Our Digital Future
≈ IMAGINE WHAT'S POSSIBLE...≈
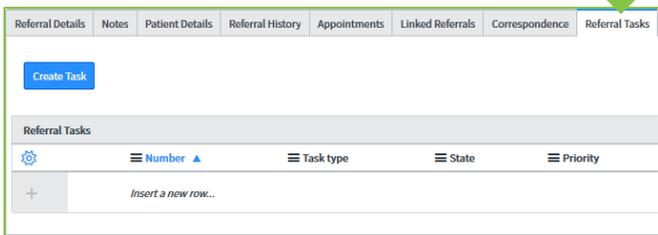**Integrated Care Digital Program**

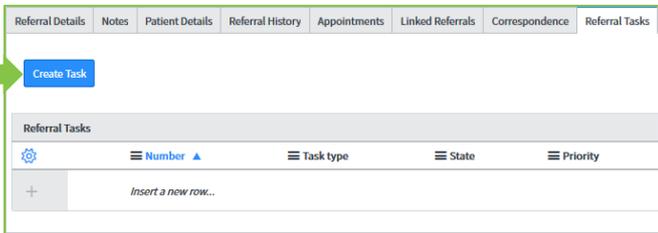# Smart Referrals
Workflow Solution (eRefer)

Referral Tasks

Additional tasks can be added to a referral to request additional actions on a referral outside the core triage and categorisation workflows.

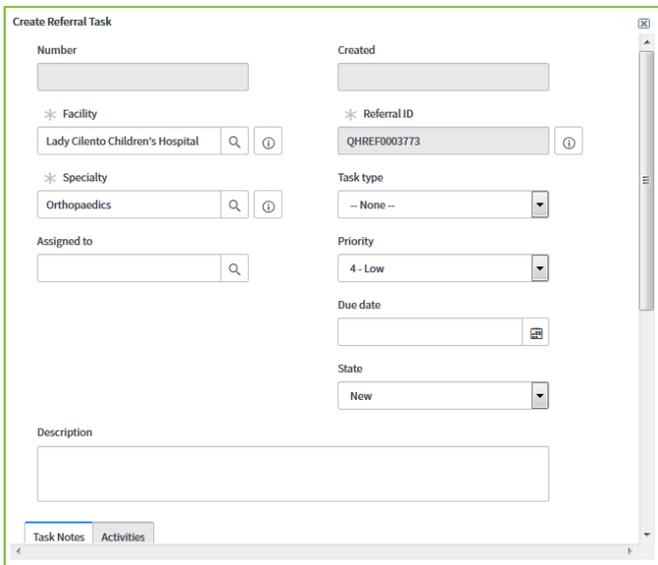## Create a task

1. Select the Referral Tasks tab on a referral.
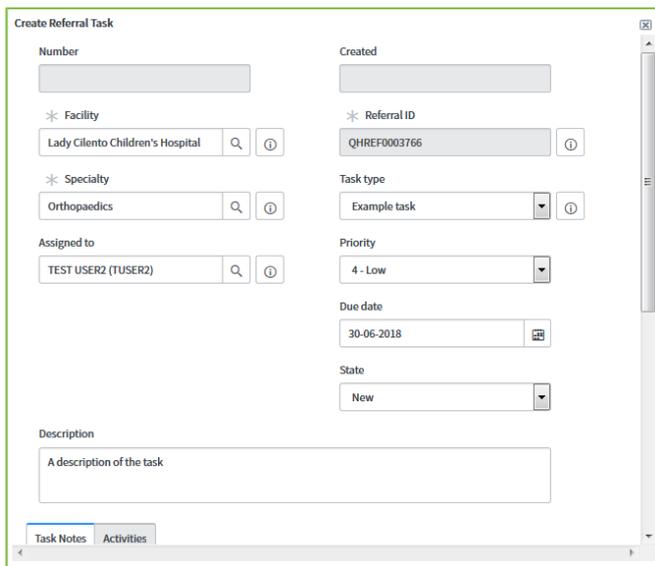

2. Click the Create Task button.

The Create Referral Task screen will display.

The Specialty field automatically populates with the specialty of the referral.

3. Fill in the relevant details for the Referral Task:

- The specialty required to complete the task can be changed using the Specialty field

- Tasks can optionally be assigned to specific users using the Assigned to field

Tasks can only be assigned to users who work within the specialty the task is assigned to.

Users who are assigned a task will receive an email notification that they have an outstanding task to complete.

- Task types are unique to the specialty on the Referral and may or may not be used.
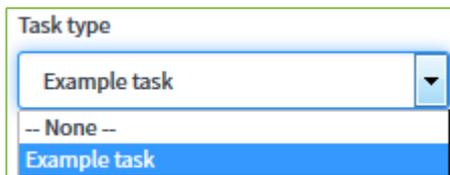
- A Due date can be assigned to help users manage their task queues.

Due date

30-06-2018

- The State can be changed to indicate if a task has been actioned. All task default to *New.*

State

New

New
In progress
On hold
Completed

- The Description field should be used to explain the actions required for the task.

Description

A description of the task

- Task notes can be used for journaling actions on the task.

Task Notes	Activities

Task Notes are not added to the Referral notes

Notes

A note about the task

Note: Unlike Referral Notes, Task Notes are NOT added to the *Summary of Categorisation* coversheet or to the medical record.
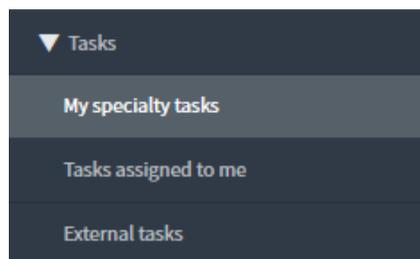
4. Scroll to the bottom of the Task and click Save.

Save

5. Created Referral Tasks will appear as line items in the tab.

≡ Number ▲	≡ Task type	≡ State	≡ Priority	≡ Due date
QHRTASK0001045		New	4 - Low	
QHRTASK0001046		New	4 - Low	

Actioning tasks

Outstanding tasks will be visible in the Tasks section of the navigation menus.

▼ Tasks

My specialty tasks

Tasks assigned to me

External tasks

Note: *My Specialty tasks* will display all outstanding tasks in the specialties allocated to user.

Tasks assigned to me will display all outstanding tasks assigned to the user.

External tasks will display all task assigned to a different specialty to that of those of the users.

1. Open the task from the queue (or from the tasks tab of the relevant referral)

Q	≡ Number ▲	≡ Referral ID	≡ Task type	≡ State	≡ Priority	≡ Due date	≡ Facility	≡ Specialty
	Search	Search	Search	Search	Search	Search	Search	Search
	QHRTASK0001001	QHREF0002064		New	4 - Low		Townsville Hospital	
ⓘ	QHRTASK0001005	QHREF0002540		New	4 - Low		Lady Cilento Children's Hospital	Orthopaedics

2. Add any notes required to describe actions taken on the task.

Task Notes	Activities

Task Notes are not added to the Referral notes

Notes   Called family to confirm additional details.

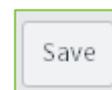3. Update the task's State as required.

State   New

New
In progress
On hold
Completed

Note: All tasks start with a state of new. In Progress and On Hold can be used as meets the needs of the specialty to manage the task. Tasks marked as completed will be considered closed and no longer appear on any queues for action.

4. Click Save to save any changes.

Save

Reallocating tasks

Tasks can be re-allocated between services and individuals if required.

1. Change the Specialty and/or the assigned to user

2. Update the state of the task if required.

3. Add a note to the task

4. Click Save to save any changes.

Navigating to the referral

When a task is opened the relevant referral can be accessed by:
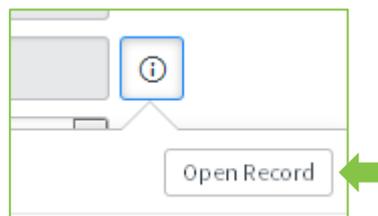
1. Select the icon next to the referral ID.

2. The referral documents will be available from the pop-up window.

3. If the user has access to the facility's referrals, the complete referral record can also be accessed by selecting the Open Record button.

How to get help

For support contact the OPD Management team by email at LCCH.OPDManagement@health.qld.gov.au or by calling 3068 1999 (select option 3).

Application and technical support can also be accessed through the IT Support Centre 1800 198 175.