

Delegates

To request access for eReferral, Delegates must send an email to EHRAccess@gnb.ca.

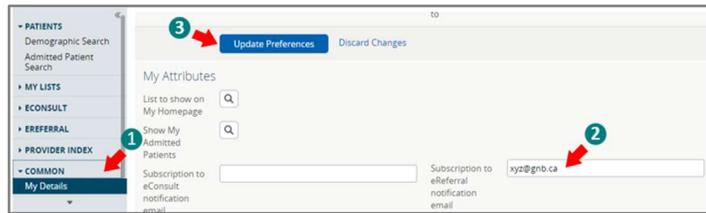
- 1) The Delegate must have logged into the EHR at least once before a PCP can make them their Delegate.
- 2) Next, the Primary Care Provider (PCP) must make you their delegate in the My Details section.

Setting up Email Notifications

PCP Delegates will receive email notifications for the following:

- The Specialist has accepted an eReferral.
 - The Specialist or their delegate has rejected an eReferral.
 - Access Staff have requested additional information from the PCP.
 - The Specialist or their delegate has requested additional information.
 - The Specialist or their delegate has closed an eReferral.
- 1) 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.



Creating an eReferral

- 1) On the EHR Homepage, select 'Demographic Search'.
- 2) Enter the Patient's Healthcare Number (HCN) in the 'Patient ID' field; or 'Last Name', 'First Name' and 'Date of Birth'.
- 3) Select the **Search** button.
- 4) Select the search result that corresponds to the desired patient.
- 5) Review the patient demographic information (using name, DOB and HCN) to confirm the correct patient is selected.

Note: If the patient cannot be found in the EHR or there is more than one record for the same patient (i.e. duplicate record), contact Electronic Health Record (EHR) team at OPOR@gnb.ca to report there is an issue with the patient/client record. Do not create an eReferral until the EHR team have confirmed the issue has been resolved. If EHR team inform you that the patient record does not exist within the EHR, then the referral must be faxed directly to a Specialist by the PCP.

- 6) On the 'left-hand menu', select 'eReferral – Create'.



- 7) Enter at least one phone number for the patient.
- 8) To use the standardized referral form saved from your EMR, select "Yes" for 'Referral Form Attached?'
- 9) Select the **Choose a file...** button to upload the PDF version of the signed referral form.
- 10) Selecting 'Yes' will hide several questions on the eReferral screen as the attached form already contains answers to these questions.

- 11) Ensure that all mandatory fields (on the attached PDF form) are completed before attaching it.
- 12) To attach a DI Report(s) to the eReferral, select "Link a document" under 'Diagnostic Imaging' and add the report(s) from the pop up.

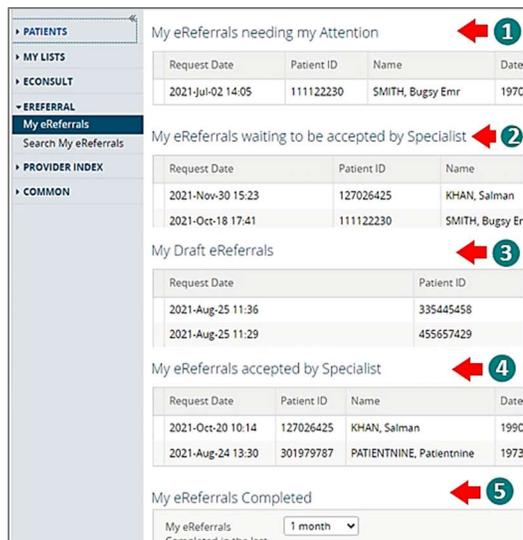
Note: Residents must complete the 'Other Information' field to indicate the PCP they are working under. The specialist office will need this information for any further follow up.

- 13) Complete the Primary Care Provider Information.
 - a. Search and update the 'Referring Provider' field with the appropriate PCP information by selecting the **Add link**.
 - b. Select whether the PCP is a Physician or a Nurse Practitioner.
 - c. Select the 'Date of Referral'.
- 14) Ensure all the mandatory fields of the eReferral are completed.
- 15) Select the **Submit** button. The eReferral Access Program Staff will be notified of the submission and will assign it accordingly.
- 16) The newly created eReferral will appear in 'My eReferrals' under the list entitled 'My eReferrals waiting to be accepted by Specialist'.

Note: PCP Delegates navigating to the 'Patient Summary' screen using the ECV button in their EMR can skip to step 6 directly to create an eReferral.

My eReferrals

The My eReferrals view has 5 sections:



- 1) **My eReferrals needing my Attention:** List of eReferrals returned to the PCP requesting
 - a. Additional information by Access Staff
 - b. Additional information by a Specialist / Specialist's Delegate.
- 2) **My eReferrals waiting to be accepted by Specialist:** List of eReferrals that have been:
 - a. *Submitted* by the PCP.
 - b. *Assigned / Reassigned* by the Access Staff.
 - c. *Redirected by a Specialist*.
 - d. *Returned to Specialist*
- 3) **My Draft eReferrals:** List of eReferral drafts created by the PCP / PCP Delegate yet to be submitted.
- 4) **My eReferrals Accepted by Specialist:** List of eReferrals that have been *Accepted, Appointment Scheduled / Rescheduled or Waitlisted by the Specialist*.
- 5) **My eReferrals Completed:** A list of eReferrals *Closed, Rejected or Cancelled*.

Note: PCP Delegates using the **ECV** button (through an EMR), select the icon on the 'Patient Summary' screen and select 'My eReferrals' under the 'EREFERRAL' menu to view the sections above.

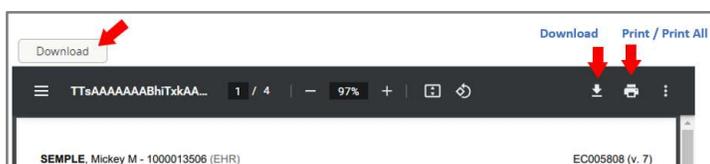
Print / Print All / Download - eReferral:

1) 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.

2) 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.



3) 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.

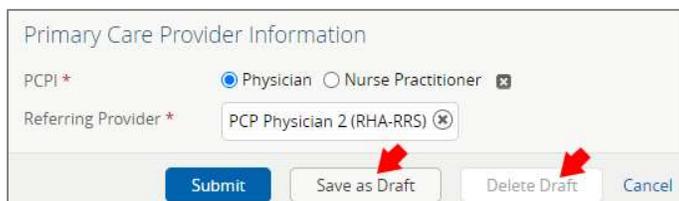


Save / Delete Drafts:

If a PCP is unable to fully complete an eReferral during creation, it can be saved as a Draft to be reviewed and submitted later. Depending on the workflow within the PCP’s office, the Draft function may optionally be used by the PCP to review and submit eReferrals created by their Delegates.

- 1) Navigate to the left hand menu and select ‘eReferral – Create’ as mentioned in ‘**Create an eReferral**’ section.
- 2) Select **Save as Draft** button upon completion of the eReferral form.
- 3) Any information entered in the eReferral until this point will be saved in a draft version of the eReferral with the status as *Draft*.
- 4) The eReferral appears in ‘My eReferrals’ under “My Draft eReferrals” section.
- 5) The eReferral can be completed later and “Submitted”.
- 6) The PCP may also delete the draft by selecting the **Delete Draft** button followed by the **Delete** button in the confirmation pop up.

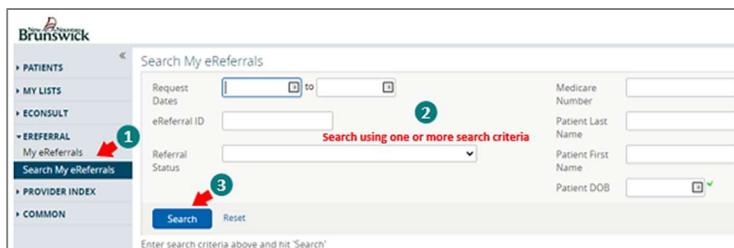
Note: PCP Delegates can access their eReferral drafts only from their ‘eReferral Dashboard’.



Searching for My eReferrals:

Only eReferrals created by the PCP or their Delegate can be searched using this functionality.

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



Help:

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