

*eReferral*

**Transforming Alberta's  
Referral Experience**

**eHealth JUNE 3, 2015**

**Allen Ausford** MD FCFP Clinical Professor

# Faculty/Presenter Disclosure

Dr. Allen Ausford, FCFP, Clinical Professor

- **Relationships with commercial interests:**
  - Consulting fees
    - Alberta College of Physicians and Surgeons
    - Canadian Medical Protective Association
    - Alberta Health Services
    - Alberta Health
    - Orion Health

# Disclosure of Commercial Support

- Potential for conflict of interest:
  - Due to his extensive clinical experience using Alberta's Netcare system, Dr. Ausford received compensation from Orion Health to facilitate the physician user perspective during the development of the eReferral software.
  - Dr Ausford does additional consulting work with Orion Health
    - Demonstrations
    - Site Visits
    - Software Development
    - General Clinical / IT advice
    - Member of Northern Hemisphere Clinical Working Group

# Mitigating Potential Bias

- The focus of this presentation is on the functionality of the eReferral software from a user's perspective
- The information is presented with the purpose to inform others on lessons learned

# Referral letters

**Dear Doctor,**

I am apparently referring this man to you.

Unfortunately I can't find any records in the notes as to why, but I'm sure you will find out.

**Yours sincerely with kind regards**

**GP Letter to an Outpatient Clinic :**

Dear Dr W,

Regards Mrs X, Bradford-upon-Avon.

Please see and advise.

**The letter got the following reply :**

Dear Dr Y,

I have seen your patient and advise you to do the same.

# Talk Agenda

## *eReferral*

**Alberta Netcare** *enabled*

**Potential** *scope*

**Look** & *Feel*

**Features** & *benefits*

**Updates**

**Referral** *evolution*

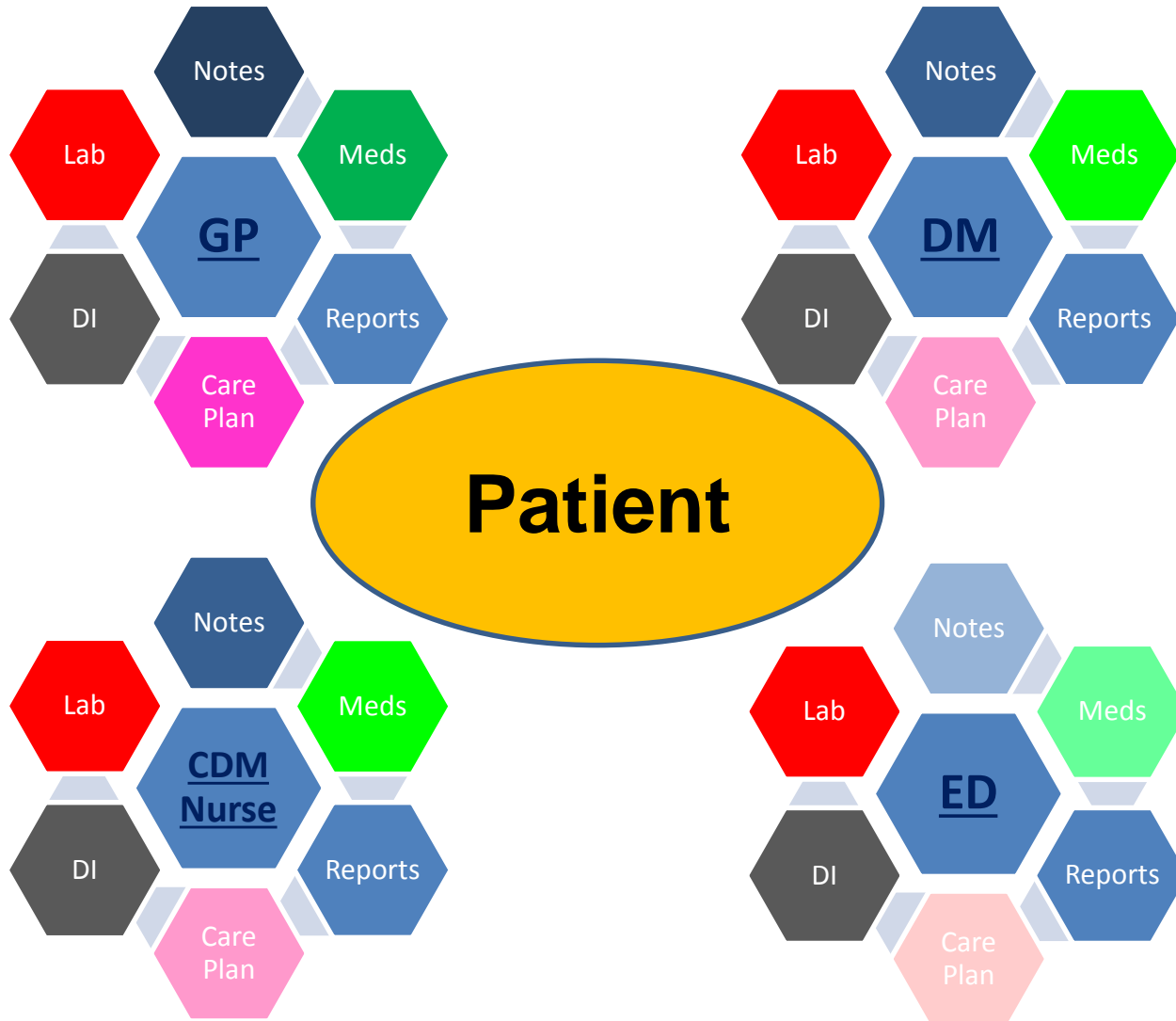
**Goals**

**Key** *insights*

# Local Definitions

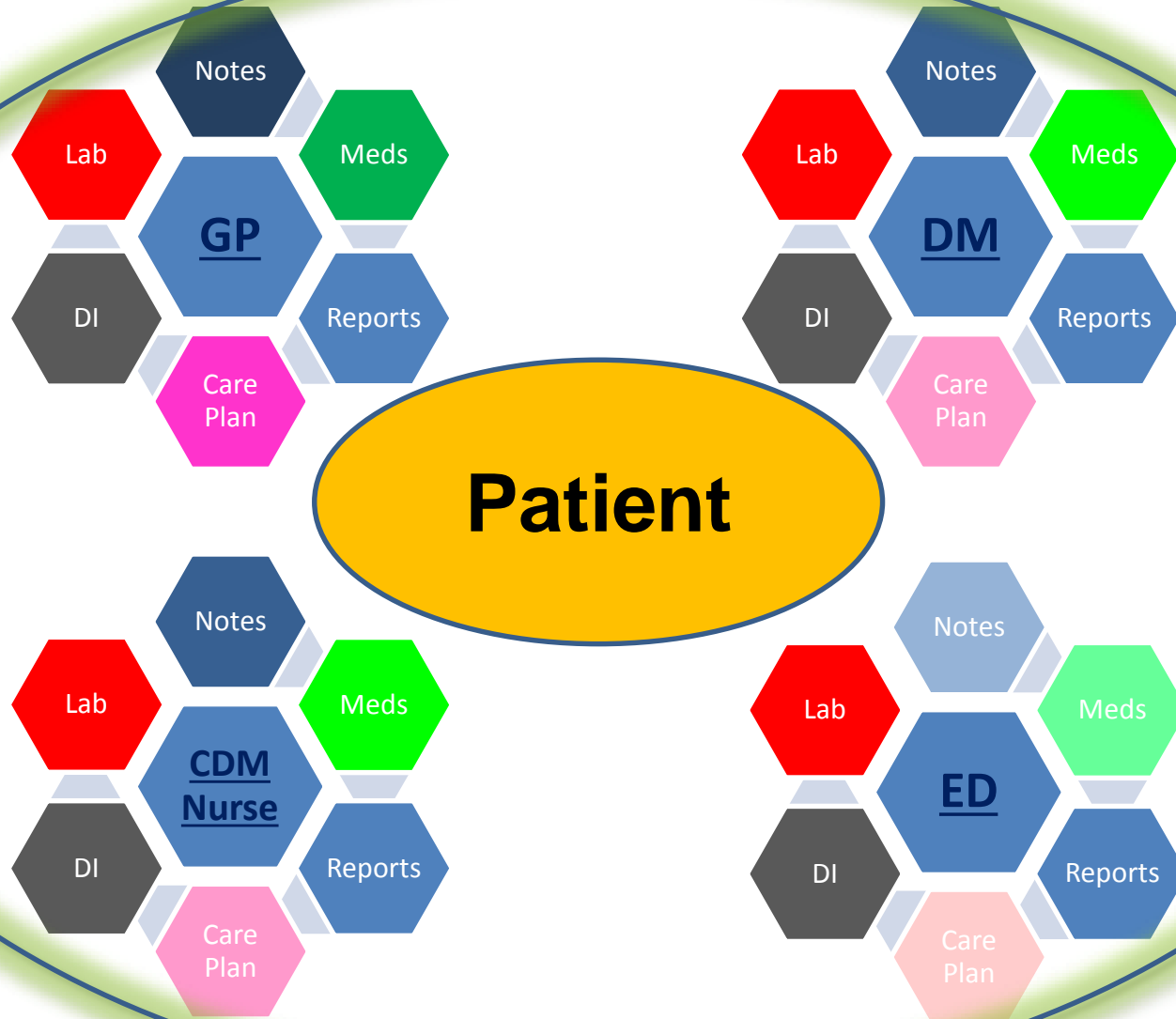
- **Electronic Health Record (EHR) = Alberta Netcare**
  - Mainly Patient Centric
  - Not always used with every patient encounter
  - Subset of pertinent global clinical information
  - Shared Information Tool (Information is usually pulled)
  - User: Read mainly
  
- **Electronic Medical Record (EMR)**
  - Mainly Provider or Facility Centric
  - Equivalent to the clinic paper chart
  - Detailed local clinical encounter information
  - Not Automatically Shared with other systems (Information is usually pushed)
  - User: Read / Write

# Provider Centric EMRs





# Patient Centric EMR's/EHR



# Alberta Netcare (EHR/HIE)

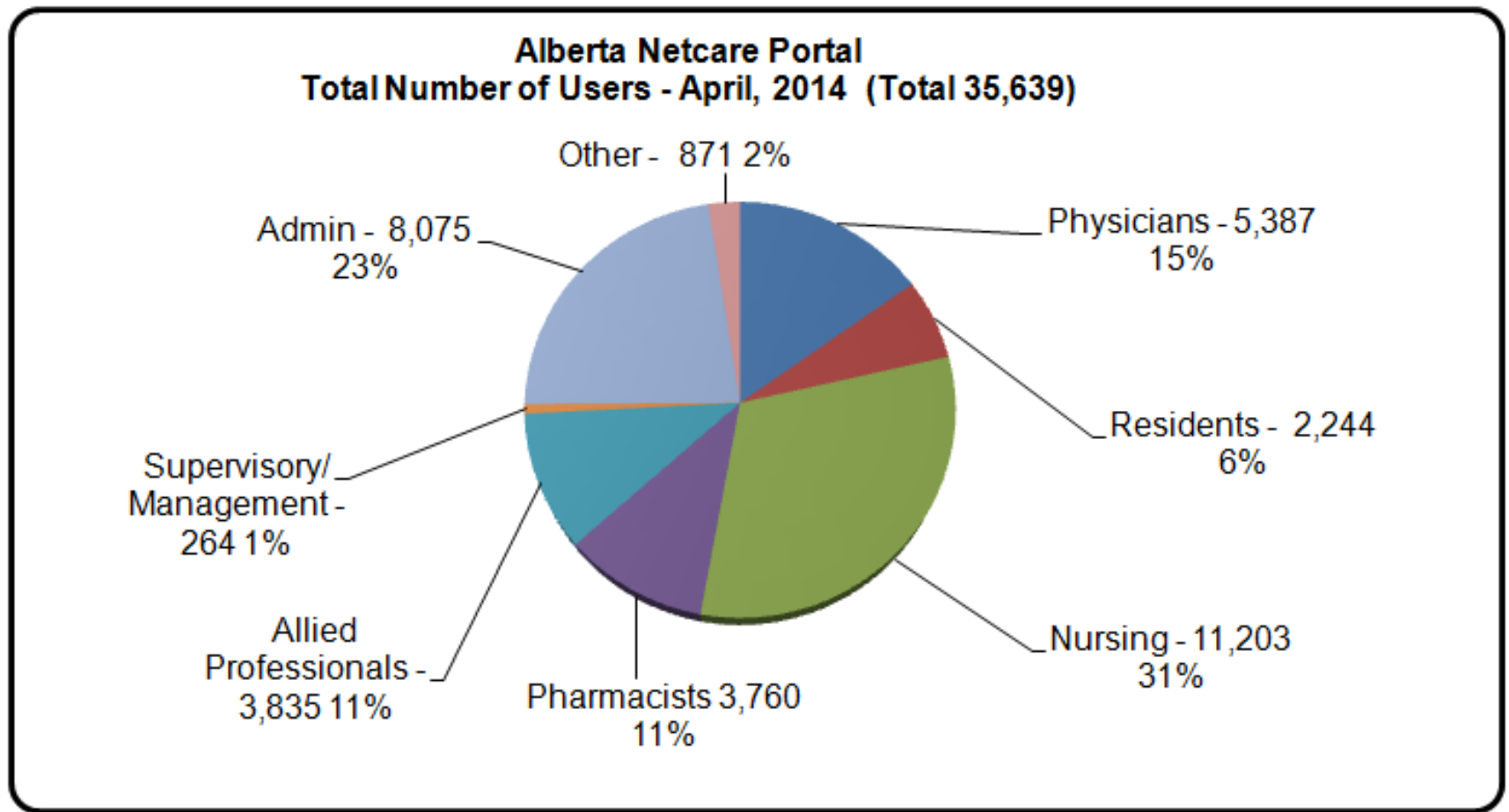
## Orion Health Suite

- Provider Portal
- EMR context launch
- Case management
- Pharmaceutical Information Network
- PAC system / Viewer
- Population Health dashboard
- List capabilities
  - ADT generated
  - Provider generated
- Messaging
- Resources and links
- Data integrity
- Enhancement request
- eReferral

# Alberta Netcare Statistics

- 96% of dispensed medications
- 92% of all laboratory test reports
- 92% of diagnostic images and reports
- >200 million screens of information accessed by Alberta Health professionals

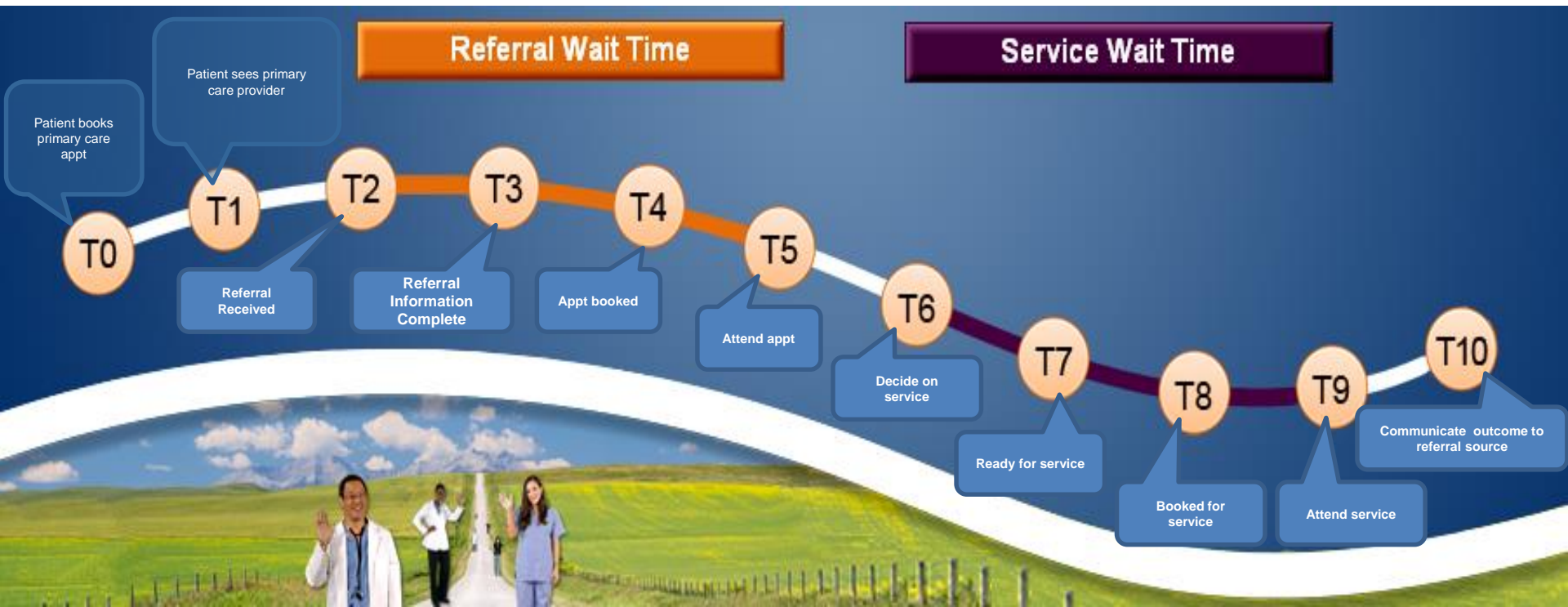
# Alberta Netcare Statistics



# What is Path to Care

A provincial program aimed at improving the way we manage referrals and patient wait times.

*Right Care* *Right Place* *Right Time*



# eReferral Development

## Clinical Design Team

- 9 Design Team meetings February-April 2013
- 12 Voting members
- 15 Support members
- Terms of Reference
- Guiding Design Principles
- Weekly telecom update/vetting meetings with broad group of potential users
- July 2014 Limited Production Rollout go-live

# eReferral Development

## Key requirements

- Province wide
- Leverage current Netcare data/platform
- Standardized form tools / Time efficient
- User Friendly / Team based
- Tracking /Triaging
  - Referrals
  - Wait times
- Health Services Catalogue enabled

# What is it?

Features & Benefits

**Simple.**

**Timely.**

**Personal.**

track referrals. check for completeness. advice or consult. delegate authority. shared work. save drafts. view wait times. view referral history. accessible. searchable catalogue. leverage Netcare info.

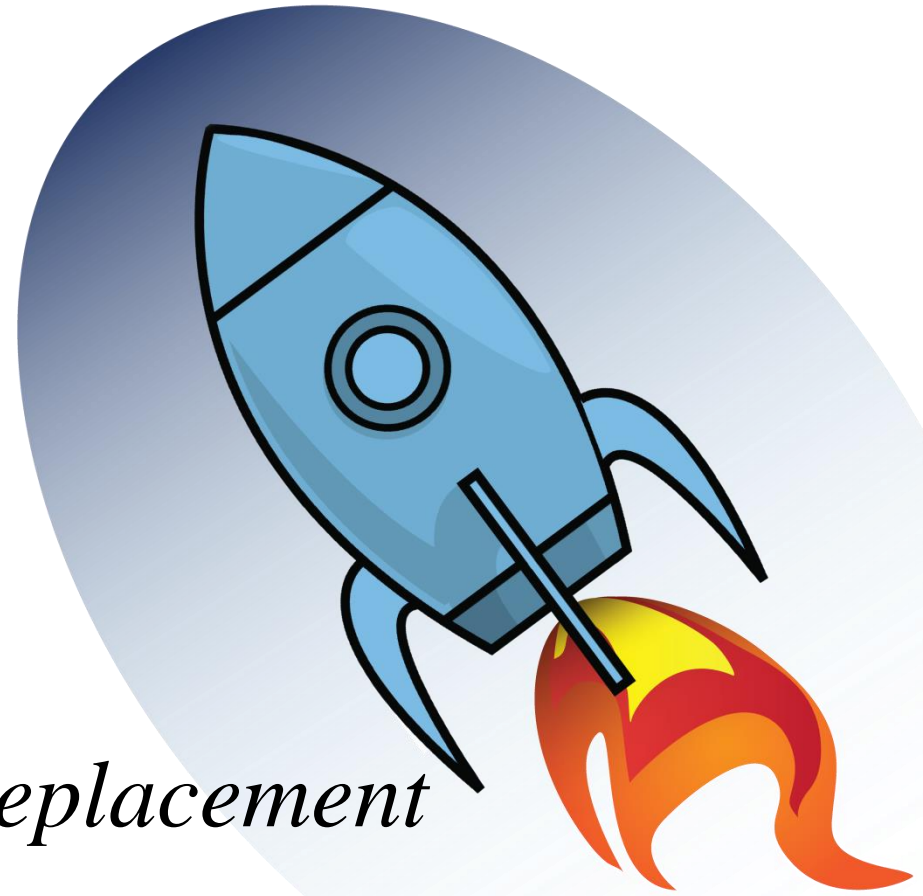


# LIMITED PRODUCTION ROLLOUT

**breast** *cancer*


**lung** *cancer*

**hip and knee** *joint replacement*



14.Jul.2014

# LOOK AND FEEL Home Page





training26

Home Settings Help

Logout

- Common
  - My Details
  - Worklists
- Favourites
- Searches
- eReferral
- Patient Lists
- Clinical eTOOLS
- Resources
- Enhancement Request
- Messaging

You last logged in 21-Oct-14 15:56

## My Referrals

### My Referrals

Referrals	Total
Recently Updated	0
Cancelled/Declined	0
Additional Information Requested	0
Drafts	2
Undelivered	0
In Progress	0
Completed	0

### Triage Referrals

#### Triage Referrals

Referrals	Total
Drafts	2
Undelivered	0
Triage	24
Information Requested	3
Waitlisted	2
Deferred	0
Scheduled	0
Completed/Cancelled/Declined	3

## Search for a Patient

### Patient Search

Identifier

Identifier Type PHN / ULI

Last Name  Date Of Birth  -- Month --  Year


First Name  Sex All Female Male

Middle Name/Initial  Phone Number

Search Tip : An identifier search is recommended. For name search, please enter the complete last name, complete first name and date of birth.

### Recently Viewed Patients


#### Last 7 Days

<input type="checkbox"/>	Identifier	Name	Sex	Age	
<input type="checkbox"/>	42534-6114	SIMPSON, George	M	84 years	-
<input type="checkbox"/>	10124-9034	BLACK, Edward	M	102 years	-

Remove None selected

Showing 2 of 2

#### Last 4 Weeks

<input type="checkbox"/>	Identifier	Name	Sex	Age	
<input type="checkbox"/>	10006-8677	HEART, Jim	M	68 years	-

# LOOK AND FEEL Health Services Catalogue

Often used search terms can be saved for future use

Search terms are easily identified and can be used to funnel results

## Health Services Catalogue

Select a favourite search ▾

Provider

Specialty

Reason for Referral

Facility

Sub Specialty

City

Zone  North  Edmonton  Central  
 Calgary  South

Items can be sorted by any heading

Reason for Referral	Sub Specialty	Specialty	Facility	City	Zone	Provider	Approximate Wait Time	Accepting New Referrals	Referral Resume Date
<a href="#">Ductal carcinoma in situ - post segmental resection breast cancer</a>	Breast Cancer	<a href="#">Oncology</a>	<a href="#">Central Alberta Cancer Centre</a>	Red Deer	Central	Next Available	29 calendar days	Y	
<a href="#">Locally advanced breast cancer</a>	Breast Cancer	<a href="#">Oncology</a>	<a href="#">Central Alberta Cancer Centre</a>	Red Deer	Central	Next Available	29 calendar days	Y	

Search results are service matched by reason for referral

Wait times and referral acceptance information are available for every receiving provider

# LOOK AND FEEL Reason for Referral & Request Type

42534-6114 SIMPSON, George (M/83 years)

## Request for Service

### Select a Form

Reason for Referral \*

Refer For \*

Save drafts

Track patient referrals throughout the system

Send requests for consultations and advice

## Drafts

Special Considerations	Creation Date	Referral Reason	Referring Provider	Created By	Request Type
	20-Jan-2014	Legg-Calve-Perthes disease	Dr. Allen E. AUSFORD	Twenty Training	Consult

Results 1-1

## In Progress

Special Considerations	Received Date	Referral Reason	Referring Provider	Appointment	Triage	Elapsed Time	Approximate Wait Time	Request Type	Service Provider	Status	Status Reason	Last Modified
Y	03-Jan-2014	Benign bone tumor	Dr. Giovanni E. COPPOLA		Alberta Hip and Knee Clinic	3 weeks 6 days	77 calendar days	Consult		Waitlisted		3 weeks 6 days
	23-Jan-2014	Knee pain	Dr. Dennis K. WONG		Edmonton Musculoskeletal Centre	6 days	35 calendar days	Consult		Waiting for Clerical Triage		6 days

# LOOK AND FEEL Standardized Referral

R

## Triage Requirements

Has the Patient or Guardian been informed of the diagnosis or Reason for Referral? \*

Standard requirements for triage

Tissue Pathology / Cytology \*  Attached

The following tests must have been completed within the last 28 days. Any tests that are older need to be reordered.

Chest X-ray or CT \*  Attached  Ordered

Date Ordered \* 12-Feb-2014

Location

Abdominal Imaging US or CT \*  Attached  Ordered

Bone Scan \*  Attached

The following laboratory tests must have  
**Required laboratory tests:**

CBC with differential  
Renal function: Creatinine  
Liver function: ALT/AST, AP, Total Bilirubin  
Electrolytes: Calcium

Laboratory tests \*  All available  
 No tests available

Ability to attach labs & images

## Attachments

Link Alberta Netcare Portal Laboratory Results

*The results displayed on this referral may not be the most recent version. Clicking on the above links will allow you to view the most recent results.*

Link Alberta Netcare Portal Reports

*The reports displayed on this referral may not be the most recent version. Clicking on the above links will allow you to view the most recent reports.*

Attach External Documents

Questions to assist triage

Comorbidities

- History of stroke
- Cardiovascular disease (e.g. prior MI)
- Respiratory disease
- Peripheral vascular disease (PVD)
- GI disease
- Renal disease
- Liver disease (e.g. Hepatitis B or C)
- Diabetes
- Rheumatologic disease (e.g. SLE, scleroderma etc.)
- Active infections (e.g. MRSA, shingles, TB, VRE)
- Cognitive issues
- DVT
- VTE
- Any other concurrent medical problem

Requested Action \*

Cancer pain and symptom management

# LOOK AND FEEL Triage Dashboard

## Triage

Select a favourite search ▼

Received Date  to

PHN/ULI

Referral Reason

Status  Reassigned  Waiting for Clerical Triage  Clerical Triage in Progress  Waiting for Clinical Triage  
 Clinical Triage in Progress  Information Provided  Waiting for Appointment

Request Type  Consult  Advice

Referrals for Review  All  Yes

[Search](#) [Reset](#)  +

Multiple filter options for referral display

Creates a common workspace for the triage team

Calculates elapsed time since submission and shows provincial access targets

Patient Name	DOB/Age	PHN/ULI	Review	Received Date	Referral Reason	Referring Provider	Submitted By	Response Target	Access Target	Elapsed Time	Time to Target (days)	Request Type	Status	Status Reason	Last Modified	Last Modified By	Letter/Fax
SIMPSON, George	22-Jun-1930 (83 years)	425346114		03-Jan-2014	Non small cell lung cancer	Dr. Giovanni E. COPPOLA	Twenty One Training	2 business days	3 weeks	3 weeks 6 days	6	Consult	Waiting for Appointment		2 days ago	Twenty Six Training	<a href="#">Generate</a>
SIMPSON, George	22-Jun-1930 (83 years)	425346114		03-Jan-2014	Locally advanced breast cancer	Dr. Giovanni E. COPPOLA	Eleven Training	2 business days	3 weeks	3 weeks 6 days	6	Consult	Information Provided		2 weeks 2 days ago	Twenty Seven Training	<a href="#">Generate</a>
OUTPOST, John Robert	11-Apr-1948 (65 years)	200196114		13-Jan-2014	Mesothelioma	Dr. Giovanni E. COPPOLA	Twenty Seven Training	2 business days	3 weeks	3 weeks 6 days	6	Consult	Waiting for Appointment		2 weeks 2 days ago	Twenty Seven Training	<a href="#">Generate</a>
BLACK, Edward	16-Jan-1912 (102 years)	101249034		13-Jan-2014	Knee pain	Dr. Giovanni E. COPPOLA	Twenty Seven Training	7 calendar days	8 weeks	2 weeks 2 days	-40	Consult	Waiting for Appointment		1 week ago	Twenty Six Training	<a href="#">Generate</a>
BLACK, Edward	16-Jan-1912 (102 years)	101249034		13-Jan-2014	Non small cell lung cancer	Dr. Giovanni E. COPPOLA	Twenty Seven Training	2 business days	3 weeks	2 weeks 2 days	-5	Consult	Clerical Triage in Progress		2 weeks 2 days ago	Twenty Seven Training	<a href="#">Generate</a>

# Recent referral stats

**Hip and Knee Joint Replacement – 398**

**Lung Cancer – 156**

**Breast Cancer - 924**

# Update

## Hip and Knee Joint Replacement

### Feedback

- *Some duplication of work with EMR*
- *Health Services Catalogue wait times extremely helpful*
- *Need more groups receiving referrals for it to be useful*

### Next Steps

- *Enhance platform to allow for attachment of EMR generated forms instead of filling on form*
- *Increase awareness of hip and knee referral requirement through newsletter and other venues*
- *Focus training on large volume clinics*
- *Notifications*



# Update

## Breast and Lung Cancer

### Feedback

- *Once sending sites receive training they are using eReferral consistently*
- *Receiving sites appreciate that referrals are complete and legible*

### Next Steps

- *Revised tumour referral requirements are complete with reduced requirements and provincial adjudication*
- *Train additional surgeons offices once secretaries have Netcare access*

# Referral Evolution

## Stages of Referral Evolution



### Variability

- Lack of standardization
- Difficult system navigation

### Standardization

- Standard processes
- Information requirements
- Triage categories
- Service response times

### Automation

- Referral tracking
- Service matching
- Transparency
- Patient choice
- Wait time capture

### Intelligence

- Reporting
- Outcomes
- Integration
- IT system stability
- Evaluation

# Goals

## Initially

- Support advice and consult requests
- Create one place for referrals to be created, submitted and tracked
- Transparency into services offered, wait times and where the referral is
- Patient centric approach
- Create simple reports i.e. # of referrals submitted by reason for referral

## Long term

- Create critical mass
- Provincial referral requirements
- Track all care transitions
- Support research, resource planning
- Wait time reporting
- Integrate with all required systems (EMR, EHR, Scheduling, PHP)

# KEY INSIGHTS

Work In Progress



- EMR generated letter
- Reporting
- Generic referral
- Advice request
- Secure messaging
- Consolidate directories

# KEY INSIGHTS

**Mixed impact**

**Automation = Adoption**

**Target user**

**Critical mass**

**Integration**

**Conversations**



# Communications

## eReferral



Alberta's Paperless Referral Solution

May 2015 Vol. 3.2

### THIS MONTH IN ACCESS IMPROVEMENT



**e**Referral has garnered more national exposure this month as the recipient of the **Infoway e-Connect Impact Challenge Award**, which rewards innovative teams comprised of health providers that use and

symposium highlighted innovations in specialty areas that typically cause frustration for primary care physicians with regards to patient access. Topics delivered included gastroenterology, neurology, rheumatology and chronic

#### IN THIS ISSUE

Access Improvement  
this month

Quick Updates

eReferral is making  
headlines

Quality Referral  
Evolution

Mackid Symposium:  
Community

# Questions

