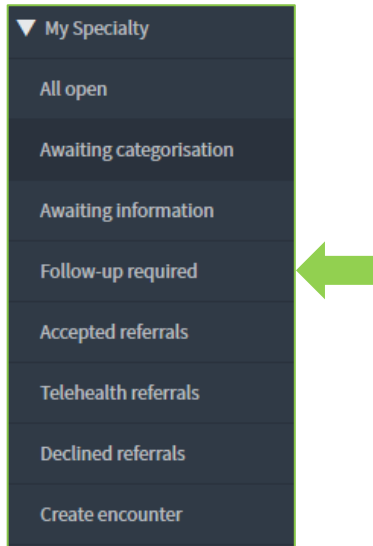




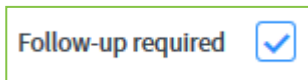
Smart Referrals Workflow Solution (eRefer)

Referral Finalisation

Follow-up required



The follow up required queue will display all referrals for the specialty where the Follow-up required check-box has been selected by a user.

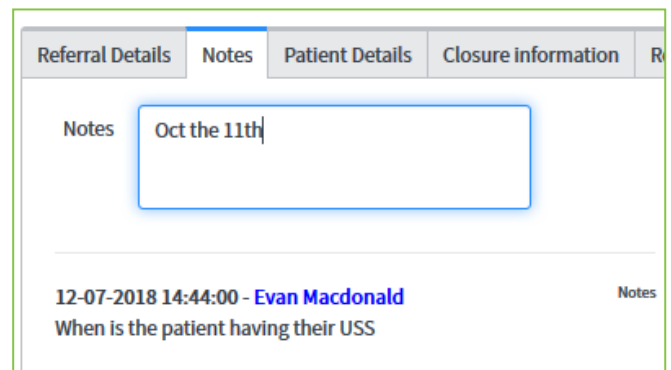


This check-box replaces the previous system where users could force an uncategorised referral into a state of AO action to request an additional action.

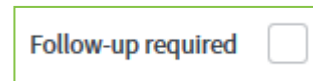
The follow up required queue must be monitored and actioned on a regular basis to ensure referrals are processed within their KPI.

1. Open a referral from the queue.

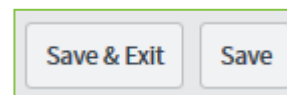
2. Review any notes from the user and complete the required action.



3. Unselect the follow up required check box when complete.



4. Click Save or Save & Exit to finalise the referral.



The referral will return to the relevant queue for processing.

Note: Referrals in a state of *awaiting categorisation* may continue to show as outstanding for categorisation on reports even while on the follow up required queue.



Accepted referrals

1. Select a referral from the queue by clicking on the Referral ID.

Referral ID	Date received	URN	Given name/s	Surname	DOB	Specialty	Work list
REF2009021	08/11/2017	Demo111	Demo	Surname	08/03/2001	Audiology	Ca
REF2009028	08/11/2017	1400191	Esmimtwo	Chqortest	01/01/2017	Audiology	Audiology ENT MOC
REF2009036	08/11/2017	1400164	B/O Scott	Chqortest	03/01/1990	Audiology	Ur

2. Review the referral, including any notes on the Notes tab

Referral Details	Notes	Patient Details	Referral History	Appointments
Notes				
<p>27-05-2018 09:13:31 - Ref Test Doctor 1 Book patient into monday morning fracture clinic.</p>				

All accepted new referrals will be allocated to a Clinic list that will identify how to wait-list or schedule the patients appointment.

Note: All referrals to be uploaded into the ieMR must be attached an encounter. The encounter should be created at the time the referral is created in HBCIS/ESM

Category	Category 2
* Clinic list	Spinal - Rhys Edwards
Okay to overbook	<input checked="" type="checkbox"/>
Telehealth	<input type="checkbox"/>
Clinician required at Telehealth site	<input type="checkbox"/>
Outreach	<input type="checkbox"/>

3. Review the outpatient scheduling system and add or update the patient's referral details from the Workflow solution according to ESM/HBCIS business rules.

The Referral ID from the Workflow solution should be copied into the Cross platform ID field of ESM, or the Referral ID on screen two of the HBCIS referral entry section.

Referral ID	QHREF0003076
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4. Copy the encounter FIN number from ieMR into the ieMR ID field.

ieMR ID	4657897
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Note: Additional booking instructions for ESM may be available on the Scheduling tab.

Scheduling	Notes	Patient Details	Referral History	Appointments	Linked Referrals
Category	Category 2	Primary reviewer	Rhys Edwards		
Clinic	Spinal - Rhys Edwards	Secondary reviewer			
Appointment type	Office flow	Third reviewer			
Appointment location	TMR 1a clinic	Ordering setting	On Campus		
		Patient type	Public		

5. If required enter a note in the Notes field on the Notes tab

Referral Details	Notes	Patient Details	Referral History	Appointments
Notes				
Patient contacted to confirm current address.				

6. Generate correspondence from Correspondence tab if required. See the Correspondence QRG for details.

Change the State to Closed.

State	Closed
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7. Select a Close code and add any Close notes as required.

Close code	Accepted
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Note: All categorised referrals should be closed with a close code of either:

- *Accepted* – Referrals with a category that are now on an Outpatient waiting list or scheduled an appointment for the specialty.
- *Alternative service pathway* – Referrals with a category that may not be on the waiting list for that specialty as the patient is progressing through an alternative model of care, such as a screening clinic.

Selecting the wrong code may result in the referral not being added to the patient's medical record

8. Click Save to confirm the changes or Save & Exit to confirm and return to the queue.

Save & Exit	Save
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Declined referrals

1. Review the referral, including any notes on the **Notes** tab.

Non-Acceptance reason	Out of Area
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2. Generate correspondence from **Correspondence** tab. See the Correspondence QRG for details.
3. Change the **State** to *Closed*.

State	Closed
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4. Select a **Close code** and add any **Close notes** as required.

Close code	Declined
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5. Click **Save** to confirm the changes or **Save & Exit** to confirm and return to the queue.

Save & Exit	Save
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Returning a referral for reconsideration

A referral may need to be returned to a clinician for reconsideration.

Returning the **Category** or **Non-acceptance reason** fields to *--None--* will revert the **State** to *Awaiting* categorisation so as it appears on the clinician's queue.

Follow-up or clarification from clinicians should be by contacting them directly or by using the **Tasks** feature. See the Tasks QRG for details.

Coversheets

After a referral has been *Closed* the system will automatically create a new document with a coversheet and any notes attached to the referral for addition to the patient's Medical record.

After closure a referral record will need to be re-loaded to prompt the coversheet version of the referral to display.

 The PDF will be created shortly. The record must be reloaded to view the document.

See the Add to medical record QRG for more details.

Patient history

The patient's history will be available in the **Referral history** and **Appointments** tabs.

Previous referrals can be opened directly from the Referral history tab.

Additional information about the patient can be obtained by selecting **The Viewer** button which will open directly to the patient summary in The Viewer in a new window.

The Viewer

Note: Patient history will not show until the referral has been attributed to a patient and *saved* using the **Save** or **Save & Exit** buttons.

Flags during data entry

Users will be alerted during the initial data entry if the follow flags are going to be applied to the referral:

- Outside catchment area – where the patients permanent address is outside the nominated catchment area for the HHS or Specialty.

Surname	Patient
Outside catchment area	

- Suspected duplicate referrals – where there is another referral for the same patient, to the same specialty, with the same date on referral.

Date on referral	25-05-2018
Suspected duplicate referrals	

- Exceeds treating age limit – where the patient is older than the nominated maximum eligible age for the Specialty

Calculated age	15 years 3 months
Exceeds treating age limit	

These allow early identification to the user that additional follow up may be required prior to progressing to the next stage in the process.

Records that aren't referrals

Occasionally records may be created in the system that are not referrals or cannot be processed because they are incomplete / or unable to be read.

The referrals can be closed without being fully processed.

1. Change the **State** to Closed

2. Select a valid **close code**

3. Add **Close notes** if required

4. Click **Save** to confirm the changes or **Save & Exit** to confirm and return to the queue.

Create Encounter queue

After closure all accepted referrals are to be uploaded into the patient's ieMR. To trigger the action to upload a referral to the ieMR, the patient's FIN number from the encounter **MUST** be entered into the ieMR ID field.

In the previous version of the system (eRefer) this field was mandatory, however this was unable to be applied in the current version.

According to business processes this field must still be completed, and referrals where this should have occurred will display on this queue until complete. Users in the specialty must ensure the FIN number is added to this field in a timely manner to ensure referrals are uploaded to the ieMR.

1. Open a referral from the queue and click the Reopen button.

2. Add the FIN number for the patient's encounter for the referral to the ieMR ID.

3. Change the state back to *Closed*

4. Re-select the appropriate Close code.

5. Click Save or Save & Exit to finalise the referral.

The referral will now be available to the Health Information Services team to upload to the ieMR.

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 by calling 1800 198 175.