



Referral Norms

Bottom Line

- **Prescribers**, clinicians and staff who provide services in Alberta Health Services (AHS) departments where Connect Care is the record of care, must order, triage and schedule any referrals to or from that department within Connect Care.¹
- Any referral using Connect Care must be processed using the Closed Loop Referral Management² tools provided within the Connect Care clinical information system.
- Requests for exceptions to Connect Care referral norms will require review and approval by the Connect Care Executive Committee.

Objectives

- Closed loop referral management is key to AHS's commitment to safe and effective referral processes for patients, their families, and healthcare providers.
- Use of fax or other means of processing referrals outside of the Connect Care record of care *unnecessarily* increases risks for errors, omissions, miscommunications, and delays that could put patients' health at risk.

Significance

- It is apparent that many prescribers are unaware of requirements and associate processes for closed-loop referral management in Connect Care. Clear direction and correction of misperceptions are required.
- The Closed Loop Referral Management tools in Connect Care enhance patient safety by tracking referral progress through all stages from request to fulfillment, while notifying stakeholders of any delays or deficiencies.
- The electronic transmission of referrals in Connect Care reduces dependence on faxing, and the inherent risks and inefficiencies to which faxing contributes.

Norms

- **Referral Orders:**
All referrals originating in Connect Care must be placed as a referral order, regardless of whether the service provider or program is internal or external to Connect Care. This ensures that a record of the referral exists in the legal record of care.
- **Referral Intake:**
Connect Care referral workflows will continue to accommodate current intake processes from prescribers not using Connect Care as the record of care.
- **Referral Management:**
All received referrals, whether from sources internal or external to Connect Care, must be managed using triage, scheduling, communication and other referral tools provided by Connect Care.
- **Referral Competence:**
Prescribers, clinicians and staff (including non-AHS Medical Office Assistants) are required to complete appropriate training to gain access to referral management tools.

¹ Connect Care Executive Committee, December 9, 2020

² HQCA, "Improving Continuity of Care: Key Opportunities and a Status Report on Recommendations from the 2013 Continuity of Patient Care Study", April 29, 2016.