



# Sending Referrals User Guide

TELUS Collaborative Health Record

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# OVERVIEW

## RATIONALE FOR THIS GUIDE

To ensure providers are sending and receiving referrals on a consistent basis at a provincial level, the following best practices guide has been developed. Your EMR advisor can provide assistance to develop a workflow that best meets the needs of your clinic.

A list of common PEI referral programs (Provincial, Out of Province, and Community Supports) can be found in **Appendix A, B, and C**. If the user is on CHR, send an internal referral. If not, send an outgoing referral. A list of CHR users is available on the PEI EMR Website.

<https://www.princeedwardisland.ca/en/topic/electronic-medical-records-emr>

## TWO REFERRAL SENDING OPTIONS – INTERNAL AND OUTGOING

A referral can be sent two ways. Those that are sent from one CHR user to another (internal) and those sent to users not on CHR (outgoing). Sending and receiving Internal and Outgoing referrals follow different processes on the CHR.

## DEFINITIONS

**INTERNAL REFERRALS:** Referrals sent from one CHR user to another. The referring provider sends their referral internally to the recipient (i.e. the specialist) or to the specialist's central intake. These internal referrals will not show up on the recipient's incoming fax. Since these referrals are sent internally, both referring and receiving providers can see these referrals through their internal referrals folder (see picture below) in their CHR. Referrals can also be tracked through a patient's chart.

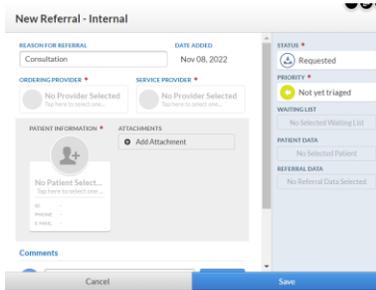
**INCOMING REFERRALS:** Referrals sent to you from outside the CHR will appear in your incoming fax CHR inbox. Your MOA will assign these referrals to your Incoming Referrals folder or your central intake waitlist.

**OUTGOING REFERRALS:** Referrals sent from a CHR user to someone not on CHR would be sent via an outgoing referral option. These referrals are faxed to the receiving provider's location. Referring providers will track these referrals through their outgoing referrals folder in their CHR. Referrals can also be tracked from the patient's chart. Since the referral is sent outside the CHR, if the receiving provider is not on CHR. The only way to track progress is if the recipient sends communication which would be updated on the referral (MOA to change status to Accepted).

**REFERRING PROVIDER:** A physician who sends a referral to another provider or program is the referring provider. The referring provider should track referrals through their outgoing or internal folders, or through the patient chart.

**RECIPIENT:** A referral recipient could be another provider, a specialist, specialty clinic, or program. The recipient can receive referrals through their incoming fax (if sent as an outgoing referral), to their internal referrals folder (if sent internally) or to their central waitlist folder (if the referring provider chose a waitlist). Recipients should ensure their filters are set up to capture all scenarios.

**REFERRAL CARD:** A referral card is the box that appears when you create a referral.



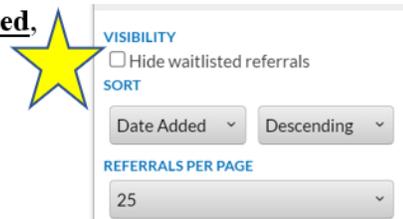
## INTERNAL REFERRAL PROCESSES WORKFLOW

### FILTERING YOUR INTERNAL AND INCOMING AND OUTGOING REFERRALS FOLDERS

#### REFERRING PROVIDER FOLDER SETUP

To track your outgoing referrals, choose the following filter options	
Ordering Provider	You are the ordering provider
Service Provider	All Service Providers
Presenting Issues	All Presenting Issues
Patient Data	All Patient Data
Referral Data	All Referring Data
Priorities	All Priorities
Hide Waitlisted Referrals	Leave unchecked
Sort	Ascending / Descending as per your preference

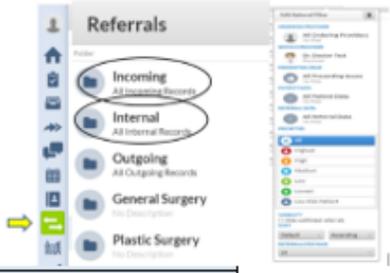
At the bottom of the filter Make sure you **Sort** by **Date Added, Descending**



## RECIPIENT FOLDER SETUP

To track your incoming and internal referrals, choose the following filter options

Ordering Provider	All Ordering Providers
Service Provider	You or Your Central Intake Folder (or both)
Presenting Issues	All Presenting Issues
Patient Data	All Patient Data
Referral Data	All Referring Data
Priorities	All Priorities
Hide Waitlisted Referrals	If you have a waitlist (OBGYN, Gen Surg) and assign your referrals there, you can hide them from your incoming filter by checking this box. If the box is unchecked, the referrals will appear in both your incoming and your waitlist folders
Sort	Ascending / Descending as per your preference

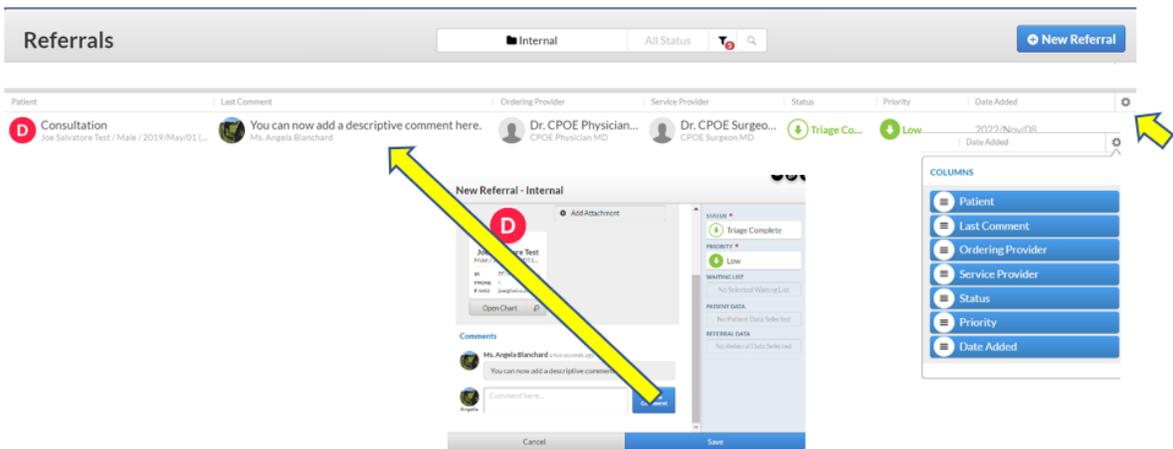


## ADDING THE MOST RECENT COMMENT TO REFERRALS FOLDERS VIEW

Users can now view the last referral comment on their referral folder. This is a convenient way to add descriptive text to a referral. Please note that the **most recent comment** will appear in this section.

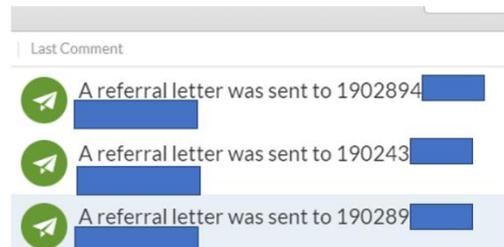
Steps:

1. In a referrals folder, click on the cog on the upper right.
2. Choose **Last Comment** so it is highlighted in blue
3. You can reorder where the comment appears on the folder by dragging it up and down on the list.
4. Click **Refresh**.



The screenshot shows the Referrals interface with a table of referrals. The 'Last Comment' column is highlighted in blue. A yellow arrow points to the 'Last Comment' option in the 'COLUMNS' list on the right. Another yellow arrow points to the 'New Referral' button in the top right corner.

When a letter has been sent for outgoing referrals, the following comment will appear.



The screenshot shows the 'Last Comment' column with three entries, each preceded by a green paper plane icon:

- A referral letter was sent to 1902894
- A referral letter was sent to 190243
- A referral letter was sent to 190289

## SENDING AN INTERNAL REFERRAL

### INTERNAL REFERRAL STATUSES

Statuses are different for internal and outgoing referrals. Many of the internal statuses are primarily used by the receiving provider to help properly triage the referral. Providers sending a referral should only use a **requested** status.

If the referral is not ready to send, leave it in **draft** form and make sure you are **both the ordering and service provider** to ensure the referrals stays in your folder until ready to send.

**Internal staff follow up** may or may not be used, depending on clinic workflows. Talk to your EMR advisor about which status works best for your clinic.

INTERNAL REFERRAL STATUSES	
REQUESTED	Use this status when sending a referral
DRAFT	Use this status when you are not ready to send the referral. <b>IMPORTANT</b> - Make sure you are both the ordering and service provider until the referral is ready to send.
INTERNAL STAFF FOLLOW UP	This status may or may not be used, depending on clinic workflows. Talk to your EMR advisor about which status works best for your clinic. <b>IMPORTANT</b> - Make sure you are both the ordering and service provider until the referral is ready to send.
CREATED IN ERROR	Use to cancel a sent or draft referral
CANCELLED	
PENDING	For Triage only, do not use when sending a referral
REQUIRES TRIAGE	
TRIAGE COMPLETE	
ACCEPTED	
ADDITIONAL INFORMATION REQUIRED	
WAITLISTED	
BOOKED	
REJECTED	
TRANSFERRED	
ARCHIVE	

### CREATING A REFERRAL LETTER FROM WITHIN AN ENCOUNTER

If you know the provider is on CHR, you can send an internal referral directly to the provider or the provider's central referral folder.

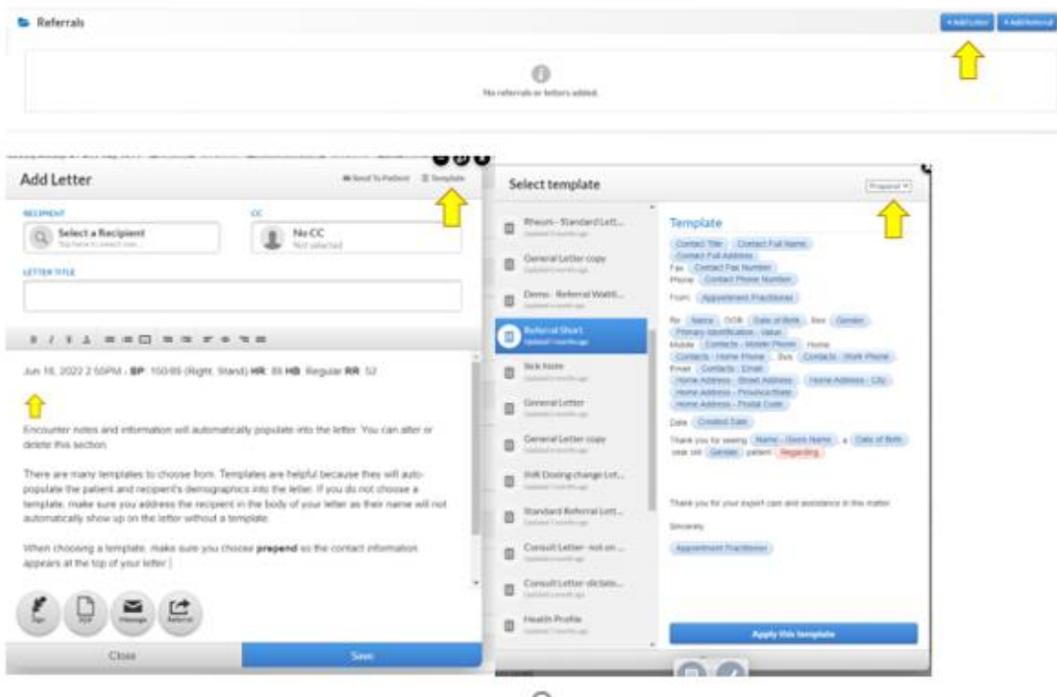
When in the encounter, go to the referral section and choose **Add Letter**. You will notice an Add Referral option as well. You can choose this option however; the referral is generated directly from your encounter notes and cannot be edited or changed.

**Creating a referral from Add Letter is the best option.**

Steps

1. Choose your template (if applicable).
2. Write / edit / update your letter.
3. View your letter by clicking on PDF (if you need to make additional edits, close the PDF by clicking on the grey close bar at the bottom. This will bring you back to your letter).

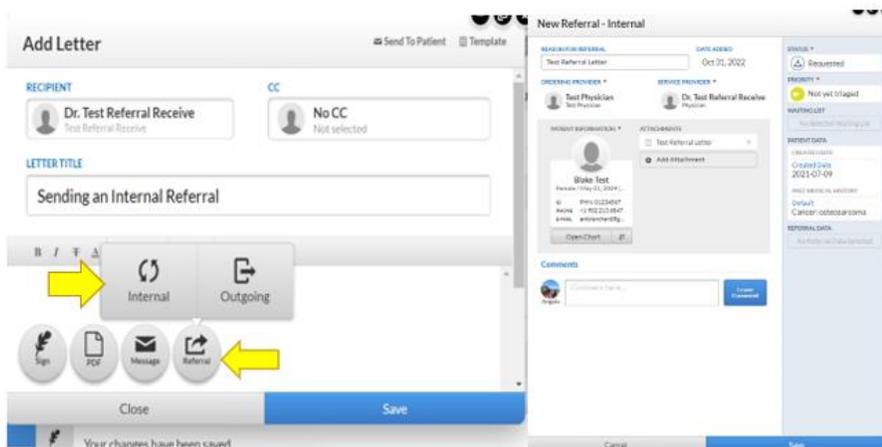
4. Click Save.
5. Click Sign PDF.
6. Your letter is complete. There are three options to send the letter: Send as an **internal referral**, **outgoing referral**, or **fax the letter**. Directions for each option are below.



## SENDING AN INTERNAL REFERRAL TO ANOTHER CHR USER

**STATUS: REQUESTED** - All sent referrals should be in **requested** status.

1. Click **Referral**, then **Internal**. The referral card opens, and your referral letter is attached.
2. Choose a reason for referral. The reason for referral will populate from the letter title template. You can change this if you like.
3. You are the ordering provider.
4. The service provider is the recipient /specialist. **YOU MUST CHOOSE A SERVICE PROVIDER or WAITLIST.**
5. Click **Add Attachment** (if you need to attach additional information). Follow the prompts.
6. The status should be **Requested**.
7. The priority is **Not Yet Triage**. You are not the triaging provider therefore shouldn't assign the priority status. Make sure to relay urgency concerns in your letter.
8. Add any relevant comments. Make sure you click **Leave Comment**, or the text will not save.
9. Click Save. When you click save, the referral will be sent. There are many places to view your referral: Internal referrals, user outbox, patient chart (referrals) or patient outbox.



## IF AN INTERNAL REFERRAL IS STARTED, BUT NOT READY TO SEND

**STATUS: DRAFT (this status may or may not be used, depending on clinic workflows)**

If you are not ready to send the referral because you are missing information, please choose **yourself as both the ordering provider and the service provider**. Change the status to **Draft** as a reminder to yourself or your MOA that the referral requires additional attention before it is ready to be sent. If you are set as both the ordering and service provider, the referral will stay within your clinic and on your filter until you are ready to send it elsewhere. When the referral is complete, **change the service provider** to the recipient and switch the status to **Requested** and the priority to **Not Yet Triage**.

1. Click **Referral**, then **Internal**.
2. Choose a reason for referral. The reason for referral will populate from the letter title template. You can change this if you like.
3. You are the ordering provider.
4. You are the service provider (until you are ready to send – see above).
5. Click **Add Attachment** (if you need to attach information). Follow the prompts. The letter will automatically attach to the referral.
6. The status tag should be **Internal Staff Follow Up**.
7. Choose **Not Yet Triage** for the priority status.
8. Add any relevant comments. Make sure you click **Leave Comment**, or the text will not save.
9. Click Save. When you click save, the referral will be sent to your internal referrals folder. The status tag will appear in red as **Internal Staff Follow Up**. You or your MOA will notice this status tag and can act accordingly.
  - a. When the referral is complete, **change the service provider to the recipient**.
  - b. Change the status to **Requested**.
  - c. Click Save, and it will go to the recipient. You can view it from your **Internal Referrals Folder**. You can also check the referral from the patient chart. Start / Open – referrals.

## SENDING AN OUTGOING REFERRAL

### OUTGOING STATUS

Statuses are different for internal and outgoing referrals. Many of the outgoing statuses are primarily used by the receiving provider to help properly triage the referral. Providers sending an outgoing referral should only use **letter sent** or **draft** when creating an internal referral. Scenarios are explained below.

OUTGOING REFERRAL STATUSES	
LETTER SENT	Use this status when the provider or MOA sends the referral
DRAFT	Use this status when an outgoing referral is started but not ready to send. See directions
READY	Use this Status if the MOA completes the referral
RECEIVED	Use if a referring provider wants to track outgoing referrals. See directions.
CANCELLED	Use to cancel a sent or draft referral
NEEDS FOLLOW UP	For Triage only, do not use when sending a referral
ARCHIVE	For Triage only, do not use when sending a referral

## MANAGING YOUR OUTGOING REFERRALS FOLDER

When a letter has been sent for outgoing referrals, the following comment will appear: **A referral letter was sent to 1 902 555 .....** It is important to check your outgoing referrals folder regularly to ensure this comment appears on your outgoing referrals folder.

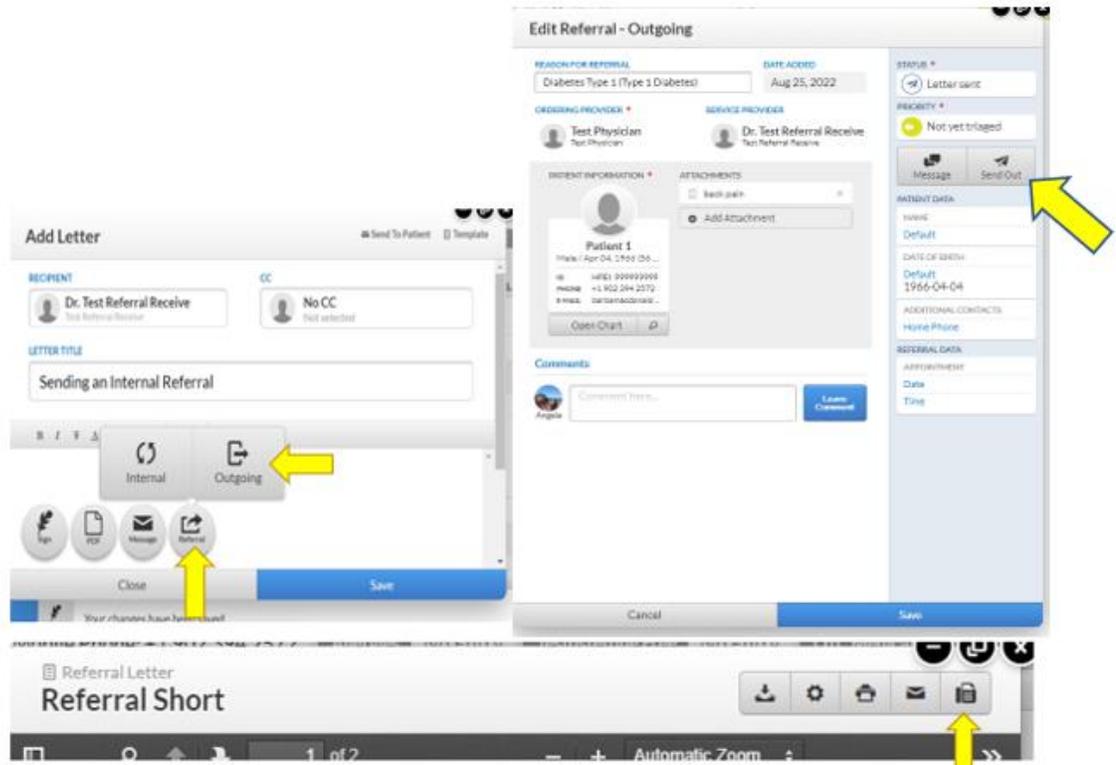
You may notice (see second picture), that the status is **Letter Sent** however there is no comment available to advise a referral letter was sent to a specific number. This is a red flag that the fax may not have been successfully sent. If there is no comment in this section, review the referral and the patient's outbox to ensure the fax was successfully sent.

Patient	Order / Provider	Last Comment	Service Provider	Status	Priority
Standard Referral Letter Walter Worker / Male / Jun 01, 1997 (25 yr)	Ang... EMR...	A referral letter was sent to 19025...	Dr. Test Referral Receive Test Referral Receive	Letter Sent	Not Yet Triaged
Referral Short Janae Obe / Female / Mar 11, 2000 (22 yr)	Dr. T... Physician	No Comment Available	Dr. Test Referral Receive Test Referral Receive	Letter Sent	Not Yet Triaged
Referral Short Daisy Chickens / Female / Jul 25, 2022 (4 mo)	Ang... EMR...	No Comment Available	No Provider Selected	Letter Sent	Not Yet Triaged
Referral Short Daisy Chickens / Female / Jul 25, 2022 (4 mo)	Ang... EMR...	No Comment Available	No Provider Selected	Letter Sent	Not Yet Triaged

## SENDING AN OUTGOING REFERRAL

### STATUS: LETTER SENT

1. Click **Referral**, then **Outgoing**. The referral card opens, and your referral letter is attached.
2. Choose a reason for referral. The reason for referral will populate from the letter title template. You can change this if you like.
3. You are the ordering provider.
4. **CHOOSE A SERVICE PROVIDER WHENEVER POSSIBLE**, especially if sending locally. If the service provider is not available, (out of province / region) you can free text the fax number in step 10.
5. Click **Add Attachment** (if you need to attach additional information). Follow the prompts. The letter will automatically attach to the referral.
6. The status is **Letter Sent**.
7. The priority is **Not Yet Triaged**.
8. Add any relevant comments. Make sure you click **Leave Comment**, or the text will not save.
9. Click **Send Out**. You may be prompted to **Save**.
10. Although saved, the letter has **not been sent** yet. A PDF will appear.
  - a. Optional: You may add a cover page if you like. Click on the feather beside **cover page**, choose the relevant information, choose **apply**, then add your comments. Click **close**, then **save**.
11. Click the **fax** icon (if a template was used, the recipient fax will appear automatically) If not using a template, search for the contact or free text the fax number.
12. Click **Send**. Now, the referral has been faxed to the recipient's number.
13. There are many places to view your referral: Outgoing referrals, user outbox, patient chart (referrals) or patient outbox.
14. If the receiving provider is not on CHR, the only way to track progress is if the recipient sends communication, which would then be manually updated on the patient's referral (i.e. MOA to change status to **Received** and add any relevant notes to the comment section).

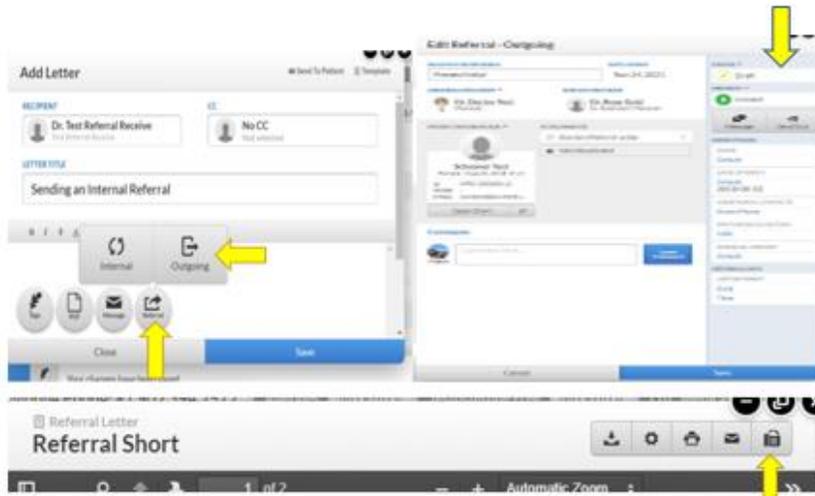


## REFERRAL LETTER STARTED, NOT READY TO SEND

**STATUS: DRAFT (this status may or may not be used, depending on clinic workflows)**

If you are not ready to send the referral because you are missing information, change the status to **Draft** as a reminder to yourself or your MOA that the referral requires additional information before it is sent. When the referral is complete, change to status to **letter sent**.

1. Click **Referral**, then **Outgoing**. The referral card opens, and your referral letter is attached.
2. Choose a reason for referral. The reason for referral will populate from the letter title template. You can change this if you like.
3. You are the ordering provider.
4. **CHOOSE A SERVICE PROVIDER WHENEVER POSSIBLE**, especially if sending locally. If the service provider is not available, (out of province / region) you can free text the fax number in step 10.
5. Click **Add Attachment** (if you need to attach additional information). Follow the prompts. The letter will automatically attach to the referral.
6. The status is **Draft**.
7. Choose **Not Yet Triaged** for the priority.
8. Add any relevant comments. Make sure you click **Leave Comment**, or the text will not save.
9. Click **Save**.
10. The **Draft** status is a reminder that the referral requires additional attention before it is sent.
11. When the referral is complete, switch the status to **letter sent**.
12. Follow steps 9-14 on the **Sending an Outgoing Referral (Letter Sent)** Instructions.



## REFERRAL STARTED BY PROVIDER AND COMPLETED BY MOA

**STATUS: READY (this status may or may not be used, depending on clinic workflows)**

Sometimes a MOA will finish and send a referral for the provider. A **Ready** status will alert the MOA that the provider has a referral that is **Ready** to be sent. These following steps can guide your workflows but may change, depending on clinic-specific responsibilities.

1. Click **Referral**, then **Outgoing**. The referral card opens, and your referral letter is attached.
2. Choose a reason for referral. The reason for referral will populate from the letter title template. You can change this if you like.
3. You are the ordering provider.
4. **CHOOSE A SERVICE PROVIDER WHENEVER POSSIBLE**, especially if sending locally. If the service provider is not available, (out of province / region) you can free text the fax number in step 10.
5. Click **Add Attachment** (if you need to attach additional information). Follow the prompts. The letter will automatically attach to the referral.
6. The status is **Ready**.
7. Choose **Not Yet Triaged** for the priority.
8. Add any relevant comments. Make sure you click **Leave Comment**, or the text will not save.
9. Click **Save**.
10. The **Ready** status is a reminder that the referral requires additional attention before it is sent.
11. When the referral is complete, switch the status to **letter sent**.
12. Follow steps 9-14 on the **Sending an Outgoing Referral (Letter Sent)** Instructions.

## SENDING LETTERS THAT ARE NOT TRACKED THROUGH REFERRALS

If you want to send a letter (i.e. consult or patient update) that doesn't need to be tracked through referrals, you can create a letter and send it by fax or internal message, thus bypassing the referral section. The letter will appear on the patient file under letters but will not be part of the referral tracking process.

You cannot add attachments to a letter however you can attach a letter (and relevant attachments) to an internal message on CHR if you feel the provider would like all relevant information to accompany the consult letter (instructions to follow). The receiving provider, if on CHR, can access the information on the CHR as well. Use your discretion as to whether you attach information to an internal message or simply notify the provider where they can find the information on the patient chart.

You can also send letters with attachments from the Update Patient – Patient Chart section of the dashboard for providers not on CHR (instructions to follow).

## FAXING A LETTER WITHOUT CREATING A REFERRAL

### OPTION 1: CREATE THE LETTER WITHIN THE ENCOUNTER

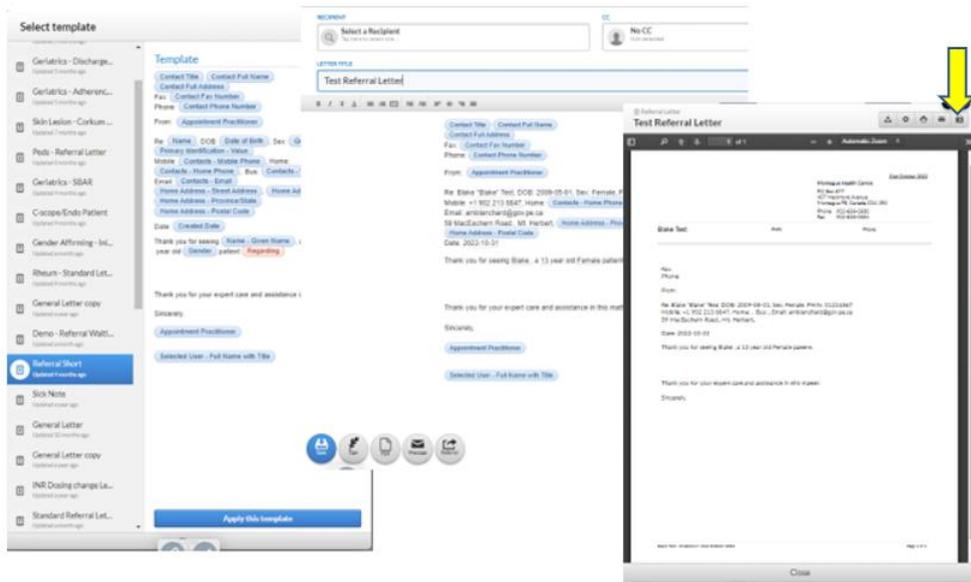
#### Steps

1. When in the encounter, go to the referral section and choose **Add Letter**.
2. Choose your template (if applicable).
3. Write / edit / update your letter.
4. View your letter by clicking on PDF (if you need to make additional edits, close the PDF by clicking on the grey close bar at the bottom. This will bring you back to your letter).
5. Click Save.
6. Click Sign PDF.
7. Your letter is complete. Fax the letter from the PDF view by clicking on the fax icon at the upper right hand corner.
8. This letter can be found in the patient chart under **letters**.

### OPTION 2: CREATE THE LETTER FROM THE PATIENT CHART

#### Steps

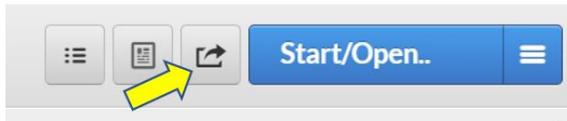
1. Open patient chart.
2. Go to Start/Open.
3. Go to Letters.
4. Choose **New Letter**.
5. Choose your template (if applicable).
6. Write / edit / update your letter.
7. View your letter by clicking on PDF (if you need to make additional edits, close the PDF by clicking on the grey close bar at the bottom. This will bring you back to your letter).
8. Click Save.
9. Click Sign PDF.
10. Your letter is complete. You can **fax** the letter from the PDF by clicking the fax icon on the upper right hand corner.
11. This letter can be found in the patient chart under **letters**.



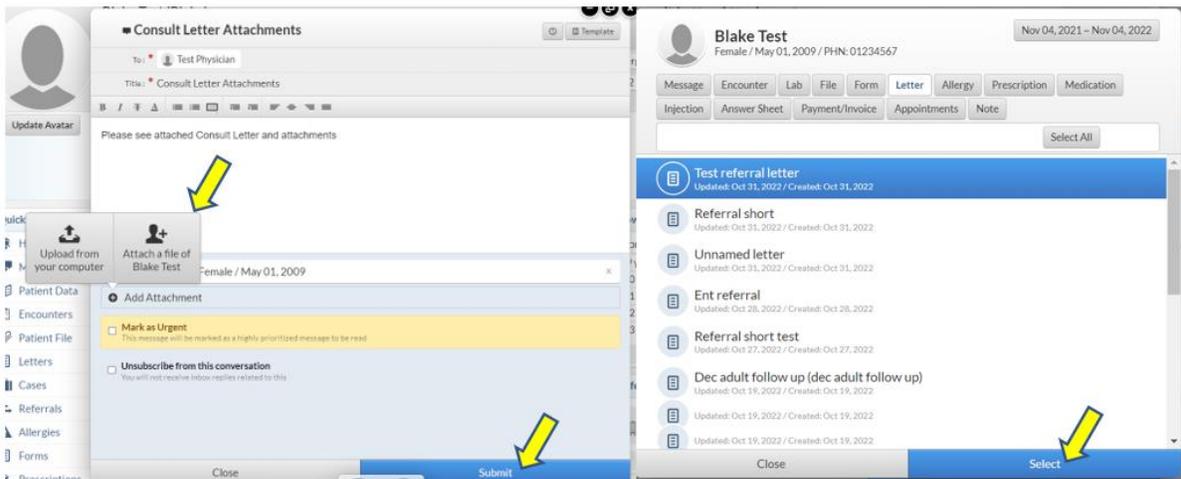
**ATTACHING A LETTER (AND ATTACHMENTS) TO AN INTERNAL CHR MESSAGE (this status may or may not be used, depending on clinic workflows)**

**Steps**

1. Once your letter has been written, go to Messages.



2. Choose the recipient, add a message title, write a brief note in the message body.
3. Click on **Add Attachment**, choose from Patient Files and **select** the relevant letter and accompanying attachments from the patient files section of the chart.
4. Click submit.



## SENDING LETTERS AND ATTACHMENTS FROM THE PATIENT DASHBOARD (this status may or may not be used, depending on clinic workflows)

### Steps

1. Click on the Update Patient from the patient's dashboard view.



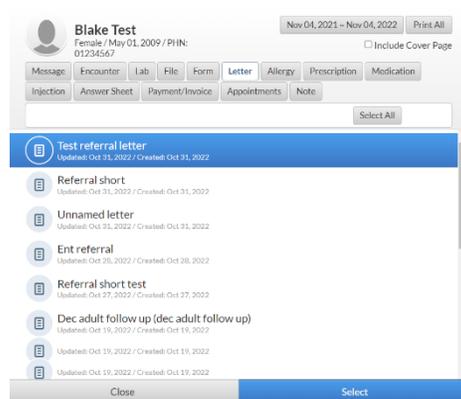
A screenshot of a patient dashboard update form. The form has several input fields: 'CELL PHONE', 'HOME PHONE', 'EMAIL', 'NOTIFICATION METHOD' (with a sub-label 'Email and SMS'), and 'ADDRESS'. There is an 'Update Information' button at the bottom right, which is highlighted with a yellow arrow.

2. Click on Patient Chart



A screenshot of the 'Update Patient' form. The 'Patient Chart' button is highlighted with a yellow arrow. Below the button are tabs for 'General', 'Address & Extra', 'Portal', 'Merge Patient', and 'Accessibility'. The form includes fields for 'TITLE' (Ms.), 'FIRST NAME' (Blake), 'MIDDLE', and 'LAST NAME' (Test).

3. Highlight what you would like to send. You can highlight attachments from multiple sections. When you have finished, click Select.



A screenshot of a patient chart for 'Blake Test'. The chart shows a list of documents with checkboxes for selection. The documents include: 'Test referral letter', 'Referral short', 'Unnamed letter', 'Ent referral', 'Referral short test', and 'Dec adult follow up (dec adult follow up)'. A 'Select All' button is visible at the bottom right of the list.

4. Check your letterhead defaults and click **Save** when the PDF pop up option appears.
5. Click the fax icon on the upper right corner of the PDF and fax the document to the recipient.

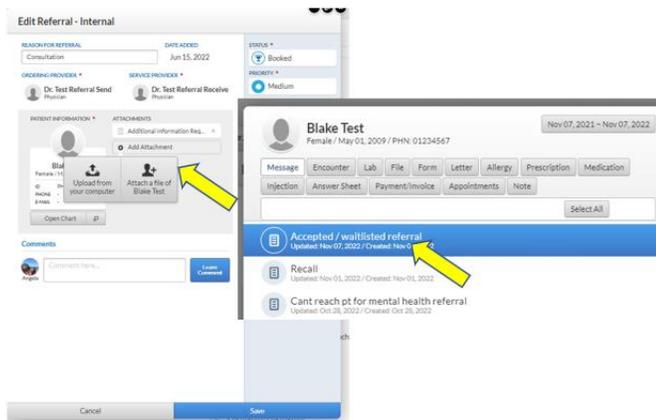
## WHEN ADDITIONAL INFORMATION IS REQUIRED

### FOR INTERNAL REFERRALS

If an ordering provider sends a referral that requires additional information, **the triaging provider or MOA will quickly scan the CHR to see if the information is readily available on the patient chart.**

If they cannot quickly find the information, they will send an internal message that additional information is required with details regarding what is missing. When an additional information required message is received for an internal referral, the ordering provider completes the following steps:

1. The ordering providers will attach any relevant files or information directly to the referral card. By clicking on **Add Attachment**.



2. The ordering provider will leave a comment that the additional information has been attached to the referral card. Don't forget to click **Leave Comment** or the information won't be saved.
3.  The ordering provider will change the status from **Additional Information Required** back to **Requested**. Leave the priority as **Not Yet Triaged**. This step is important as the recipient will be checking **Requested** statuses daily.
4. Click **Save**.

**It is possible that an ordering provider missed switching the status back to requested. It is important to develop a clinic workflow to ensure referrals do not have an Additional Information Required status for an extended period. Work with your EMR Advisor to develop a workflow that works for your clinic.**

## FOR OUTGOING REFERRALS

The ordering provider will receive a letter by fax asking for additional information. If the user is not on CHR, send a letter and attachments (instructions above) back to the referring provider via fax.

## CLOSING THE REFERRAL LOOP

When a referral is received, most specialists send the referring provider an acceptance or rejection letter. If you receive a referral acceptance letter for an outgoing referral, change the status to **Received**.

After the patient has been seen by the specialist, a consult letter will be sent back to the referring provider. If the specialist is on CHR the acceptance letter may be sent by internal message or letter. If not on CHR, it will arrive by e-fax.

When you are comfortable that a referral cycle is complete and no longer has to be tracked by your clinic, change the status to **Archive**. (talk to your EMR advisor about the workflow that best suits your clinic) For example: The patient's surgery or procedure has been performed; The patient is now being followed / case managed by another program; The patient is no longer being followed by the specialist or program.

**It is essential that all CHR users check their referral folders and CHR inbox on a daily basis. If a provider or user will be out of the office, ensure adequate coverage has been implemented.**

HELPFUL REFERRAL RESOURCES CAN BE FOUND AT:

<https://www.princeedwardisland.ca/en/topic/electronic-medical-records-emr>

**Appendix A – Common Prince Edward Island Referral Contacts**

**Appendix B - Common Services Referred Outside PEI**

**Appendix C - Community Referral Resources**

**PEI CHR Active User List**