Connect Care Referral Management

What is Referral Management?

Referral is a prescribing process in which one provider (prescriber) requests services of another provider (consultant). It affects, and is affected by, other information processes including decision support, clinical documentation and clinical process improvement. Referral management is about how accountability is assigned, standards are applied, error is minimized, and communication is coordinated. Closed loop referral management tracks all referral actions, with patient, prescriber and consultant aware of expectations and outcomes at each phase from need discovery through to need fulfillment.

Why does Referral Management Matter?

Referral management is a multi-stakeholder process that can suffer from miscommunication at one or more steps in a referral management loop. Fragmented processes can complicate the work of health care providers and put patients at risk. Streamlined referral management is an improvement priority for AHS and a design priority for the Connect Care clinical information system (CIS).

As Connect Care grows, closed loop referral management can grow. Hybrid processes will continue during transitions and where referrals bridge Connect Care and non-Connect Care systems.

How are Referrals Managed within Connect Care?

- Where both referrer and consultant use Connect Care as the record of care, all referrals must be ordered and managed using Connect Care tools and workflows.
- All referrals that can be initiated and fulfilled within the CIS use closed-loop referral management, providing patients and providers with a clear understanding of referral progress at any point in time.

How are Referrals from outside Connect Care Managed?

- Standardization of AHS processes will help those working outside a Connect Care context by standardizing referral access, selection, intake, triage and scheduling for Connect Care consultations.
- Referrals to Connect Care consultants from prescribers who do not use the Connect Care CIS can be accepted via facsimile, mail, telephone, Netcare eReferral or (preferably) the Connect Care Provider Portal. This gets a referral to intake. Thereafter referral management occurs within Connect Care, with communications e-delivered, faxed, eReferral-recorded or mailed to the referring provider.

How are Referrals Managed while Transitioning to Connect Care?

- As the Waves of Connect Care roll out, Connect Care service providers will continue to accept existing methods for referral from areas where Connect Care has not yet launched.
- Referral intake from outside Connect Care contexts may involve manual re-entry or attachment of the information received to the Connect Care CIS.
- Whenever possible, external prescribers using Netcare eReferral will be encouraged to use the Connect Care Provider Portal; piloting this approach with some external clinics that routinely refer to Connect Care specialists.

Who guides Referral Management in Connect Care?

- A Primary Health Care Integration Network engages health system stakeholders to develop and co-design a mutually agreeable future state for referral management in Alberta, including clarification of workflows for Electronic Medical Record (EMRs), Alberta Netcare eReferral and the Connect Care Provider Portal.
- Connect Care Area Councils and the Non-AHS Community Prescribers Advisory Group (NACPAG) oversee optimization of Connect Care referral tools; ensuring that health profession stakeholders, community physicians and Primary Care Networks (PCNs) are fully involved.

Alberta Health Services