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EMR Generic Referral Form

User Guide

EMPOWERING PROVIDERS | CONNECTING PATIENTS

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Background

Accuro has worked with eHealth, the Saskatchewan Ministry of Health and the Wait 1 steering committee to develop a referral letter that aligns with the College of Family Physicians of Canada (CFPC) and the Royal College of Physicians and Surgeons of Canada (Royal College) "Guide to Enhancing Referrals and Consultations between Physicians".

The Saskatchewan Wait 1 Initiative (Improving Access to Specialists and Diagnostics) aims to reduce the wait time for a patient to see a specialist or access diagnostic services. For the referral-consultation process, effective and informative communication was highlighted by physicians as one of the core requirements.

The College of Family Physicians of Canada (CFPC) and the Royal College of Physicians and Surgeons of Canada (Royal College) have provided a "Guide to Enhancing Referrals and Consultations between Physicians". This guide includes templates with data elements that are recommended for "good" referral and consult process.

In Saskatchewan, the College of Physicians and Surgeons, the Senior Medical Officers and the Saskatchewan Medical Associations have endorsed the use of these generic referral and consult letters to support timely, effective and informative communication between primary and specialist physicians. Making these referral and consult letter templates available in the EMR is an effort to make it easier for physicians to meet these standards.

One-time Accuro Configuration

Before completing and generating the referral letter, the EMR must first be configured with the template, introduction and footer to be used as the basis for all referral letters. These configuration steps are only completed once, in order to save the required documentation templates in the EMR.

Creating the Letter Template

Unlike forms, letter templates cannot be downloaded from a central repository. The template will need to be copied and pasted into the Template Wizard in Accuro. The template creates a Clinical Note and becomes the body of the letter that is sent from Accuro.

From the Accuro Start menu, open the Template Wizard.

1. Press 'Alt' on your keyboard

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2. Type "Template Wizard" and tap enter
3. Select the 'New' button in the bottom left hand corner of the Template Wizard
4. Enter a name for the template, such as "Generic Referral Letter"
5. Copy and paste the following into the Template Wizard:

Urgency of Referral: [Emergent (0-48 hours, speak with Consulting Provider)|Urgent: =< 2 weeks|Routine: => 2 weeks|Update from Primary Care Provider]

Type of Consultation requested: [One time consultation|Shared Care|Transferred Care]

Reason for Referral:

Relevant medical profile information, labs, and investigations can be found attached. Further information may be available by accessing the provincial eHR Viewer.

History of presenting complaint:

<MHXPROBLEM>

<MHXSURGICAL>

<MHXFAMILY>

<MHXMEDICATIONS>

<MHXALLERGIES>

<MHXLIFESTYLE>

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Clinical Warnings: [none recorded]

Special Considerations:

Information given to patient:

Test results and historical notes: see attachments

<CURRENTDATE>

6. Some formatting may be required. The final version of the template should look like this:

Urgency of Referral: [Emergent (0-48 hours, speak with Consulting Provider)] [Urgent: =< 2 weeks] [Routine: => 2 weeks] [Update from Primary Care Provider]

Type of Consultation requested: [One time consultation] [Shared Care] [Transferred Care]

Reason for Referral: 

Relevant medical profile information, labs, and investigations can be found attached. Further information may be available by accessing the provincial eHR Viewer.

History of presenting complaint: 

<MHXPROBLEM>

<MHXSURGICAL>

<MHXFAMILY>

<MHXMEDICATIONS>

<MHXALLERGIES>

<MHXLIFESTYLE>

Clinical Warnings: [none recorded] 

Special Considerations: 

Information given to patient: 

Test results and historical notes: see attachments

<CURRENTDATE>

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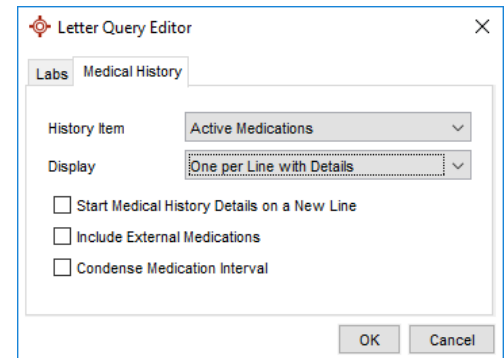
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NOTE: The information populated under the "History of presenting complaint" portion of the template, by default, display in comma separated lists. If desired this formatting can be modified by the user OR additional Medical History Bands can be added to the template if data is recorded differently than described in this document:

1. Delete the text that is the "tag". For example, to replace the Medications with a format of one per line, delete the text '<MXMEDICATIONS>'
2. Select the 'Query' button from the top of the editing tools in the Template Wizard



3. Select the Medical History Tab, and choose the History Item and Display desired



The 'Letter Query Editor' dialog box is shown with the 'Medical History' tab selected. It contains two dropdown menus: 'History Item' set to 'Active Medications' and 'Display' set to 'One per Line with Details'. Below these are three checkboxes: 'Start Medical History Details on a New Line' (unchecked), 'Include External Medications' (unchecked), and 'Condense Medication Interval' (unchecked). 'OK' and 'Cancel' buttons are at the bottom right.

4. Depending on the history item chosen, additional options may be available as checkboxes to determine what should display on the letter for each patient.
5. Once all options are selected, press 'OK' to insert the tag into the template

7. Click save

Creating the Introduction and Footer for the Letter

Accuro creates letters with 4 elements:

1. Header – contains provider information and clinic letterhead (if applicable)
2. Introduction – contains the patient and recipient information
3. Body – comes from the clinical note saved to the patient's chart
4. Footer – contains the provider's signature and any closing greetings

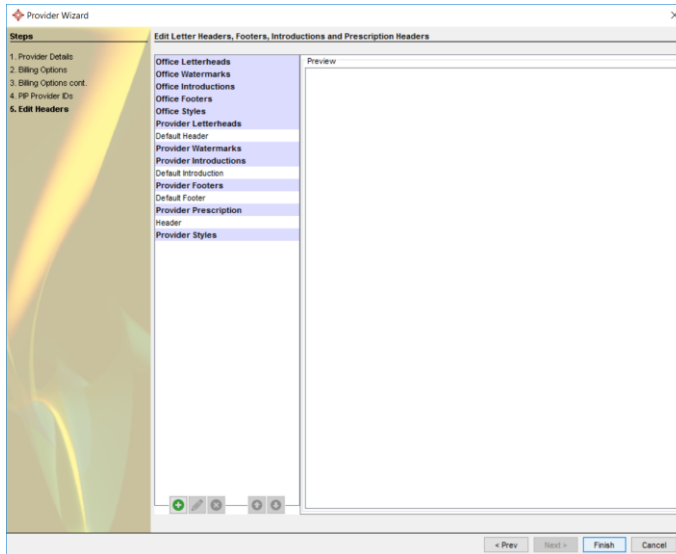
The introduction and footer for this generic referral letter needs to be in a specific format and will need to be created in Accuro.

1. Press 'F2' on your keyboard to open the Provider Management screen
2. Select the name of one provider from the "Search Results" on the left
3. Click the 'Configure' button along the bottom of the screen
4. Now press 'Next' in the Provider Wizard window until the "Edit Letter Headers, Footers, Introductions and

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Prescription Headers" screen displays



5. Press the 'Add' button
6. A window appears asking you to choose the following:
 - a. Level: Office or Provider
 - b. Type: Letterhead, Introduction, Footer or Watermark
 - c. Method: Create New, Copy Existing or Create from Template

Introduction

7. Level – Select "Office", then click 'Next'
8. Type – Select "Introduction", then click 'Next'
9. Method – Select "Create New", then click 'Next'
10. Choose Finish
11. Enter a Title for the introduction, such as "Generic Referral Intro"
12. Delete the text that automatically populates and copy and paste the following into the "Edit Introduction" window:

PATIENT:

<PATFIRSTNAME> <PATLASTNAME>

Address: <PATADDRESS> <PATCITY> <PATPROVINCE>

Postal Code: <PATPOSTALCODE>

DOB: <PATBIRTHDATE>

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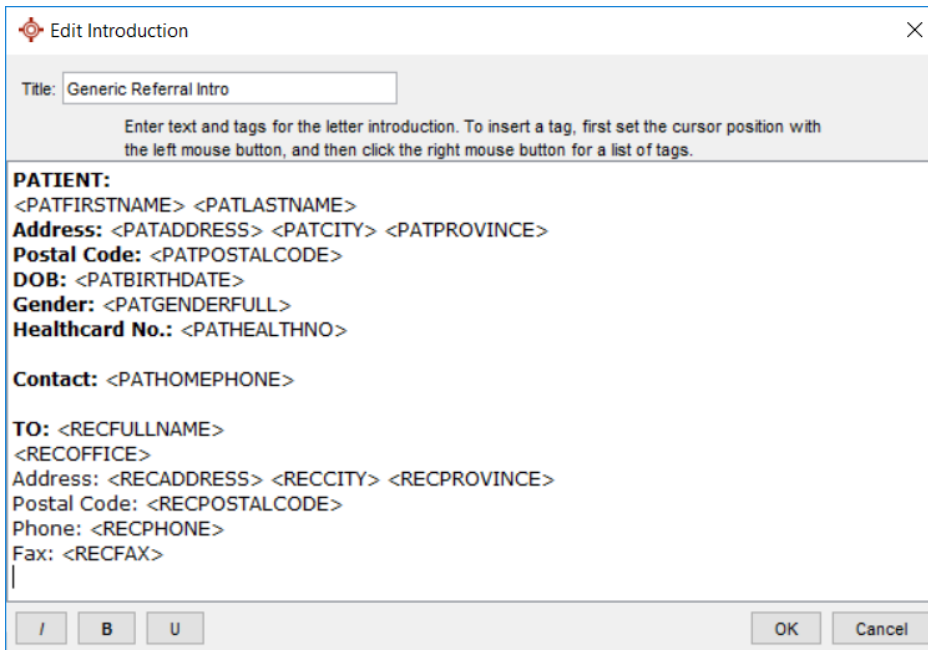
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Gender: <PATGENDERFULL>
Healthcard No.: <PATHEALTHNO>

Contact: <PATHOMEPHONE>

TO: <RECFULLNAME>
 <RECOFFICE>
 Address: <RECADDRESS> <RECCITY> <RECPROVINCE>
 Postal Code: <RECPOSTALCODE>
 Phone: <RECPHONE>
 Fax: <RECFAF>

13. Some formatting may be required. The final version of the introduction should look like this:



14. Press 'OK' to save. Do not press 'Finish' yet, as the footer still needs to be created.

Footer

1. Press the 'Add' button again
2. A window appears asking you to choose the following:
 - a. Level: Office or Provider

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- b. Type: Letterhead, Introduction, Footer or Watermark
 - c. Method: Create New, Copy Existing or Create from Template
3. Level – Select “Provider”, then click ‘Next’
4. Type – Select “Footer”, then click ‘Next’
5. Method – Select “Copy Existing”, then click ‘Next’
6. Choose the footer that is most commonly used for the selected Provider, then click ‘Finish’
7. Modify the Title for the introduction, such as “Generic Referral Footer”
8. Underneath the text that automatically populates as part of the footer, place the cursor and copy and paste the following:

Please use the following link to provide feedback: <https://www.surveymonkey.com/r/ReferralTemplate>

9. Press ‘OK’ to save
10. Now click ‘Finish’

Required EMR fields

The referral form has been created to pull information already recorded in the patient’s chart. Please ensure all information in the patient chart has been updated including the following Medical History Bands BEFORE opening the referral form.

- History of Problems
- Surgical Medical History
- Family History
- Active Medications
- External Medications (if applicable)
- Allergies (if applicable)
- Lifestyle (if applicable)

Generating the letter

Once the Letter Template and Introduction are saved into the EMR and the required medical history bands are confirmed and up to date. The referral letter can be generated for a patient.

1. From the EMR > Encounter Notes tab select a patient by typing into the search field in the upper left hand corner
2. In the electronic drawer (notes/forms dropdown) in the middle of the screen, find the Generic Referral Letter template. The Note template is titled however you named it in step 4 above in [‘Creating the Letter Template’](#)

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Accuro EMR 2017.01 - SK SIPPA TEST SITE

Patient: Test, Kelowna 1980-Sep-08 (36 Yr female) 111 111 111 (306) 666-6777

Day Sheet Encounter Notes Chronic Conditions Virtual Chart Medications Medical History Patient Information

Patient Test, Kelowna 36 years old female

Notes

Generic Referral Letter (NEW)

Forms

Standard Forms:

SK - Generic Consult Form

SK - Generic Referral Form

gener

Edit

3. Click on the title of the template to open the note
4. All information that is already in the patient's chart will populate into the letter. Enter additional text where required and double click on any clickable words that need to be selected. Moving through the letter line by line:
 - a. Urgency of Referral - For all emergent referrals, please speak with consultant on call. For advice on other referrals, consider using LINK telephone access program at 1-888-831-2225 (ACAL) or 306-766-6050 (Bedline) for select specialties.
 - b. Type of consultation requested:
 - i. *One time consultation* - use for simple problems, basic surgical issues.
 - ii. *Ongoing shared care* - use for management of some chronic illnesses, shared prenatal care, cancer management, etc.
 - iii. *Transferred care* - use for most emergency referrals, acute medical issues or complex health needs beyond the scope of the primary provider (e.g. complex addictions, some hospice care, rehabilitation, etc.)
 - c. Reason for Referral: What are the clinical questions you hope will be answered by this referral? Urgency of referral should also include any requests for specific specialist-led investigations
 - d. Medical Profile: Please use the special considerations section to provide details regarding

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psychiatric/social problems, concerns regarding patients understanding, need for an interpreter, specific wishes of patient/patient's family etc.

Please refer to <http://www.albertahealthservices.ca/assets/info/hp/arp/if-hp-arp-referral-by-design.pdf> for additional referral recommendations (Government of Alberta)

5. Press the 'Gen. Letter' button
6. The "Letter Generation" window opens, and the proper information along the left of the window needs to be selected:
 - a. Select the  to search the address book for the recipient (Consulting Physician)
 - b. Enter any Carbon Copies by pressing the add button and searching the address book
 - c. Ensure the correct header and footer (with signature) have been chosen. The 'Generic Referral Letter' footer should be selected in the second dropdown
 - d. The last dropdown determines the introduction, ensure the Generic Referral Intro has been chosen
 - e. If any medical history populates in the introduction area, click the 'Medical History...' button and de-select "All".
 - f. Use the Add button under "Attachments" to include any other chart items with this referral
7. Make any final formatting edits to the letter before sending it to the Consulting Physician

From:
 Grey, Meredith [5555] ▼

To:
 Kepner, April   

April Kepner
 123 Main Street
 Saskatoon, SK
 Phone: (306) 555-4444
 Alternate Phone: (000) ____-____
 Fax: (360) 555-5656

Carbon Copies (Cc):
 Sloan, Mark
   

Default Header  

Generic Referral Footer 

☒ Include Page Number ☒ Include Patient Name

--None-- 

Generic Referral Intro  

 **Medical History...**

Attachments

2014-Sep-24: SOAP
 2016-Apr-11: Diabetes (SK QIP)
 2014-Sep-29 - Physical History

☐ Show Enclosure Names

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Sending the letter

When the letter is complete, it is sent to all selected recipients and should be tracked in Accuro in the "Outstanding Requisitions, Referrals and Orders" area.

To fax the letter:

1. Choose the 'Send Letter' button at the bottom of the "Letter Generation" window to fax it to the selected recipients. The Letter/Fax Recipients window displays
2. Check the 'Referral Letter' checkbox and ensure that the dropdown has 'New Referral Order' chosen

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Letter / Fax Recipients

Recipient	Address	Long Distance	Fax	Print	Fax Number
April Kepner		.	✓	.	(360) 555-5656
Mark Sloan		.	✓	.	(306) 555-8989

☒ Referral Letter

New Referral Order--

Coversheet Message

☐ Send Faxes Later Manually
 ☒ Include Coversheet

Send

Preview

Cancel

3. Add any coversheet messages, and press 'Send' when ready

Billing reminder: Use 55B to help collect wait time data

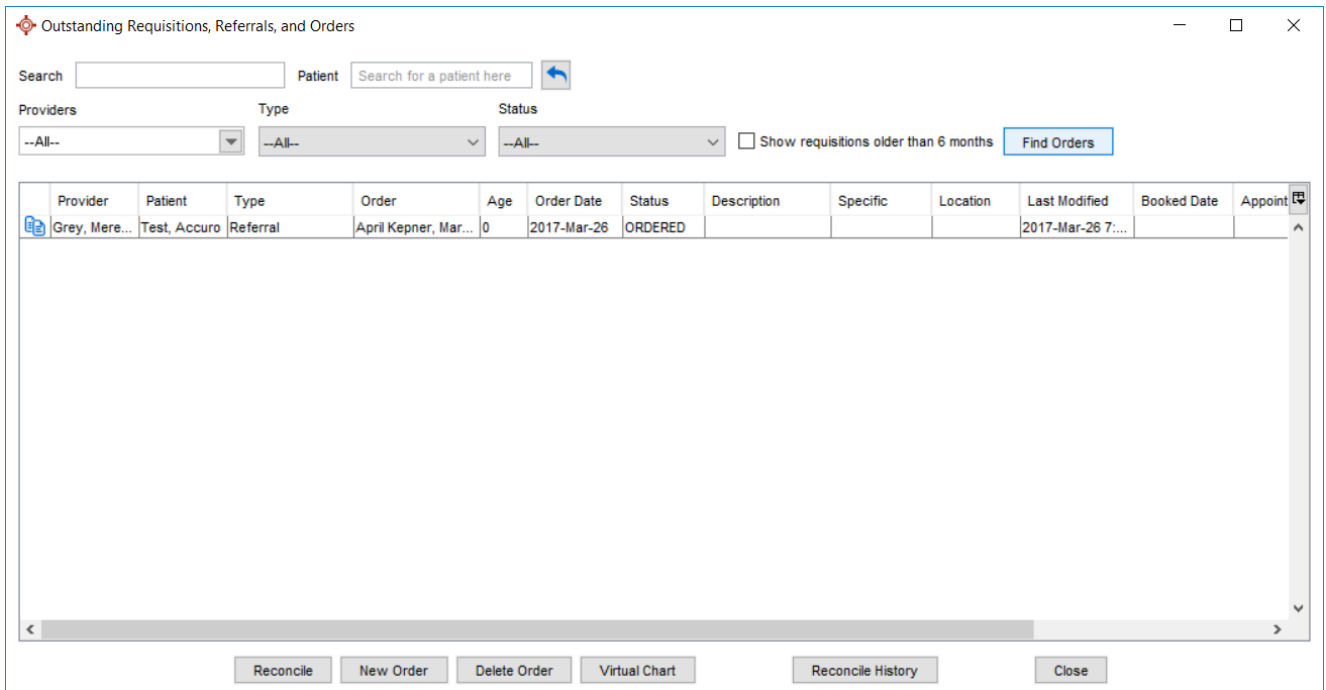
Outstanding Requisitions, Referrals and Orders

Referral letters that have been sent from Accuro can be tracked in a single location. Open the Outstanding Requisitions, Referrals and Orders report from the Accuro Start menu.

1. Press 'Alt' on your keyboard
2. Type "Outstanding Requisitions" and tap enter
3. Select 'Find Orders' to populate the list. Search criteria can be entered first

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Provider	Patient	Type	Order	Age	Order Date	Status	Description	Specific	Location	Last Modified	Booked Date	Appointment
Grey, Mere...	Test, Accuro	Referral	April Kepner, Mar...	0	2017-Mar-26	ORDERED				2017-Mar-26 7:...		

- There are fields to indicate when the consult has been booked, contact information or any description, location or specific details that may be relevant

Information to Assist when completing the letter:

Type of consultation requested:

One time consultation - use for simple problems, basic surgical issues.

Ongoing shared care - use for management of some chronic illnesses, shared prenatal care, cancer management, etc.

Transferred care - use for most emergency referrals, acute medical issues or complex health needs beyond the scope of the primary provider (e.g. complex addictions, some hospice care, rehabilitation, etc.)

Urgency of Referral:

For all emergent referrals, please speak with consultant on call. For advice on other referrals, consider using LINK telephone access program at 1-888-831-2225 (ACAL) or 306-766-6050 (Bedline) for select specialties.

Reason for Referral:

What are the clinical questions you hope will be answered by this referral? Urgency of referral should also include any

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requests for specific specialist-led investigations

Medical Profile:

Please use the special considerations section to provide details regarding psychiatric/social problems, concerns regarding patients understanding, need for an interpreter, specific wishes of patient/patient's family etc.

Please refer to (<http://www.albertahealthservices.ca/assets/info/hp/arp/if-hp-arp-referral-by-design.pdf>) for additional referral recommendations (Government of Alberta)

Billing reminder: Use 55B to help collect wait time data

Training and Support

QHR Technologies can provide your clinic with support and user training. User training may be subject to a fee.

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