method****.*



You can be notified immediately or to receive an overnight summary. Immediate notifications via email contain a ***Referral ID*** that can be used to find the referral, whereas summary emails overnight do not contain any ***Referral IDs***. Example emails are shown below:

The consult request, on which you are recorded as the assigned Receiver, has had a recent event occur of 'Consult: Appointment Missed'.

Referral Id: RFS-XXX-000000
Referring Provider: Dr. XXX
Submitted By: Dr. XXX
To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Assigned Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

To change your notification subscriptions,
Common > 'Manage Notifications' settings

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.
- AHS facility - https://portal.albertanetcare

For help, please click on the "Need Help?"
screen

Sample email from a notification with a delivery method of: Notify Immediately by Email.

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as the assigned Receiver
- [20 occurrences] Consult: Service Provider Set (check your 'Triage' worklist)
- [10 occurrences] Advice: Clinical Triage in Progress
- [10 occurrences] Consult: Waiting for Clerical Triage (check your 'Triage' worklist)
- [6 occurrences] Advice: Completed (check your 'Completed/Cancelled/Declined' worklist)
- [5 occurrences] Advice: Waiting for Clinical Triage (check your 'Triage' worklist)
- [6 occurrences] Consult: Waitlisted (check your 'Waiting for Appointment/Waitlisted' worklist)
- [4 occurrences] Consult: Cancelled (check your 'Completed/Cancelled/Declined' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'My Assigned Referrals' dashboard.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email.

d. In ***My General Subscriptions***, click ***Change*** and select the desired delivery method. Click ***Accept*** to save your changes or ***Use My Defaults*** to select the default delivery settings.

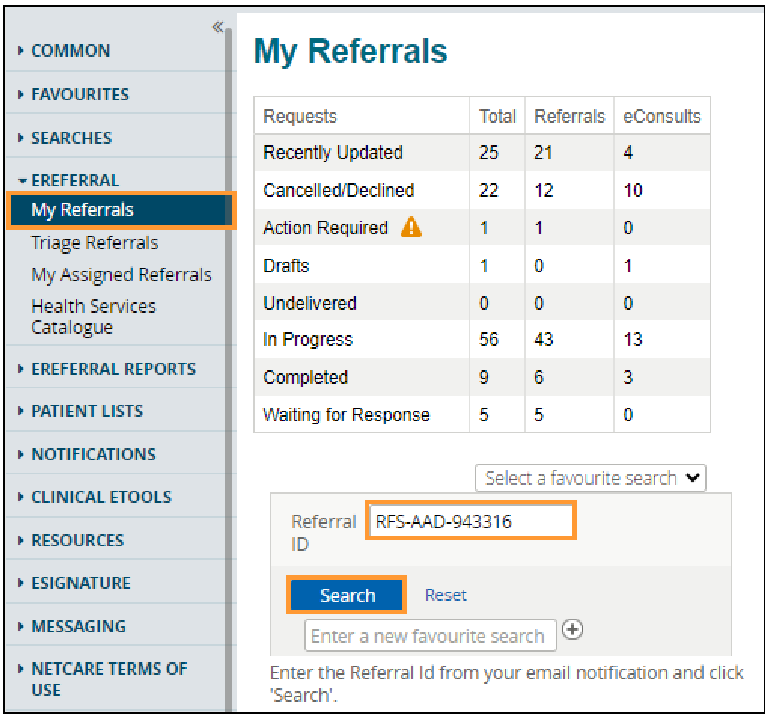
My General Subscriptions

☐	Notification	User Type	Delivery Methods
☐	eReferral Receiver - Referral: Declined	eReferral Receiver or Triage	
☑	eReferral Receiver - eConsult: Action Required	eReferral Receiver or Triage	Customized Change
☑	eReferral Receiver - eConsult: Cancelled	eReferral Receiver or Triage	Customized Change
☑	eReferral Receiver - Referral: Service Provider Set	eReferral Receiver or Triage	☐ Notify Immediately by Email (Absent of Patient Identifiable Information) ☑ Notify Overnight in Daily Summary Email (Absent of Patient Identifiable Information) Accept Use My Defaults

e. Click the box next to a specific provider notification option to uncheck it. This will unsubscribe you and you will no longer receive that notification.

f. Click the ***Save*** button to save your changes.

g. To find a referral, copy the complete ***Referral ID*** (including RFS-AAD-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. Referral ID is only available on emails sent as 'Notify Immediately by Email.' Daily summary emails <u>do not</u> include Referral IDs.



h. Click ***Search*** and the specific referral will display.

9.7 Auto-Subscribed Notifications - Triage User

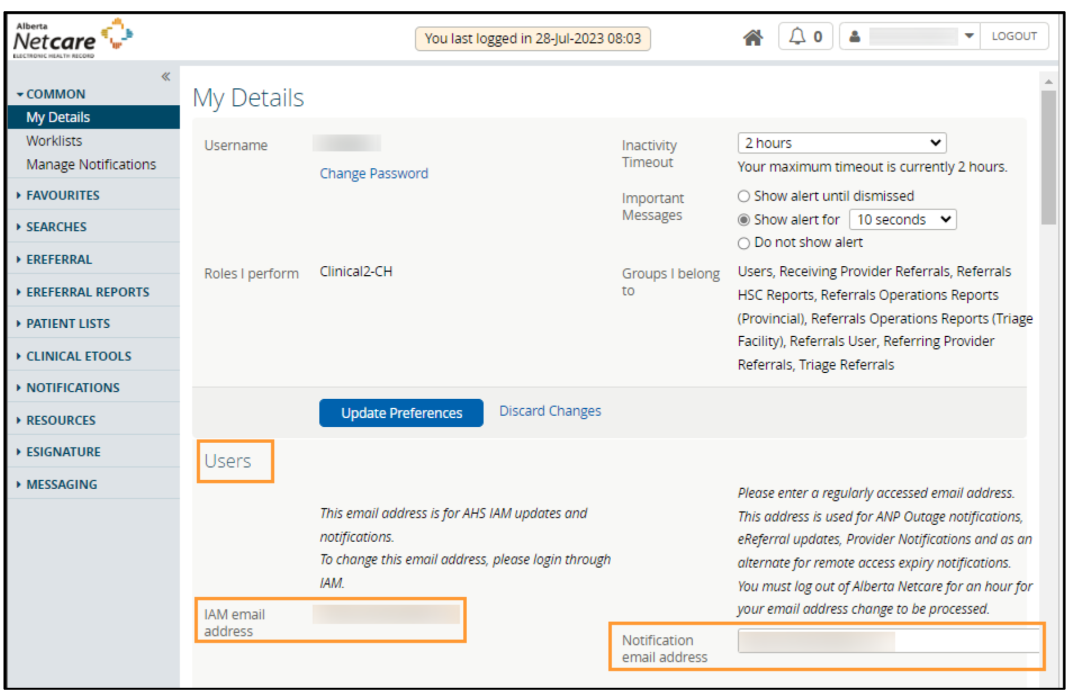
Below is a list of **default** notifications that all triage users will automatically receive when an activity occurs on an eConsult or Referral. These notifications can be customized to meet your needs. There are several other options that triage users can subscribe to.

NOTIFICATIONS – EREFERRAL TRIAGE	WHEN WILL IT BE SENT?
Referral Triage - eConsult: Action Required	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Cancelled	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Clerical Triage in Progress	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Completed	Notify Overnight in Daily Summary Email
Referral Triage - eConsult: Waiting for Clinical Triage	Notify Overnight in Daily Summary Email
Referral Triage - Referral: Action Required	Notify Overnight in Daily Summary Email

9.8 Register for Notifications – Triage User

a. Click on ***My Details*** from the ***Clinical Portal Menu***.

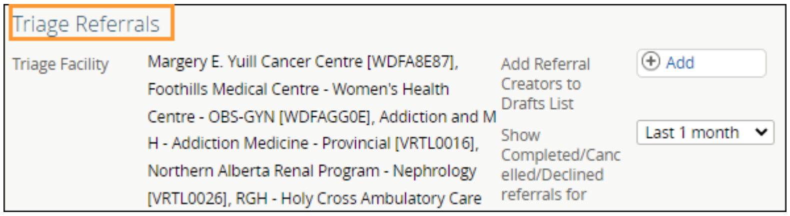
b. Scroll to the section titled ***Users***. Enter your preferred email address (this can be an AHS email or another email address external to AHS) that you use and check regularly in the ***Notification email address*** field. If you update your email address in ***My Details***, you must be logged out of the Alberta Netcare Portal for an hour to allow the email address change to be processed.



c. You will also notice an AHS IAM email field that is automatically populated with your email address. This email field is not editable and is pulling your email address from the Alberta Health Services (AHS) IAM database. To change this email address, you must log on to IAM. Go to: iam.albertahealthservices.ca/uaa/login to update.

d. Click the ***Update Preferences*** button to save your changes.

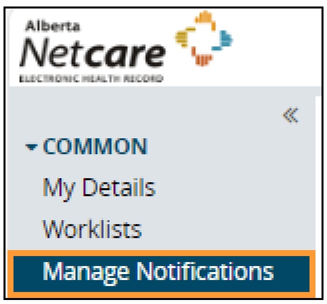
e. To manage your triage settings, scroll down to ***Triage Referrals***. Validate your ***Triage Facilities***.



9.8 Managing Notifications Subscriptions – Triage User

A triage user can customize their notifications and method of delivery:

a. Click on ***Manage Notifications***.



b. Confirm that your email is correct. If you need to update your email address, go to ***My Details***.

c. Choose your ***Default Delivery Method***. You can be notified immediately or can receive an overnight summary. Immediate notifications via email contain a ***Referral ID*** that can be used to find the referral, whereas summary emails do not contain any ***Referral IDs***. The sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email is shown below.

The following eReferral notification events you are subscribed to have occurred within the past 24 hours.

1) Notification events where you are recorded as a member of the Triage team
- [1 occurrence] Consult: Clerical Triage in Progress (check your 'Triage' worklist)

To view these referrals, please visit your Alberta Netcare Portal>eReferral> 'Triage Referrals' dashboard.

2) Notification events where you are recorded as the Referrer
- [1 occurrence] Consult: Waitlisted

To view these referrals, please visit your Alberta Netcare Portal>eReferral>My Referrals> 'Recently Updated' worklist.

To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

.

Sample email from a notification with a delivery method of: Notify Overnight in Daily Summary Email

'Consult:

Referral Id:
Referring Provider:
Submitted By:

To view this referral,
1. Log into Alberta Netcare Portal.
2. Navigate to your Alberta Netcare Portal > eReferral > 'My Referrals' dashboard.
3. Copy/paste the Referral Id into the Referral Id field below your dashboard and click 'Search'.

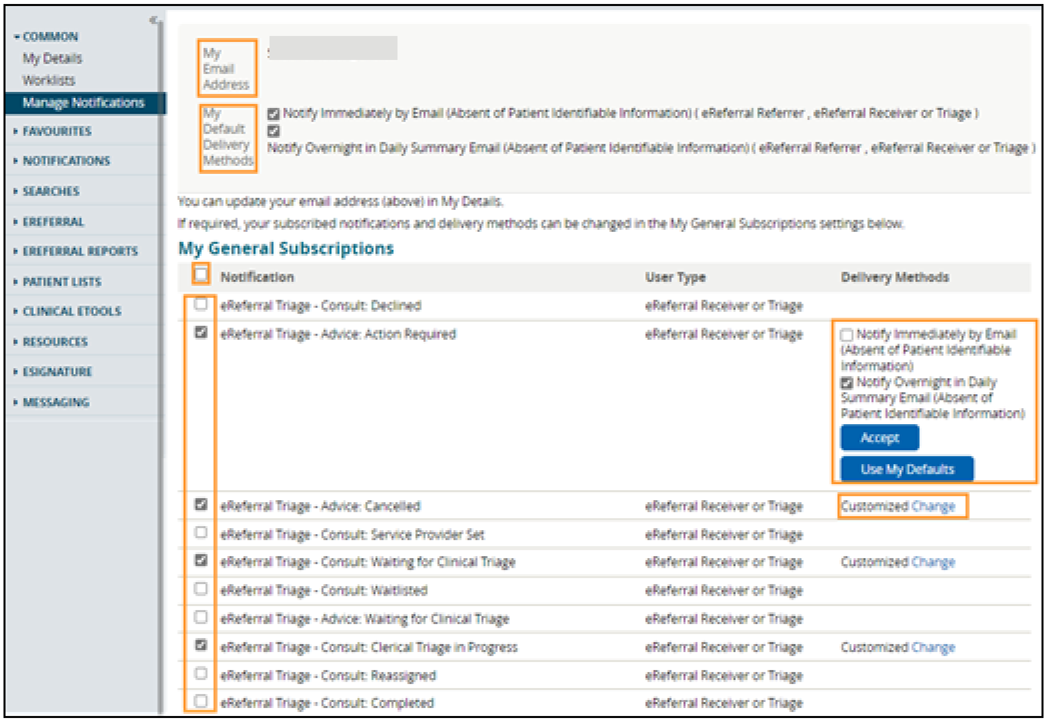
To change your notification subscriptions, please visit your Alberta Netcare Portal > Common > 'Manage Notifications' settings screen.

To access Alberta Netcare Portal:
- Remote site using a fob - https://access.albertanetcare.ca
- AHS facility - https://portal.albertanetcare.ca

For help, please click on the "Need Help?" menu item on the left of the Netcare login screen.

Sample email from a notification with a delivery method of: Notify Immediately by Email.

d. From the ***My General Subscriptions*** section, select the notification and delivery method for each of the notifications available by clicking on the box in front of the notification.



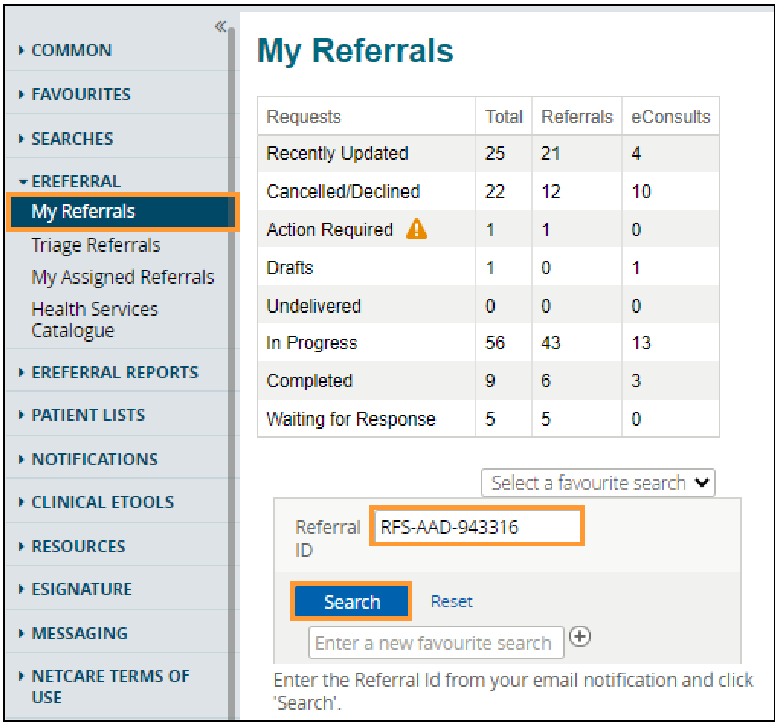
e. Click ***Change*** in the delivery method column and select the desired delivery method.

f. Click ***Accept*** to save your changes or ***Use My Defaults*** to select the default delivery setting.

g. Click the box next to a specific triage notification to uncheck it. This will unsubscribe you and you will no longer receive that notification.

g. Click the ***Save*** button to save your changes.

h. To find a referral, copy the complete ***Referral ID*** (including RFS-XXX) included in the email and paste the ***Referral ID*** into the box under the ***My Referrals*** dashboard to search for your patient using the ***Referral ID***. Referral ID is only available on emails sent as 'Notify Immediately by Email.' Daily summary emails <u>do not</u> include Referral IDs.



i. Click ***Search*** and the specific referral will display.

10.0 eReferral Reports

The Alberta Netcare Portal eReferral application includes several reports that extract and record selected data from the system. Providers accessing these reports must belong to one (or both) of the following groups:

- **Referrals Operations Reports (Provincial)** – Returns province-wide data; intended for the eReferral project team.
- **Referrals Operations Reports (Triage Facility)** – Returns data relating to a specific facility only; intended for staff at that facility.

These reports are subject to change as new reporting requirements are identified and implemented. To gain access to these reports, email access.ereferral@ahs.ca to get started.

The reports are accessed from the ***Clinical Portal Menu*** **–** ***eReferral Reports***. These reports are available to users with Clinical 1, Clinical 2, or Clinical 5 access, with an additional two reports available to those with Clinical 1 access.

Reports Available to Clinical 1, Clinical 2 and Clinical 5 Users:

- ***Referral Request*** – Provides the total number of Referrals submitted.
- ***Referral Request Referrals by Status*** – Reports the number of Referrals by status. Total number of ***Completed***, ***Cancelled*** and ***Declined*** referrals can be seen, as well as total Referrals with additional information requested. Reports can also be run for specific time periods.
- ***Referral Request Referrals by Referral Reason*** – Provides the number of Referrals submitted under each referral reason.
- ***Referral Request Referrals by Referring Provider*** – Gives the number of Referrals submitted by each user.
- ***Referral Request Referrals by Referring Provider and Referral Reason*** – Generates a list of referring providers for any specific reason for referral along with the number of Referrals the provider submitted using that reason.
- ***eConsult Requests*** – Provides the total number of eConsults submitted, and the total number of times each ***Complete Reason*** was used on the ***Complete Form***. For example, the total number of times that ***Continue Managing Within Your Scope of Practice*** is reported.
- ***Health Services Catalogue (HSC) Triage Site Listing*** *(Provincial user group only)* – Generates a list of all the facilities in the ***Health Services Catalogue***, along with their contact information.
- ***Health Services Catalogue (HSC) Provider Listing*** *(Provincial user group only)* – Lists all of the providers in the ***Health Services Catalogue***, along with their provider identification number.

Additional Reports Available to Clinical 1 Users:

These two reports are available to Clinical 1 users if they add the triage facility in ***My Details***:

- ***Referring Providers On Behalf Of Report*** - Lists the names of all Alberta Netcare Portal users that have submitted a Referral/eConsult on your behalf by adding your name to their ***My Details***.

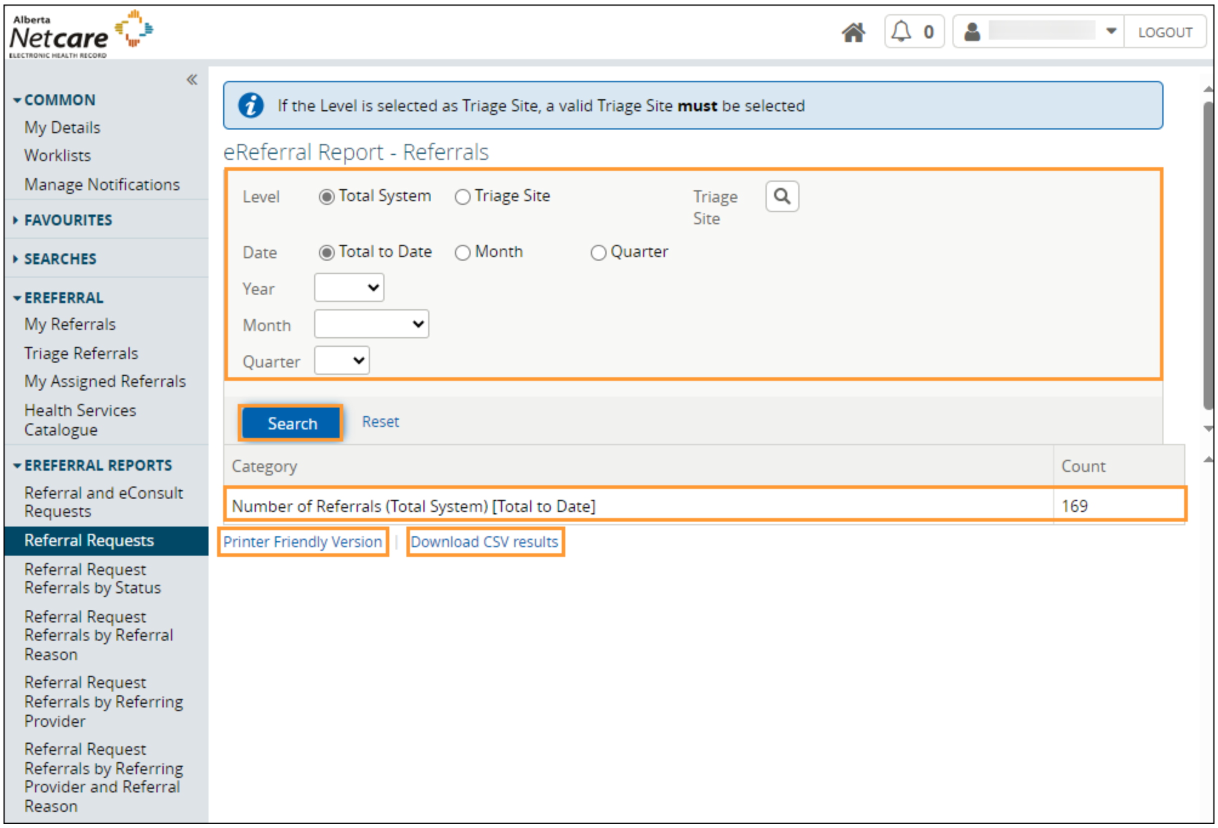
- ***Receiving Providers On Behalf Of Report*** – Lists the names of all Alberta Netcare Portal users that have received a Referral/eConsult on your behalf by adding your name to their ***My Details***.

10.1 Running a Report

a. Click ***eReferral Reports*** from the ***Clinical Portal Menu***.

b. Select the report you wish to generate.

c. Enter selection criteria and click the ***Search*** button. The wider the selected criteria, the longer the report will take to generate and display.



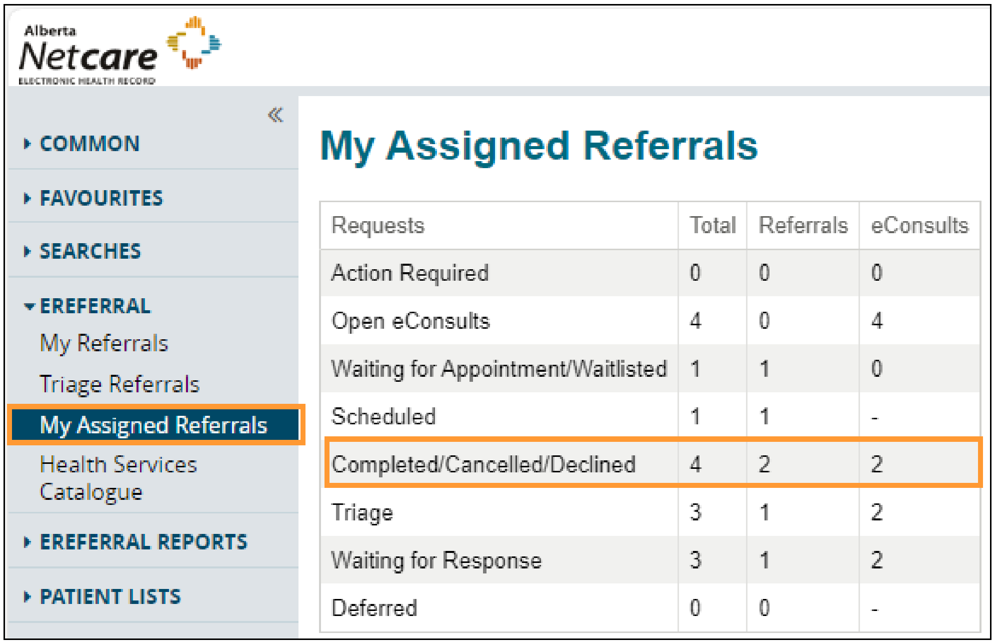
d. Enter selection criteria and click the ***Search*** button. The wider the selected criteria, the longer the report will take to generate and display.

e. Click ***Download CSV results*** for analysis in Microsoft Excel. Click ***Printer Friendly Version*** to save the report as a PDF or print.

10.2 eConsult Billing for Receiving Providers

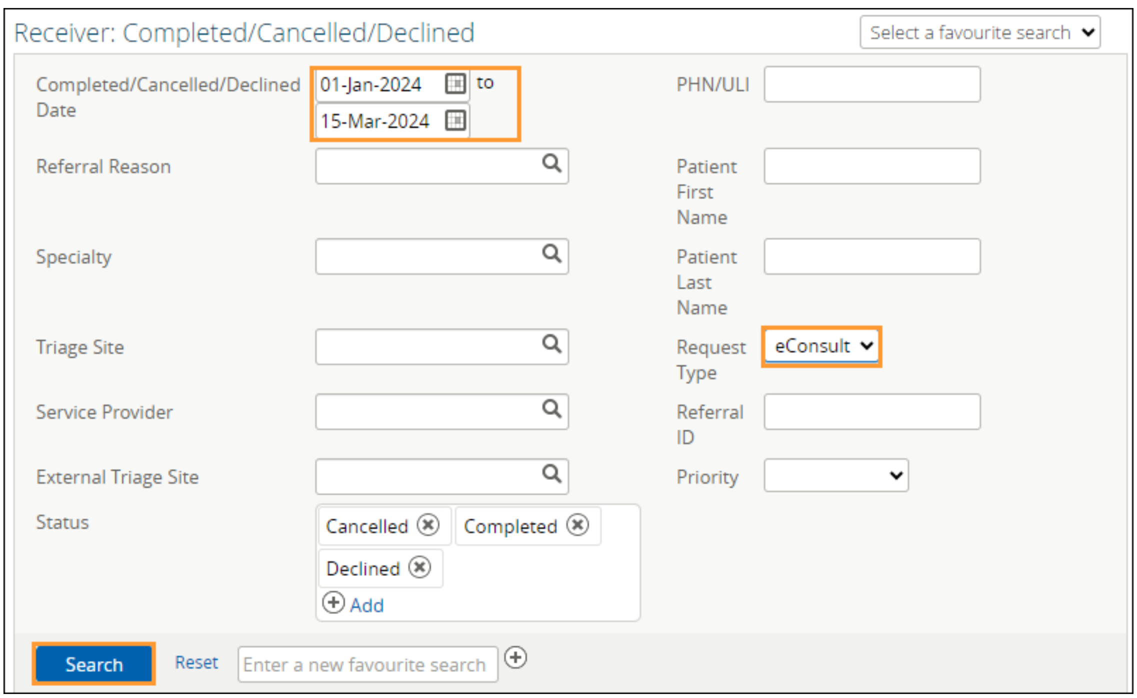
eReferral eConsults are billable using eConsult 03.01O**.** Below is the process to gather the information you require for billing.

a. View your ***My Assigned Referrals*** dashboard and go to your ***Completed/Cancelled/Declined*** requests.



b. Enter the date range for your search in the ***Completed/Cancelled/Declined Date*** fields.

c. Select ***eConsult*** for ***Request Type*** and click ***Search***.



The results that appear are the eConsults you have received in the date range you selected. For example, for billing purposes you may search the last calendar month to see how many eConsult you received.

Patient Name	DOB/Age/ULI	Received Date (T2)	Referral Reason	Referring Provider	Accepted Date (T3)	Appointment Scheduled	Appointment Attended (T5)	Priority	Access Target	Request Type	Service Provider
PATHFINDER, Test Id		27-Oct-2017	Hip pain						5 Calendar days	Advice	
EREFERRAL, Two B		13-Apr-2018	Hip pain						5 Calendar days	Advice	

Results 1-2 Printer Friendly Version | Download CSV results

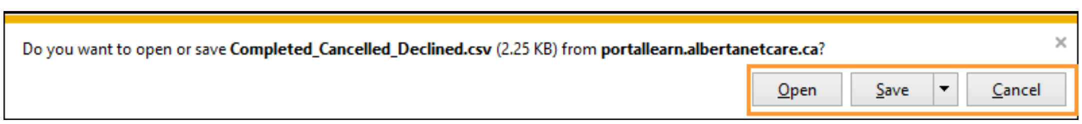
d. Click either ***Printer Friendly Version*** or ***Download CSV results*** on the bottom of the page to view these results in a more printer friendly version or to save them on your computer. You can share these documents with your team and complete billing as normal.

- The ***Printer Friendly Version*** is a PDF document that can be printed.

My Assigned Referrals - Completed/Cancelled/Declined

Patient	Received Date	Referral Reason	Referring Provider	Appt.	Access Target	Elapsed Time	Time to Target (days)	Request Type	Service Provider	Status	Status Reason	Completed/ Cancelled/ Declined
EREFERRAL, Five A	07-Nov-2017	Urology Issue			5 business days	23 minutes	6	Advice		Completed	Continue Managing Within Your Scope of Practice	2 weeks ago

- The ***Download CSV results*** opens in Microsoft Excel spreadsheet. You can open and/or save it.



NOTE: Since this information contains identifiable patient information, please ensure that it is transmitted over secure email only.

e. To complete your billing process, you can download the Prac ID of the other physician. Go to https://www.alberta.ca/fees-health-professionals.aspx for more information.