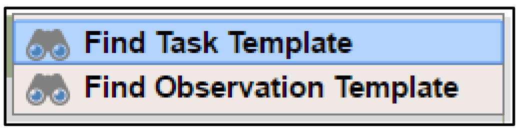
Standardized Referral Template in TELUS Health Med Access

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.

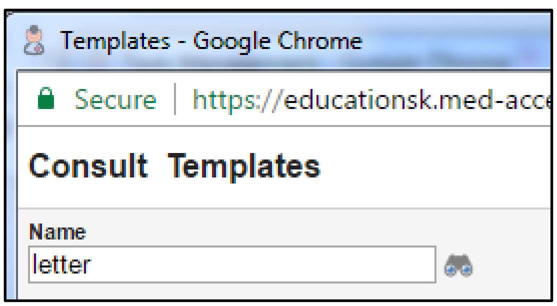
1. Setting the Referral Template as a Favourite

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

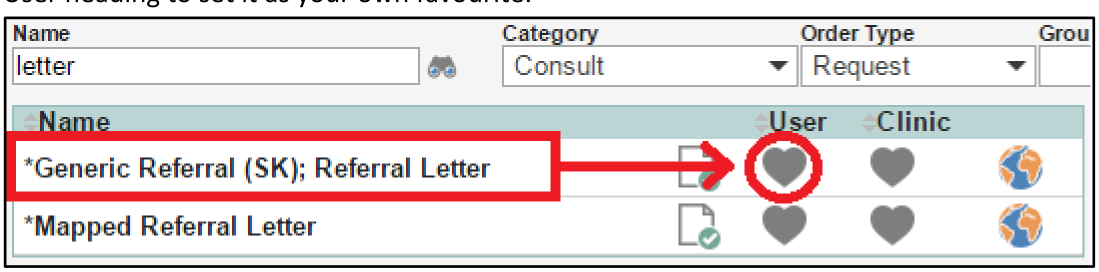
1. From a patient's Consults tab, start by left clicking the Request icon in the top-right hand corner.
2. Click on the Template icon in the top-right corner of the new Consult task.
3. In the context menu that appears, select the top option to **Find Task Template**:



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



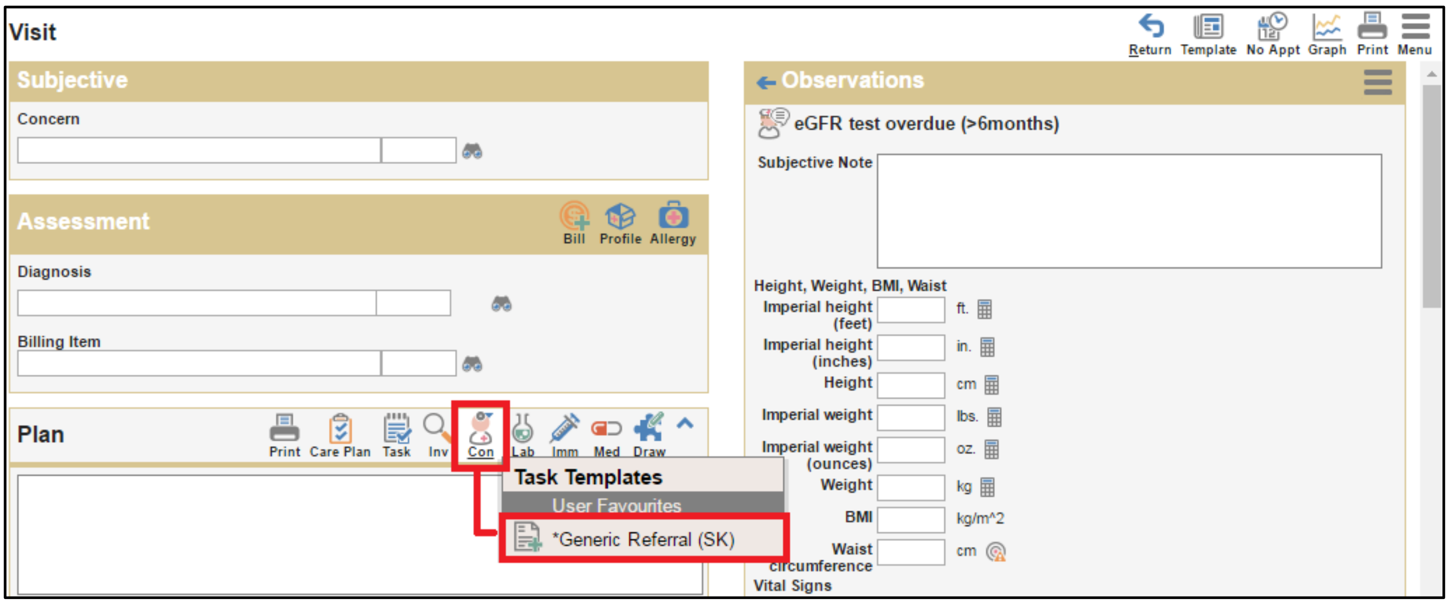
5. Find the ***Generic Referral (SK); Referral Letter** template in the search results and click the icon under the User heading to set it as your own favourite:



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:

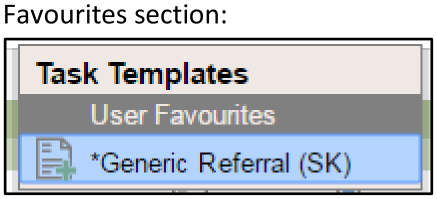


3. A new Consult task will appear, using the standardized generic referral template.

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:

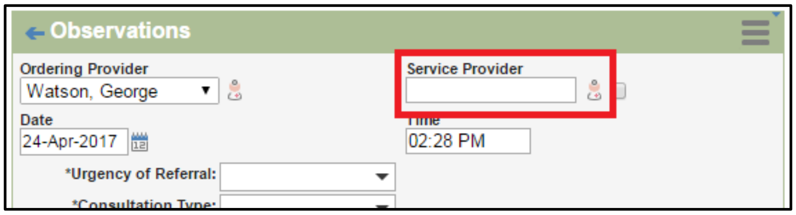
1. From a patient's Consults tab, right-click the  icon in the top-right corner
2. In the context menu that appears, click on the ***Generic Referral (SK)** template that appears in the User Favourites section:



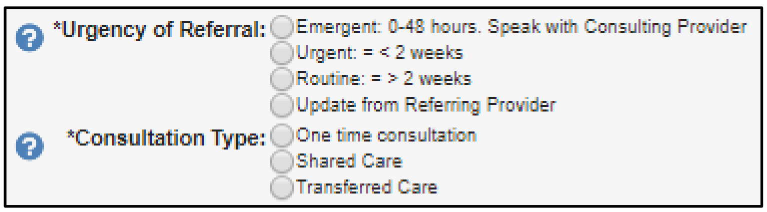
3. A new Consult task will appear, using the standardized generic referral template.

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:

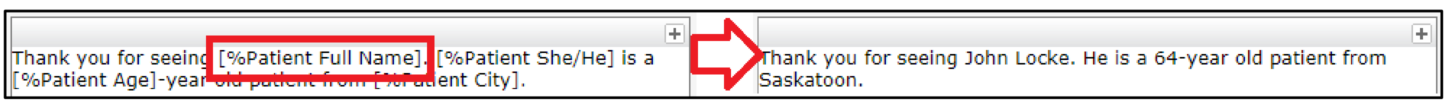


Use the radio buttons at the top to select the **Urgency of Referral** and **Consultation Type** (these are required fields):

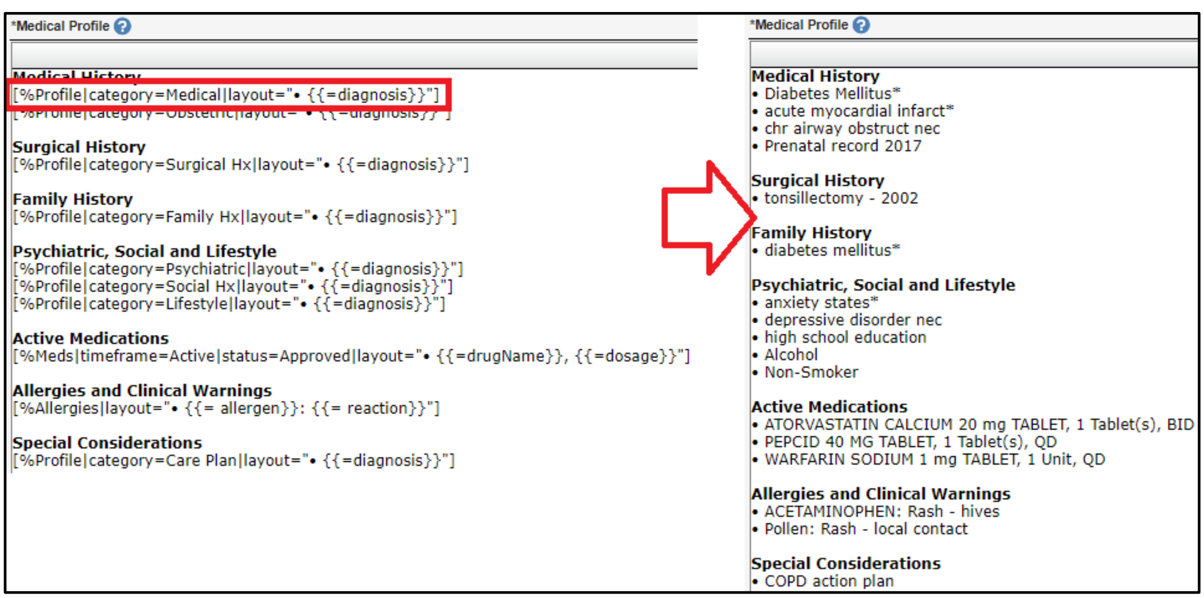


Hover over info point icons to see additional information and instructions.

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



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:

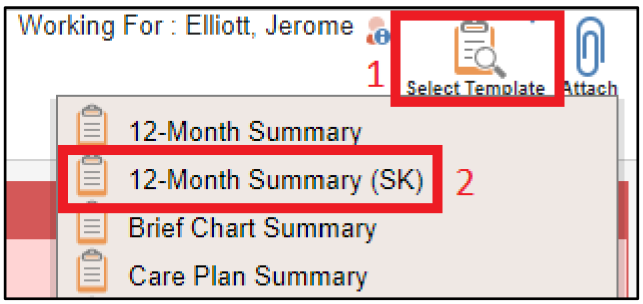


5. Attach a Chart Summary

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: