Referral review - category change

Note: A referral review/category change may occur if a patient is waiting for an appointment and:

- a revised/new referral has been received, or
- a clinician has reviewed the patient's initial referral.

When a referral is upgraded from a lower category (e.g. 3) to a higher category (e.g. 1), the days wait must be reset to 0 days (Specialist Outpatient Service Implementaiton Standard – SOSIS). As such, the following process must be followed to ensure the days wait is accurately reflected on the specialty request lists.

1. Click the ESM scheduling appointment book Icon from the App Bar.

2. Perform an appointment inquiry (ESM – request - person search).

3. Locate the patient on the request list (e.g. patient below is a Cat 2, waiting 94 days).

| Days Waiting	Appointment Type	Category	Name
94	Paeds - Dev New	2	DUMMY, Pt cardiac

New referral received

Decision by clinician to upgrade

1. Right click the appointment record, complete request. This will move the appointment to the WIP.

2. In the appointment tab, scroll down to the last clinical update field and enter the date the decision was made to upgrade the referral (e.g. the referral was upgraded from a Cat 2 to a Cat 1). Press the move button to update the information in the WIP.

Last Clinical Update:
09-Sep-2017

Move ▶
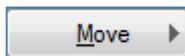
3. Click the next button and enter the new referral information that was received. Please note, the referral information may be different on this new referral. Take care to over-key the following details accurately:

   a. new case category (upgraded category)

   b. named referral

   c. length of referral

   d. date referral received (new date)

   e. date on referral (new date)

   f. referral source (new referral)

   g. referring clinician details (new clinical)

   h. last clinical update (ensure this remains as the last date of review)

   i. scheduling comments that indicate a new referral has been received and the patient has been upgraded (e.g. 09/09/17 – Ref upgraded to Cat 1 after review by Dr Black BR).

4. Click move to add the new referral information to the WIP.

5. On the newly entered referral, click request and OK to add the patient back to the request list.

6. For the remaining referral, right click, remove.
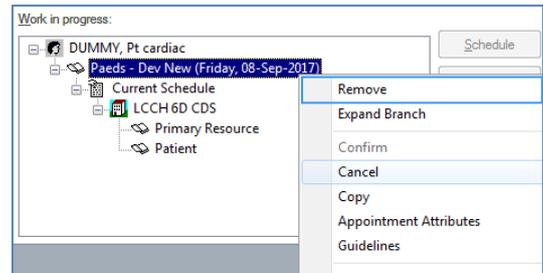
7. Locate the old referral on the request list, right click cancel request.

8. Enter the cancel reason as WL – data triaging and add a relevant action comment (e.g. 09/09/17 – Ref upgraded to Cat 1 after review by Dr Black BR).

9. Click the notification tab, navigate to the reports tab. Select the OUTPT – WL subsequent referral upgrade letter, select your printer and right arrow. Click OK.

OUTPT - WL Subsequent Referral Upgrade
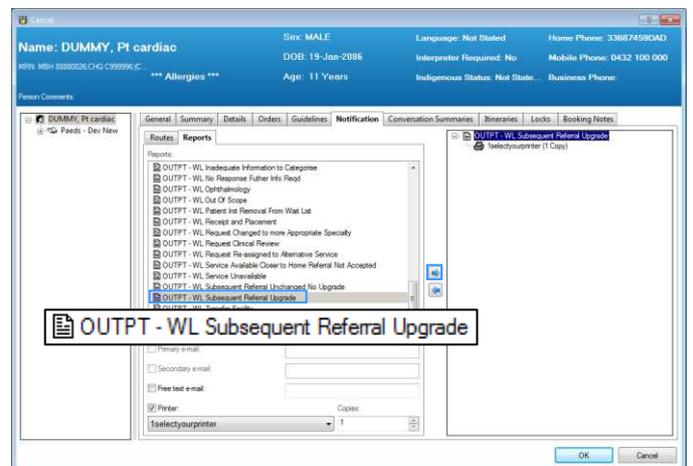
10. The referral has now been upgraded to a Cat 1 and a referral upgrade letter has been printed for both the patient and referring practitioner.

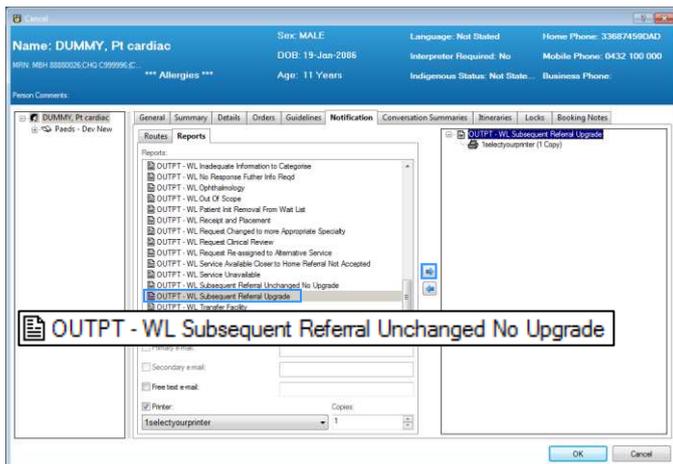| Days Waiting	Appointment Type	Category	Name
0	Paeds - Dev New	1	DUMMY, Pt cardiac

Decision by clinician: referral to remain unchanged

1. Right click the appointment record, modify.

2. Scroll down to the last clinical update field and enter the date the decision was made to retain the same category referral (e.g. the referral was maintained as Cat 2).

Last Clinical Update:

09-Sep-2017

3. Click the notification tab, navigate to the reports tab, select the OUTPT – WL subsequent referral unchanged no upgrade letter, select your printer and right arrow. Click OK.

OUTPT - WL Subsequent Referral Unchanged No Upgrade

4. The referral remains as a Cat 2 and a letter is printed for both the patient and referring practitioner to advise of this outcome.

Original referral reviewed

Decision by clinician to upgrade category

Follow steps 1-3 in the new referral received section with the following exceptions:

- named referral, length of referral, date referral received, date on referral, referral source, referring clinician should all remain the same.

Decision by clinician referral to remain unchanged

This process is the same as if a new referral was received.