PCCA REQUISITION PROTOCOL FACILITATION GUIDE

Edmonton Southside PCN



PCCA Requisition Protocol

Background

The PCCA Requisition Protocol allows PCCAs to provide routine screening requisitions for patients due for a mammogram, FIT, diabetes screening, and plasma lipid profile. This protocol helps increase screening uptake while ensuring physicians' appointments remain available for those who need them most. It also standardizes the process, maintains role scope, and ensures follow-up for patients with outstanding results.

Eligibility Criteria

PCCAs can only be involved in providing screening requisitions for routine, low-risk patients. After reviewing the EMR, Netcare, and talking to the patient, PCCAs will only offer a screening requisition to a patient if:

- a) They have had at least one result in the past and
- b) The most recent result was normal and
- c) Patient passes screening questions:
 - For Mammogram: No new or unusual changes to patients' breasts are reported
 - For FIT: No new or unusual changes to patients' bowel habits are reported *and* a colonoscopy has not been completed in the past 10 years

If the patient does not pass screening questions, or has any other health concerns, the PCCA will book an appointment with the physician rather than provide a screening requisition. This ensures the patient's concerns are addressed, and they are provided the most appropriate screening or diagnostic test.

Clinic Process for Delivering Requisition

PCCAs will use a templated screening requisition in the EMR to promote efficiency, ensure accurate selections are made each time, and track any outstanding results, if necessary. The requisition can be provided to the patient in whichever way works best for the clinic:

- Printed and faxed, or sent by eFax, to the lab or center of the patient's choice
 - o If the clinic does not have eFax, request that it be enabled or that the PCCA be granted access.
- Sent to the patient's email via an EMR Patient Portal
 - Ensure the PCCA is not emailing the patient from their own account, and that email responses are either disabled or directed to a clinic staff member.
- Printed and available at the front desk for the patient to pick up.
- Printed and mailed to the patient via standard mail.

Optional: Patient educational handouts can be included along with the requisition.

Documentation

After calling a patient, the PCCA will create a worklist/task in the chart called 'PCCA Requisition Protocol' with the specific screens listed. This task will have the requisition attached with the test auto populated. This allows the clinic staff members to provide requisitions to patients who return a missed PCCA phone call.

Establish a Process for Clinic Staff to respond to missed calls



- When the patient calls back, clinic staff will refer to PCCA's worklist/task in the patient's chart.
- Determine if the physician wants their clinic staff to ask the screening questions for FIT and Mammogram.
 While the PCN requires PCCAs ask these questions, the physician may direct their staff otherwise. If the front staff does not ask the screening questions, they can still provide the requisition(s) as the lab will ask these questions, as well.
- Determine if the clinic staff will follow the same option as the PCCA to deliver the requisition to the patient: fax/eFax, emailed through Patient Portal, printed for pick-up, or mailed.
- Clinic staff should complete the worklist/task.

Receiving Test Results

As the requisition is in the physician's name, all test results will be delivered to the physician in the EMR.

Establish a Follow-up Process

Each rotation, the PCCA will call patients due for preventative health screening and offer appointments or screening requisitions. If a patient was previously provided a requisition and has not completed their screen, the PCCA will remind them to complete the test and can offer to send another requisition, particularly if the requisition was faxed to a lab or imaging centre.

Alberta Precision Labs (APL) – Process requisitions for FIT, Diabetes Screening or Plasma Lipids Profile. As of 2024, APL communicated that faxed requisitions are held for 2 months at the Edmonton Patient Service Centres.

Insight, MIC, and Canadian Diagnostics Imaging Centre – Process requisitions for mammogram. As of 2024, these centres informed ESPCN that they attempt to call patients at least once, and requisitions stay with their centres for 6-12 months.

Physician to Sign Directive

Physicians must indicate for which preventative screening tests they consent the PCCA providing requisitions. They may also indicate any limitations.



MAMMOGRAM REQUISITION EXAMPLES (INSIGHT, MIC AND CDC):



General Requisition

Scan for a list of locations



www.x-ray.ca

Signature:

Central Booking Toll Free Fax Toll Free Fax Online 1-866-771-9446 780-930-1593 1-855-930-1593 x-ray.ca/book-an-appointment 780-669-2222 To cancel or rebook your appointment, please call Central Booking: Mon-Fri: 8AM-7PM, Sat: 9AM-4PM, Sun: Closed Name: Test, New Appointment Details: Address: Edmonton AB Date: Non-Binary Male DOB (mm/dd/yyyy) Phone: (780) -Time: () Female Insurance: W.C.B. () Other: X-Ray • All Sites **FCG** Pain Management Fluoro ECG X-ray requested: E,S&D Injection Site Small Bowel FT Repeat Number of Injections Signature * No appointment needed for general x-ray or ECG Ultrasound Small Parts MSK - may include x-ray Vascular General Neck (lump, salivary glands)
Shoulder + AC Joint
L □ R □ Echocardiogram Abdomen Renal Elbow L R Carotid (incl. vertebral Abdomen + Elastography Bladder Thyroid & subclavian arteries) Abdomen + Pelvis Pelvis Wrist Scrotum □ L □ R L R Peripheral Arterial Lump site: Fingers Abdomen + E,S&D Abdominal Wall Arm Leg Hip (adult only) □ L □ R Other: Liver Elastography Peripheral Venous Knee □ L □ R HCC Screening Program (for DVT) Ankle □ L □ R Obstetrics Arm Leg Foot □ L □ R Complete Series Routine Pregnancy L R Bilateral □ L □ R Other: □ L □ R (early, nt, anatomy) ABUS BPP (>28 wks) Popliteal Fossa/ Soft Tissue Nuchal Translucency (11-14 wks) Twins Axilla L R Bone Scan (15 min-return 2-4 hours later for 30-60 min) MIBI - Myocardial Perfusion Scan (Meadowlark, Millwoods) Parathyroid Scan (30 min-return in 2 hrs for 30 min) Cardiac Resting Gated Blood Pool Study (90 min) Liver RBC Scan for hemangioma (40 min-retum in 2 hrs for 1 hour) Renal Study: Standard (1 hour) Lung V/Q Scan (to rule out PE - 90 min) Gallium Scan (2 separate days) Hypertension HIDA (Hepatobiliary) + GBEF (2-4 hours) Thyroid Scan (45 min) Other: Breast Imaging Screening mammography + ABUS/US Bone Densitometry Screening mammography (may include supplementary ultrasound for dense breasts) Diagnostic mammography (specify): Ultrasound L R Bilateral ABUS requisition for further breast work Cardiac Diagnostics MRI & CT Exercise Stress Test Please see our dedicated Cardiac requisition for other exams All imaging available including comprehensive Neuro, MSK, Breast and Prostate Please refer to our dedicated requisition Relevant History, Physical Findings, and Provisional Diagnosis For routine screening Pregnant? YES NO LMP: Referring Physician's Information URGENT FAX REPORT (until 4 pm, M-F) Name: Send Images With Patient Physician's Stamp Address: 6119-28 Avenue NW Edmonton, AB T6L6N5 & Practice ID Copy To: (780) 463-1184



Fax () -



GENERAL REQUISITION

Partnered with



Central Booking

Ph 780.450.1500 Toll Free 1.800.355.1755 Fax 780.450.9551 Request an appointment online at mic.ca



Name: Test, New	Appointment Details				
Address: Edmonton	Date:				
Phone Res: (780) - Other:	() -	Time: :			
Date of Birth (mm/dd/yyy):	Age: Male Female	Clinic Location:			
PHN: WCB (ON Other:	Refer to	Preparation Instructions on Reverse		
ALL EXAMINATIONS Please b	ring your Health Care card and anoth	er piece of identi	fication with this form.		
Edmonton Gateway Clinic ⊕ T. Allin Clinic (X-ray only) 107-5925 Gateway BL/D NW 2 B1-10155 120 St NW Hys Medical Centre T.	ation © Extended Hours available for X- awa Centre © Windermere 00-3017 66 ST NW 201-6103 Currents DR N erra Losa Ft. Saskatchewan \$66 170 ST NW \$0uthPointe 115-9332 Southfort DR	Sherwood P	ass Centre		
Significant Clinical History	Date of L.M.P:	S	tat Report Instructions		
for routine screening	Pregnant: Yes N Patient's Signature:	· [STAT fax report STAT verbal report to #: () - Send copy of x-rays with the patient		
X-Ray Exams Requested:	-		_		
Ultrasound Preparation required for exams marked with General Neck (Salivary glands / Lymph nodes) Thyroid Complete Abdomen * add liver elastography (liver fibrosis) * HCC Screening Program add liver elastography (liver fibrosis) * AAA Screen * Renal/Bladder * Pelvis (Female/Male) * Vascular Carotid Echocardiogram Lower Extremity: Venous Doppler (DVT) R L Ankle Brachial Index (ABI) Varicose Vein Assessment R L Cother:	General RLQ Compression (Appendix) * Scrotal Anal Sphincter (female only) Soft Tissue Mass: Other Obstetric Complete Obstetrical Series * (early, NT & detailed) Early Obstetric (<12 wk) * Nuchal Translucency Screening * (11w3d to 14w0d) Detailed Fetal Anatomy (>18 wk)* add Uterine Artery Doppler Obstetric (>28 wks Includes BPP) * Twin Obstetric * Other:	(MRI is more app pain, and interna Approximate dat R L SI R L EI Distal Bloe Medial R L W Dorsal [Radial [R L FI	te of Injury if acute: coulder		
Breast Imaging Screening Mammography and ABUS/ Supplemental Ultrasound if indicated Screening Mammography Breast Ultrasound R L Axilla R L Breast Biopsy	Gastrointestinal In Esophagus E, S & D (Esophag Duodenum) Small bowel follow Whole Body Co	gus, Stomach through	Bone Densitometry Bone Densitometry Thoracle and Lumbar Spine (Correlative x-rays) Pain Management Injection site: (eg. hip, facet, etc.)		
Hepatobiliary Scan (HIDA) (approx 2 hours)	NM Arthrogram (for prosthesis loosening) R Site: Please use Cardiac Requisition for these 3 exams: Myocardial Perfusion imaging with Ejection Fract	(eg: hlp, knee)	☐ Left ☐ Right ☐ Both Blood Thinners? ☐ Yes ☐ No Alternately, please refer to our Pain Managemen Requisition		
	Cardiac Amyloidosis Scan Thailium Myocardiai Viability imaging		Exercise Stress test (EST) (For EST exams please use Cardiac Requisition)		

Practitioner's Name:
Practitioner's Address: 6119-28 Avenue NW Edmonton, AB T6L6N5

Clinic Ph: (780) 463-2134 Clinic Fax: (780) 463-1184
Copy to: Fax Copy: () -

Practitioner's Stamp
& Practice ID



Official Diagnostic Imaging Provider for:



General Imaging

Toll free: 1.877.420.4CDC (4232)
Toll free Fax: 1.877.919.3291
Email: appointments@CanadaDiagnostics.ca
Online Request: CanadaDiagnostics.ca

Patient & Appointment Information	Date of Requisition: 26-Jul-2024	Physician
Name Test, New		Referring Physician
Address		Clinic Main Street Family Clinic
City Edmonton Province	e AB Postal Code	Phone (780) 463-2134
Home Phone (780) -	ther Phone (780) -	Fax (780) 463-1184
DOB	emale Weight 🔲 lbs 🗌 kg	Copy to Dr.
AHC# WCB#/Accid	ent Date /	Fax Copy to Dr. () -
Appt. Date Time :	CDC Site	PRAC ID
Mira 103-11910 111 Ave NW Edmont	•	Signature
North Town 134-9450 137 Ave NW Edmont	•	STAT Report Options
Westgate 172-17010 90 Ave NW Edmont 109 Street 7121 109 St NW Edmont	•	STAT Fax Report
Ellerslie 632 91 St SW Edmont	•	STAT Verbal Report #
	od Park, AB Phone: 780.467.2773 Fax: 780.467.2982	Send copy of images with the patient
		Reports & Images available at CanadaDiagnostics.ca/Practitioners
General Ultrasound	Obstetrical Ultrasound	Clinical History
Routine Abdomen HCC Screening	Obstetrical Series (Early, Nuchal and Detalled)	LMP or EDC
Liver Elastography NAFLD r/o fibrosis	Early Obstetric (dating/viability) (<12 weeks)	
Abdominal U/S + UGI	Nuchal Translucency (11w2d to 13w5d)	for routine screening
Abdominal Wall (Pain/Lump/Other)	Detailed Anatomy (-18-20 weeks)	
Abdomen + Pelvis	BPP/Biophysical Profile (28+ weeks)	
Routine Female Pelvis (Gyne + Urlnary Tract)	Other Specify indication	
Routine Male Pelvis (Includes Kldneys)	Gastrointestinal (GI) Studies	
Kidneys, Ureters, Bladder only	UGI (Esophagus, Stomach, Duodenum)	
Scrotum/Testes (Bilateral)	Small Bowel Follow Through	
Groin (pain/lump/other) R L	Critical Board Tollow Tillough	Available by appointment or
Thyroid Gland Thyroid FNA*	Vascular Ultrasound	X-ray (Walk-in) walk-in (based on availability)
Neck (Salivary Glands/Lymph Nodes/Mass)	Leg Arterial Doppler with ABI (Bllateral)	X-ray (Specify Indication)
Other	Leg Venous Doppler/DVT R L	
* Must meet guideline criteria	Arm Arterial Doppler (Bilateral)	
MSK Ultrasound	Arm Venous Doppler/DVT R L	
(Includes x-ray of area if needed)	Renal Artery Stenosis Study (Hypertension)	Pain Management
Shoulder R L	Echocardiogram	(Includes X-ray of area if needed)
Shoulder U/S + Arthrogram R L	Carotid Doppler	Pain Management Injection R L
☐ Elbow ☐ R ☐ L	Advanced Manager (Manager)	Specify injection Area or use Pain Management Req
Hand R L	Advanced Vascular (Mira ONLY)	
Wrist R L	Leg Arterial Doppler with TBI (Bllateral)	December of the second
Hip R L	Thoracic Outlet Syndrome	Breast Imaging
		CDC will utilize ABU\$ when appropriate Screening Mammography (No Symptoms)
	Bone Mineral Densitometry	Screening Warmingraphy (No symptoms) Screening U/S (If Indicated by Breast Density Score)
	Bone Mineral Densitometry	Diagnostic Mammography R L
Mass/Cyst/Other Specify Area	(Vertebral Fracture Assessment done per OSC guidelines)	(Pain, lump, other proble includes U/S as needed)
		☐ Breast & Axilla U/S ☐ R ☐ L
		Regart Bioney R I

Breast Biopsy

"There may be a cost to patients for special materials used
Procedure availability & hours of operation vary by CDC location.



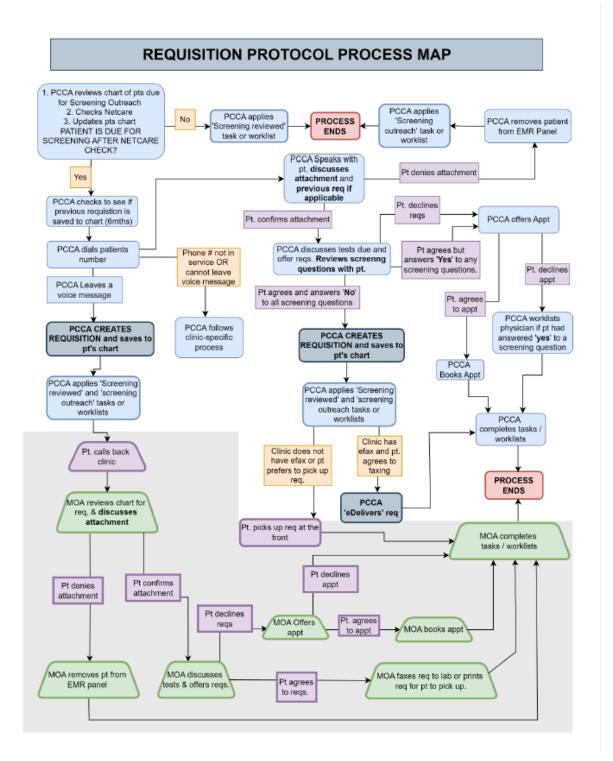
GENERAL LABORATORY REQUISITION EXAMPLES (FIT, DIABETES AND LIPIDS):

∞	General Laboratory Requisition Sca						canning Label or Accession # (lab only)								
				ion Laboratories 1-877-868-6848											
			nline at www.albertaprecisionlabs.ca or 1-877-702-4488												
Leaders	in Laboratory Me	dicine	Locations ar	nd Hours	of Ope	ration	www.alber	taprec	cisionlabs.ca						
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Expiry:															
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Requis	ition Date (d	d-Mon-yy	yy)				a Fasti Patientins	_				Ho	ours Fasting	Third Party Bill Client	
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	anine Amino	_		,	_	Testosterone, Total Thyroid Stimulating Homone (TSH)						Therapeutic Drug Monitoring Dose route			
		_	rubin, Total and Cor	ijugated		Progressive Thyroid Stimulating Hormone (TSH)					- 1	se Regimen	Oral IV Other		
=			tive Protein (CRP)		Immunology/Serology						Hou	w Long on Cur	ment Regimen?		
Cr	reatine Kinas	e (CK)	Creatinine (eGl	FR)	Epstein Barr Serology Panel Hepatitis A Virus Acute Serology - IgM Hepatitis A Virus Immunity Serology - IgG						NI I	Date of Last Dose or IV Complete			
Sodium Potassium Ferritin				Hepatitis B Surface Antigen Hepatitis B Surface Antibody						Tin	Time of Last Dose or IV Complete				
1=	brosis-4 Sco				Hepatitis C Virus Serology						Dat	Date of Next Dose or IV Start			
			ferase (GGT)		HIV 1 and 2 Serology (Antigen and Antibody)						Tin	ne of Next Dos	se or IV Start		
		_	Glucose Ra HCG, Serum (Quan		_			_	Rheumat				Carbamaze, Cyclosporin		
=	A IgG			utauvej					- IgG	Sypniis	screen		Cyclosporin		
_		_	n Phosphate		Cardiology - Electrocardiogram (ECG)						Digoxin Lithium	☐ Theophyline ☐ Valproate			
Pr	Prostate Specific Antigen (PSA)					Electrocardiogram to be read by panel Electrocardiogram to be read by Other						Phenobarbit			
Protein Electrophoresis, Serum					Transfusion Medicine							tibiotics			
Total Protein Urate					See Transfusion Medicine Requisition 21448							Gentamicin Pre Post Interval Other Tobramycin Pre Post Interval Other			
						Routine Pre-natal Red Cell Screening - use CBS Req					Van	Vancomycin Pre Other			
☐ Triglycerides Sterile Body Fluid ☐ Anti-Xa - Unfractionated Heparin															
Cardiovascular Disease Risk Assessment Fluid Type					rpe Source:						Anti-Xa - Chinactonated Flepaniii				
	(Framingham Risk Score) includes Lipid Panel Required History Test(s) Anti-Xa - Aptraban							olxaban Anti-Xa - Rivaroxaban							
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Yes No Current Tobacco Use Urinalysis Pregnancy Test (HCG, Qualitative)															
Yes No Treated for high Blood Pressure Albumin* Random 24 h Oploid Dependency Panel What is Treatment Regimen?															
-	Yes No Diabetic Creatinine Random 24 h Buprenorphine Methadone Yes No Chronic Kidney Disease Cortisol 24 h Morohine Hidromorohone							_							
-	Yes No Chronic Kidney Disease Cortisol 24 h Morphine Hydromorpho Yes No Atherosclerosis Protein Total* Random 24 h Other							ne Hydromorphone OR							
					Protein Idea Random 24 h						General Toxicology Panel				
(M <55Y / F <85Y) *includes creatinine ratio Miscellaneous						us									
Glucose Tolerance Tests Creatinine Clearance 24h Ht cm								en - TTG IgA (Includes IgA (i)							
Glucose Gestational Diabetes Screen (GDS) Wt kg ✓ FIT Colorectal Cancer Screening (Age 50-74															
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Glucose Tolerance, 2 h (F) (f) Start Date Start Time : Additional Tests					ests										
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EXAMPLE REQUISITION PROTOCOL PROCESS MAP

The process map below outlines all possible scenarios for a clinic to consider. An actual process map for a clinic would typically be less detailed than the one presented here.





ESPCN PCCA REQUISITION PROTOCOL

Proactive Care Coordination Assistants (PCCAs) at the Edmonton Southside Primary Care Network (ESPCN) can identify patients who require health screening and prepare and offer routine requisitions, at the discretion of physician members by following evidence-based guidelines and an ESPCN-established process:

- PCCAs determine the test is appropriate by reviewing eligibility criteria outlined in the <u>Alberta Screening and Prevention</u> guidelines.
- PCCAs only offer screening requisitions to patients who have had at least one result in the past and the most recent result was normal. This is done by reviewing the patient's clinic chart and the provincial electronic health record (Netcare).
- PCCAs adhere to a follow-up procedure, to confirm patients provided requisitions have completed the test, and results have been received in the EMR.

PCCAs ask additional health screening questions for the Mammogram and FIT screens (see below). If the patient responds "yes" or is unsure, the PCCA will book an appointment with the physician. If the patient replies "no" to all questions, the PCCA will provide the requisition.

Mammogram:

Do you have any new or unusual changes to your breasts?

FIT:

- Do you have any new or unusual changes to your bowel habits?
- Have you had a colonoscopy in the past 10 years?

Authorization:

prepa	red by my ESPCN PCCA. This will rema	ı
/	Requisition:	Restrictions (if any):
	Fecal Immunochemical Test (FIT)	
	Screening Mammogram	
	Diabetes screening (specify FBG or HBGA1C)	
	Plasma Lipid Profile Non-fasting	
Ciano	٠.	Data

