

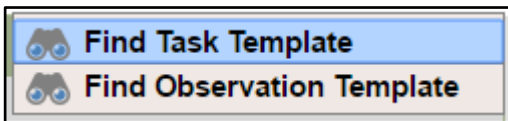
Standardized Referral Template in TELUS Health Med Access

Med Access has released a new standardized generic referral template on behalf of eHealth Saskatchewan. This document provides a brief overview of where to find the template and how to use it.

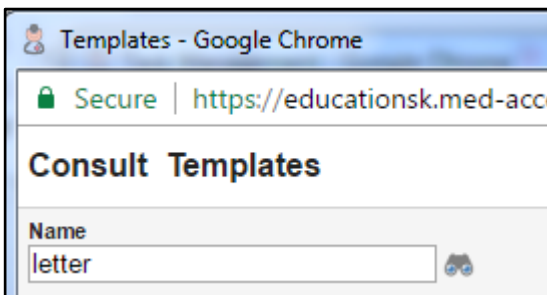
1. Setting the Referral Template as a Favourite

The new standardized generic referral template is a Consult Request Task template. To set it as a favourite:

1. From a patient's Consults tab, start by left clicking the  icon in the top-right hand corner.
2. Click on the  icon in the top-right corner of the new Consult task.
3. In the context menu that appears, select the top option to **Find Task Template**:



4. A popup window will appear. Type "**letter**" in the **Name** field and hit Enter or click the binoculars to search:



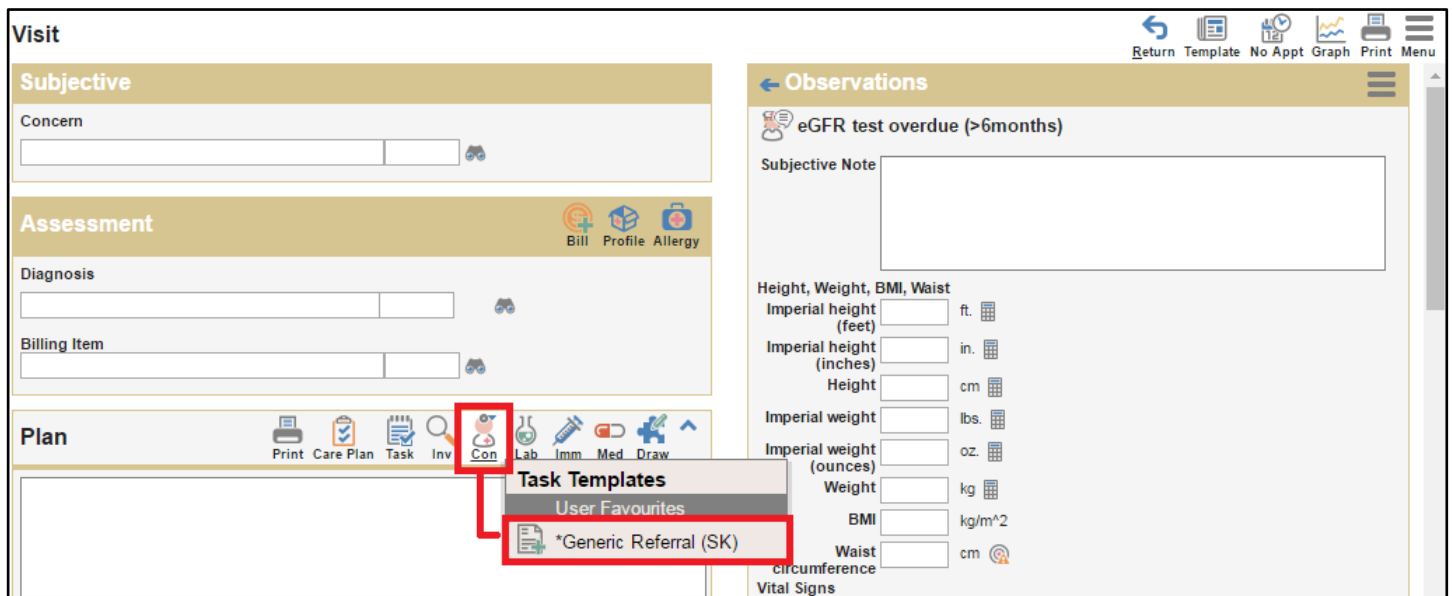
5. Find the ***Generic Referral (SK); Referral Letter** template in the search results and click the  icon under the User heading to set it as your own favourite:

Name	Category	Order Type	Group
letter	Consult	Request	
Name	User	Clinic	
*Generic Referral (SK); Referral Letter			
*Mapped Referral Letter			

2. Accessing the Referral Template from within a Visit

Most commonly, a provider decides to refer a patient to another care provider during a patient's visit. In this scenario, the new standardized generic referral template can be easily accessed without leaving the visit.

1. From within a patient Visit, hover your mouse over the  icon in the Plan section on the left-hand side
2. In the context menu that appears, click on the ***Generic Referral (SK)** template that appears in the User Favourites section:

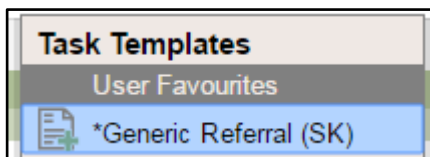


3. A new Consult task will appear, using the standardized generic referral template.

3. Accessing the Referral Template from the Consults Tab

Alternatively, the new standardized generic referral template can be accessed directly from the Consults tab within a patient chart. To access this template from the Consults tab:

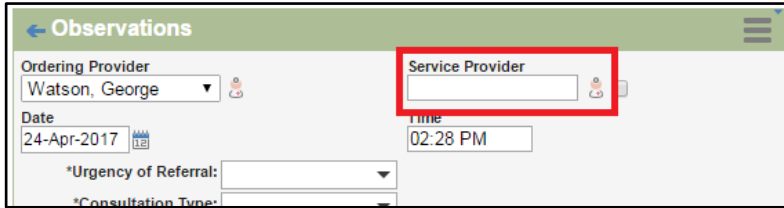
1. From a patient's Consults tab, right-click the  icon in the top-right corner
2. In the context menu that appears, click on the ***Generic Referral (SK)** template that appears in the User Favourites section:



3. A new Consult task will appear, using the standardized generic referral template.

4. Using the Referral Template

Use the **Service Provider** field at the top of the task to select the Consulting Physician you wish to send the referral to:



Observations

Ordering Provider: Watson, George

Service Provider: [Red Box]

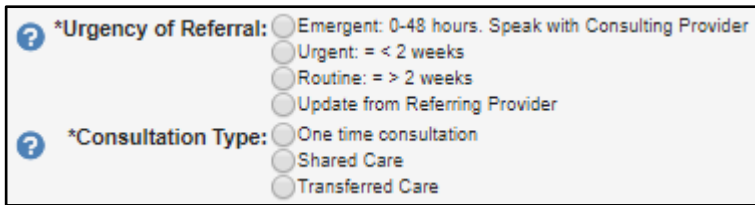
Date: 24-Apr-2017

Time: 02:28 PM

*Urgency of Referral: [Dropdown]

*Consultation Type: [Dropdown]

Use the radio buttons at the top to select the **Urgency of Referral** and **Consultation Type** (these are required fields):



*Urgency of Referral:

- ☐ Emergent: 0-48 hours. Speak with Consulting Provider
- ☐ Urgent: = < 2 weeks
- ☐ Routine: = > 2 weeks
- ☐ Update from Referring Provider

*Consultation Type:

- ☐ One time consultation
- ☐ Shared Care
- ☐ Transferred Care

Hover over info point icons  to see additional information and instructions.

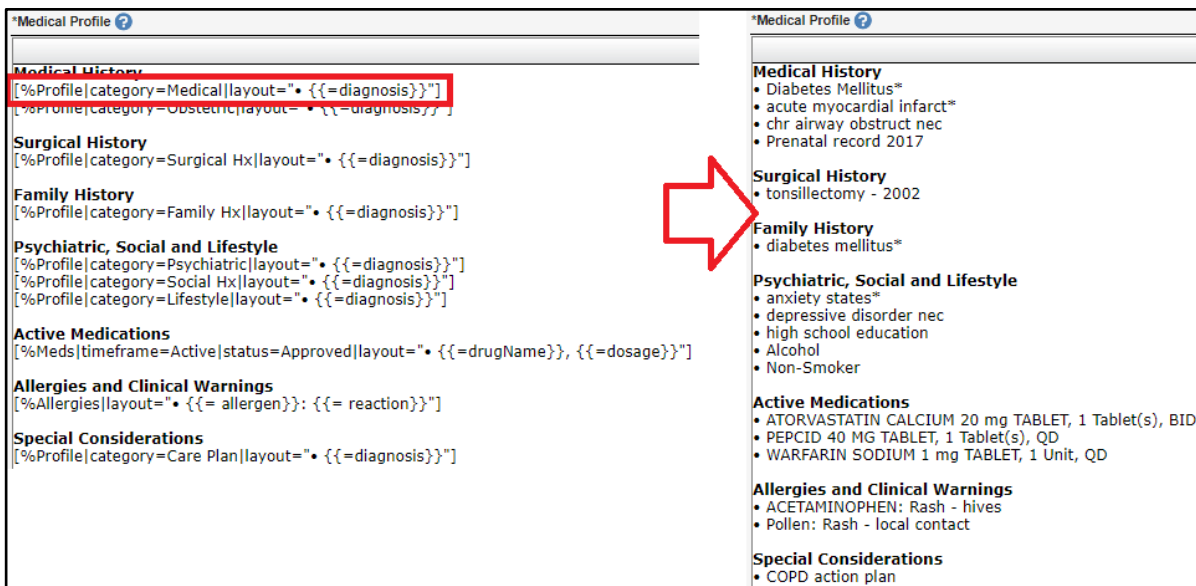
In the Reason for Referral paragraph, double-click any of the macros (eg. [%Patient Full Name]) to execute all the macros:



Thank you for seeing [%Patient Full Name]. [%Patient She/He] is a [%Patient Age]-year old patient from [%Patient City].

→ Thank you for seeing John Locke. He is a 64-year old patient from Saskatoon.

In the Medical Profile paragraph, double-click any of the macros to execute all macros and populate the patient's Profile, Meds and Allergy info automatically from the chart:



*Medical Profile

Medical History

[%Profile|category=Medical|layout="• {{=diagnosis}}"]

[%Profile|category=Obstetric|layout="• {{=diagnosis}}"]

Surgical History

[%Profile|category=Surgical Hx|layout="• {{=diagnosis}}"]

Family History

[%Profile|category=Family Hx|layout="• {{=diagnosis}}"]

Psychiatric, Social and Lifestyle

[%Profile|category=Psychiatric|layout="• {{=diagnosis}}"]

[%Profile|category=Social Hx|layout="• {{=diagnosis}}"]

[%Profile|category=Lifestyle|layout="• {{=diagnosis}}"]

Active Medications

[%Meds|timeframe=Active|status=Approved|layout="• {{=drugName}}, {{=dosage}}"]

Allergies and Clinical Warnings

[%Allergies|layout="• {{= allergen}}: {{= reaction}}"]

Special Considerations

[%Profile|category=Care Plan|layout="• {{=diagnosis}}"]

*Medical Profile

Medical History

- Diabetes Mellitus*
- acute myocardial infarct*
- chr airway obstruct nec
- Prenatal record 2017

Surgical History

- tonsillectomy - 2002

Family History

- diabetes mellitus*

Psychiatric, Social and Lifestyle

- anxiety states*
- depressive disorder nec
- high school education
- Alcohol
- Non-Smoker

Active Medications

- ATORVASTATIN CALCIUM 20 mg TABLET, 1 Tablet(s), BID
- PEPCID 40 MG TABLET, 1 Tablet(s), QD
- WARFARIN SODIUM 1 mg TABLET, 1 Unit, QD

Allergies and Clinical Warnings

- ACETAMINOPHEN: Rash - hives
- Pollen: Rash - local contact

Special Considerations

- COPD action plan

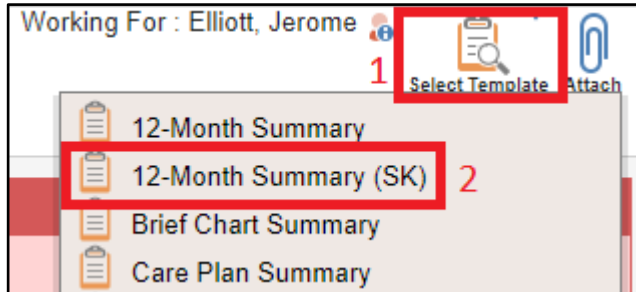
5. Attach a Chart Summary

Attaching a chart summary is the best way to send complete details about historical results and investigations.



Begin by clicking the **Summary** icon in the top-right corner of the task.

In the pop-up window that appears, click on **Select Template** and choose the **12-Month Summary (SK)** option:



By default, no results will be included. Use the checkboxes on the left-hand side to select relevant Lab, Investigation and Consult results to include in your referral as needed.



Click the **Attach** icon to save the chart summary and return to the referral task.

6. Print the Referral Letter

Print the referral letter by clicking the Print icon in the top-right corner of the task:

