

E-Referral System - Client Portal

Systems Manual April 2024

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Version

Version Number	Date	Who	Comment
0.1	April 2024	Milanka Abeysooriya	First version

Definitions

Referral:

The distribution of application package information to internal government agencies, public or other stakeholders with the intent of obtaining important information, perspectives and recommendations on the application.

Referral Agency Types:

- Internal Agency Agency internal to the Government (i.e., Ministry, Agency)
- External Agency Agency that resides external to the Government. This can include any individual, corporation or society that is external to government (i.e., BC Hydro, Bob Smith)
- Referral Center

User Groups of the E-Referral System:

- Referral Coordinator/Email coordinator Person who initiates a referral by creating and sending it.
- Recipient/Respondent Person who receives a referral and responds to it.

 Response Coordinator - Person who collects all the responses and creates a summary report.

Recipient/Representative Type:

- Primary A representative that will automatically receive email notifications for all Referral Requests and who is responsible for maintaining a Referral Agency's profile.
- Alternate A representative that will receive email notifications for Referral Requests, only if configured to do so.

Referral Level:

- Mandatory A response to a Referral Request is required.
- Optional A response to a Referral Request is optional.
- Notification The Referral Request is only a notification that does not require a response.
- Summary Only The Summary Report sent after a referral is closed.

Introduction and Purpose

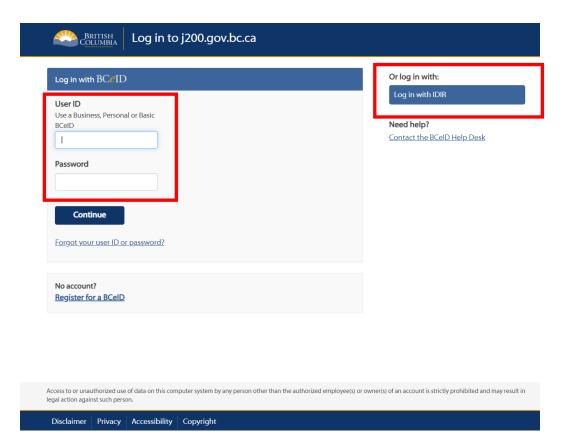
This manual is intended to give you a step-by-step overview of the online, web-based automated E-Referral system. It provides all the information needed to respond to a referral request, manage referral agencies, search referral requests and relevant additional information that is useful to perform these tasks effectively.

Logging into the E-Referral System

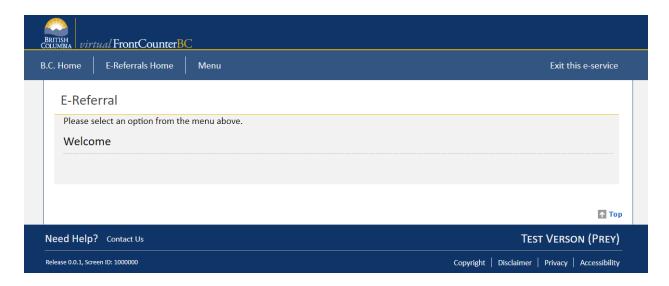
You can access the E-Referral system by clicking on the following URL link:

https://j200.gov.bc.ca/ext/ereferral/Default.aspx?PosseMenuName=ERMain

You will see the screen below as your landing screen. From here, you can log in to the E-Referral system using your IDIR credentials or a BCeID.



Once you have successfully logged in to the system, the following E-Referrals homepage will be visible.



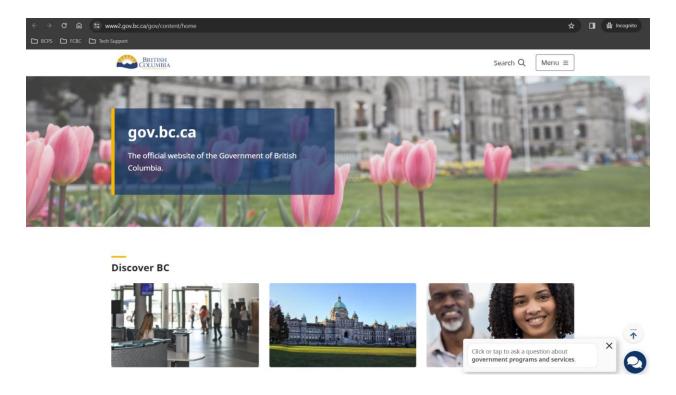
Navigating the E-Referral System

The E-Referrals homepage consists of several menus that will help you to navigate through the system.

'B.C. Home'



Clicking on this menu will take you to the official website of the Government of British Columbia, which will open in a separate tab.

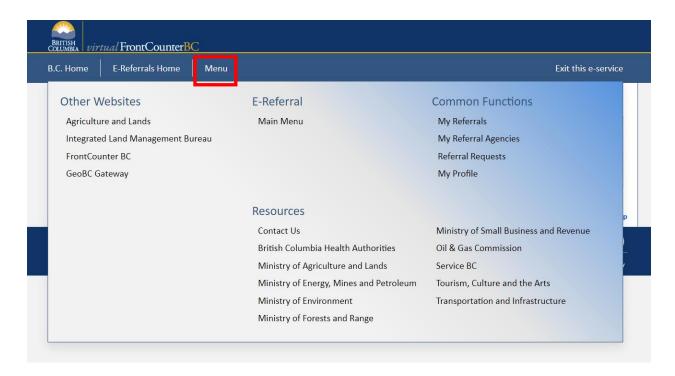


'E-Referrals Home'



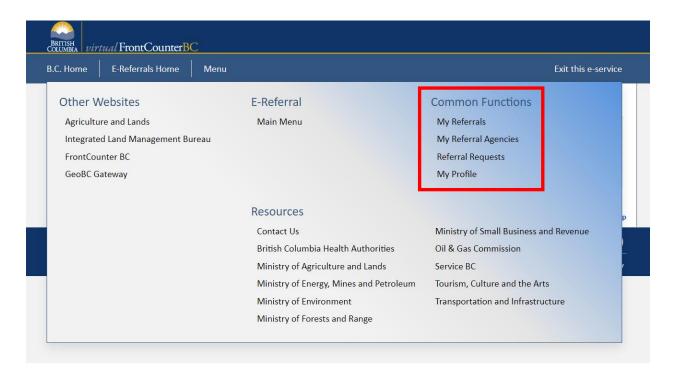
Clicking on this menu, you can navigate back to the home page of the E-Referral system from any part of the system you are in.

'Menu'



This menu consists of most of the features and functionalities provided by the system. From here, you can access resources (Contact Us, Ministry websites, etc.), other websites (FrontCounter BC, GeoBC Gateway, etc.), E-Referrals home page and most importantly, the 'Common Functions'.

Common Functions



The 'Common Functions' menu item provides links to the following functionalities:

My Referrals – Navigate to the Referral Requests assigned to you that you need to respond to.

My Referral Agencies – Navigate to Referral Agencies you are a part of.

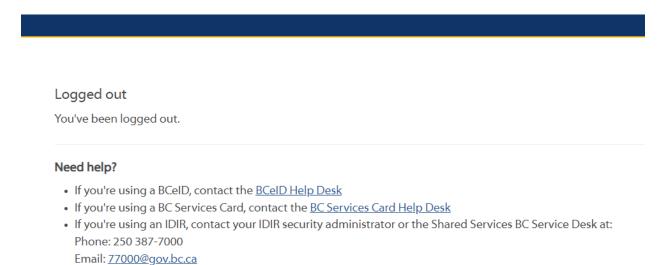
Referral Requests – Search for Referral Requests created in your Referral Center.

My Profile - Navigate to your profile.

'Exit this e-service'



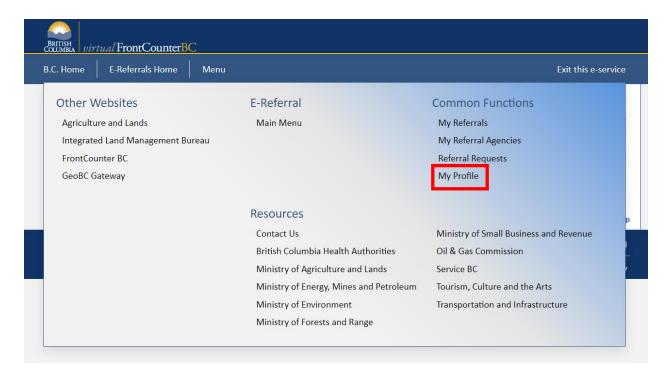
Clicking on this link will log you out of the E-Referral system and a log out confirmation will be displayed as follows.



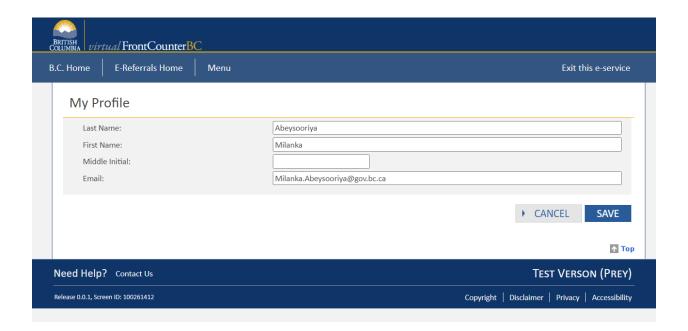
Confirming User Profile Information

When you log in to the E-Referral system, it is important to ensure that your user profile information is up to date.

1. Click on the 'My Profile' menu item under the 'Common Functions' section of the 'Menu' menu.



2. Next, you will see a screen with your User Profile Information. Fill in any missing information. In particular, please be sure to fill in your first name, last name, and email address.

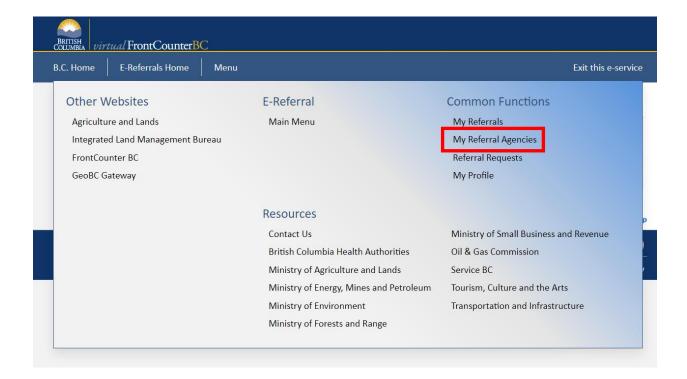


3. When you have finished reviewing the information on this page and making any modifications, be sure to click the 'SAVE' button to save your changes.

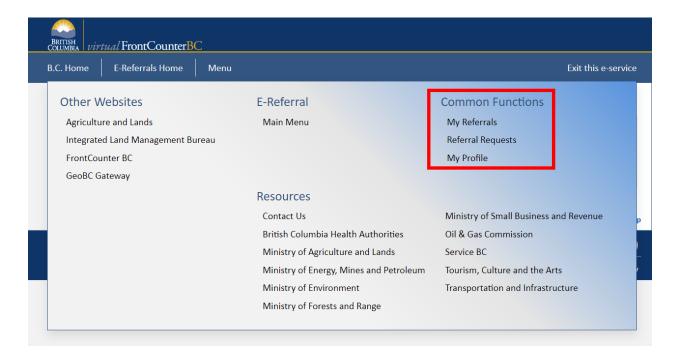
Managing Referral Agencies

Accessing the 'My Referral Agencies' Menu Item

To manage the Referral Agencies that you are a representative of, you need to click on the 'My Referral Agencies' menu item under the 'Common Functions' section of the 'Menu' menu.



However, there could be instances where the 'My Referral Agencies' menu item does not appear under the 'Common Functions' section of the 'Menu' menu as follows.



This means that you are not properly registered with the E-Referral system due to either of the following reasons.

- The registration email was not sent to you.
- You did not complete the registration process as outlined in the registration email.

If you did not receive the registration email, you need to contact the <u>FrontCounter BC office nearest you</u> and make a request for the registration email to be sent to you. If you have received the registration email, you need to click on the 'Click Here' link of the email to register your BCeID or IDIR with the E-Referral system.

You are requested to Click Here to agister your BCeID account with the E-Referral System. Once authenticated, your BCeID will be registered with Ext Ref Agency and you will be able to manage and update your agency information and receive and respond to referrals on their behalf.

Note that it can take an extended period of time to connect from the BCeID login to the E-Referrals website, this is normal. Avoid re-clicking the "Next" button or you could extend this connection time

Please DO NOT reply to this email.

For "how-to" instructions for responding to this request, visit https://portal.nrs.gov.bc.ca/web/client/-/e-referrals and click on the "e-Referrals for First Time Users Using a BCeID" instructional video. To obtain a BCeID, visit https://www.bceid.ca/

For technical assistance with E-Referrals, contact FrontCounter BC at 1-877-855-3222.

Milanka Abeysooriya FrontCounter BC

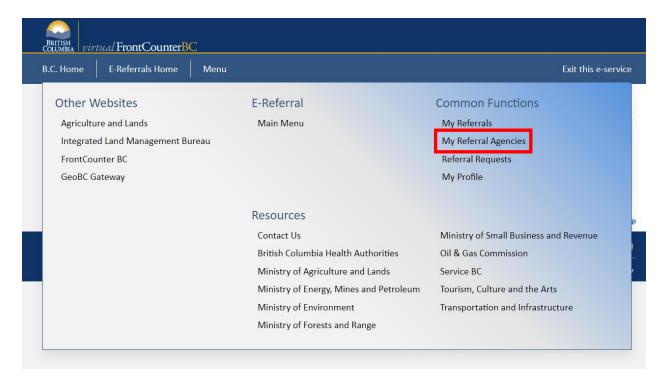
Email: Milanka.Abeysooriya@gov.bc.ca

Once this step has been completed, you will be successfully registered with the E-Referral system and the 'My Referral Agencies' menu item will be visible under the 'Common Functions' section of the 'Menu' menu.

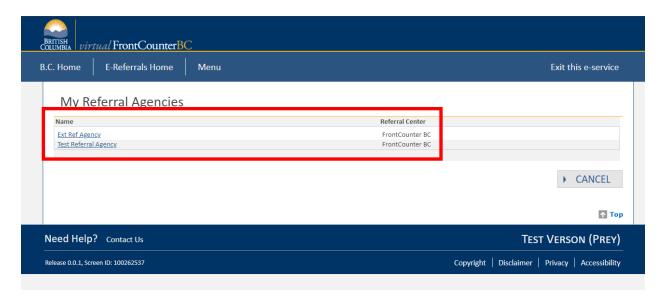
Updating Referral Agency Information

Using the E-Referral system, you will be able to update Referral Agency information of the Referral Agencies that you are either a Primary or Alternate representative of.

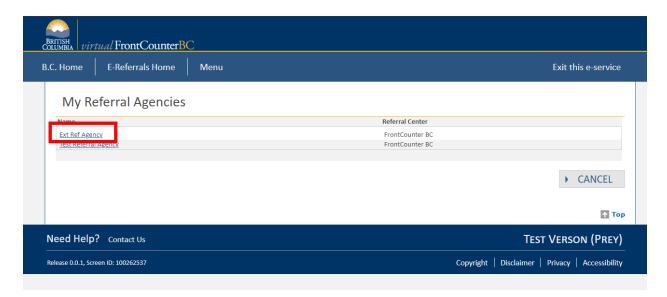
1. To access the Referral Agencies you are representative of, click on the 'My Referral Agencies' menu item under the 'Common Functions' section of the 'Menu' menu.



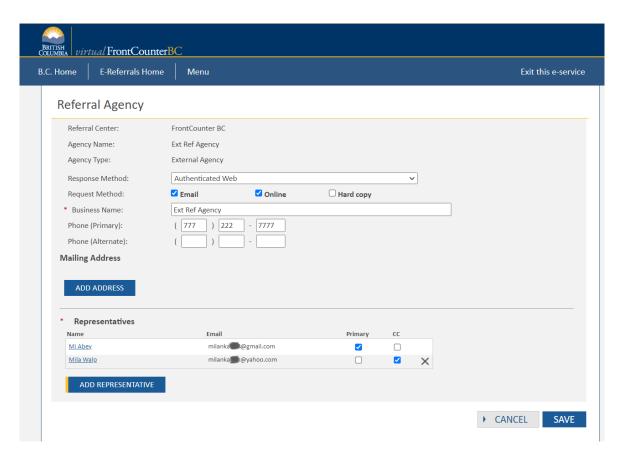
You will land on the below screen, which will display all the Referral Agencies you are a representative of.



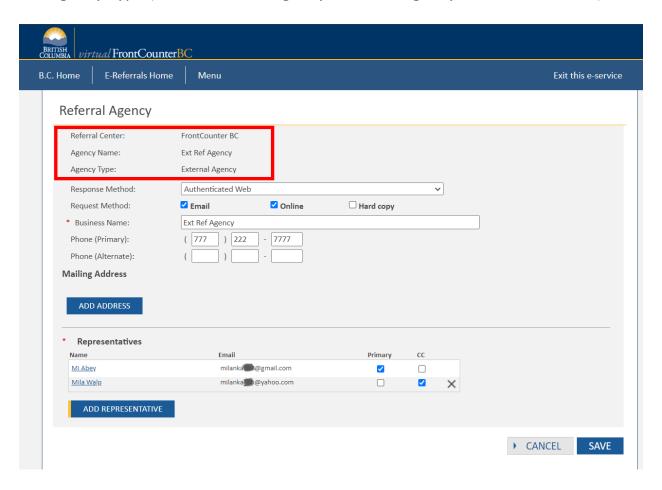
2. Click on the hyperlinked name of the Referral Agency that you want to update information of.



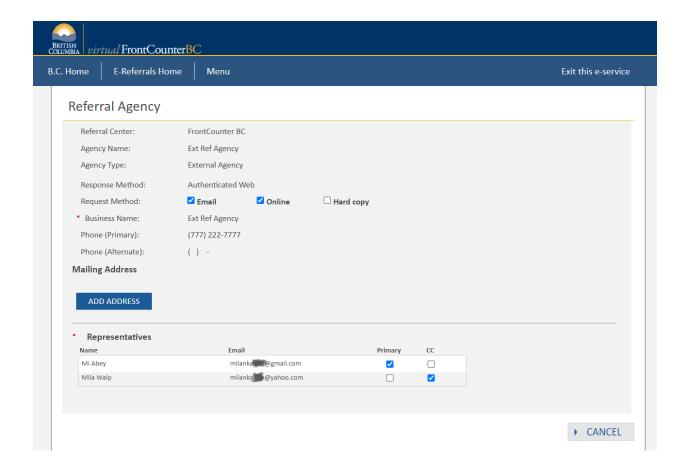
Next, you will be directed to the following screen which displays information relevant to the Referral Agency as well as their configurable options.



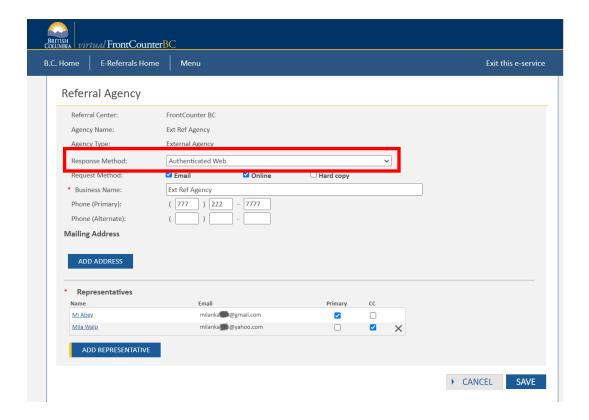
This screen displays information regarding the Referral Center, Agency Name, and the Agency Type (one of Internal Agency, External Agency or Referral Center).



IMPORTANT - For you to be able to manage a Referral Agency in the E-Referral system, it needs to be set up as a 'Self-Managed' Referral Agency. If it is not a 'Self-Managed' Agency, then the above screen will display as follows where none of the information is editable. If you want to have the ability to manage the Referral Agency, please contact the FrontCounter BC office nearest you and request the Referral Agency to be configured as a 'Self-Managed' Referral Agency.



3. To configure the Response Method that the Referral Agency uses to respond to E-Referrals, click on the following dropdown.



Managing the Response Method

Authenticated Web

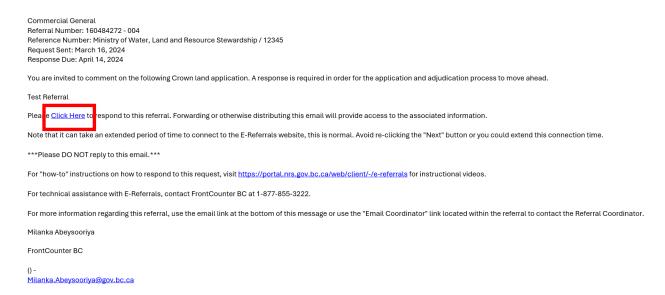
If you select this option, responding to Referrals sent to you via email or the online system will require authentication.

- External Agency Authentication via BcelD
- Internal Agency Authentication via IDIR

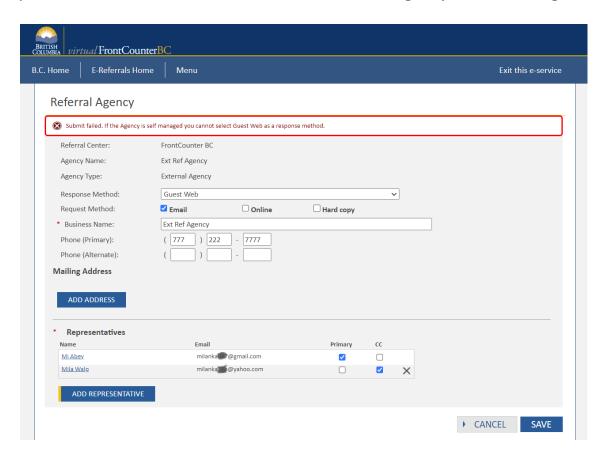
Guest Web

Setting the Response Method to 'Guest Web' will allow you to respond to Referrals, online, without requiring any authentication. For example, when you receive a Referral Request to your email, you will be able to click on the 'Click Here' link as

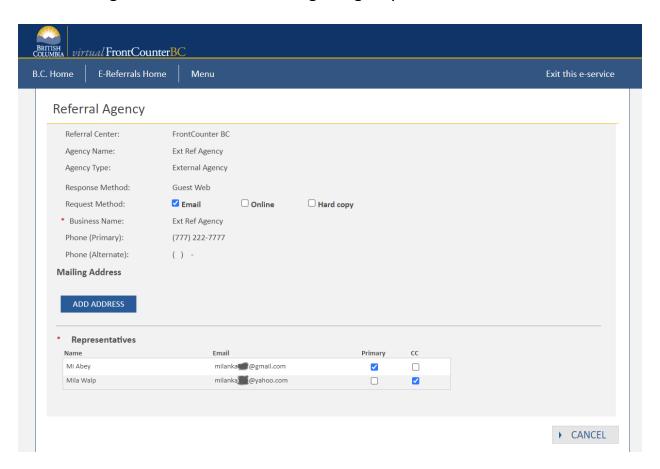
follows and directly connect to the E-Referral system without the need for BCeID or IDIR authentication.



NOTE - Currently, the E-Referral system does not allow you to set the Response Method to 'Guest Web' when the Referral Agency is 'Self-Managed'.



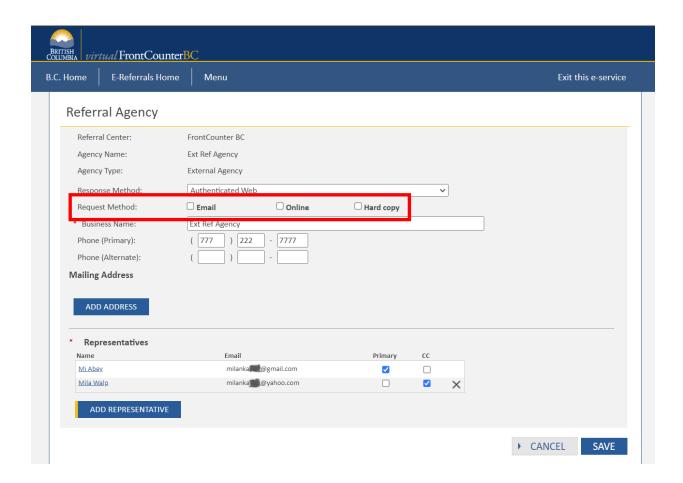
If you wish to have the Response Method of your Referral Agency as 'Guest Web', please contact the <u>FrontCounter BC office nearest you</u> and make a request. However, you will then not be able to maintain the Referral Agency yourself as it will be configured as a 'non-Self-Managed' agency.



Manual to Coordinator

If you select this option, you agree to respond to Referrals using a non-online method such as fax, email, mail (hardcopy), etc. In this case, the Referral Coordinator will enter the response into the E-Referral system.

4. To configure the Request Method that the Referral Agency wishes to receive Referrals, click on the following checkboxes as required.



Managing the Request Method

Email

If you select the 'Email' option, an email notification will be sent to your inbox when a Referral Request has been sent to your Referral Agency. This email will contain a 'Click Here' link that when clicked, will directly allow you to connect to the E-Referral system to record your response.

In this case, you might need to authenticate yourself using a BCeID or IDIR or will be allowed to log in as a 'Guest', based on how the 'Response Method' of the Referral Agency has been configured.

You are requested to Click Here to register your BCeID account with the E-Referral System. Once authenticated, your BCeID will be registered with Ext Ref Agency and you will be able to manage and update your agency information and receive and respond to referrals on their behalf.

Note that it can take an extended period of time to connect from the BCeID login to the E-Referrals website, this is normal. Avoid re-clicking the "Next" button or you could extend this connection time.

Please DO NOT reply to this email.

For "how-to" instructions for responding to this request, visit https://portal.nrs.gov.bc.ca/web/client/-/e-referrals and click on the "e-Referrals for First Time Users Using a BCeID" instructional video. To obtain a BCeID, visit https://www.bceid.ca/

For technical assistance with E-Referrals, contact FrontCounter BC at 1-877-855-3222.

Milanka Abeysooriya

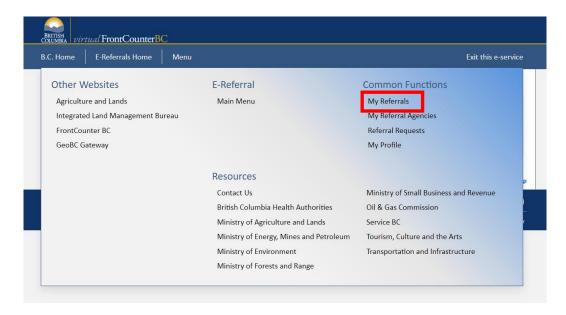
FrontCounter BC

Email: Milanka Abeysooriya@gov.bc.ca

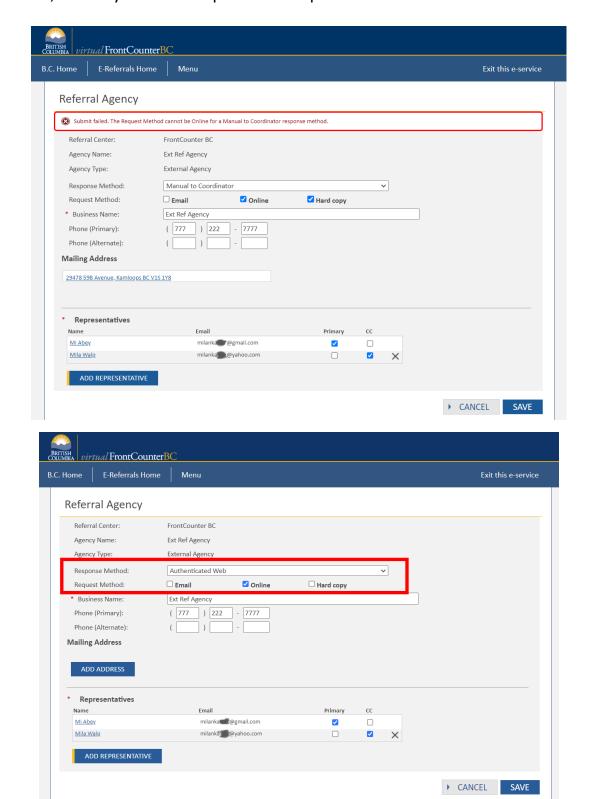
NOTE - You will still be able to access the Referral Request electronically via the online E-Referral system as indicated in the below section. Selecting the 'Email' Request Method would additionally send an email notification to your inbox when a Referral Request has been sent to your Referral Agency.

Online

Selecting this option will allow you to receive Referral Requests electronically via the online E-Referral system. When you log in to the system using your BCeID or IDIR, you will be able to access the Referral Requests that the Agencies you are a representative of have received. They can be accessed via the 'My Referrals' menu item under the 'Common Functions' section of the 'Menu' menu.



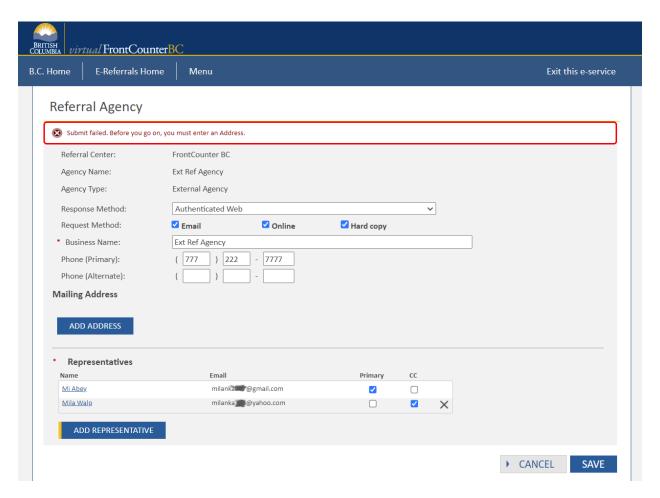
IMPORTANT - When the checkbox for the 'Online' Request Method is selected, the only allowable option for Response Method is 'Authenticated Web'.



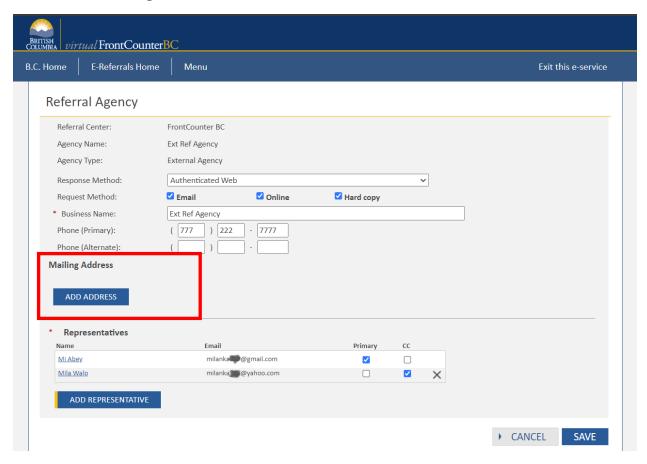
NOTE - It is recommended that you also select the 'Email' Request Method when selecting the 'Online' Request Method so that you will be notified via email when a Referral Request is sent to an Agency you are a representative of. You will receive this notification **only** if the 'Email' checkbox has been checked.

Hard Copy

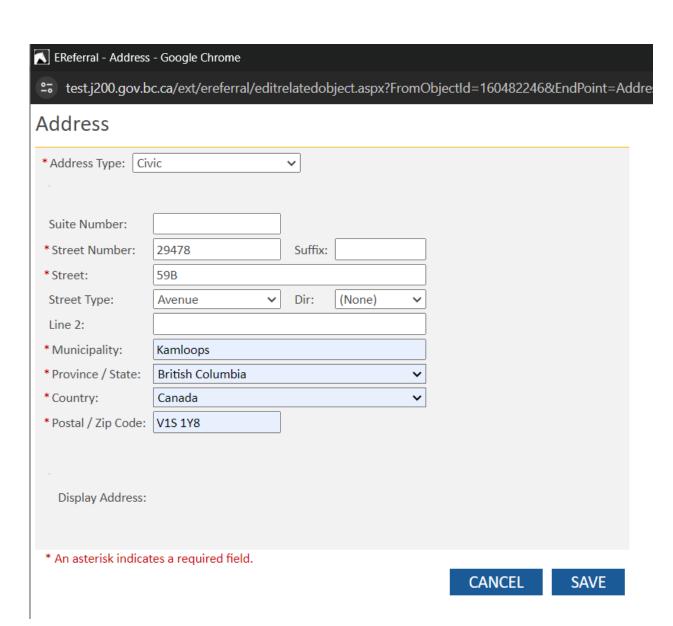
If you want to receive Referral Requests in a non-electronic method (e.g., email, fax, mail) or wish to receive a hard copy letter in addition to receiving the Referral in an electronic format, you can select the 'Hard copy' checkbox. However, when this checkbox is checked, it is mandatory that you enter a mailing address.



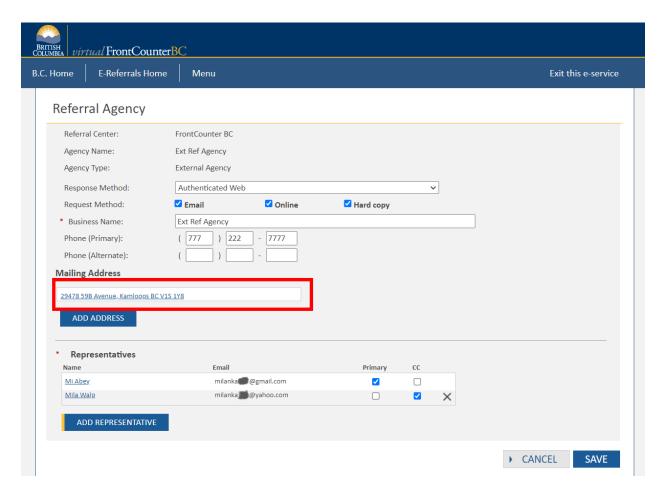
To add a mailing address, click on the 'ADD ADDRESS' button as shown below.



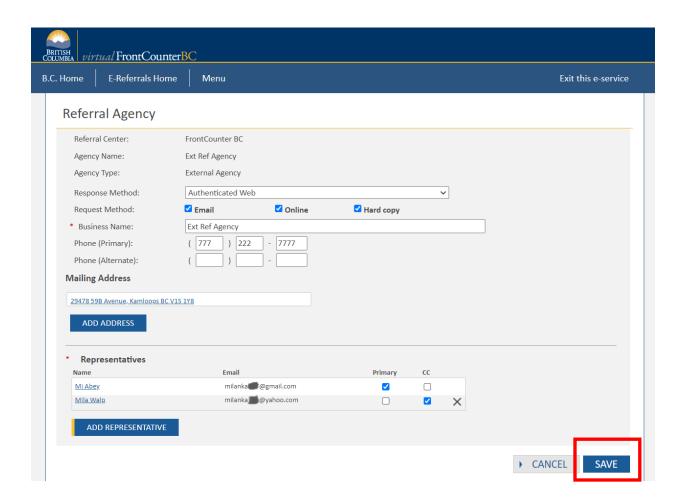
Fill out the mandatory fields in the following screen that pops up and click the SAVE button.



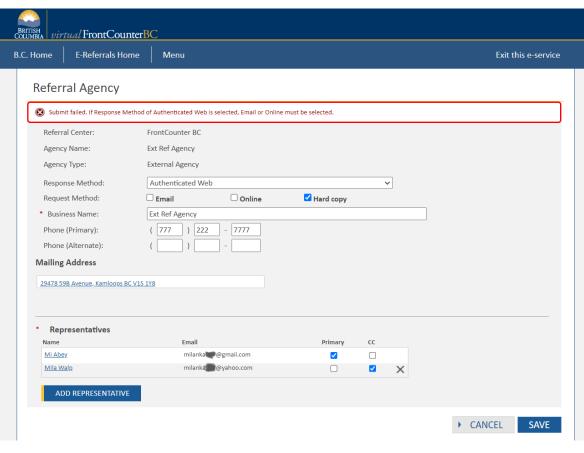
The entered address will now be displayed as follows.

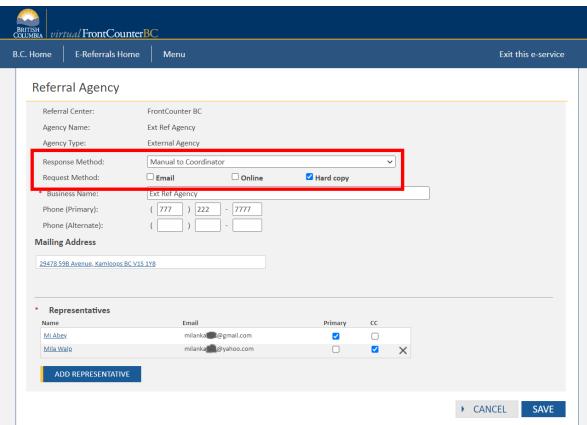


You can then click on the SAVE button to complete the configuration of your Referral Agency to receive Hard Copy Referral Requests.

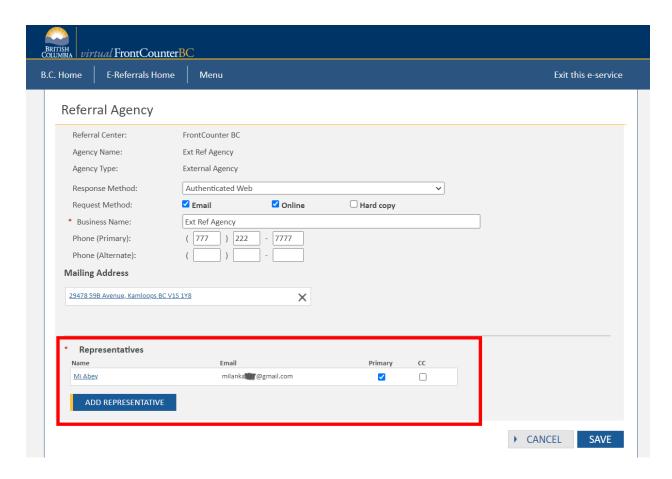


IMPORTANT - If only the 'Hard copy' checkbox is checked, you will not be allowed to select 'Authenticated Web' as the Response Method. The permitted Response Method in this case would be 'Manual to Coordinator'.

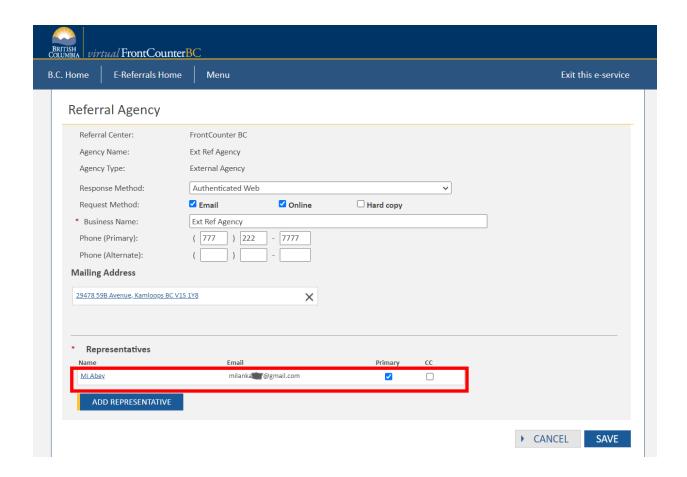




5. To manage the representatives of your Referral Agency, use the highlighted section of the below screen.



In this section, you will be able to see your Name, Email address and Representative Type (either Primary or Alternate) as you are already registered with the E-Referral system (via BCeID or IDIR) as a representative of the Referral Agency you want to manage.

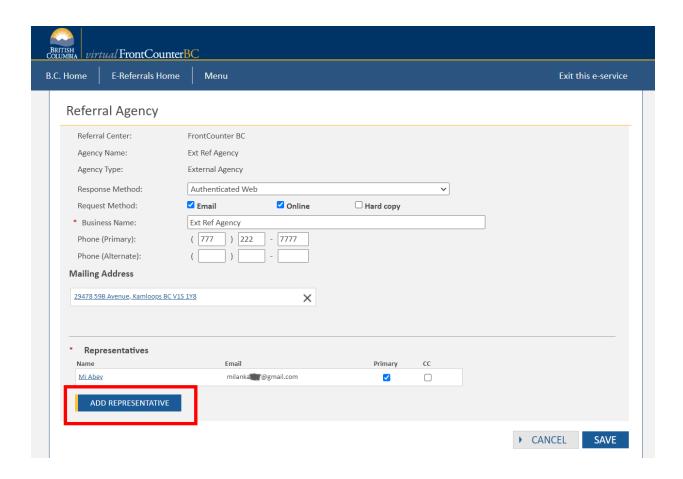


IMPORTANT - The first representative to be added to a Referral Agency should be added by the system administrator and a registration email will be sent to the representative to complete the registration. Once completed, the first representative can log in to the E-Referral system and add more representatives to the Referral Agency.

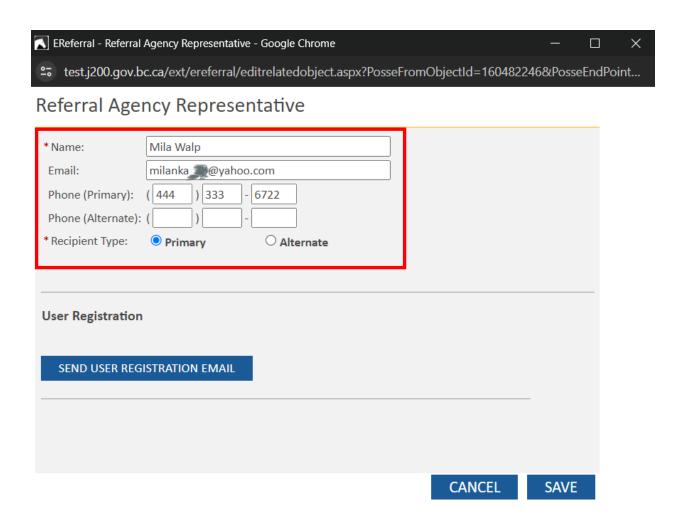
Managing Representatives

Adding a Representative

To add a representative to your Referral Agency, click on the 'ADD REPRESENTATIVE' button.



In the following screen that pops up, enter the relevant information, specifically the mandatory information (Name and Recipient Type). Here, the name can be a generic name and the email can be a generic email address.



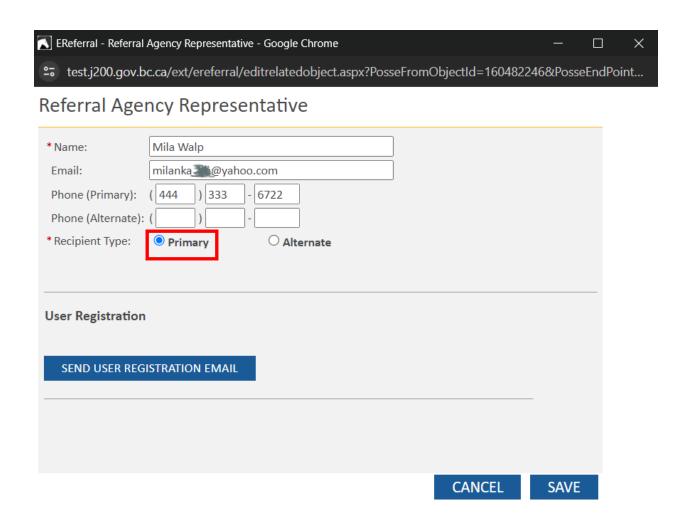
Selecting the Recipient (Representative) Type

Primary Representative

If you wish to set up the representative as a 'Primary' representative, select the 'Primary' radio button.

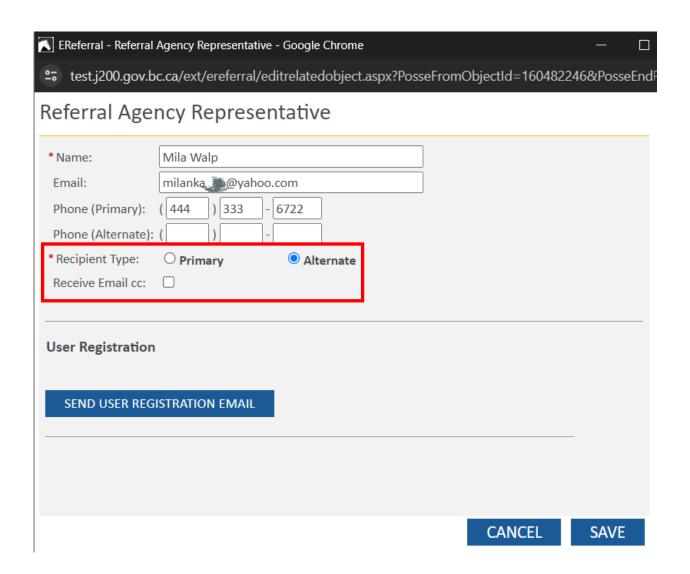
It is recommended that a Referral Agency should have at least one Primary Representative who will hold the responsibility of maintaining the Referral Agency's profile in the E-Referral system.

Primary recipients automatically receive email notifications for all Referral Requests sent to the Referral Agency and are responsible for responding to them.

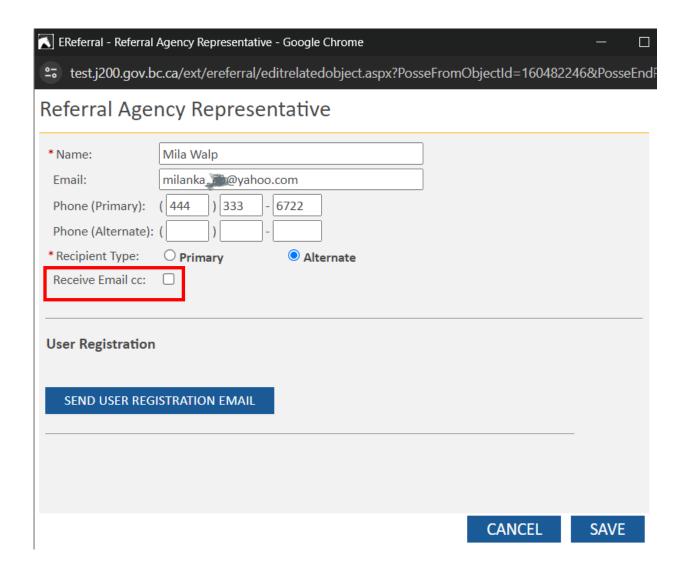


Alternate Representative

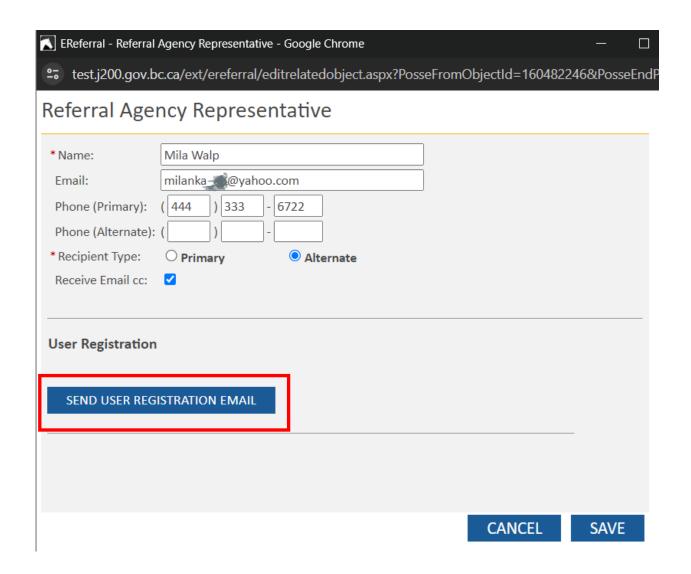
If you wish to set up the representative as an 'Alternate' representative, select the 'Alternate' radio button. When you click on this radio button, an additional 'Receive Email cc' checkbox will appear on the screen.



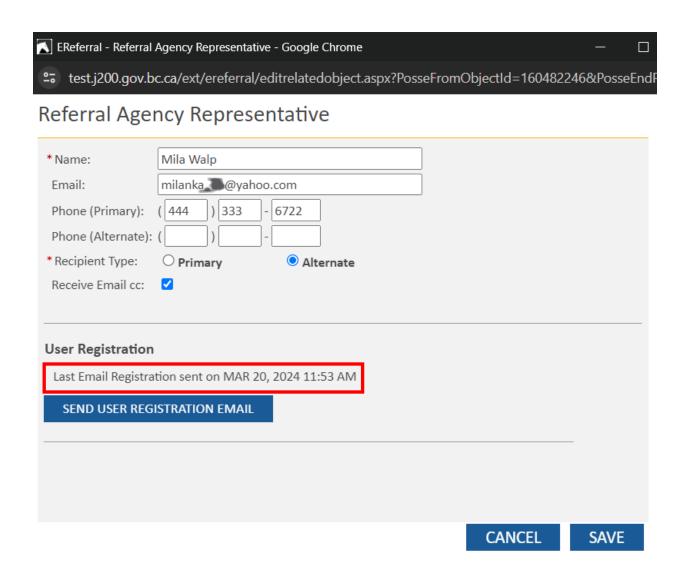
IMPORTANT - If you want to copy all email communications (including Referral Requests) sent to Primary Representatives via the E-Referral system to the Alternate Representative as well, you need to check the 'Receive Email cc' checkbox. If this checkbox is not checked, the Alternate Representative will not receive the automatic email notifications but will still be able to search, access and respond to Referral Requests using the E-Referral system.



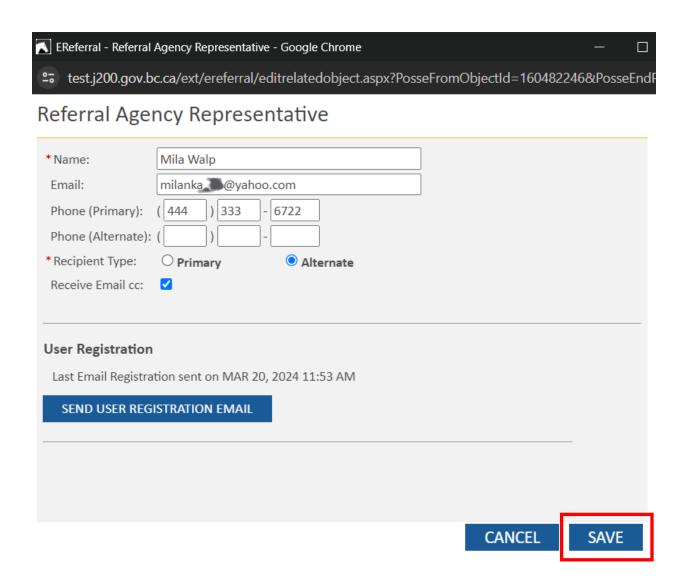
Next, click on the 'SEND USER REGISTRATION EMAIL' button to send a registration email to the new representative. The representative needs to complete the registration to be able to log in and respond to Referrals using the E-Referral system.



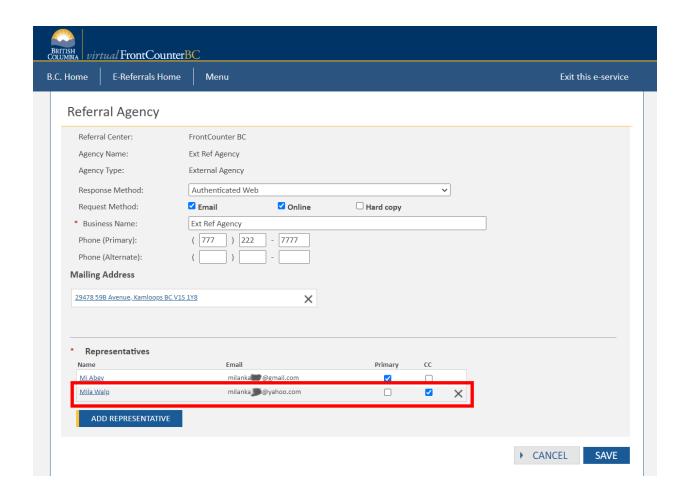
Once the registration email has been sent, the screen will be updated as follows to indicate the date and time the last registration email was sent.



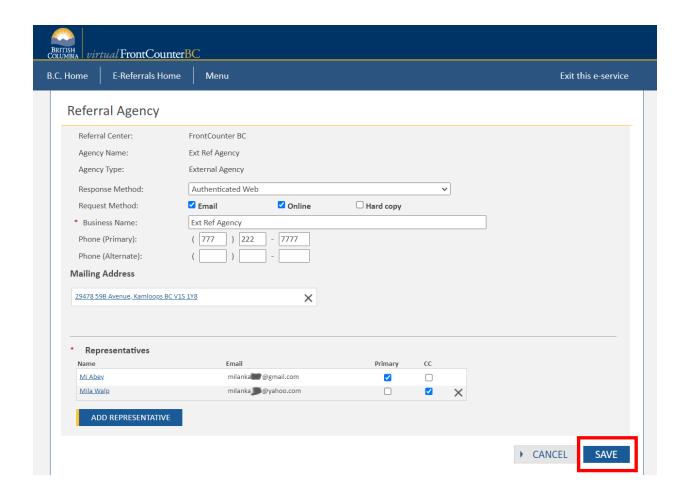
Next click on the SAVE button of this screen.



You will then return to the main Referral Agency configuration screen as follows. Here, you will be able to see that the representative you sent the registration email to before has been added to the list of representatives.

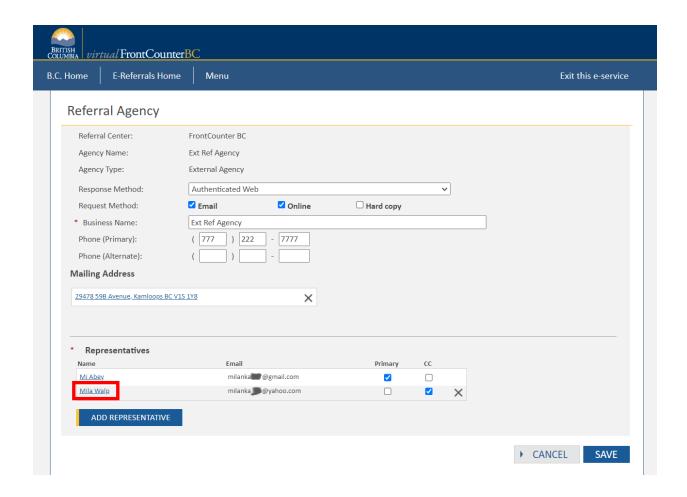


From this screen, you can continue to add more representatives to your Referral Agency by following the above process. When complete, click on the SAVE button as follows.



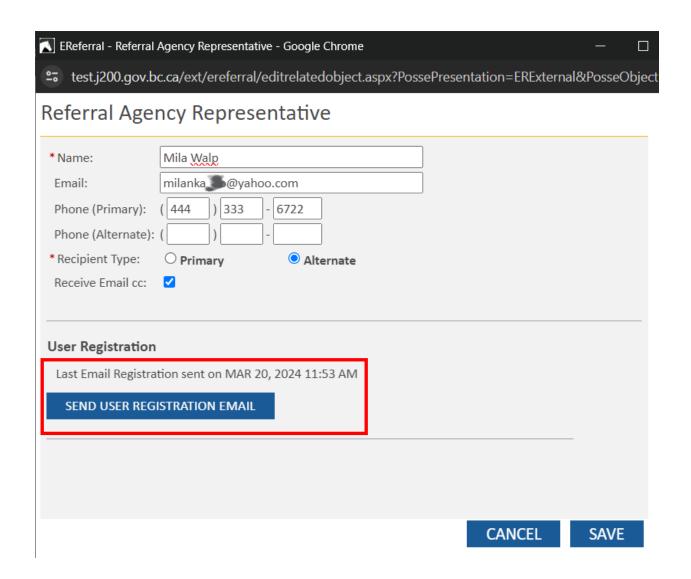
Viewing the Registration Status of a Representative

To view the registration status of a representative, you need to click on the 'Name' hyperlink of the representative as follows.

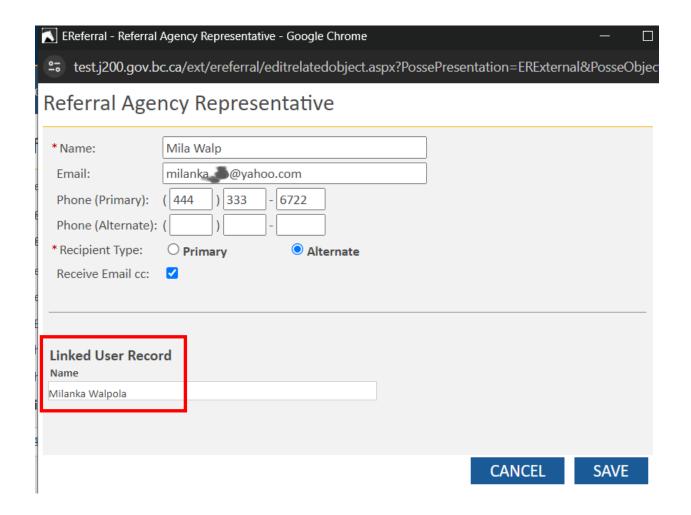


If the 'User Registration' section of the following screen still displays the date and time the last registration email was sent along with the 'SEND USER REGISTRATION EMAIL' button, it means that the representative has not completed the registration process.

In this case, you can decide to send another registration email to the representative by clicking the 'SEND USER REGISTRATION EMAIL' button and the new date and time the registration email was sent will be updated on the screen.

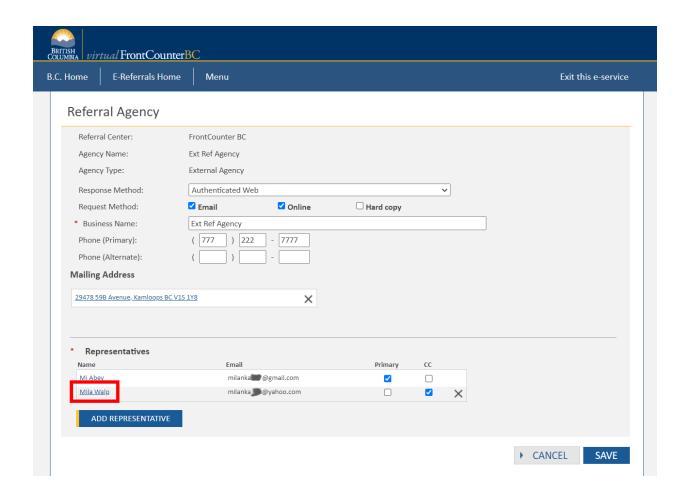


However, if the 'User Registration' section of the above screen is replaced with a 'Linked User Record' section that displays only the name of the representative that the registration email was sent to, it means that the representative has successfully completed the registration with the E-Referral system.

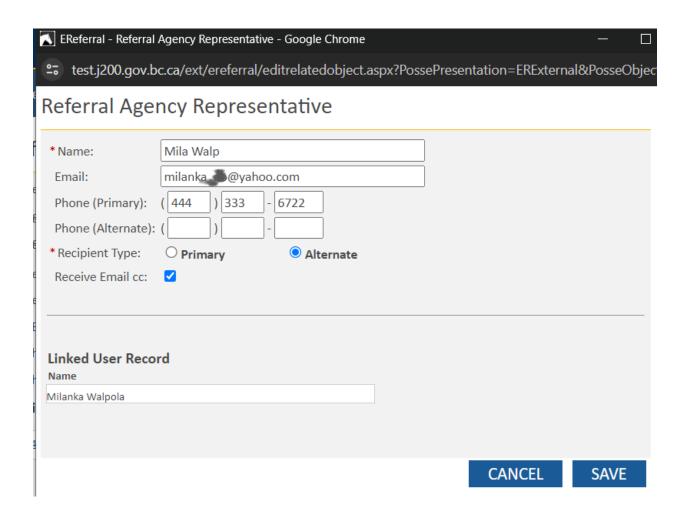


Updating Representative Information

To update a representative's information, click on the 'Name' hyperlink of the representative as follows.

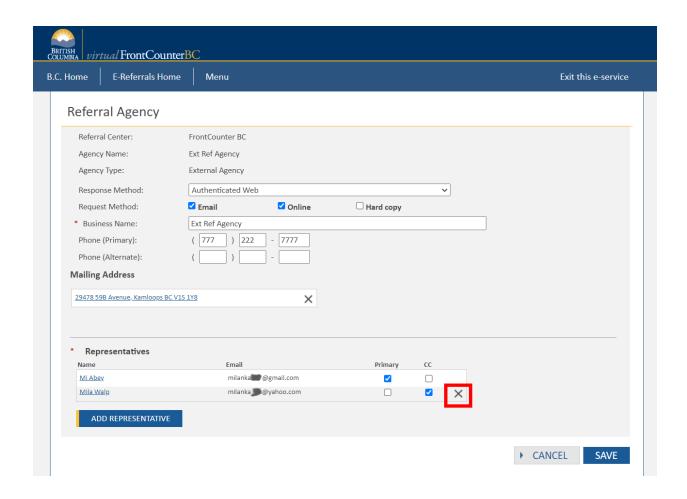


This will open the representative's record in the following screen. Here you can update the representative's information including the Recipient/Representative Type. Once complete, click on the SAVE button.

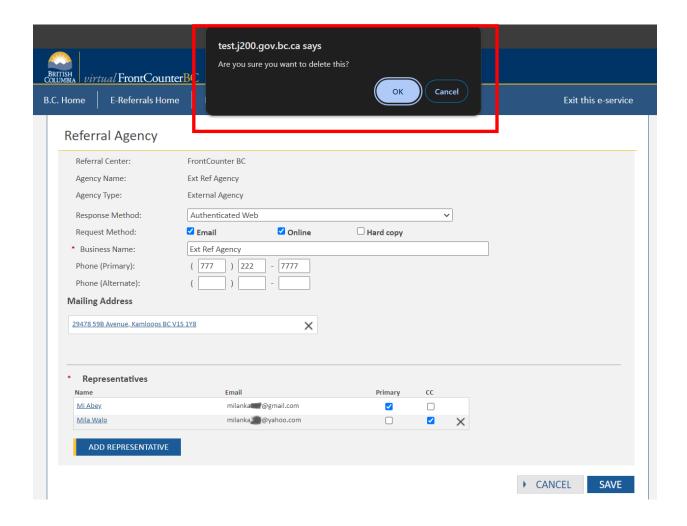


Deleting a Representative

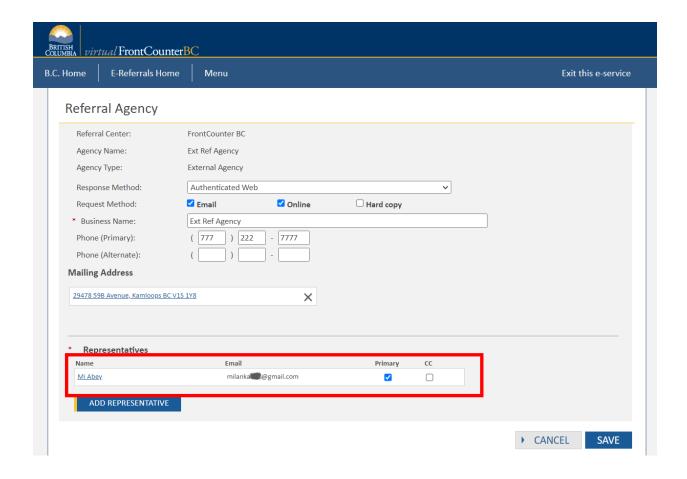
To delete a representative from your Referral Agency, click on the 'X' sign of the specific representative's record in the representative list.



A pop-up message as follows will appear asking to confirm the deletion of the representative record.

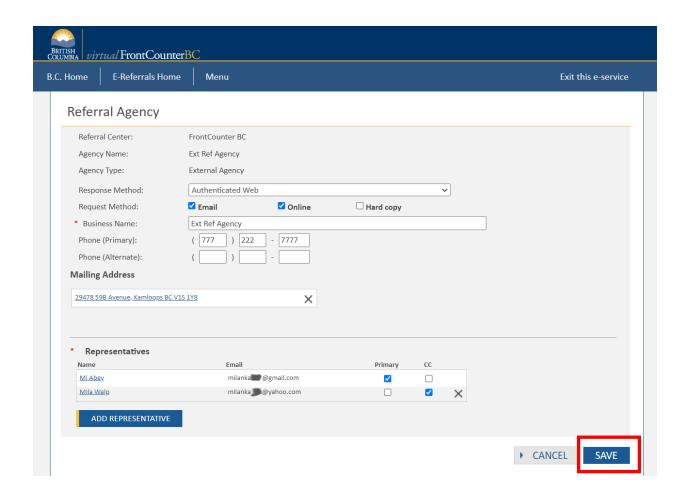


If you click the 'OK' button of this pop-up message, the representative will be deleted from the Referral Agency and the above screen will be updated accordingly. The deleted representative will no longer be able to connect with the E-Referral system to respond to Referrals on behalf of **your** Agency.



NOTE - You will not be able to delete yourself from the list of representatives of your Referral Agency and an 'X' sign will not appear at the end of your record in the representative list. If you wish to remove yourself from this list, follow either of the following steps,

- Ask another representative that is managing the Referral Agency in the E-Referral system to delete you from the representative list.
- Contact the <u>FrontCounter BC office nearest you</u> and make a request.
- 6. You have now completed configuring/updating your Referral Agency. Please be sure to click on the SAVE button before you exit the screen.



Responding to Referral Requests

How you respond to a Referral Request will mainly depend on the Request Method and Response Method that has been configured for the Referral Agency you are a representative of.

If you are an individual internal or external referee responding to a referral sent via email, the Request Method and Response Method would have already been configured by the Referral Coordinator.

IMPORTANT - Every Referral Request you receive will have an associated Referral Level that will determine the significance of the Referral Response.

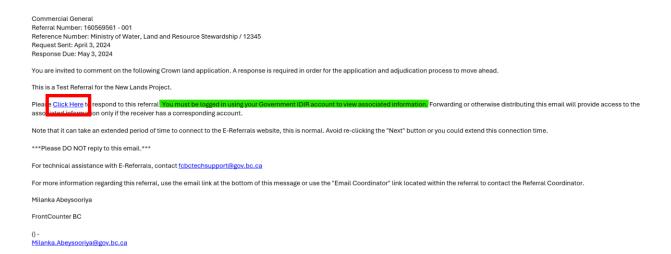
Responding to a Mandatory or Optional Referral Request

1. The first step is to access the Referral Request that you have received via Email,
Online or as a Hardcopy.

Referral Request Sent via Email

For a Referral Request sent via Email, the Response Method could be either 'Authenticated Web' or 'Guest Web'.

Click on the 'Click Here' link as follows to open the Referral. You may be asked to authenticate yourself using IDIR credentials or a BCeID or may be allowed to log in to the E-Referral system as a Guest.



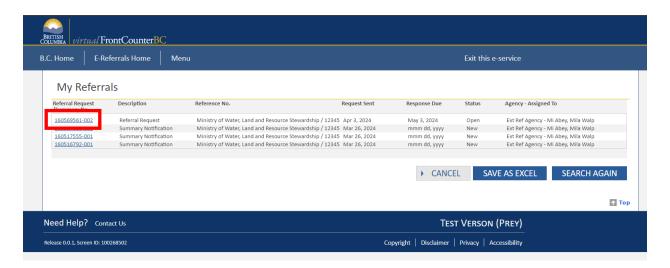
Referral Request Sent Online

For a Referral Request sent online via the E-Referral system, the Response Method would be 'Authenticated Web', where you will have to authenticate yourself using IDIR credentials or a BCeID. To access this Referral Request, you need to be

successfully registered as a representative of the Referral Agency the request was sent to.

To search for a Referral Request that you need to respond to in the E-Referral system, please refer to the 'Searching for Referral Requests' section of this manual.

In the search results, click on the 'Referral Request /Summary No.' hyperlink of the Referral Request you need to access.



Referral Request Sent as a Hardcopy

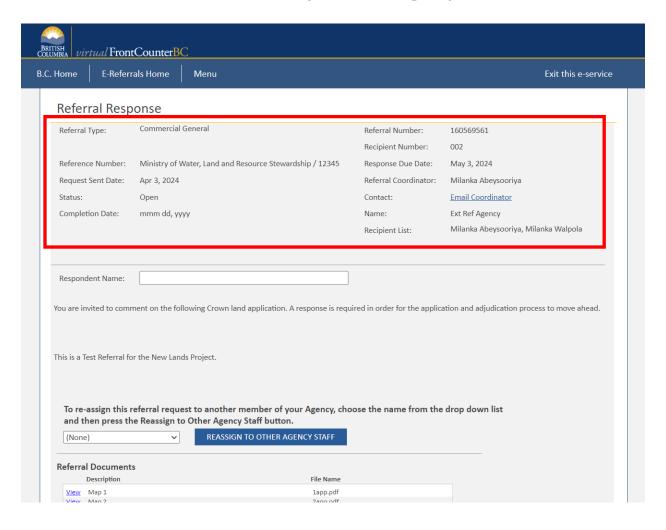
If a Referral Request is only received as a Hardcopy, the Response Method would be 'Manual to Coordinator', where you will have to respond to the referral using a non-electronic method. However, you can make the choice of receiving a Hardcopy referral in addition to receiving the referral via Email or Online.

The Hardcopy Referral Package that you receive will include the Hardcopy Referral Request Letter in addition to other relevant referral documents.

Hardcopy Referral Packages are sent on the same date the electronic referrals are sent.

- 2. Once you have opened the Referral Request, you will need to review the Referral Details.
 - Referral Type The category of the referral.
 - Reference Number Either an 'Agency Name/Agency File Number' the referral was sent from, a Project Number or a Business Line File Number.
 - Referral Number A number that will uniquely identify a referral.
 - Recipient Number A number assigned to each of the Referral Requests sent within one referral (indicating the different recipients).
 - Request Sent Date Date the referral was received.
 - Response Due Date The last date to respond to the referral.
 - Status The current state of the referral.
 - Referral Coordinator The initiator of the referral.
 - Contact Link to email the Referral Coordinator.
 - Name Name of the recipient of the referral (e.g., Referral Agency name, Internal staff name, etc.)
 - Recipient List The list of individual names the referral has been sent to.
 - Completion Date The date the referral pertaining to the referral request closed.

Referral Details - Referral Received by a Referral Agency



Referral Details - Referral Received by Internal Staff

TEST VERSION (PREY)

Referral Response Commercial General Referral Type: Referral Number: 160569561 Recipient Number: 001 Reference Response Due Ministry of Water, Land and Resource Stewardship / 12345 May 3, 2024 Number: Request Sent Referral Apr 3, 2024 Milanka Abeysooriya Coordinator: Date: Status: Open Contact Info: **Email Coordinator** Completion N/A Name: Date: Recipient List: Abeysooriya, Milanka Respondent Name: You are invited to comment on the following Crown land application. A response is required in order for the application and adjudication process to move ahead. This is a Test Referral for the New Lands Project. REFERRAL DOCUMENTS Description File Name View Map 1 1app.pdf View Map 2 2app.pdf View Map 3 3app.pdf

Referral Details - Referral Received via Hardcopy



Referral Request

FrontCounter BC

Referral Type: Commercial General Referral Number: 160569561

Reference Number: Ministry of Water, Land and Request Sent Date: Apr 9, 2024

Resource Stewardship / 12345

Organization Name: Mila Walp Response Due Date: May 3, 2024

Attention:

Request sent by: Hardcopy
Email set to: n/a

AOI Map Link:

Referral

You are invited to comment on the following Crown land application. A response is optional. If no response is received by the deadline, the application and adjudication process will move forward.

This is a Test Referral for the New Lands Project.

Response

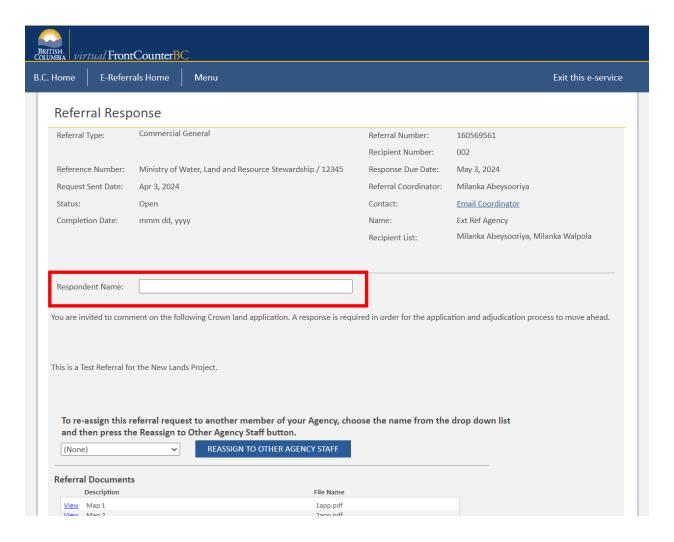
Please fill in the following information and send it to the contact listed at the bottom of the form.

Please respond to all of the following questions:

Yes No N/A Question Does this application impact your agency's legislated responsibilities? If yes, how will the proposal impact your legislated responsibility and please identify the relevant legislation (section) and what mitigative measures will be required

3. Next, you need to enter your name as follows to record the name of the person responding to the referral.

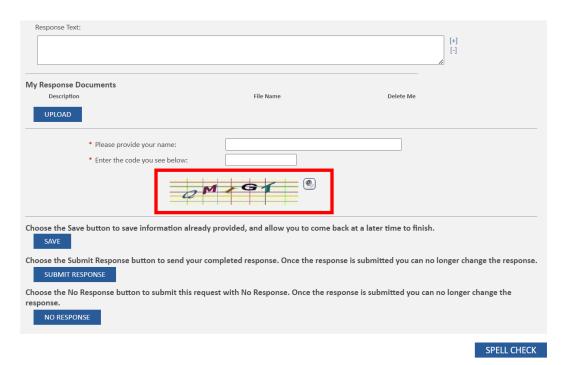
Online:



NOTE - If you are an external recipient responding to a referral as a 'Guest', you are required to provide your name and a security code in the following section of the Referral Response screen.

Response Text				[+] [-]
My Response Description	ocuments	File Name	Delete Me	
	* Please provide your name: * Enter the code you see below:	0		
SAVE Choose the Suk	e button to save information already provionit Response button to send your complet	,		
Choose the No response.	Response button to submit this request wit	th No Response. Once the res	sponse is submitted you	can no longer change the
				SPELL CHECK

Please enter the security code as exactly displayed in the image. You can click on the microphone icon next to the image if you wish to listen to the audio of the image.



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Please check	one recommendation:	
□ I	Interests unaffected	
	No objection to approval of project.	
	No objection to approval of project subject to the conditions outlined below. (please explain below)	1
☐ F	Recommend refusal of project due to reasons outlined below. (please explain below)	
□ 1	N/A	
Explanation of	of Response	
]
Respondent I	Name: Date:	-
Contact		
FrontCounter	BC	
Contact: Mila	anka Abeysooriya	

4. You will now need to review the Referral Information pertaining to the referral that has been sent to you.

E-mail: Milanka.Abeysooriya@gov.bc.ca

This section will also indicate if the response to the referral is Mandatory or Optional.

Referral Response

Referral Type: Commercial General Referral Number: 160585216 001 Recipient Number: Reference Number: Ministry of Water, Land and Resource Stewardship / 12345 Response Due Date: May 9, 2024 Request Sent Date: Apr 9, 2024 Referral Coordinator: Milanka Abeysooriya Status: Open Contact: **Email Coordinator** Completion Date: mmm dd, yyyy Ext Ref Agency Name: Recipient List: Milanka Abeysooriya, Milanka Walpola Respondent Name:

You are invited to comment on the following Crown land application. A response is required in order for the application and adjudication process to move ahead.

This is a Crown land application for Commercial General- Miscellaneous Use
File Number: 12345

Proponent: Dave Mills

Tenure Type: Seasonal

Intended Land Use/background context:

BCGS Mapsheet:

Legal Description:

Size (Area) ha (approx): 5

Schedule/Term Of Proposal: 2 yrs

Additional notes: (XX)

Referral Response

Referral Type: 160585216 Commercial General Referral Number: Recipient Number: Reference Number: Ministry of Water, Land and Resource Stewardship / 12345 Response Due Date: May 9, 2024 Request Sent Date: Apr 9, 2024 Referral Coordinator: Milanka Abeysooriya Open Contact Info: Email Coordinator Completion Date: mmm dd, yyyy Name: Mi Ab Recipient List:

You are invited to comment on the following Crown land application. A response is optional. If no response is received by the deadline, the application and adjudication process will move forward.

This is a Crown land application for Commercial General- Miscellaneous Use File Number: 12345

Proponent: Dave Mills

Tenure Type: Seasonal

Intended Land Use/background context:

BCGS Mapsheet:

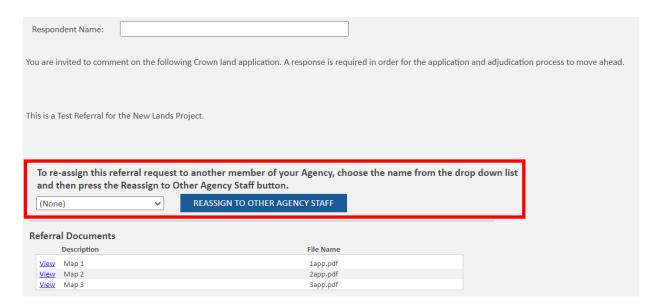
Legal Description:

Size (Area) ha (approx): 5

Schedule/Term Of Proposal: 2 yrs

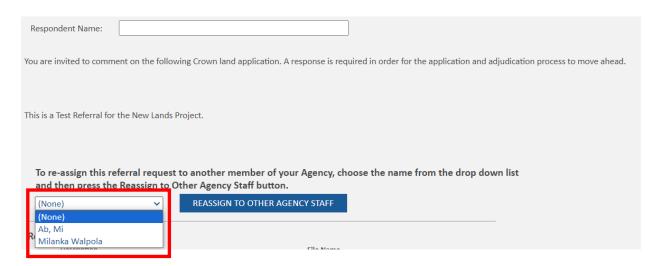
Additional notes: (XX)

- 5. You may also decide to specifically assign the referral request to a member of your Agency.
- **NOTE** The option to assign/re-assign a referral request is **only** available to referrals sent to a Referral Agency that has more than one representative.



Initially, when the referral request is not assigned to a specific representative, the dropdown list to choose the agency member will read as 'None'.

To choose a representative to assign/re-assign the referral request, click on the dropdown list as below.



Then choose a name from the dropdown list and click the 'REASSIGN TO OTHER AGENCY STAFF' button.

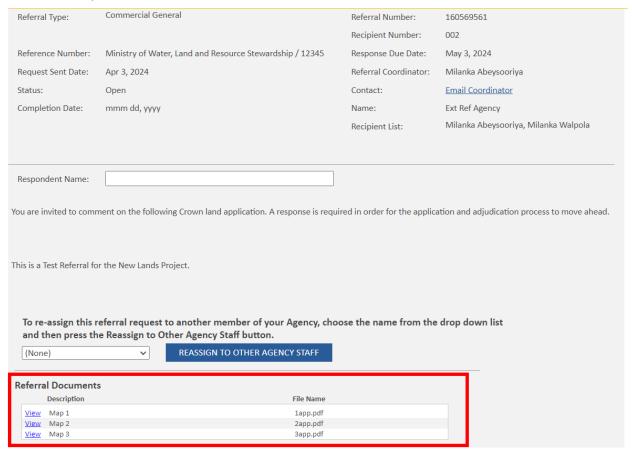
Respondent Name:
You are invited to comment on the following Crown land application. A response is required in order for the application and adjudication process to move ahead.
This is a Test Referral for the New Lands Project.
To re-assign this referral request to another member of your Agency, choose the name from the drop down list and then press the Reassign to Other Agency Staff button. Milanka Walpola REASSIGN TO OTHER AGENCY STAFF

6. Next, you will need to review the Referral Documents included in the referral.

Online:

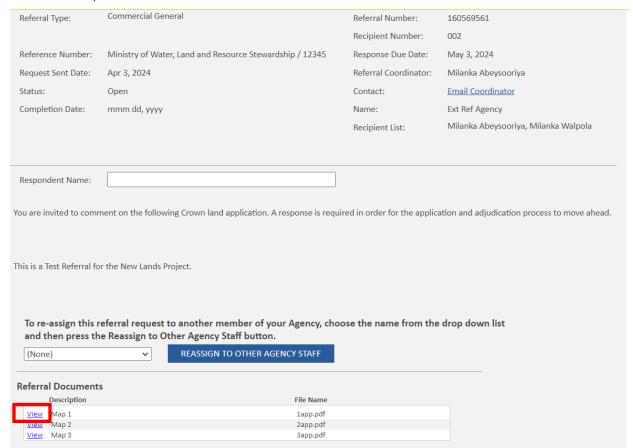
If you wish to review the Referral Documents using the Online E-Referral system, you can access them in the following section of the referral request.

Referral Response



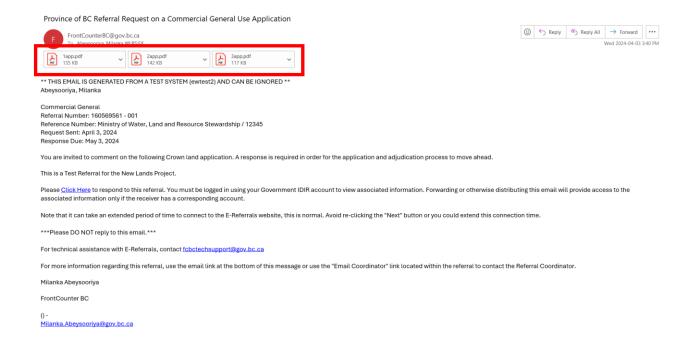
To access a specific Referral Document, click on the 'View' hyperlink of the document you wish to open. This will open the document in a new tab.

Referral Response



Email:

Sometimes, it will be possible to access Referral Documents sent as attachments in the referral request email. The decision to include Referral Documents in the email and what documents to include is made by the Referral Coordinator. The Referral Documents attached to the email may not include all Referral Documents pertaining to a referral.



Hardcopy:

For referral requests sent as Hardcopies, the Referral Documents will be included in the Hardcopy Referral Package.

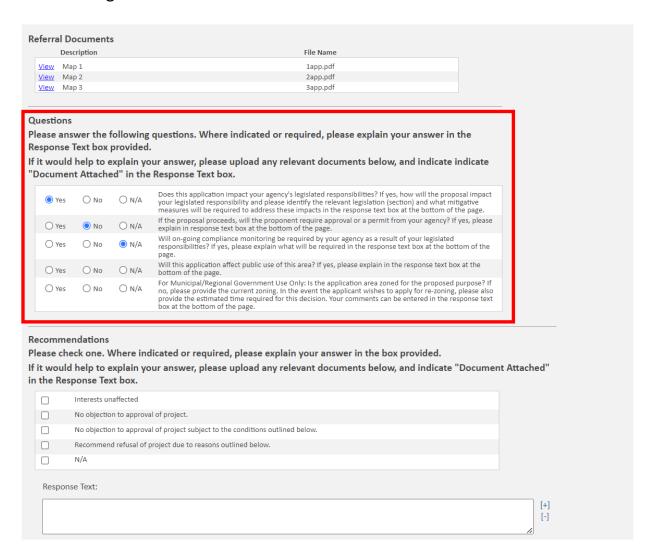
NOTE - If any of the Referral Documents you require to respond to a referral request are not included in the Referral Documents section of the Online referral or a Hardcopy Referral Package, please contact the Referral Coordinator and inform of the missing documents.

7. Now you need to answer the questions that have been sent with the referral request.

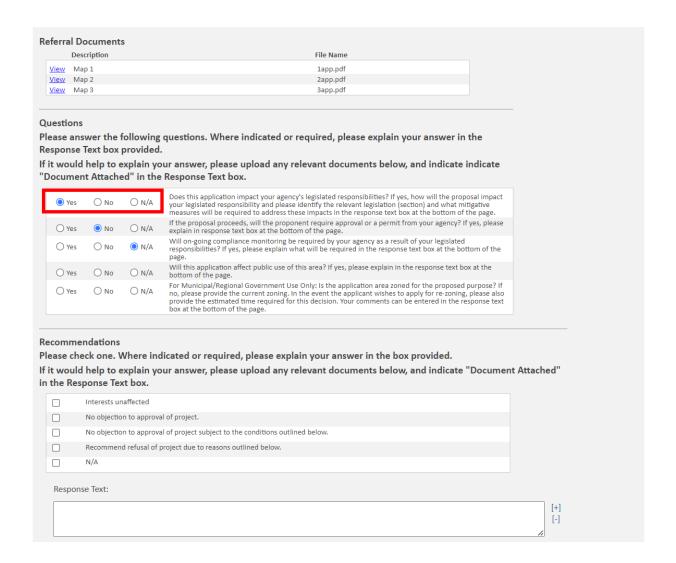
These questions relate to the 'Referral Type' of the referral and a single answer needs to be provided for each question.

Online:

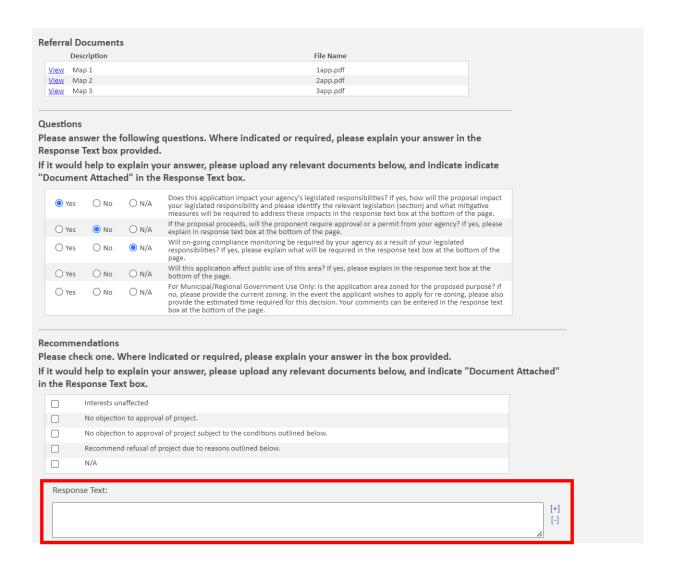
If you are accessing the referral request Online, the questions will be available in the following section.



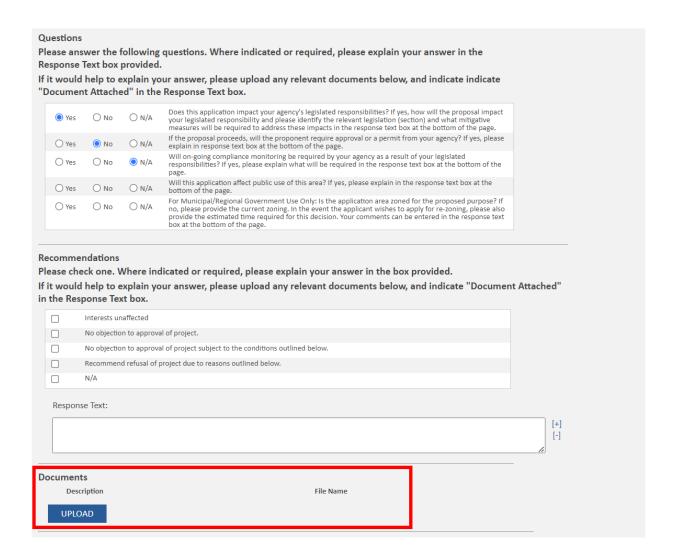
To record your answer to a question, please click on the radio button of your choice for the question.



Some of the questions may request or require you to provide additional explanations based on your choice of answer to the question. These explanations can be provided in the 'Response Text' textbox below.



You could also <u>upload any relevant documents</u> that may help explain your answers better. These documents can be uploaded via the following section. Once uploaded, please indicate as 'Document Attached' in the above 'Response Text' textbox.



Hardcopy:

For referral requests sent in as a Hardcopy, you need to record the answers to the questions in the following section of the Hardcopy Referral Request Letter.

Referral

You are invited to comment on the following Crown land application. A response is optional. If no response is received by the deadline, the application and adjudication process will move forward.

This is a Test Referral for the New Lands Project.

Response

Please fill in the following information and send it to the contact listed at the bottom of the form.

Please respond to all of the following questions:

Yes	No	N/A	Question
			Does this application impact your agency's legislated responsibilities? If yes, how will the proposal impact your legislated responsibility and please identify the relevant legislation (section) and what mitigative measures will be required to address these impacts in the response text box at the bottom of the page.
			If the proposal proceeds, will the proponent require approval or a permit from your agency? If yes, please explain in response text box at the bottom of the page.
			Will on-going compliance monitoring be required by your agency as a result of your legislated responsibilities? If yes, please explain what will be required in the response text box at the bottom of the page.
			Will this application affect public use of this area? If yes, please explain in the response text box at the bottom of the page.

Ministry of Water, Land and Resource Stewardship Reference Number: Ministry of Water, Land and Resource Stewardship / 12345 Surrey

Mailing Address:

200-10428 153rd Street Surrey, BC V3R 1E1 Phone: (604) 586-4400

Fax: (604) 586-4434
Toll Free: (877) 855-3222
Website: FrontCounterBC@gov.bc
.ca

Please ensure that you have answered all questions and only a single answer is provided for each question. To provide additional explanations to the answers when requested or required, you can use the following 'Explanation of Response' textbox of the Hardcopy Referral Request Letter.



Please chec	k one recommendation:
	Interests unaffected
	No objection to approval of project.
	No objection to approval of project subject to the conditions outlined below. (please explain below)
	Recommend refusal of project due to reasons outlined below. (please explain below)
	N/A
	n of Response
Responden	t Name: Date:

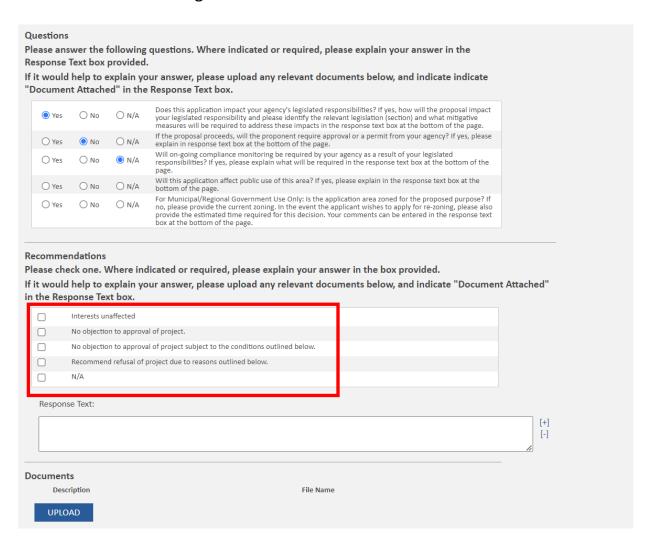
If you intend to include any relevant documents that may help explain your answers better, you will need to print them and include them in the Hardcopy Referral Response Package.

8. The next step is to record your 'Recommendation' for the referral request.

Please ensure that **only one** 'Recommendation' from the list of recommendations is selected.

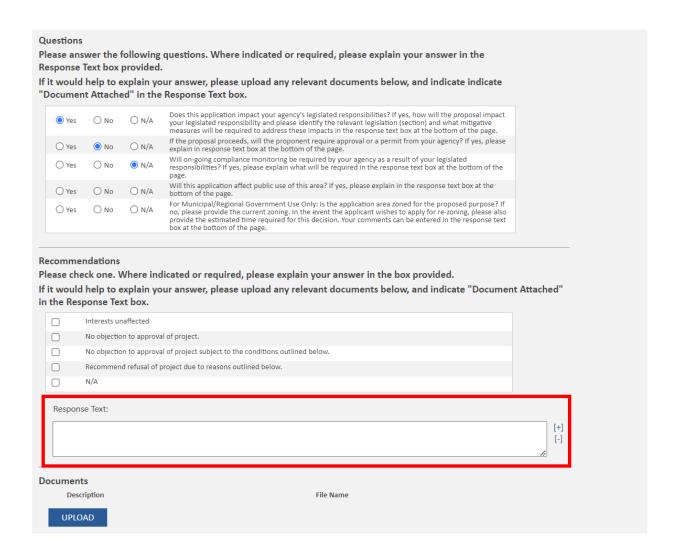
Online:

If you are accessing the referral request Online, the list of recommendations will be available in the following section.

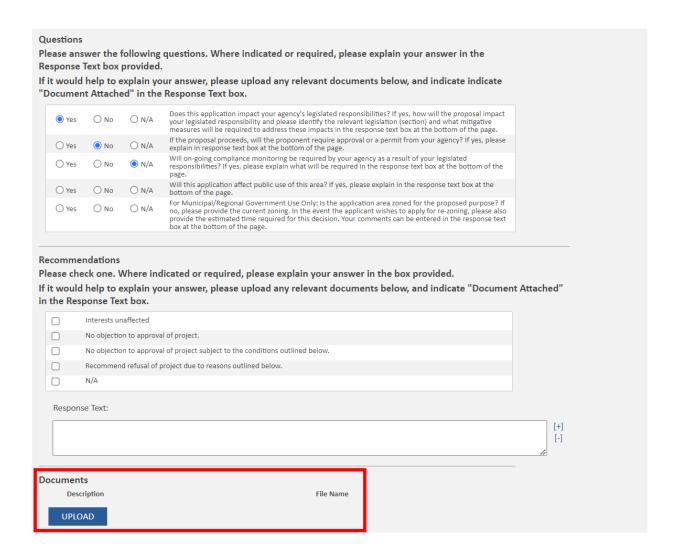


Please click on one of these check boxes to record your recommendation.

If you are requested or required to provide a detailed explanation for the recommendation you select, use the 'Response Text' textbox below.



If you need to <u>upload any relevant documents</u> to support your recommendation, they can be uploaded via the following section. Once uploaded, please indicate as 'Document Attached' in the above 'Response Text' textbox.



Hardcopy:

For referral requests sent in as a Hardcopy, the recommendation can be provided in the following section of the Hardcopy Referral Request Letter.



Please check one recommendation:
☐ Interests unaffected
☐ No objection to approval of project.
 No objection to approval of project subject to the conditions outlined below. (please explain below)
Recommend refusal of project due to reasons outlined below. (please explain below)
□ N/A
Explanation of Response
Respondent Name: Date:

To provide additional explanations to the recommendation when requested or required, you can use the following 'Explanation of Response' textbox of the Hardcopy Referral Request Letter.



Bospondon	t Name:
Explanation	of Response
	N/A
	Recommend refusal of project due to reasons outlined below. (please explain below)
	No objection to approval of project subject to the conditions outlined below. (please explain below)
	No objection to approval of project.
	Interests unaffected
Please chec	k one recommendation:

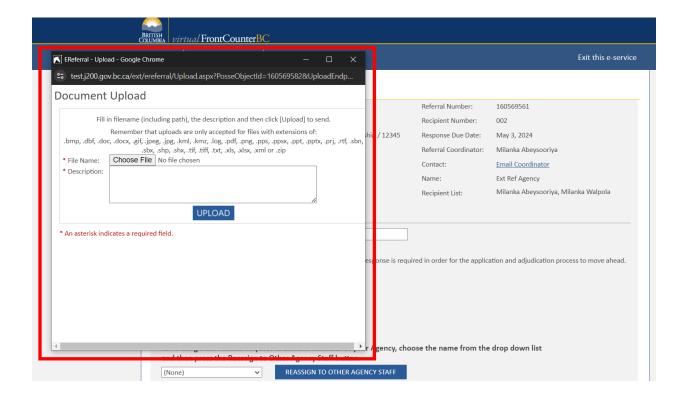
If you intend to include any relevant documents that may support your recommendation, you will need to print them and include them in the Hardcopy Referral Response Package.

9. You may also need to upload other relevant documents as part of the referral response in addition to the documents uploaded to support the questions and selected recommendation.

To upload documents, click on the 'UPLOAD' button as follows.

Yes	○ No	○ N/A	Does this application impact your agency's legislated responsibilities? If yes, how will the proposal impact your legislated responsibility and please identify the relevant legislation (section) and what mitigative measures will be required to address these impacts in the response text box at the bottom of the page.	
○ Yes	No	○ N/A	If the proposal proceeds, will the proponent require approval or a permit from your agency? If yes, please explain in response text box at the bottom of the page.	
○ Yes	○ No	O N/A	Will on-going compliance monitoring be required by your agency as a result of your legislated responsibilities? If yes, please explain what will be required in the response text box at the bottom of the page.	
○ Yes	○ No	○ N/A	Will this application affect public use of this area? If yes, please explain in the response text box at the bottom of the page.	
○ Yes	○ No	○ N/A	For Municipal/Regional Government Use Only: Is the application area zoned for the proposed purpose? If no, please provide the current zoning. In the event the applicant wishes to apply for re-zoning, please also provide the estimated time required for this decision. Your comments can be entered in the response text	
ase che would he Resp	help to e oonse Te	Where ind explain yo xt box.	dicated or required, please explain your answer in the box provided. our answer, please upload any relevant documents below, and indicate "Documen	t Attached"
ase che would he Resp	ck one. V help to e oonse Tex Interests ur	Where incexplain your toox.	box at the bottom of the page. dicated or required, please explain your answer in the box provided. pur answer, please upload any relevant documents below, and indicate "Documen	t Attached"
ase chec would he Resp	ck one. V help to e conse Tex Interests ur No objection	Where incexplain your box. maffected on to approve	dicated or required, please explain your answer in the box provided. bur answer, please upload any relevant documents below, and indicate "Documental of project.	it Attached"
ase check would he Resp	ck one. V help to e ponse Tex Interests ur No objectio	Where indexplain you with box. Inaffected on to approve on to approve the provention of the proventio	box at the bottom of the page. dicated or required, please explain your answer in the box provided. pur answer, please upload any relevant documents below, and indicate "Documental of project. al of project subject to the conditions outlined below.	it Attached"
ase chec would he Resp	ck one. V help to e conse Tex Interests ur No objectio No objectio Recommen	Where indexplain you with box. Inaffected on to approve on to approve the provention of the proventio	dicated or required, please explain your answer in the box provided. bur answer, please upload any relevant documents below, and indicate "Documental of project.	it Attached"
ase chec would he Resp	ck one. V help to e ponse Tex Interests ur No objectio	Where indexplain you with box. Inaffected on to approve on to approve the provention of the proventio	box at the bottom of the page. dicated or required, please explain your answer in the box provided. pur answer, please upload any relevant documents below, and indicate "Documental of project. al of project subject to the conditions outlined below.	t Attached"
ase chec would he Resp	ck one. V help to e oonse Tex Interests ur No objectio No objectio Recommen N/A	Where indexplain you with box. Inaffected on to approve on to approve the provention of the proventio	box at the bottom of the page. dicated or required, please explain your answer in the box provided. pur answer, please upload any relevant documents below, and indicate "Documental of project. al of project subject to the conditions outlined below.	it Attached"
ase chee would he Resp	ck one. V help to e oonse Tex Interests ur No objectio No objectio Recommen N/A	Where indexplain you with box. Inaffected on to approve on to approve the provention of the proventio	box at the bottom of the page. dicated or required, please explain your answer in the box provided. pur answer, please upload any relevant documents below, and indicate "Documental of project. al of project subject to the conditions outlined below.	t Attached"

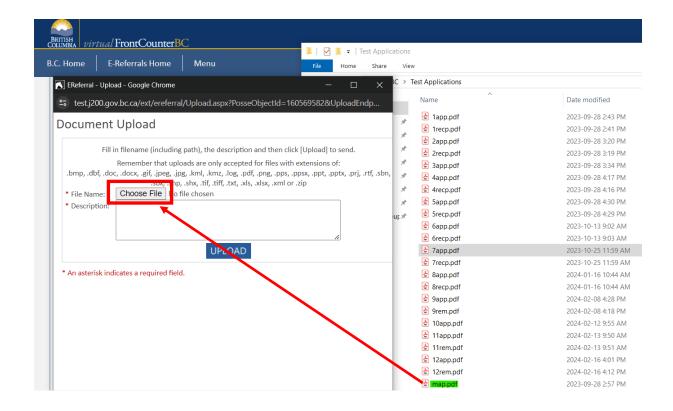
Next, a 'Document Upload' screen would open as follows.



To attach the document, you can follow either of the following two methods.

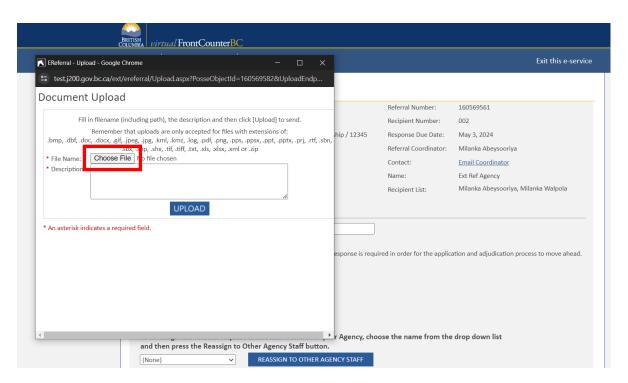
Method 1:

Drag the file from your folder and drop it on to the 'Choose File' button as follows.

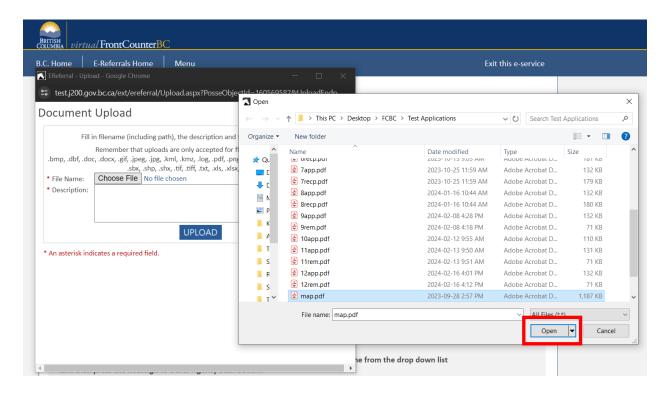


Method 2:

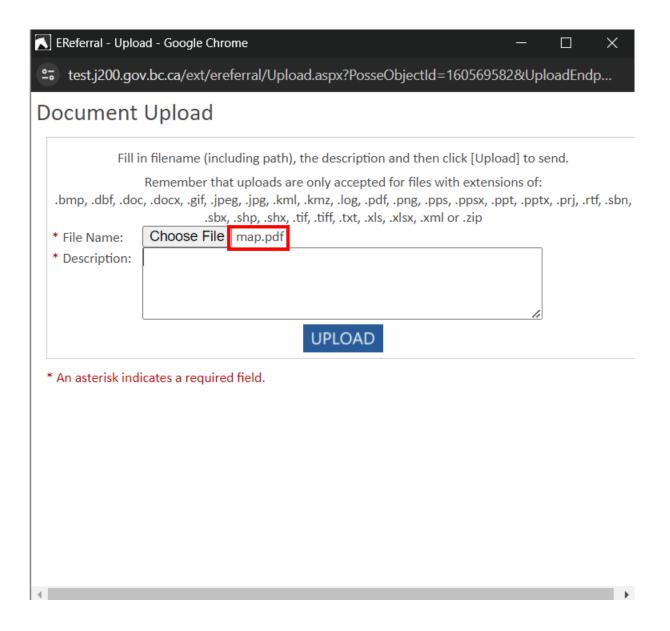
Click on the 'Choose File' button as follows.



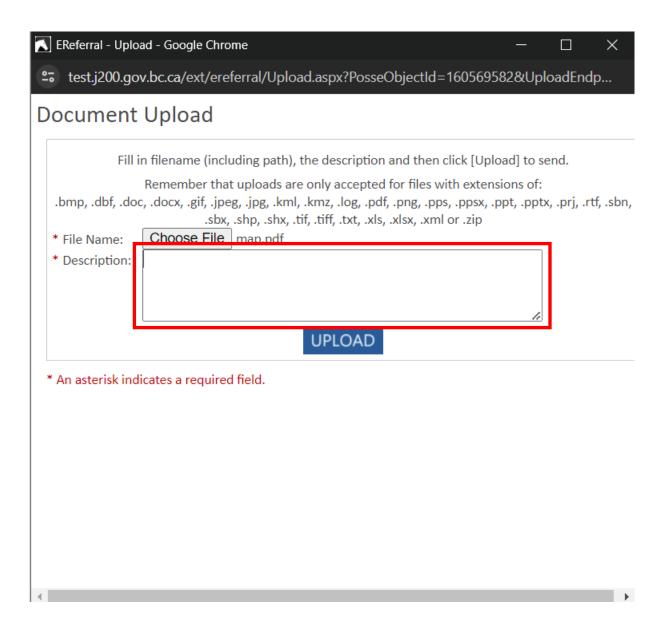
Then select the file from the File Browser that opens and click the 'Open' button.



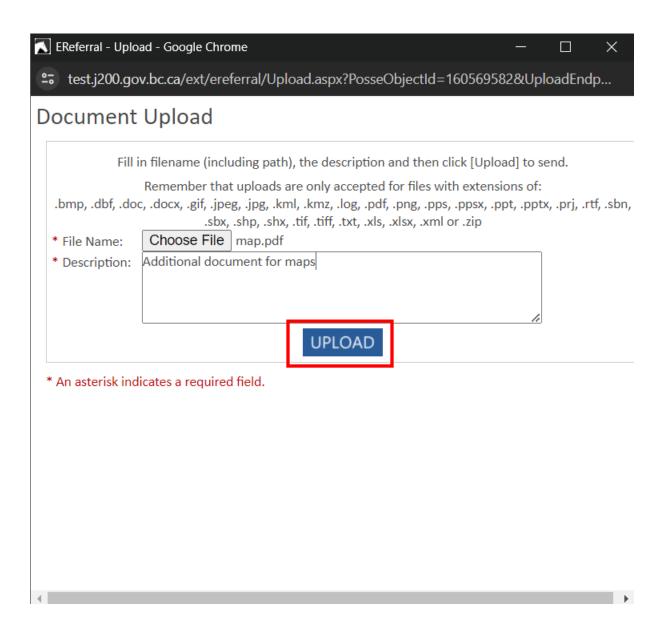
If the document was successfully attached, the file name will appear next to the 'Choose File' button as follows.



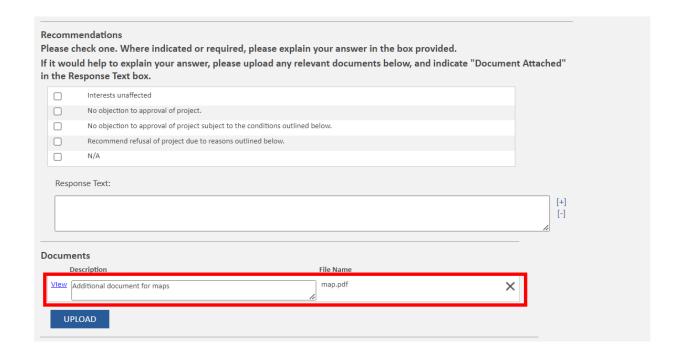
Now, enter a description for the document in the following section.



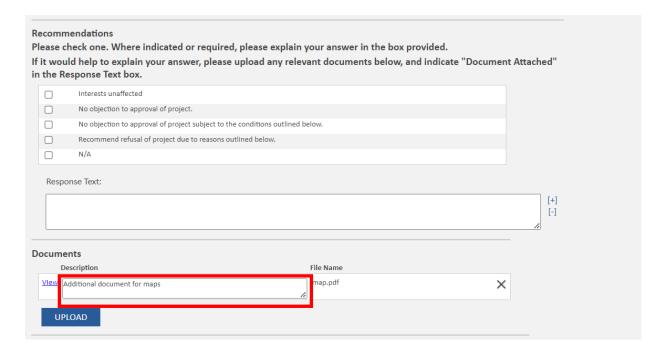
Next, click the 'UPLOAD' button to upload the document to the 'Documents' section of the Online referral response.



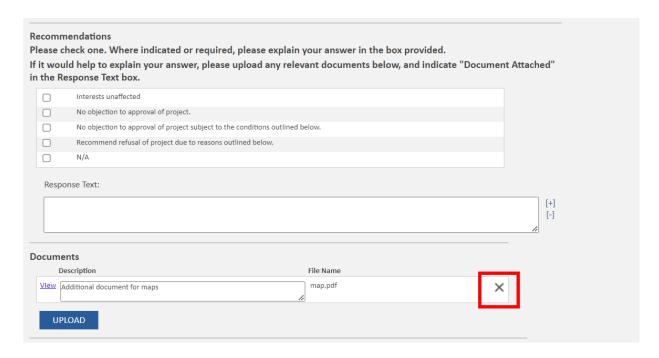
If the upload was successful, the document will appear as follows in the 'Documents' section of the Online referral response.



If you want to edit the description of the uploaded document, you can do so by using the following textbox.

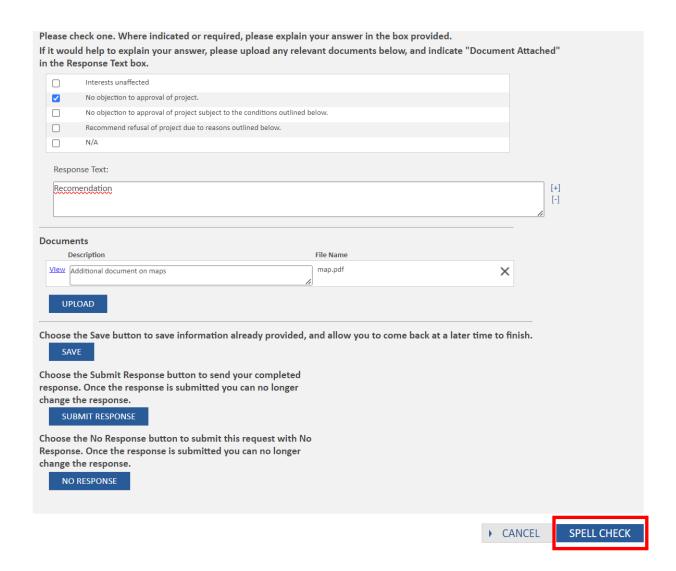


If you wish to remove an uploaded document from the referral response, you can do so by clicking the 'X' sign of the relevant document as follows.

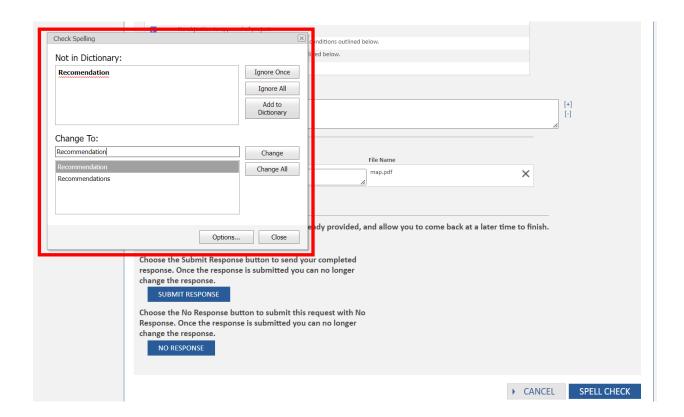


- **NOTE** If you are responding to a referral in a non-electronic format, you will need to print these documents and include them in the Hardcopy Referral Response Package.
- 10. Before finalizing your Referral Response, you may want to run a 'Spell Check' to ensure that your response is free of errors.

You are able to run a spell check on the text entered in the 'Response Text' textbox. To run the spell check, click on the 'SPELL CHECK' button as follows.



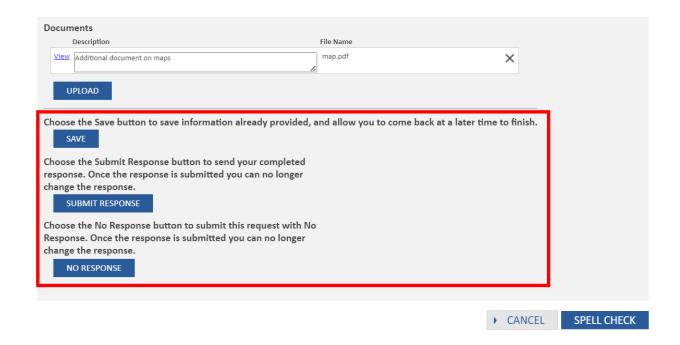
A pop-up window as follows will appear indicating any spelling errors and suggestions for corrections. Here, you have the option to either accept the suggestions or ignore the errors.



11. Now you have arrived at the final step of responding to a referral request, which is recording your final response.

Online:

A response is finalized via the following section of the Referral Response screen.

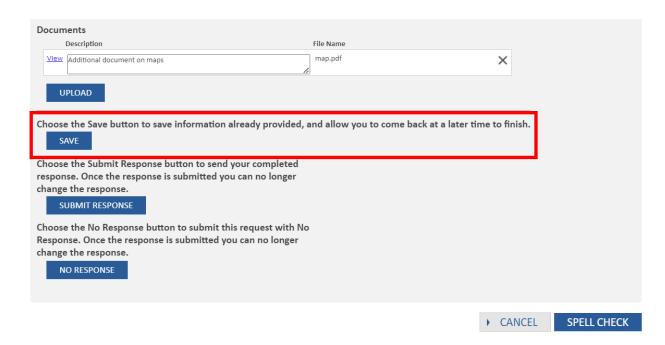


IMPORTANT - During this step, it is important that your Referral Agency representatives are aware of who will submit the final response to the referral request (e.g., primary representative, representative assigned to the referral request). If multiple representatives are commenting on a specific referral request, please have them **only** click the 'SAVE' button once they have recorded their comments and ensure that only the representative submitting the final response clicks on the 'SUBMIT RESPONSE' or 'NO RESPONSE' buttons. This will prevent the referral from closing before all required representatives have commented.

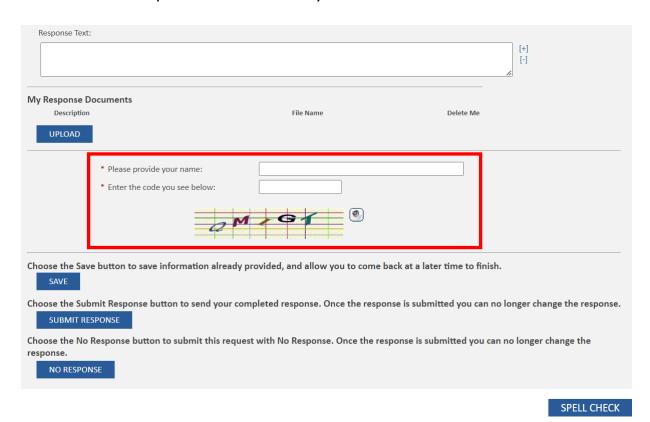
You can now choose one of the following three options to record your response,

Option 1 - 'SAVE'

If you wish to complete the Referral Response at a different time and want to save the information already provided, you can do so by clicking the 'SAVE' button.



NOTE - If you are an external recipient responding to a referral as a 'Guest', you are required to provide your name and a security code in the following section of the Referral Response screen before you click the 'SAVE' button.



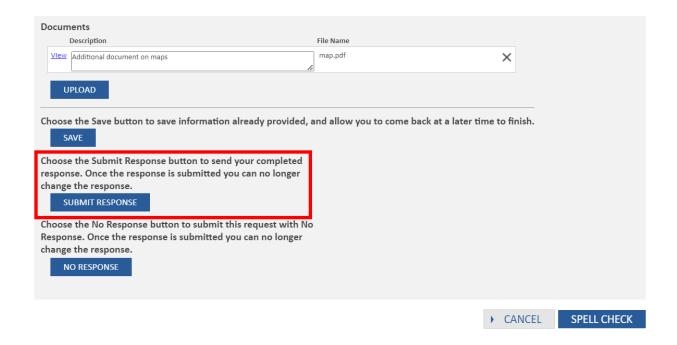
Option 2 – 'SUBMIT RESPONSE'

Once you have completed a Referral Response by recording the necessary information, you can submit the response by clicking the 'SUBMIT RESPONSE' button.

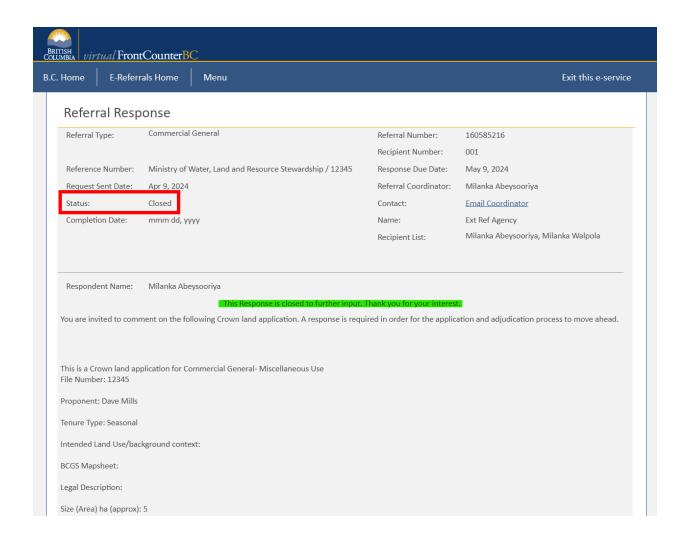
NOTE - If you are an external recipient responding to a referral as a 'Guest', you are required to provide your name and a security code in the following section of the Referral Response screen before you click the 'SUBMIT RESPONSE' button.

Response Text		[+]					
My Response Description							
	* Please provide your name: * Enter the code you see below:						
SAVE Choose the Substitute SUBMIT RE	Choose the Save button to save information already provided, and allow you to come back at a later time to finish. SAVE Choose the Submit Response button to send your completed response. Once the response is submitted you can no longer change the response. SUBMIT RESPONSE Choose the No Response button to submit this request with No Response. Once the response is submitted you can no longer change the						
NO RESPO	NSE	SPELL CHECK					

IMPORTANT - It is not possible to make any changes to a Referral Response once it has been submitted.

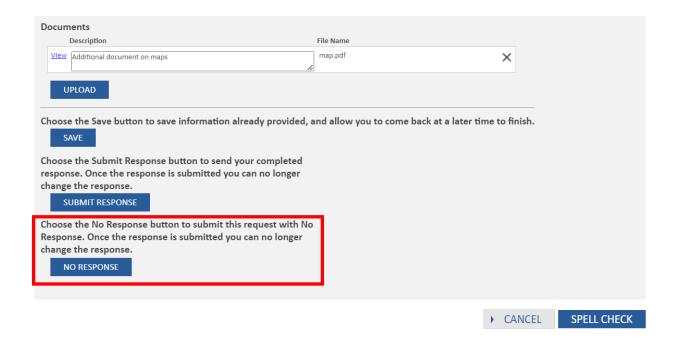


When you submit the Referral Response, you will get a confirmation as follows that indicates that the response was submitted successfully. The status of the Referral Response will also be updated to 'Closed'.



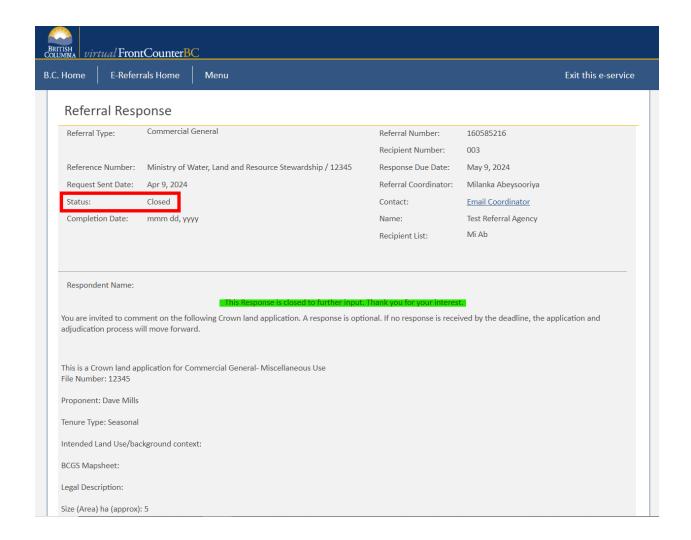
Option 3 – You also have the choice of responding to a Referral Request as 'No Response' by clicking the 'NO RESPONSE' button.

IMPORTANT - It is not possible to make any changes to a Referral Response once it has been submitted as 'No Response'.



To submit a Referral Response as 'No Response', you do **not** need to fill in any information in the Referral Response.

When you submit the Referral Response as 'No Response', you will get a confirmation as follows that indicates that the response was submitted successfully. The status of the Referral Response will also be updated to 'Closed'.



Hardcopy:

Once you have completed filling out the Hardcopy Referral Request Letter and have prepared the complete Hardcopy Referral Response Package, you can mail/fax/email them to the 'Contact' indicated in the Hardcopy Referral Request Letter.

The 'Contact' and the addresses the package can be sent to can be found in the Hardcopy Referral Request Letter as follows.

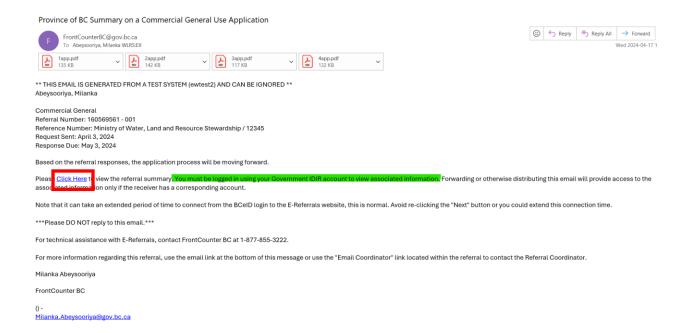
Respondent Name:		Date:		
Contact				
FrontCounter BC				
Contact: Milanka Abeysooriya				
E-mail: Milanka.Abeysooriya@gov.bc.ca				
Windows and Surroy	Mailing Address:	Dhana: (604) E96 4400		
Ministry of Water, Land and Surrey Resource Stewardship	Mailing Address:	Phone: (604) 586-4400		
Reference Number:	200-10428 153rd Street	Fax: (604) 586-4434		
Ministry of Water, Land and	Surrey, BC V3R 1E1	Toll Free: (877) 855-3222		
Resource Stewardship / 12345		Website: FrontCounterBC@gov.bc		

Responding to a Referral Summary

1. The first step is to access the Referral Summary that you have received via Email,
Online or as a Hardcopy.

Referral Summary Sent via Email

To open a Referral Summary sent via Email, click on the 'Click Here' link as follows. You may be asked to authenticate yourself using IDIR credentials or a BCeID or may be allowed to log in to the E-Referral system as a Guest.

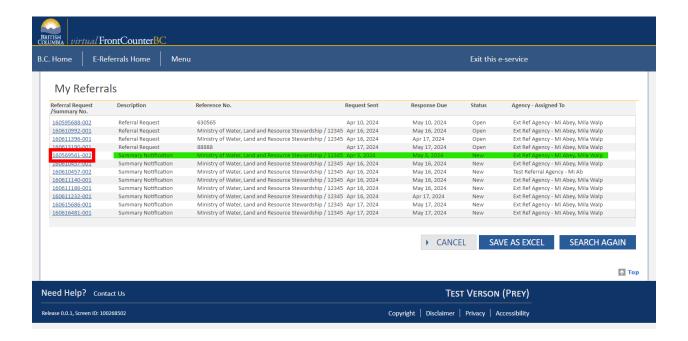


Referral Summary Sent Online

To access a Referral Summary sent online via the E-Referral system, you will need to log-in to the system by authenticating yourself using IDIR credentials or a BCeID. To access this Referral Summary, you need to be successfully registered as a representative of the Referral Agency the summary was sent to.

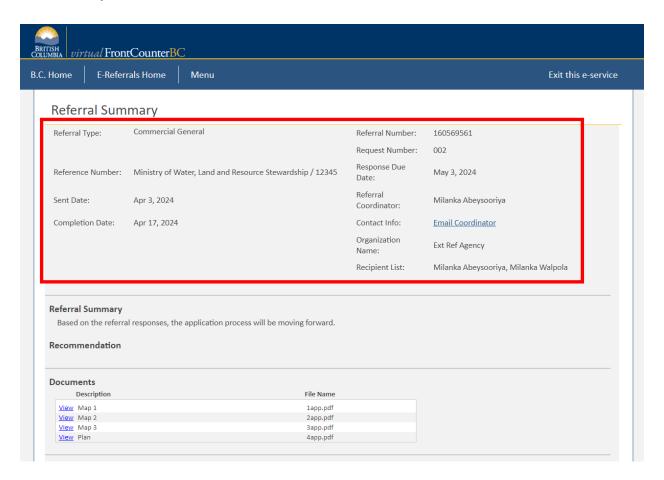
To search for a Referral Summary in the E-Referral system, please refer to the 'Searching for Referral Requests' section of this manual.

In the search results, click on the 'Referral Request /Summary No.' hyperlink of the Referral Summary you need to access.

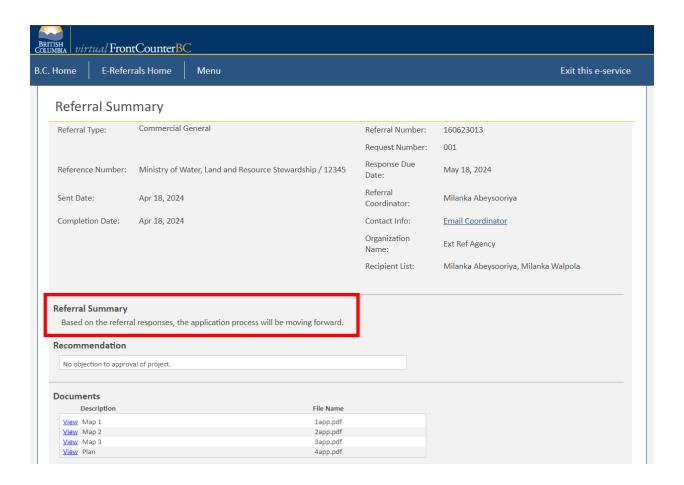


- 2. Once you have opened the Referral Summary, you will need to review the Referral Summary Details.
 - Referral Type The category of the referral.
 - Reference Number Either an 'Agency Name/Agency File Number' the referral was sent from, a Project Number or a Business Line File Number.
 - Referral Number A number that will uniquely identify a referral.
 - Request Number A number assigned to each of the Referral Requests sent within one referral (indicating the different recipients).
 - Sent Date Date the referral was received.
 - Response Due Date The last date to respond to the referral.
 - Completion Date The date the referral closed, and summaries were sent.
 - Referral Coordinator The initiator of the referral.
 - Contact Info Link to email the Referral Coordinator.

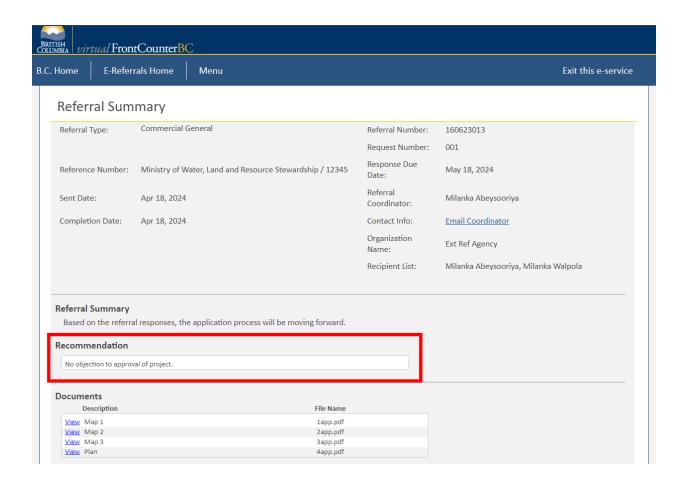
- Organization Name Name of the recipient of the referral (e.g., Referral Agency name, Guest name, etc.).
- Recipient List The list of individual names the referral was sent to.



3. Now you can review the Referral Summary in the following section.



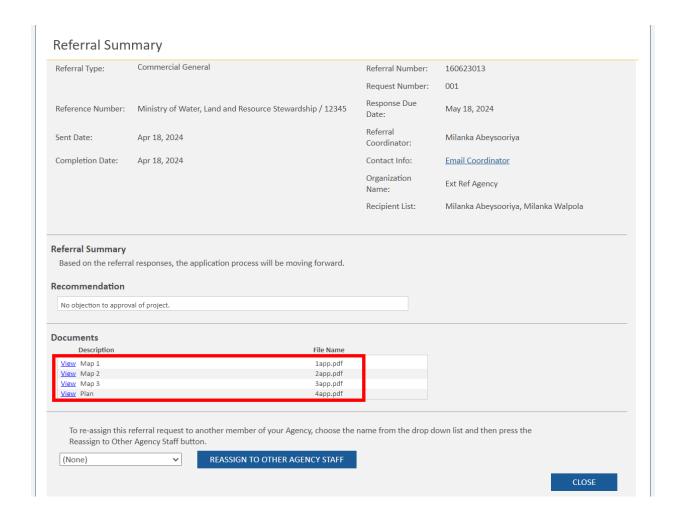
4. Next, you can review the recommendation provided with the Referral Summary.



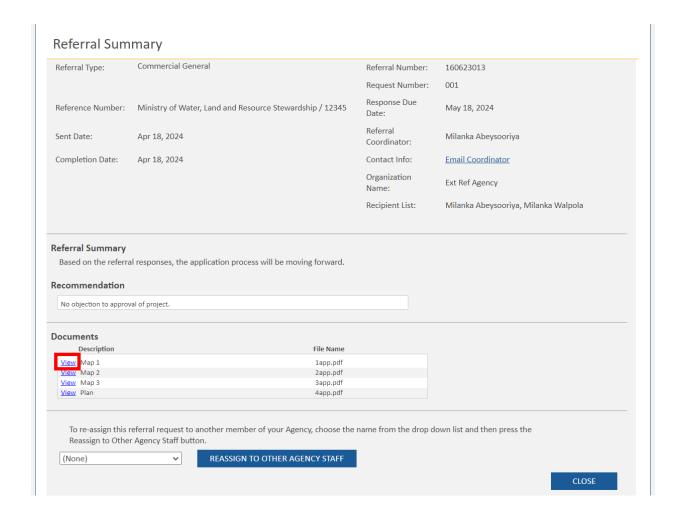
5. In the next section, you can review the Referral Documents included in the summary.

Online:

If you wish to review the Referral Documents using the Online E-Referral system, you can access them in the following section of the referral summary.

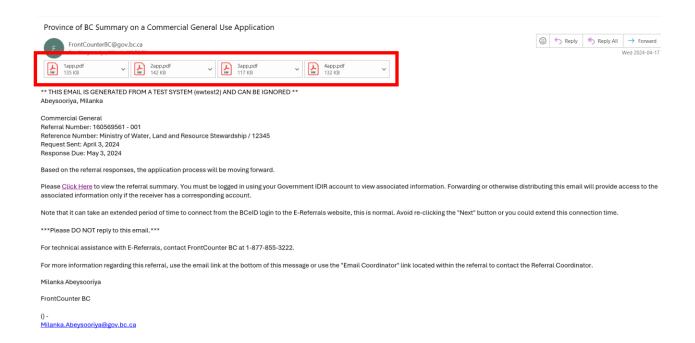


To access a specific Referral Document, click on the 'View' hyperlink of the document you wish to open. This will open the document in a new tab.

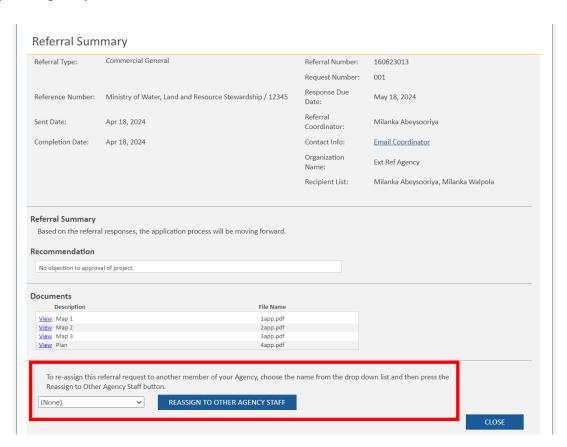


Email:

Sometimes, it will be possible to access Referral Documents sent as attachments in the referral summary email.

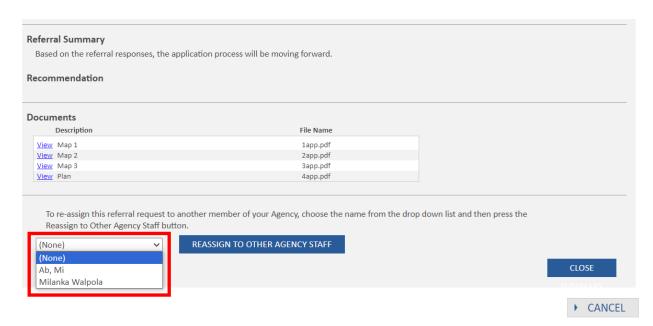


6. You may also decide to specifically assign the referral summary to a member of your Agency.

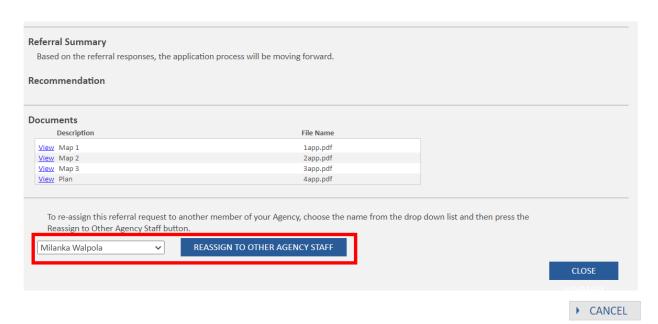


Initially, when the referral summary is not assigned to a specific representative, the dropdown list to choose the agency member will read as 'None'.

To choose a representative to assign/re-assign the referral summary, click on the dropdown list as follows.

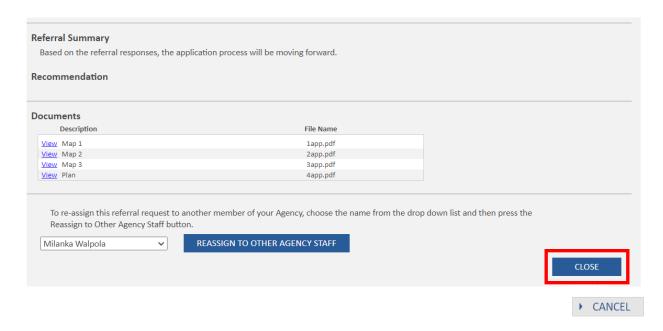


Then choose a name from the dropdown list and click the 'REASSIGN TO OTHER AGENCY STAFF' button.



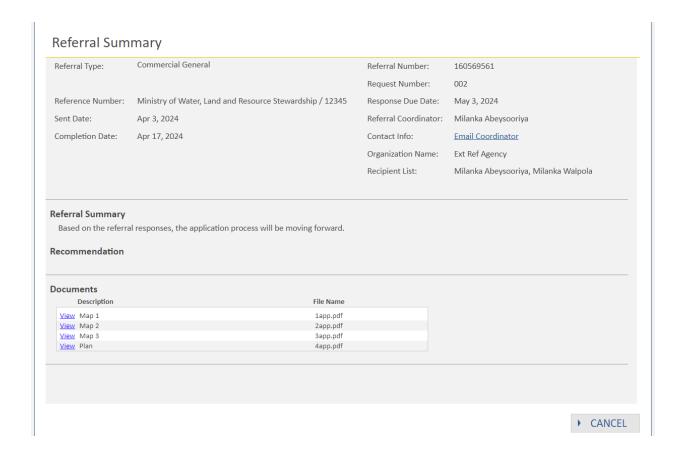
7. Once you have completed the review process, the final step is to 'Close' the referral summary.

To close a referral summary, click the 'CLOSE' button as follows.



NOTE - Once a referral summary has been closed, it will be marked as 'Read' in the system and it will not be possible to assign/re-assign the referral summary to another member of the Agency.



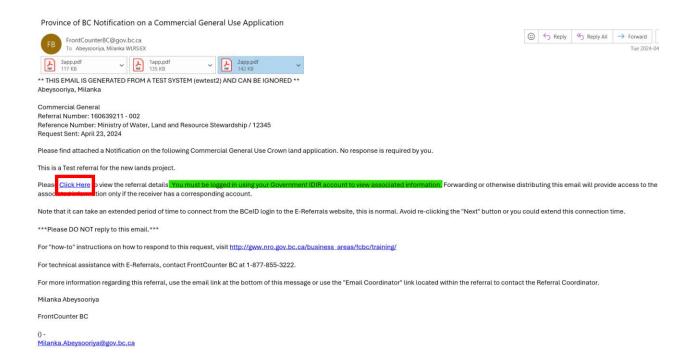


Responding to a Referral Notification

1. The first step is to access the Referral Notification that you have received via Email, Online or as a Hardcopy.

Referral Notification Sent via Email

To open a Referral Notification sent via Email, click on the 'Click Here' link as follows. You may be asked to authenticate yourself using IDIR credentials or a BCeID or may be allowed to log in to the E-Referral system as a Guest.

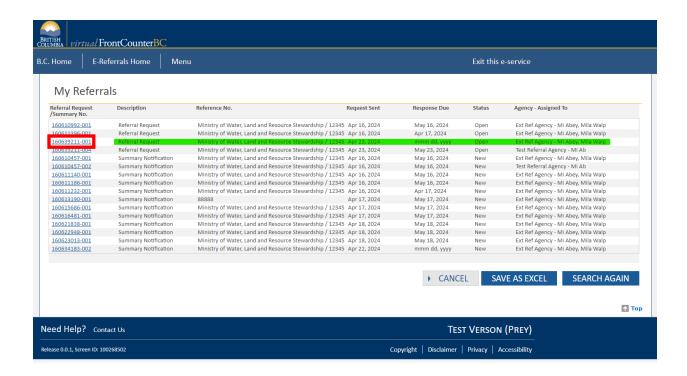


Referral Notification Sent Online

To access a Referral Notification sent online via the E-Referral system, you will need to log-in to the system by authenticating yourself using IDIR credentials or a BCeID. To access this Referral Notification, you need to be successfully registered as a representative of the Referral Agency the notification was sent to.

To search for a Referral Notification in the E-Referral system, please refer to the 'Searching for Referral Requests' section of this manual.

In the search results, click on the 'Referral Request /Summary No.' hyperlink of the Referral Notification you need to access.



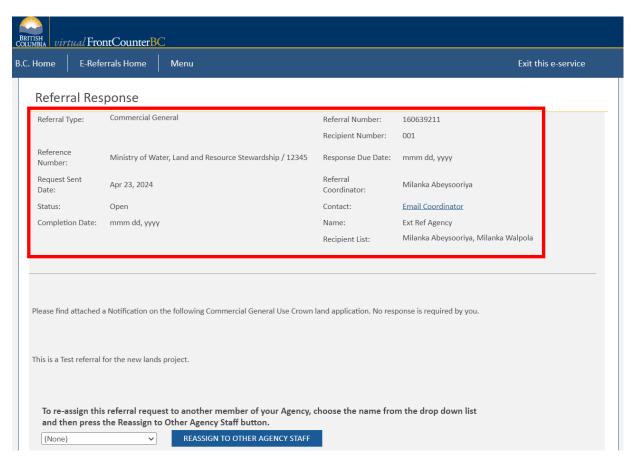
Referral Notification Sent as a Hardcopy

The Hardcopy Referral Package that you receive will include the Hardcopy Referral Request Letter (notification) in addition to other relevant referral documents.

Hardcopy Referral Packages are sent on the same date the electronic referrals are sent.

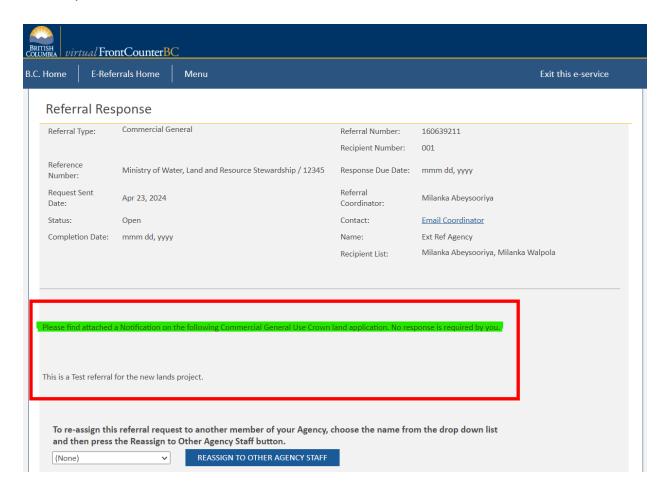
- 2. Once you have opened the Referral Notification, you will need to review the Referral Notification Details.
 - Referral Type The category of the referral.
 - Reference Number Either an 'Agency Name/Agency File Number' the referral was sent from, a Project Number or a Business Line File Number.
 - Referral Number A number that will uniquely identify a referral.

- Recipient Number A number assigned to each of the Referral Requests sent within one referral (indicating the different recipients).
- Request Sent Date Date the referral was received.
- Response Due Date This will appear as 'mmm dd, yyyy' as a response is not required for a notification.
- Completion Date The date the referral closed.
- Referral Coordinator The initiator of the referral.
- Contact Link to email the Referral Coordinator.
- Status The current state of the referral.
- Name Name of the recipient of the referral (e.g., Referral Agency name,
 Guest name, etc.).
- Recipient List The list of individual names the referral was sent to.

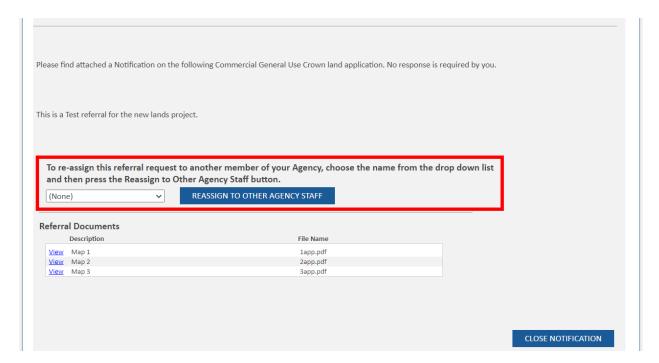


3. You will now need to review the Referral Information pertaining to the referral notification that has been sent to you.

This section will also indicate that the referral is a notification, and a response is not required.

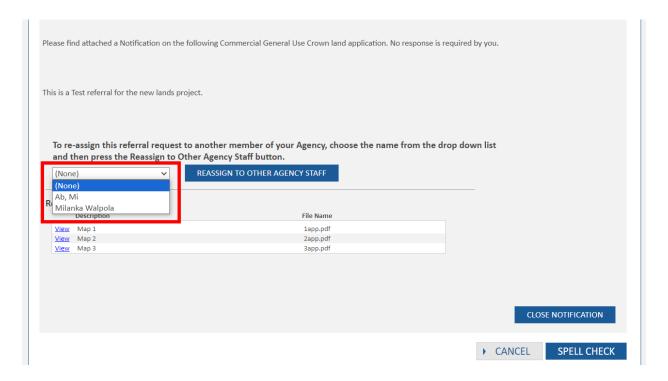


- 4. You may also decide to specifically assign the referral notification to a member of your Agency.
- **NOTE** The option to assign/re-assign a referral notification is **only** available to referrals sent to a Referral Agency that has more than one representative.

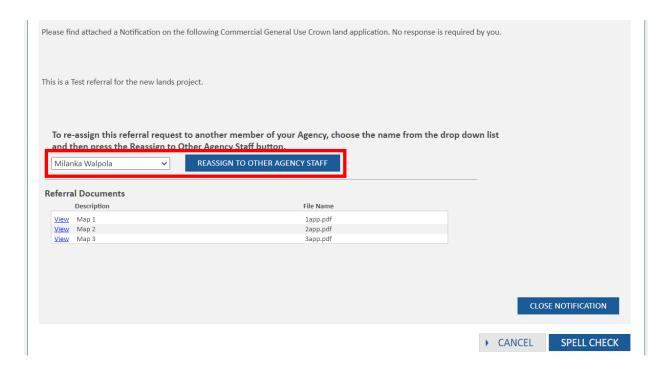


Initially, when the referral notification is not assigned to a specific representative, the dropdown list to choose the agency member will read as 'None'.

To choose a representative to assign/re-assign the referral notification, click on the dropdown list as below.



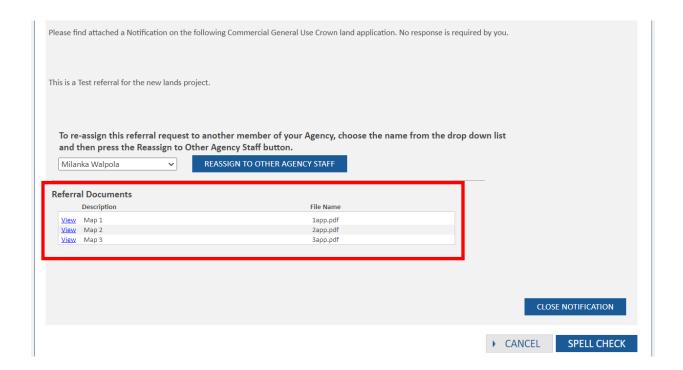
Then choose a name from the dropdown list and click the 'REASSIGN TO OTHER AGENCY STAFF' button.



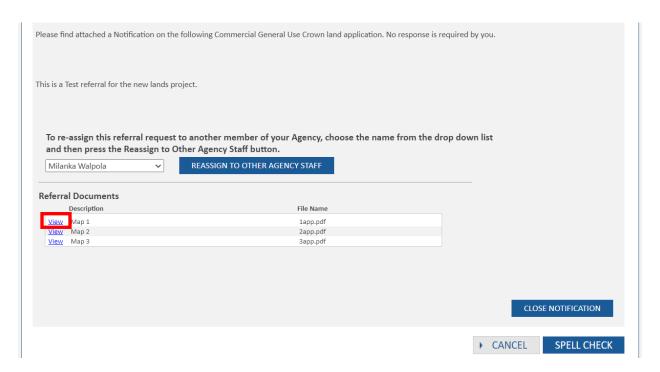
5. Next, you will need to review the Referral Documents included in the referral.

Online:

If you wish to review the Referral Documents using the Online E-Referral system, you can access them in the following section of the referral notification.

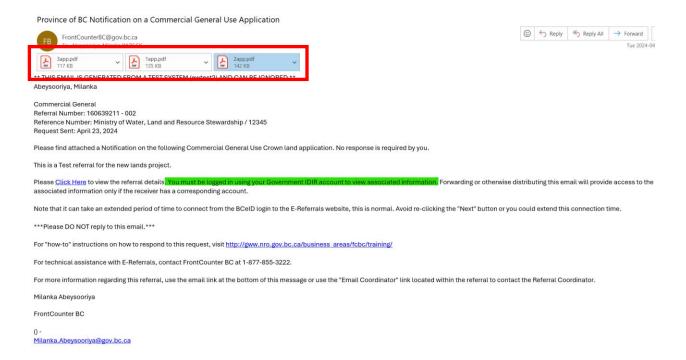


To access a specific Referral Document, click on the 'View' hyperlink of the document you wish to open. This will open the document in a new tab.



Email:

Sometimes, it will be possible to access Referral Documents sent as attachments in the referral notification email. The decision to include Referral Documents in the email and what documents to include is made by the Referral Coordinator. The Referral Documents attached to the email may not include all Referral Documents pertaining to a referral.



Hardcopy:

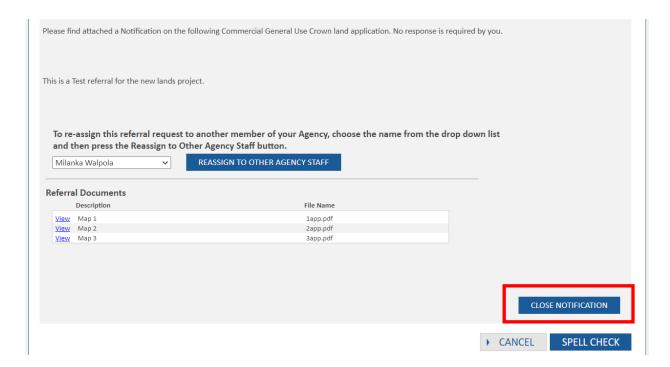
For referral notifications sent as Hardcopies, the Referral Documents will be included in the Hardcopy Referral Package.

6. Once you have completed the review process, the final step is to 'Close' the referral notification.

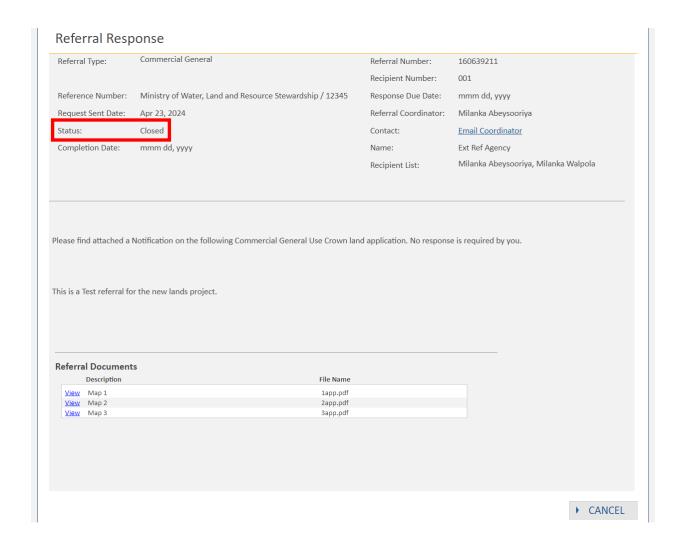
NOTE - Even though a response is not required for a Referral Notification, it is recommended to 'Close' off the notification to mark it as 'Closed' in the E-Referral system.

Notification Received by a Referral Agency/Internal Staff

To close a referral notification, click on the 'CLOSE NOTIFICATION' button as follows.

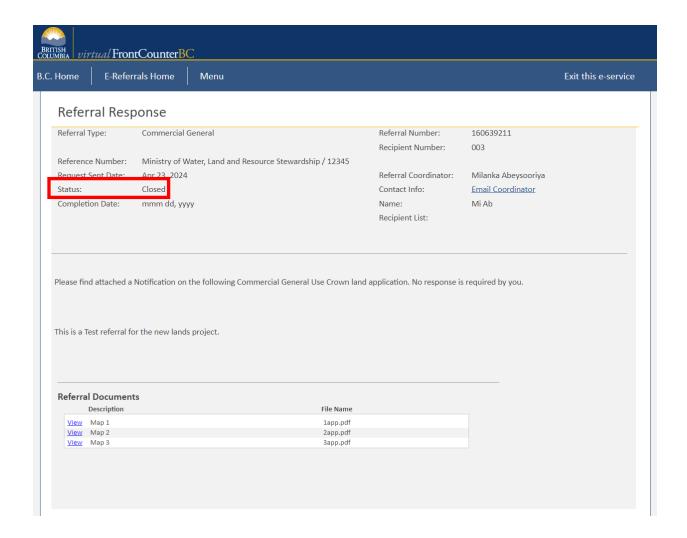


NOTE - Once a referral notification has been closed, its status will be updated to 'Closed' and it will not be possible to assign/re-assign the notification to another member of the Agency.



Notification Received by a Guest Recipient

If you are a 'Guest' recipient of a Referral Notification received via Email, the notification will appear with status 'Closed' by default, and a button to close the notification will not be available.

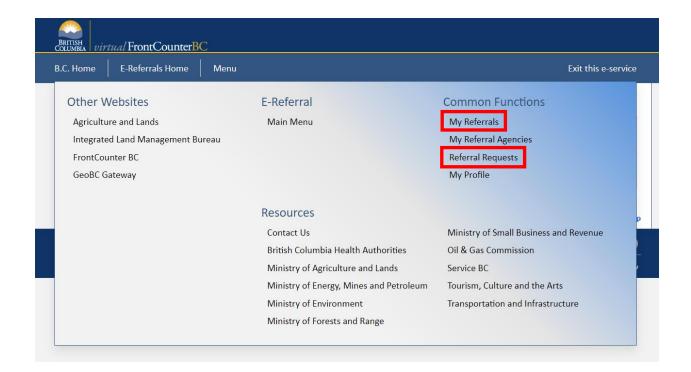


Searching for Referral Requests

You can search for referral requests sent via the E-Referral system using the search functionalities provided in the 'Common Functions' section of the 'Menu' menu. These functionalities include:

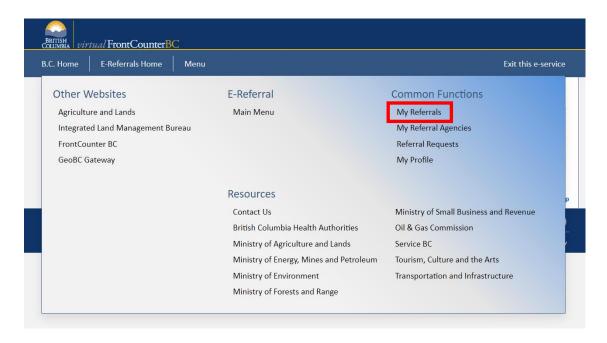
My Referrals – Navigate to the Referral Requests assigned to you that you need to respond to.

Referral Requests – Search for Referral Requests created in your Referral Center.

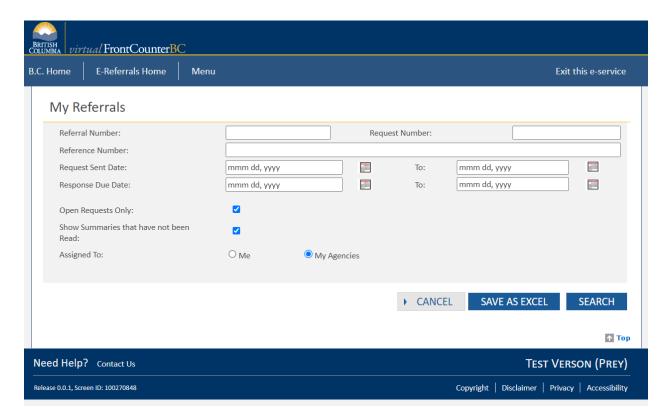


Searching for Referral Requests Assigned to You

1. To search for referral requests that are specifically assigned to you or to a referral agency that you are a representative of, click on the 'My Referrals' menu item of the 'Common Functions' section of the 'Menu' menu.

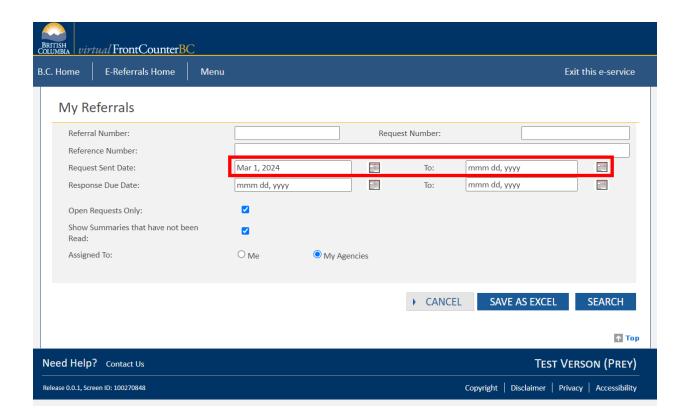


2. You will then land on the following search page.



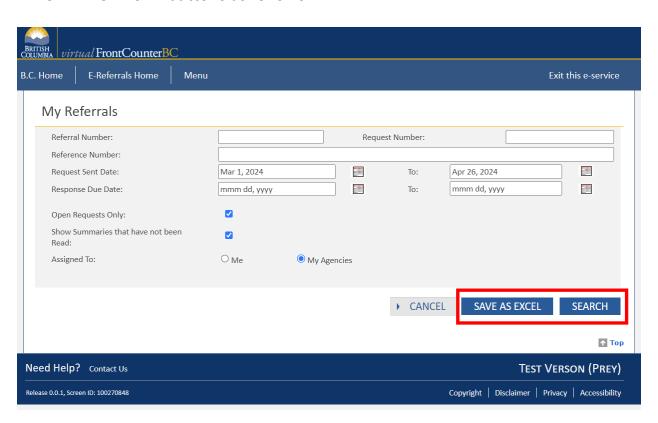
The search criteria for this functionality are as follows:

- Referral Number A number that will uniquely identify a referral.
- Request Number A number assigned to each of the Referral Requests sent within one referral (indicating the different recipients).
- Reference Number Either an 'Agency Name/Agency File Number' the referral was sent from, a Project Number or a Business Line File Number.
- Request Sent Date Select a date range to signify the date the referral was received. You can either type in a date using the 'mmm dd, yyyy' format (e.g., 'Jan 9, 2024') or select a date via the calendar control.

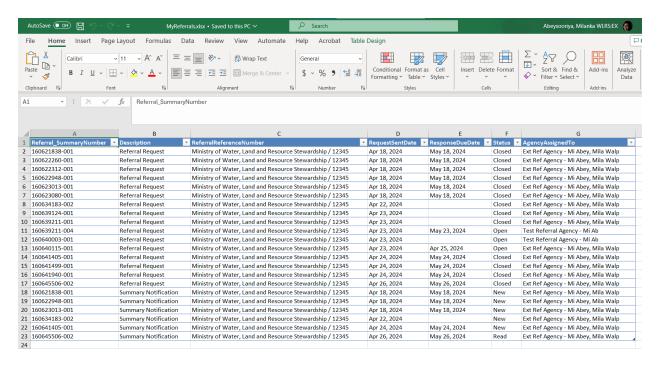


- Response Due Date Select a date range to signify the last date to respond to the referral. The process to specify a date is the same as for 'Request Sent Date' above.
- Open Requests Only If checked, the search will yield referral requests where the status of the referral the request was sent from is 'Open'.
- Show Summaries that have not been Read If checked, the search will yield referral summaries that have a status of 'New'.
- Assigned To Select one of the following two options.
 - Me Search results will be narrowed down to Referral Requests that have been specifically assigned to you or to a referral agency that you are a representative of.

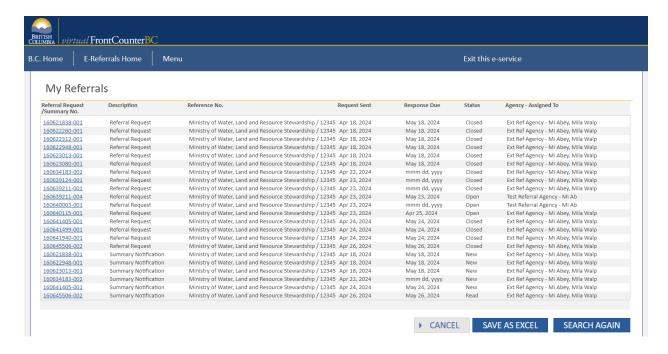
- My Agencies Search results will be narrowed down to Referral Requests and Referral Summaries that have been received by a referral agency you are a representative of even in the case the Referral Request/Summary is specifically assigned to another representative of the agency.
- **NOTE** It is recommended that you provide the search criteria as much as possible to narrow down the search results, in order to help you find the referral request that you are looking for. However, if you have the 'Referral Number' of the referral request, you do not need to fill in other search criteria and the search results will directly take you to the referral you are looking for.
- 3. Once you have filled in the necessary search criteria, click on the 'SEARCH' or 'SAVE AS EXCEL' buttons as follows.



If you click on the 'SAVE AS EXCEL' button, the search results will be directly imported to an Excel sheet that you can save on your Personal Computer for later review.



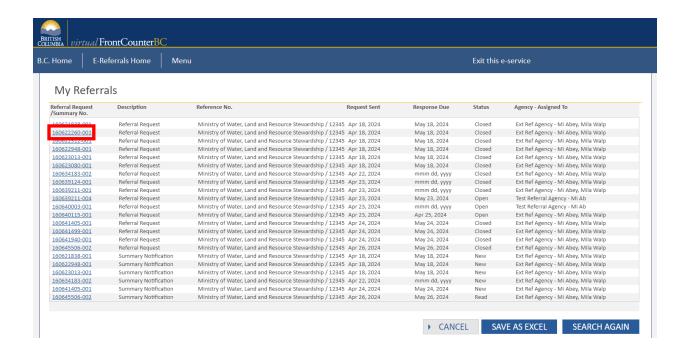
If you click on the 'SEARCH' button, you will be directed to a search results page as follows.



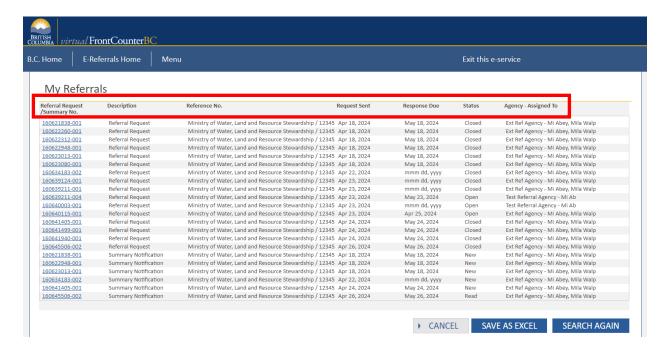
The search results page displays the results that match the search criteria along with the following descriptors.

- Referral Request/Summary No. A combination of the Referral Number and Request Number of the referral.
- Description Description of the search record (i.e., Referral Request, Summary Notification).
- Reference No. Either an 'Agency Name/Agency File Number' the referral was sent from, a Project Number or a Business Line File Number.
- Request Sent The date the referral was received.
- Response Due The last date to respond to the referral.
- Status The status of a Referral Request (e.g. Open, Closed) or Summary Notification (e.g. New, Read).
- Agency Assigned To The agency the referral was sent to and the list of representatives of that agency.

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



Also, if you wish to sort the search results, you can do so by clicking on a specific descriptor of the search result table as follows. The search results will then be sorted/grouped according to the descriptor you clicked on.



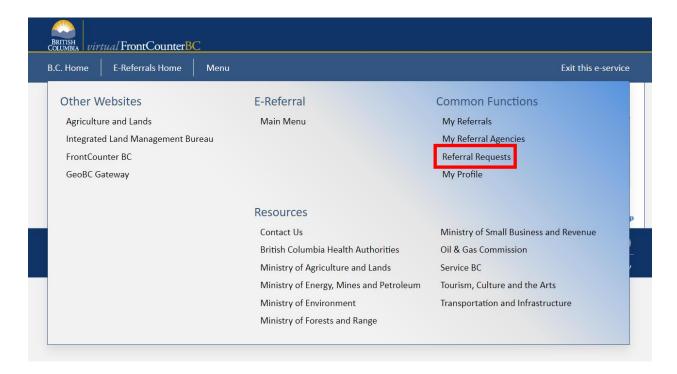
4. Next, you may decide to click on the 'SAVE AS EXCEL' or 'SEARCH AGAIN' buttons in the search results page.

If you click on the 'SAVE AS EXCEL' button, the search results will be directly imported to an Excel sheet from the search results page that you can save on your Personal Computer for later review.

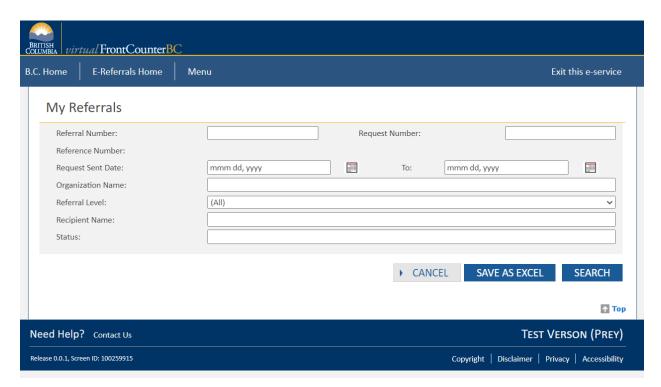
If you click on the 'SEARCH AGAIN' button, you will be directed to the main search screen to initiate a new search.

Searching for Referral Requests Created in Your Referral Center

1. To search for referral requests created in the 'Referral Center' that your referral agency belongs to, click on the 'Referral Requests' menu item of the 'Common Functions' section of the 'Menu' menu.

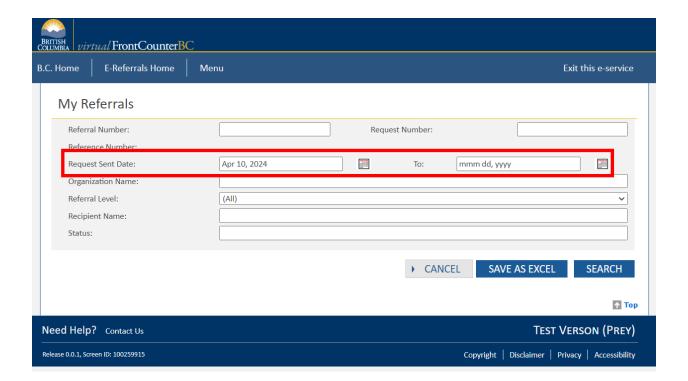


2. You will then land on the following search page.



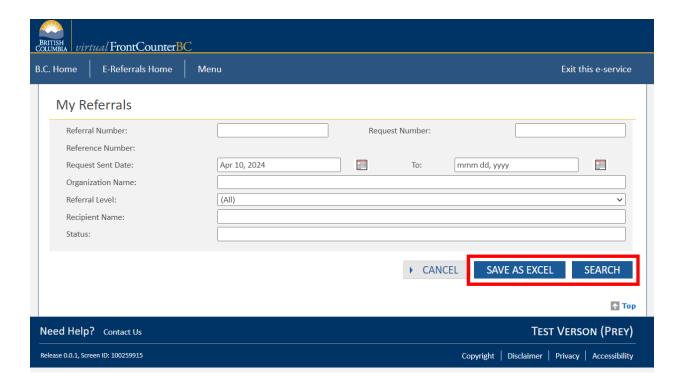
The search criteria for this functionality are as follows:

- Referral Number A number that will uniquely identify a referral.
- Request Number A number assigned to each of the Referral Requests sent within one referral (indicating the different recipients).
- Request Sent Date Select a date range to signify the date the referral was received. You can either type in a date using the 'mmm dd, yyyy' format (e.g., 'Jan 9, 2024') or select a date via the calendar control.

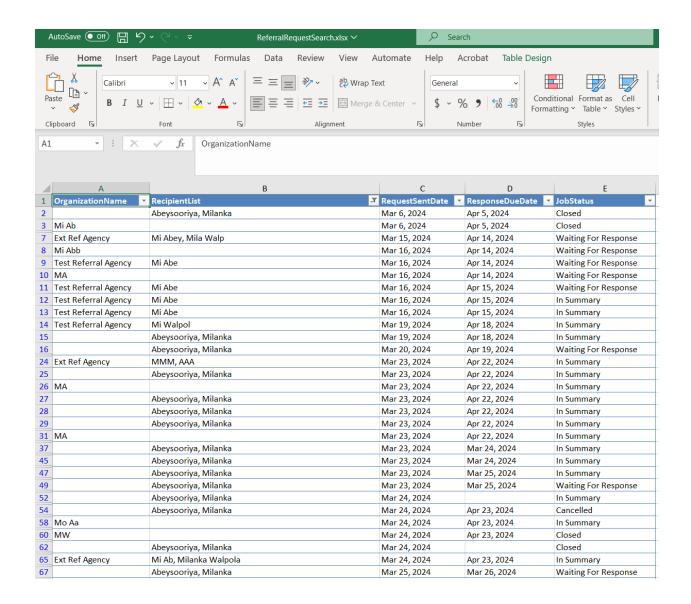


- Organization Name Referral Agency Name, Guest recipient name.
- Referral Level Referral Level associated with the referral request.
- Recipient Name Name of the recipient of the referral request.
- Status Status of the referral the referral request is associated with (i.e., Closed,
 In Summary, Waiting For Response, Cancelled).

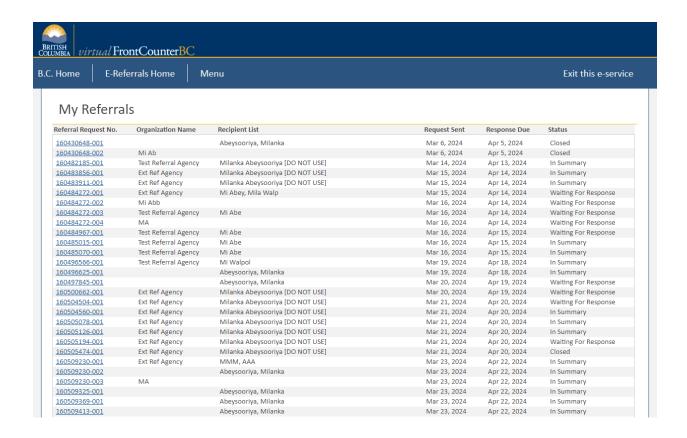
3. Once you have filled in the necessary search criteria, click on the 'SEARCH' or 'SAVE AS EXCEL' buttons as follows.



If you click on the 'SAVE AS EXCEL' button, the search results will be directly imported to an Excel sheet that you can save on your Personal Computer for later review.



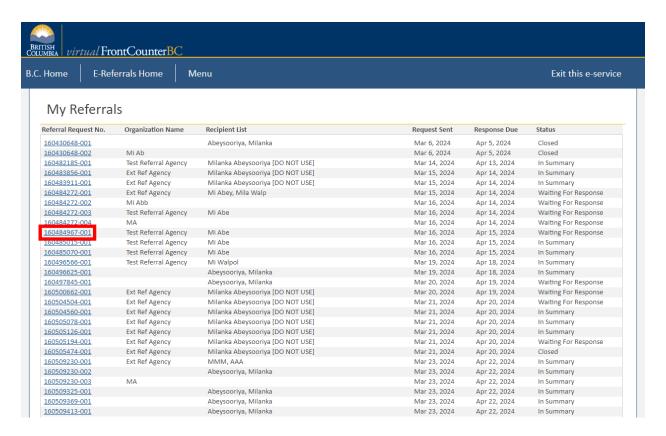
If you click on the 'SEARCH' button, you will be directed to a search results page as follows.



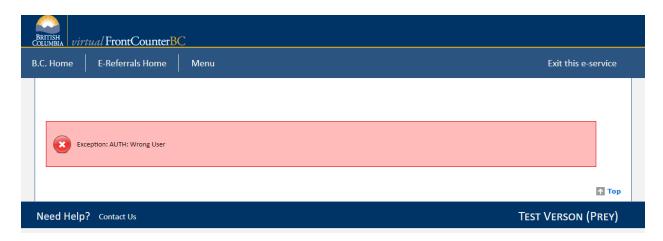
The search results page displays the results that match the search criteria along with the following descriptors.

- Referral Request No. A combination of the Referral Number and Request Number of the referral.
- Organization Name Referral Agency Name, Guest recipient name.
- Recipient List List of representatives of the referral agency, Internal staff name.
- Request Sent The date the referral was received.
- Response Due The last date to respond to the referral.
- Status Status of the referral the referral request is associated with (i.e., Closed,
 In Summary, Waiting For Response, Cancelled).

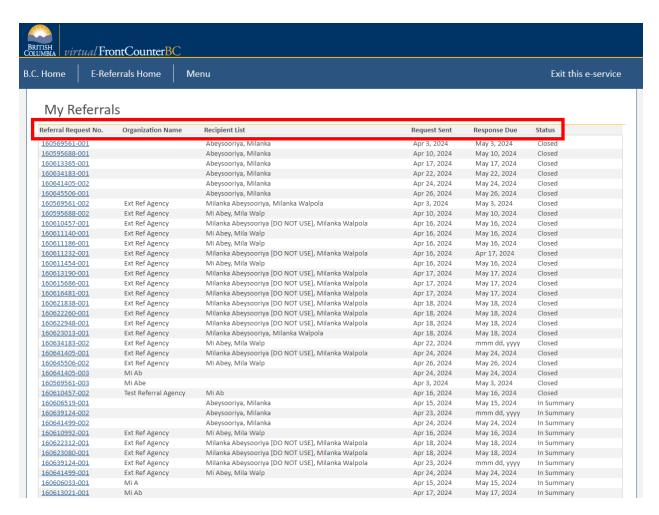
To access a specific Referral Request or Summary Notification, click on the blue hyperlink under the 'Referral Request No.' column of the search results page.



IMPORTANT - You will only be able to access Referral Requests or Summary Notifications sent to a referral agency that you are a representative of. Accessing any other result will give you an error message as follows.



Also, if you wish to sort the search results, you can do so by clicking on a specific descriptor of the search result table as follows. The search results will then be sorted/grouped according to the descriptor you clicked on.



4. Next, you may decide to click on the 'SAVE AS EXCEL' or 'SEARCH AGAIN' buttons in the search results page.

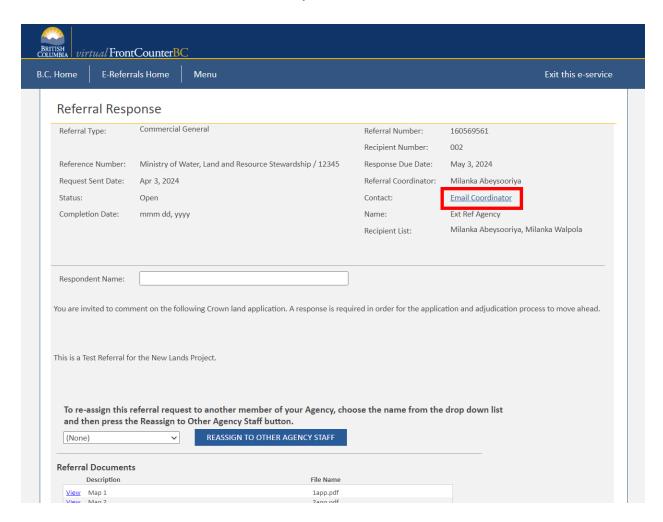
If you click on the 'SAVE AS EXCEL' button, the search results will be directly imported to an Excel sheet from the search results page that you can save on your Personal Computer for later review.

If you click on the 'SEARCH AGAIN' button, you will be directed to the main search screen again to initiate a new search.

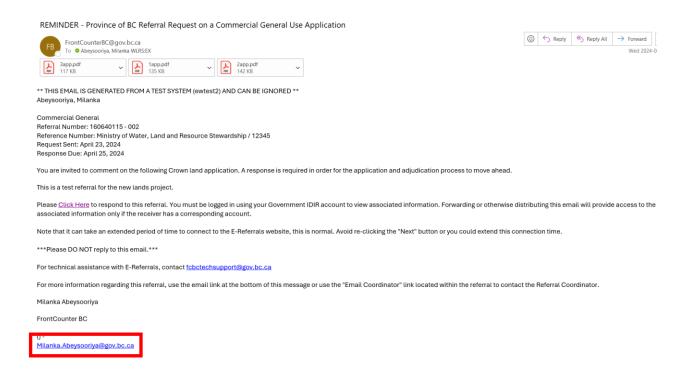
Additional Information

Contacting the Referral Coordinator

For referral requests sent online via the E-Referral system, click on the 'Email Coordinator' link as follows to directly email the Referral Coordinator.



For referral requests received via email, click on the email link as follows to directly email the Referral Coordinator.



For hardcopy referral requests, the contact information of the Referral Coordinator can be found in the Hardcopy Referral Request Letter as follows.

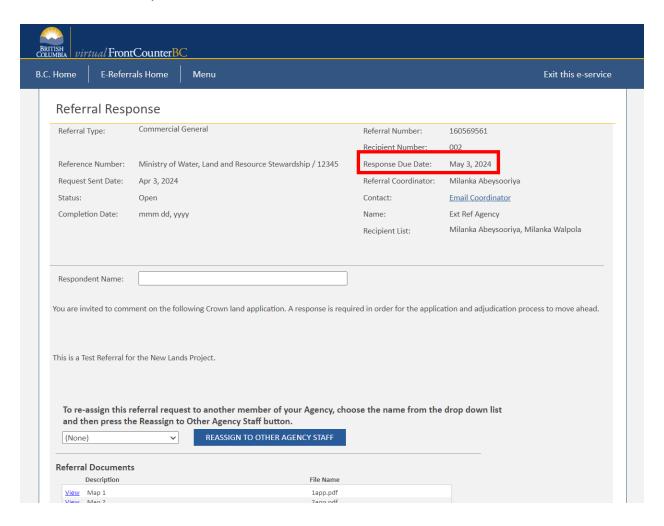
Respondent Name:		Date:
Contact		
FrontCounter BC		
Contact: Milanka Abeysooriya E-mail: Milanka.Abeysooriya@	gov.bc.ca	
Ministry of Water, Land and Surrey	Mailing Address:	Phone: (604) 586-4400
Resource Stewardship Reference Number:	200-10428 153rd Street	Fax: (604) 586-4434
Ministry of Water, Land and Resource Stewardship / 12345	Surrey, BC V3R 1E1	Toll Free: (877) 855-3222 Website: FrontCounterBC@gov.bc .ca

Response Days

All referral requests have a defined time frame for completion. If you do not respond within the defined time frame, the review of the application may proceed.

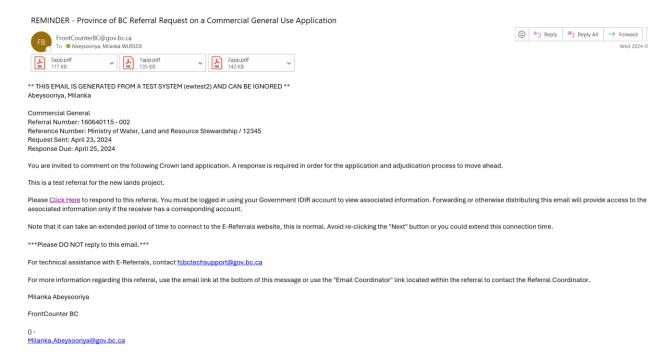
Responses received after that time frame may still be considered if no decision has yet been made by the Authorizing Agency.

The last date to respond to a referral request is indicated by the Response Due Date in the referral request.



Response Days for Mandatory Referral Requests

If you have received a referral request via email, a reminder email will be sent to you on a date that has been configured by the Referral Coordinator, indicating that a response for a mandatory referral request is due. This reminder email is a duplicate of the referral request email that was initially sent to you.



If you are unable to respond to a referral request by the Response Due Date, you can request an extension by contacting the Referral Coordinator.

Response Days for Optional Referral Requests

For optional referral requests, extensions to the Response Due Date are not provided.

Expired Registration

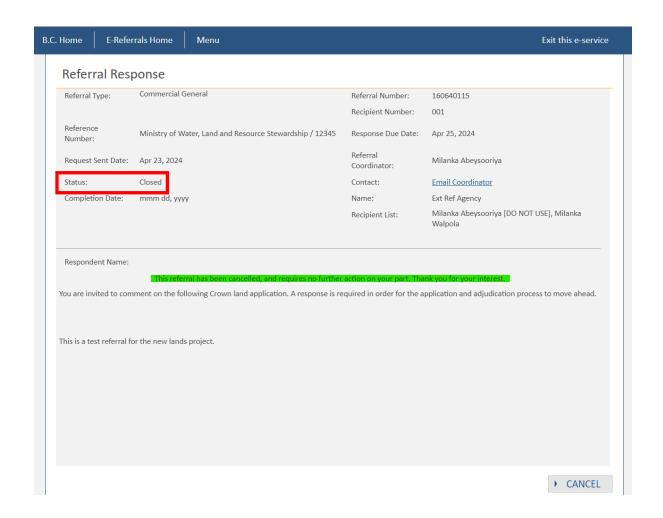
If a representative of your referral agency has not registered with the E-Referral system in a timely manner when a registration email was sent to them, the registration may expire. The registration period usually expires 2 weeks after the registration email was sent.

In this case, it may be necessary to send a new registration email to the representative to complete the registration. You can <u>send a new registration email</u> via the E-Referral system or by contacting the <u>FrontCounter BC office nearest you</u> and making a request.

Cancellation of a Referral

The Referral Coordinator has the ability to cancel a referral at any stage of the referral process. However, you will still be able to access the referral request via the Online E-Referral system or through a referral request email that was sent to you.

Once you access the referral request, you will be able to see a message indicating that the referral has been cancelled and the State of the referral will be updated to 'Closed'.



If you have any questions regarding a cancelled referral, please <u>contact the Referral</u>

<u>Coordinator</u> that sent you the referral request.

Contact Us

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

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

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