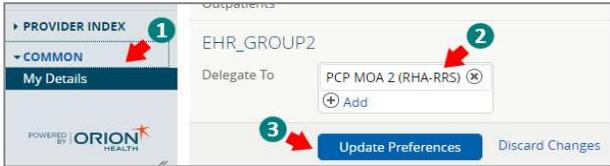


Assigning a Delegate

Primary Care Providers (PCPs) can 'delegate' access to eReferrals by assigning their approved office staff as Delegates (e.g. Medical Office Admins / Registered Nurses / LPNs etc.)

- 1) Select 'My Details' under 'COMMON' on the left-hand menu.
- 2) Find the 'Delegate To' field in the section entitled 'EHR_GROUP2' and select "Add".
- 3) The 'PCP Delegate search' dialog is displayed.
- 4) Search for the Delegate using the 'Full 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.

Note: PCPs using the **ECV** button through an EMR, select the icon on the 'Patient Summary' screen and follow the steps above.

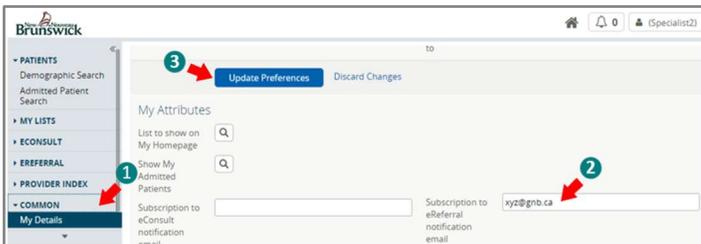


Setting up Email Notifications

PCPs will receive email notifications for the following:

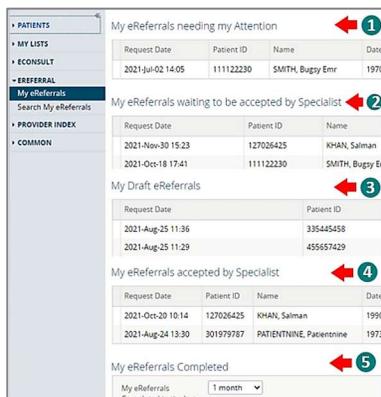
- The Specialist has accepted an eReferral.
 - The Specialist or their delegate has rejected an eReferral.
 - Access Staff have requested additional information from the PCP.
 - The Specialist or their delegate has requested additional information.
 - The Specialist or their delegate has closed an eReferral.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



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*.

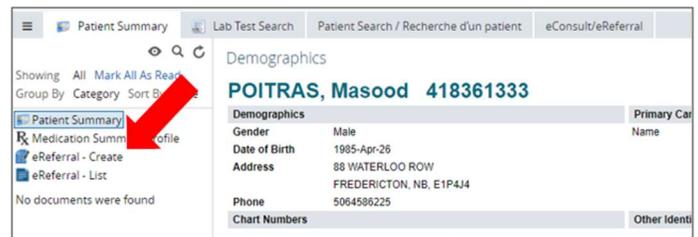
Note: PCPs using the **ECV** button (through an EMR), select the icon on the 'Patient Summary' screen and select 'My eReferrals' under the 'EREFERRAL' menu to view the sections above.

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.
- 13) Complete the Primary Care Provider Information.
 - a. The 'Referring Provider' will default to the current PCP user.
 - 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: PCPs navigating to the 'Patient Summary' screen using the **ECV** button in their EMR can skip to step 6 directly to create an eReferral.

eReferral Actions

1) **Provide Information (to Administrator / Specialist):** The Access Staff or Specialist may request additional information from the PCP if required.

- 1) The PCP will receive an email notification for this request.
- 2) The eReferral will appear under 'My eReferrals needing my Attention' section with the status *Returned to Primary care Provider (By Administrator) / (By Specialist)*.
- 3) Select the eReferral and navigate to the 'Activity' section.
- 4) The message from the user will be displayed under the 'Request Information' header.

Note: You may need to scroll down to find this Activity, depending on what tasks / activities have been completed for this eReferral since the information was first requested.

- 5) Select the "Provide Information" action.
- 6) Enter the information in the 'Requested Information' field.
- 7) Select the **Provide Information** button.
- 8) The eReferral will be sent back to the requester of the information (either Access Staff or the Specialist).
- 9) The eReferral will be displayed under 'My eReferrals waiting to be accepted by Specialist' section with the status of *Submitted* (if returned to Access Staff) and *Returned to Specialist* (if returned to a Specialist).

2) **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.

Note: To communicate any information which may be important for patient care, the PCP should contact the Specialist directly.

3) **Edit:** eReferrals can only be edited prior to being *Assigned* to a Specialist. If changes or additional information are required after the eReferral has been *Assigned*, use the "Add Note" functionality.

- 1) Search for the eReferral to be edited and open it.
- 2) Select the "Edit" action.
- 3) Edit the necessary fields
- 4) Click the **Save** button to save the changes.

Note: If a Specialist has "Requested for Additional Information", the "Edit" action will be available for the PCP to edit all the fields and to add / remove attachments in the eReferral.

4) **Cancel:** eReferrals can only be cancelled prior to being *Assigned* to a Specialist.

- 1) Search for the eReferral to be cancelled and open it.
- 2) Select the "Cancel" action.
- 3) Select a 'Cancellation Reason'.
- 4) Add a comment in the 'Comment' field (optional).
- 5) Click the **Cancel** button.
- 6) The eReferral will now have a status of *Cancelled*.
- 7) The cancellation reason and comments will appear in the 'Activity' details for the 'Cancel' activity.
- 8) The *Cancelled* eReferral will be displayed under the 'My eReferrals Completed' section.

Note: To "Cancel" an eReferral after it has been *Assigned*, contact the Access Staff at eReferral@gnb.ca using the shared template located in [HP / SP \(gnb.ca\)](http://HP/SP.gnb.ca).



Attachments – Add / Delete

PCPs can "Add" or "Delete" attachments in an eReferral only:

- During the creation of an eReferral.
- When the eReferral has been *Submitted* but has not been *Assigned* to the Specialist by the Access Staff.
- When the eReferral has been *Returned to the PCP* requesting Additional Information by the Access Staff or Specialist.

Note: While creating or editing a draft eReferral, an attachment can be added or deleted using the buttons on the referral form, as the 'eReferral Attachments' panel is only available once the eReferral has been submitted.

To "Add" or "Delete" an attachment in an eReferral prior to being *Assigned* to a Specialist or *Returned to the PCP by the Access Staff or Specialist* requesting for Additional information, follow the below steps:

Adding an Attachment:

- 1) Select the "Edit" Action.
- 2) Attach the file using the **Choose a file** button.
- 3) Click on the **Save** button at the bottom of the page.
- 4) The file will now be displayed under 'Attachments' section of the form and in the 'eReferral Attachments' section on the right-hand side of the screen.



Deleting an existing Attachment:

- 1) Select an eReferral that has been *Submitted* or *Returned to Primary Care Provider (By Specialist / Administrator)*.
- 5) Navigate to the 'eReferral Attachments' on the right-hand side of the screen above the 'Activity' section.
- 2) Select the icon beside the attachment.
- 3) A confirmation pop-up will be displayed.
- 4) Select **Delete** to delete the attachment.

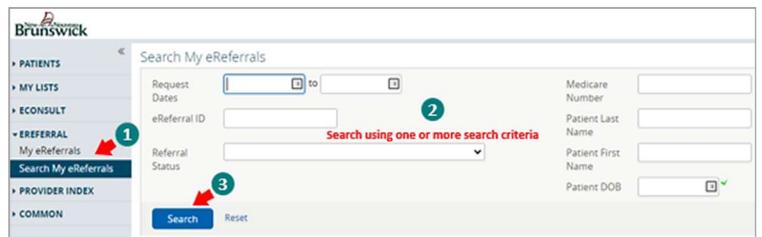


IMPORTANT: When replacing an attachment, the new attachment must be uploaded first, before deleting the old attachment.

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.



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: PCPs can access their eReferral drafts only from their 'eReferral Dashboard'.



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.