



Referral expiry dates

When scheduling review appointments in ESM, a mandatory **referral expiry date** field is required. This quick reference guide explains the use of the **referral expiry date** fields for the following scenarios:

- **01-Jan-1970:** Migrated appointment with no suitable linked referral
- **01-Jan-2100:** Indefinite referral
- **02-Feb-2100:** Updated referral received, but not yet activated
- **Other expiry date:** Expired referral

Migrated appointment with no suitable linked referral

ESM referral expiry date	01-Jan-1970
Description of date field	<ul style="list-style-type: none"> • No suitable linked referrals were located during migration • This date was chosen to ensure an 'expired' flag displays on daily appointment lists and is clearly visible as an error
Check-in prompts	<ul style="list-style-type: none"> • Ask patient/family if they have brought a new referral to appointment
New referral received on check-in	<ul style="list-style-type: none"> • Update referral accept formats with new referral information • Update the referral expiry date (today + the referral duration from updated referral)
No updated referral presented at appointment	<ul style="list-style-type: none"> • Continue to use the current expiry date and remind patient/family that a new referral is required for future appointments; print OUTPT – Expired Referral letter for patient

Indefinite referral

ESM referral expiry date	01-Jan-2100
Description of date field	<ul style="list-style-type: none"> • Indefinite referral has been received • This date was chosen to ensure indefinite referrals are flagged to not expire

Check-in prompts	<ul style="list-style-type: none"> • Nil
New indefinite referral received on check-in	<ul style="list-style-type: none"> • Update referral accept formats with new referral information • Update the referral expiry date to 01-Jan-2100

Updated referral received, but not yet activated

ESM referral expiry date	02-Feb-2100
Description of date field	<ul style="list-style-type: none"> • Updated referral has been received before appointment • When this date appears, it's a flag for reception staff to activate the referral expiry date on patient check-in / check-out
Check-in prompts	<ul style="list-style-type: none"> • Calculate and update the referral expiry date based on the duration of the referral (the accept format above the referral expiry date field)

Other previously expired date

ESM referral expiry date	Other expired date
Description of date field	<ul style="list-style-type: none"> • The referral expiry date remains expired until an updated referral is received either before or during patient check-in for appointment • An 'expired' flag displays on daily appointment list
Check in prompts	<ul style="list-style-type: none"> • Ask patient/family if they have brought a new referral to the appointment
New referral received on check-in	<ul style="list-style-type: none"> • Update referral accept formats to new referral information • Update the referral expiry date (today + the referral duration from updated referral)
No updated referral presented at appointment	<ul style="list-style-type: none"> • Continue to use the current expiry date and remind patient/family that a new referral is required for future appointments; print OUTPT – Expired Referral letter for patient





Expired referrals reports

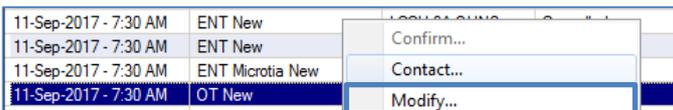
The LCCH Clinical Costings team will forward an expired referrals report to all outpatient administration team leads every Monday. This report will flag:

- Weekly summary of all future-booked appointments with an expired referral attached (one month in advance).
- This report will include all hospital specialties and can be filtered by your location.

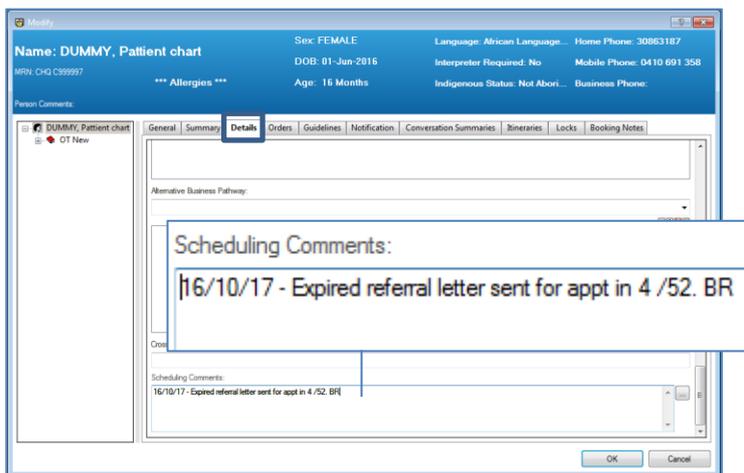
Actioning the expired referral report

Load the expired referral report and filter for your location.

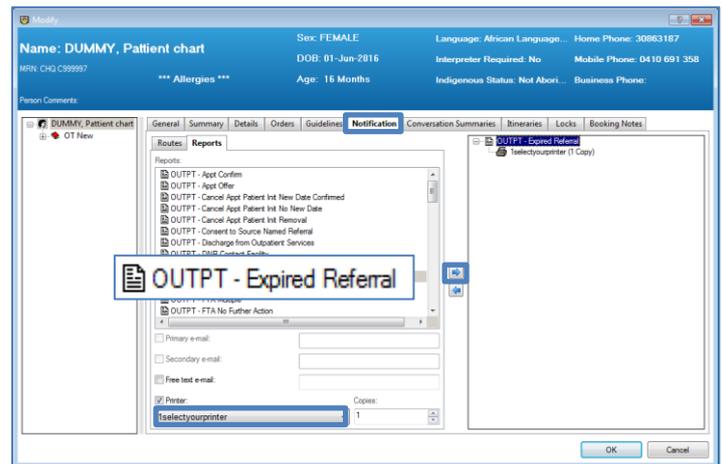
1. Perform an [appointment inquiry](#) search to locate the corresponding patient.
2. Right click on the upcoming appointment, [modify](#).



3. Click on the [details](#) tab, scroll to the bottom and add a scheduling comment (e.g. 16/10/17 - Expired referral letter sent for appt in 4 /52. BR)



4. Click on [notifications](#) tab, then [reports](#) tab. Select the [OUTPT – expired referral](#) report. Select your [printer](#) and move to the right window pane. Click [ok](#).



5. Continue with each patient on your report.
6. Post the printed letters to patients and/or referring practitioners as appropriate.

