



# ESM referral and request management

## Frequently asked questions

### When would not ready for care be added?

All LCCH and CYCHS staff should add **not ready for care (NRFC)** as per ESM Business Rules v1.00 for:

- clients/patients who have requested a **reschedule** or **cancellation** of a scheduled **new appointment**
- clients/patients who have declined an offer of appointment, with NRFC being applied up until the **new appointment** date or the maximum NRFC days per category (Cat 1: 15 days; Cat 2: 45 days, Cat 3: 90 days)
- client/patient **no shows** (fails to attend) or **did not wait (DNW)** after checking in for an appointment. NRFC can be applied from their initial appointment with the service to the day before the new scheduled appointment or the maximum NRFC days per category (Cat 1: 15 days; Cat 2: 45 days, Cat 3: 90 days).

### Can I schedule an appointment for a client/patient who is in a current status of not ready for care?

The system will allow you to schedule an appointment for a client/patient who is not currently ready for care. Therefore, it's important to use the NRFC flag column when scheduling from **request lists**. Moving this column to the left on your **request list** will help you notice when this is needed.

### Where do administration staff find the reason for appointment information? Is this taken from the referral form under the diagnosis section?

The reason for appointment is a field provided to administration staff by clinicians (as a part of clinical triage). Administration staff should not enter this information without clinical direction and should not attempt to determine this information from referrals.

### What is the referral expiry date for walk-ins, self-referrals, etc.?

Referrals for walk-ins and self-referrals are valid for 12 months and the expiry date should be entered when scheduling a review appointment. For walk-ins with an appointment the same day as presentation, you can schedule directly from the **WIP** (without going to the **request list** first) as per the business rules. If the patient will not be seen today, this referral would need to be entered on to the **request list** before scheduling.

### Why is the referral expiry minus one day?

A year is from 1<sup>st</sup> Jan to 31<sup>st</sup> Dec, not 1<sup>st</sup> Jan to 1<sup>st</sup> Jan. Please apply the same logic to three-month referrals.

### How do you book an appointment without a referral or if the referral has expired?

Patients cannot gain access to specialist services without an initial new case referral that requires triaging from a clinician. The only exception is for walk-in patients and self-referred patients (within CYCHS).

If a referral has expired, you should always create the follow-up appointment by using the **next/move** function from a previous appointment in the same specialty. This will copy the previous referral information (including **expired referral** date) and allow you to schedule appointments. Once an updated referral has been received for the review appointment, the **referral expiry date** field should be set to **02-Feb-2100**, and then updated on patient check-in.

### How do I add a patient to a review request list?

Patients can only be added to a **review request list** if the area has one built in ESM. To add the patient to the **review request list**, click the **request** button (located next to the WIP box) and this will default to the appropriate list.

**For more information, contact the ieMR team.**

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## Can I set up a dedicated recall list as a waitlist?

**Request lists** are pre-defined lists that have been prepared for go-live based on current business needs. **Request lists** can be built if there is a relevant business rule however, this would only be for a specific department or area (not a specific user).

## Is there an alert/prompt to indicate when a patient will breach their wait time for the appointment categorisation?

This alert is not available in ESM.

## When would we use the fields of other and data take up in the referral duration field?

The **other** referral duration should be used if the referring doctor has indicated a duration other than 12 or three months. If a GP provides instructions such as 'Please consider this to be an 18 month referral', this information should be entered under **scheduling comments and 'other' selected**.

The **data take-up** should be used when an updated referral has been received for an appointment, but not yet activated. The associated **referral expiry date** field must be updated to 02-Feb-2100.

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