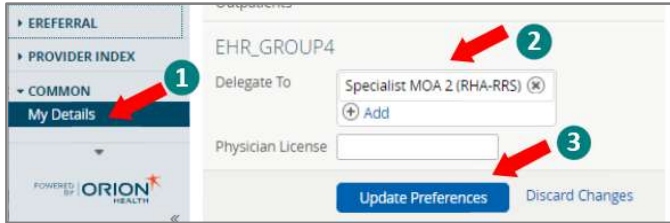


Assigning a Delegate

Specialists can 'delegate' access to eReferrals by assigning their Medical Office Admins (MOAs) / Registered Nurses as their Delegate.

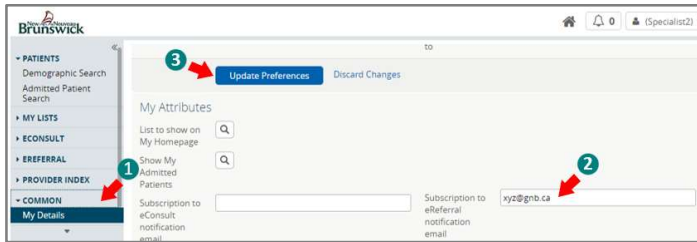
1. Select 'My Details' under 'COMMON' on the left-hand menu.
2. Find the 'Delegate To' field in the section entitled EHR_GROUP4 and select "Add".
3. The 'Specialist's Delegate' search dialog is displayed.
4. Search for the Delegate using the 'Name' or 'User Id' fields.
5. Select the delegate from the list generated.
6. The selected person now displays as a delegate.
7. Select **Update Preferences** to save the changes.
8. To revoke a delegation, click the 'x' next to the delegate's name.



Setting up Email Notifications

1. To receive email notifications regarding eReferral information, select 'My Details' under 'COMMON' on the 'left-hand menu'.
2. Under the 'My Attributes' section, enter the preferred email address in the 'Subscription to eReferral notification email' field.
3. Click on the **Update Preferences** button.

Note: Email notifications received for an eReferral will NOT contain PI or PHI.



eReferral Actions

1. **Accept eReferral:** Only a specialist can "Accept" eReferrals. This action cannot be delegated. The specialist would "Accept" eReferrals that are:
 - New and *Assigned* by the Access Staff.
 - *Reassigned* by the Access Staff.
 - Returned with additional information provided by the PCP.
 - 1) To accept an eReferral, click on the "Accept" action.
 - 2) Select the Priority.
 - 3) Click on **Accept** button.
2. **Request Information (from Primary Care Provider):** The Specialist may request additional information from the Primary Care Provider (PCP) before or after "Accepting" an eReferral.
 - 1) Select "Request Information (from Primary Care Provider)"
 - 2) Enter the requested additional information in the *Required Information* text box.
 - 3) Select the **Request Information** button.
 - 4) The eReferral will now move to the 'My eReferrals waiting for PCP Response' section.
3. **Redirect eReferral:** The Specialist can "Redirect" an eReferral if they have determined the patient must see a different Specialist for the same Specialty. The Specialist may redirect an eReferral before or after "Accepting" an eReferral.
 - 1) Select the "Redirect" action.
 - 2) Select the "Reason" for the redirect from the drop down.
 - 3) Provide a comment (e.g. specific Specialist to be redirected to) in the 'Comment' field.
 - 4) Click the **Redirect** button.

4. **Reject eReferral:** The Specialist can "Reject" an eReferral before or after "Accepting" it. Typically, the specialist would "Reject" eReferrals
 - a. If the patient does not need to see a Specialist.
 - b. May need to be referred to a different specialty (e.g. neurologist).
 - 1) To Reject an eReferral, select the "Reject" action.
 - 2) Select a reason for the rejection and optionally enter a comment.
 - 3) Click the **Reject** button and the eReferral will move to the 'My eReferrals Completed' section.
 - 4) A notification will be sent to the PCP indicating the status of the eReferral.

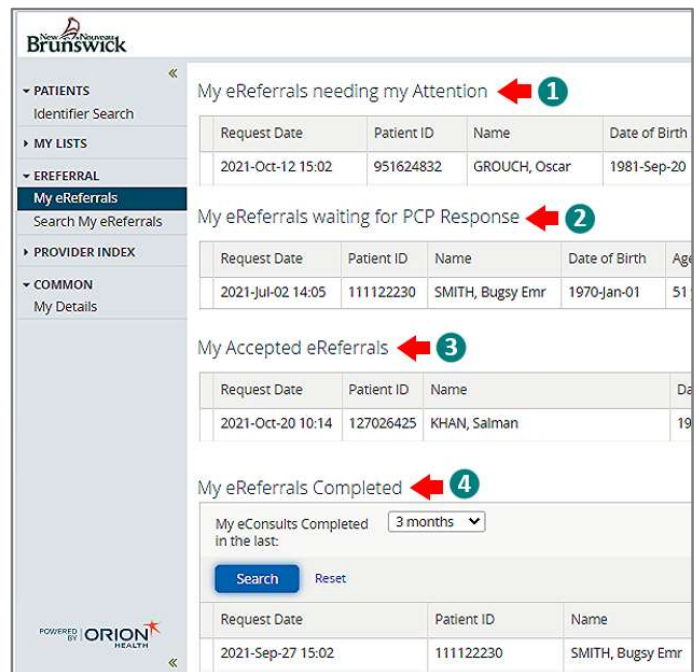
5. **Add Note:** Prior to an eReferral being *closed*, notes can be added to capture/communicate information related to the eReferral. Notes will be visible to all users with access to view eReferrals.
 - 1) Click on the "Add Note" action.
 - 2) Select the 'Type' in the dropdown
 - 3) Enter the note in the 'Comment' field.
 - 4) Select the **Add Note** button to complete the action.



My eReferrals

'My eReferrals' Specialist view has 4 sections:

1. **My eReferrals Needing My Attention:** Contains a list of eReferrals for the Specialist that are:
 - a. *Assigned* by the Access Staff / eReferral Admin.
 - b. *Reassigned* by the Access Staff.
 - c. Returned with additional information provided by the PCP.
2. **My eReferrals Waiting for PCP Response:** A list of the Specialist's eReferrals awaiting a response from the PCP.
3. **My Accepted eReferrals:** A list of eReferrals *Accepted* by the Specialist.
4. **My eReferrals Completed:** A list of eReferrals *Closed* or *Rejected*.



Schedule / Reschedule / Waitlist Appointments

Appointments can be "Scheduled", "Waitlisted", or "Rescheduled" only if the eReferral is *Accepted* by the Specialist.

- Schedule Appointment:**
 - Click on the "Schedule Appointment" action.
 - Enter the date of the appointment.
 - Click the **Schedule Appointment** button.
- Reschedule Appointment:** Only a *Scheduled* appointment can be rescheduled.
 - Open the eReferral with the *scheduled* appointment.
 - Select the "Reschedule" Action.
 - Enter the new date for the Rescheduled appointment and click the **Reschedule Appointment** button.

Note: If the patient's unavailability prevents an appointment from being scheduled/rescheduled, this can be recorded by selecting "Yes" for 'Deferred due to Patient Unavailability' and entering the period of unavailability (i.e. start and end dates).

- Add to Waitlist:** When the patient's unavailability prevents an appointment from being scheduled, the **Add to Waitlist** function is utilized.
 - To record the Patient's unavailability, open an accepted eReferral.
 - Select the "Add to Waitlist" action.
 - Select "Yes" for the question 'Deferred due to Patient Unavailability'
 - Enter the date range the patient is unavailable.
 - To record multiple date ranges, select the **Add Date Range** button and enter additional dates.
 - To remove a date range, click the icon next to the date.
 - When all dates have been entered, select the **Add to Waitlist** button to complete the action.
 - The eReferral remains in the 'Accepted eReferrals' section of the dashboard with a status of *Waitlisted*.

Note: All Accepted eReferrals are considered part of the Specialist's In-Office waitlist.

Closing an eReferral

The eReferral must have a status of *Scheduled Appointment* or *Rescheduled Appointment* for it to be "Closed". The Specialist can "close" the eReferral once the patient has been seen by the Specialist.

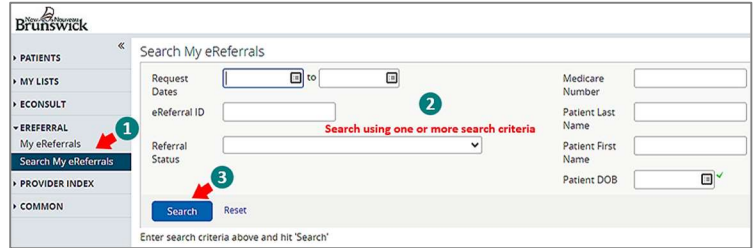
- Open the eReferral.
- Select the "Close" Action.
- Enter a date in the 'Date First Seen by Specialist' field.
- Select the Referral Outcome as *Surgical* or *Non-Surgical*. Click the **Close eReferral** button to complete the eReferral process.



Searching for My eReferrals

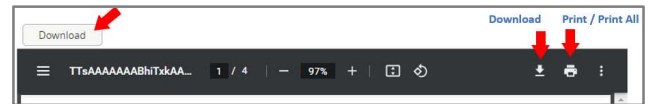
The eReferral search functionality only returns results of eReferrals that are assigned to the Specialist.

- On the 'left-hand menu', navigate to the 'Search My eReferrals' found under 'EREFERRAL' section.
- Use one or more of the available search criteria and click on the **Search** button to generate search results.

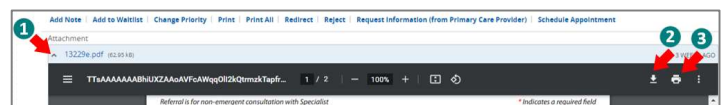


Print / Print All / Download - eReferral

- Print / Download:**
 - Select the "Print" action to generate a PDF file.
 - Click on **Print** icon to print the eReferral.
 - Click on the **Download** button or the icon to download the eReferral.
 - The downloaded PDF will be saved under the 'Downloads' folder on the local PC.
- Print All:** This action enables the user to print the eReferral along with all the 'Notes' and 'Activity History' associated with it. Attachments need to be printed separately (see below).
 - Click on the "Print All" action to generate a PDF.
 - Click on **Print** icon to print all the generated information.
 - Click on **Download** button or the icon to download all the generated information.



- Download / Print Attachments:** Only PDF documents can be downloaded or printed.
 - Click on the link to the attachment.
 - Select the **Download** icon to download the attachment
 - Select the **Print** icon to print the attachment.



Instructions for Locums

In the month prior to the Locum's expected start date, ensure that Access Staff are informed of:

- The Specialist for whom the Locum will be covering.
- Expected start and end dates.
- Which types of eReferrals should be sent to this Locum (i.e. subspecialty such as hips, shoulders, etc)
- In the month prior to the Locum's expected end date, ensure that Access Staff are informed when to resume assigning eReferrals back to the Specialist.

Note: The Locum will have access to the same functionalities as the Specialist.

Help

**For more detailed information regarding the functionality of eReferral please refer to the training materials located in [HP / SP \(gnb.ca\)](#) or contact the eReferral Administrator at: eReferral@gnb.ca