# E-Referral System – Client Portal

Process Guide

June 2024

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## Version

| Version Number | Date | Who | Comment |
|---|---|---|---|
| 0.1 | June 2024 | Milanka Abeysooriya | First version |
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## 1: Introduction

‘E-Referrals’ is an online, web-based, automated referral system that improves client service by streamlining business processes. The ‘E-Referrals Client Portal’ allows users to manage their referral agencies and search, view and respond to referral requests. It is a free service that is easy to navigate, is available 24/7, and is part of the Province’s One Process initiative to improve and streamline authorization processing.

## 2: Profile Set Up

1. Log in to the ‘E-Referrals Client Portal’.
2. From the Home page, click on the ‘My Profile’ menu item under the ‘Common Functions’ section of the ‘Menu’ menu.
3. Update the following information as required.
    - Last Name
    - First Name
    - Middle Initial
    - Email
4. Save the profile upon completion of set up.

# 3: Managing Referral Agencies

## 3A: Accessing the Referral Agency Profile

1. From the 'E-Referrals – Client Portal' Home page, click on the 'My Referral Agencies' menu item under the 'Common Functions' section of the 'Menu' menu.
2. Select the hyperlinked name of the Referral Agency that needs to be updated.
3. The landing screen will display all configurable options for the Referral Agency.

## 3B: Updating Referral Agency Information

1. Update the following information as required.
   - Response Method
   - Request Method
   - Business Name
   - Phone Numbers
   - Mailing Address
2. Ensure to save the changes upon completion.

## 3C: Managing Representatives

- Add representative
- Delete representative
- Change the preferences of an existing representative
- View the registration status of a representative

# 4: Searching for Referral Requests

## 4A: Searching for Referral Requests Assigned to Oneself

To search for referral requests that are specifically assigned to oneself or to a referral agency that they are a representative of:

1. Click on the ‘My Referrals’ menu item of the ‘Common Functions’ section of the ‘Menu’ menu.
2. In the landing screen, enter the following search criteria as much as possible to narrow down the search results.
   - Referral Number
   - Request Number
   - Reference Number
   - Request Sent Date
   - Response Due Date
   - 'Open Requests Only' and 'Show Summaries that have not been Read' checkboxes
   - Assigned To - 'Me' or 'My Agencies' radio buttons
3. Next, click on the ‘SEARCH’ or ‘SAVE AS EXCEL’ buttons.

   ‘SAVE AS EXCEL’ button - The search results will be directly imported to an Excel sheet that can be saved on to a Personal Computer for later review.

   ‘SEARCH’ button – A search results page that matches the search criteria will be displayed.

4. To open a specific Referral Request or Summary Notification, click on the blue hyperlink under the 'Referral Request/Summary No.' column of the search results page.

## 4B: Searching for Referral Requests Created in the Referral Center

To search for referral requests created in the 'Referral Center' that a referral agency belongs to:

1. Click on the 'Referral Requests' menu item of the 'Common Functions' section of the 'Menu' menu.
2. In the landing screen, enter the following search criteria as much as possible to narrow down the search results.
   - Referral Number
   - Request Number
   - Request Sent Date
   - Organization Name
   - Referral Level – Referral Level associated with the referral request (i.e., Mandatory, Optional, Summary Only, Notification)
   - Recipient Name
   - Status – Status of the referral the referral request is associated with (i.e., Closed, In Summary, Waiting For Response, Cancelled)
3. Next, click on the 'SEARCH' or 'SAVE AS EXCEL' buttons.

   'SAVE AS EXCEL' button - The search results will be directly imported to an Excel sheet that can be saved on to a Personal Computer for later review.

‘SEARCH’ button – A search results page that matches the search criteria will be displayed.

4. To open a specific Referral Request or Summary Notification, click on the blue hyperlink under the ‘Referral Request No.’ column of the search results page.

   ** Please note that access is only provided to Referral Requests or Summary Notifications sent to a referral agency that the user is a representative of.

## 5: Responding to Referral Requests

How a Referral Request is responded will mainly depend on the Request Method and Response Method that has been configured for the Referral Agency the request was sent to. Every Referral Request will have an associated Referral Level (Mandatory, Optional, Summary Only, Notification) that will determine the significance of the Referral Response.

### 5A: Responding to a Mandatory or Optional Referral Request

1. Open the Referral Request received via Email, Online or as a Hardcopy.
2. Review the referral details (i.e., Reference Number, Request Sent Date, Response Due Date, Status).
3. Enter the ‘Respondent Name’ to record the name of the person responding to the referral.
4. Review the referral information pertaining to the referral.
5. If necessary, assign the referral request to a member of the agency.

6. Review the referral documents included in the referral.
7. Answer the questions that have been sent with the referral request.
8. Select only one Recommendation from the list of recommendations.
9. Upload documents to support the answers to the questions, selected recommendation, and the overall referral response.
10. Run a spell check to ensure that the response is free of errors.
11. Record the final response.
    - Submit response
    - Submit as ‘No Response’
    - ‘Save’ response until all representatives have commented

## 5B: Responding to a Referral Summary

1. Open the Referral Summary received via Email, Online or as a Hardcopy.
2. Review the referral summary details (i.e., Reference Number, Sent Date, Response Due Date).
3. Review the referral summary information.
4. Review the recommendation provided with the referral summary.
5. Review the referral documents included in the summary.
6. If necessary, assign the referral summary to a member of the agency.
7. Finally, ‘Close’ the referral summary by clicking the ‘CLOSE’ button. This will mark the summary as ‘Read’ in the system.

## 5C: Responding to a Referral Notification

1. Open the Referral Notification received via Email, Online or as a Hardcopy.

2. Review the referral notification details (i.e., Reference Number, Request Sent Date, Response Due Date, Status).
3. Review the referral information pertaining to the referral notification.
4. If necessary, assign the referral notification to a member of the agency.
5. Review the referral documents included in the notification.
6. Finally, 'Close' the referral notification by clicking the 'CLOSE NOTIFICATION' button. This will mark the notification as 'Closed' in the system.

## 6: Other Resources

- 'E-Referrals – Client Portal' System Manual – Please refer to the System Manual for more detailed instructions and visual aids.
- Common Issues and Workarounds
- Instructional Videos

## 7: Contact Information

For any **questions** regarding **managing your referral agencies** or the **E-Referral registration process**, please contact the FrontCounter BC office nearest you.

For **technical problems** regarding E-Referrals, please contact FrontCounter BC.

For any **questions** regarding the **referral request** (e.g., project, referral documents, etc.), please contact the 'Referral Coordinator' listed in the referral request.