

The Referral Manager is an application that allows coordinators, administrators and specialists to view and process their referrals. Owing to tight integration with the SeNT Referrals product, data contained within the referrals is guaranteed to be validated. Powerful sort functionality and easily auditable workflows ensure that no referral is missed.

Functionality

Referral Manager enables recipients such as administrators and specialists to:

- Manage and triage referrals
- Queue referrals to specialties
- Track progress of referrals
- Connect electronically to internal hospital systems

Clicking a referral summary in the referral list selects it and shows the details of that referral in the referral information panel. Actions can be performed on the selected referral using the buttons in the action bar.

How it works

The Referral Manager screen consist of two sections, the **referral list** and the **action bar**. These are shown in Figure 1 below. To toggle between list and detail view, click the **View detail** button.

System requirements

Referral Manager requires Internet Explorer version 10 or above or Google Chrome to run.

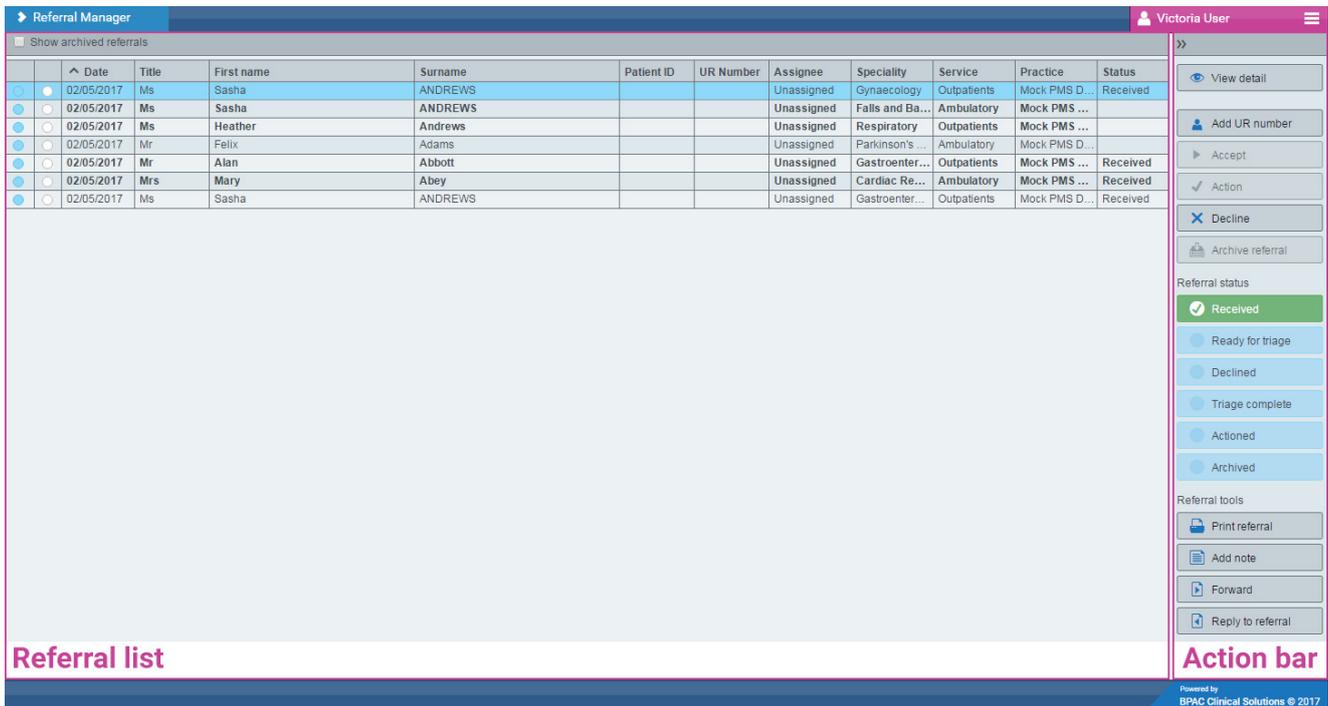


Figure 1. The Referral Manager screen is divided into three sections: the **referral list** and the **action bar**.

Referral detail view

The Referral Manager detail screen consists of three sections, the **referral list**, the **referral information panel** and the **action bar**. These are shown in Figure 2 below.

Clicking a referral summary in the referral list selects it and shows the details of that referral in the referral information panel.

Actions can be performed on the selected referral using the buttons in the action bar.

The action bar will display action buttons and status icons for specific regions. For more information see the **regional variations** section.

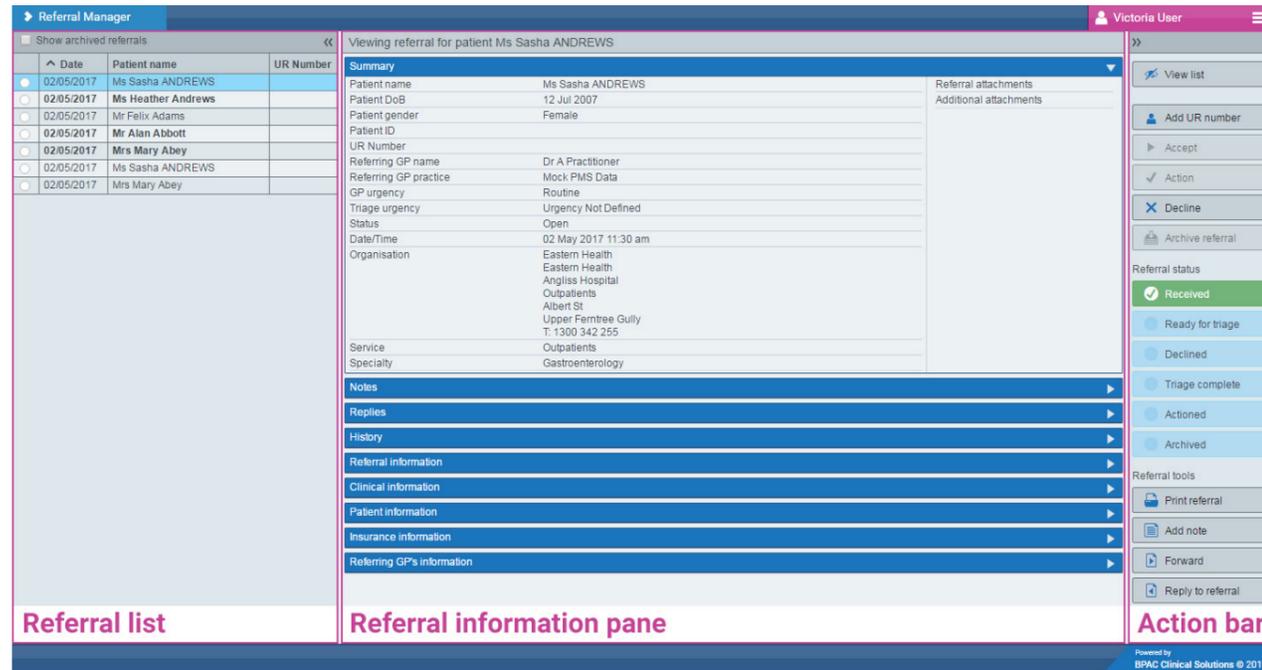


Figure 2. The Referral Manager screen is divided into three sections: the **referral list**, the **referral information panel** and the **action bar**.

Referral list

The referral list is a panel on the left of the screen. This panel contains summaries of the referrals that have a status of 'open' to which you have access.

All referral summaries in the list are initially displayed in **bold** to indicate that they are unopened. Once a summary has been clicked it is unbolded to indicate that it has been opened.

The default list view displays all columns. If the detailed view is shown the following columns will display:

- Date
- Patient name
- UR number

Any field that has an ellipsis (...) can be viewed in full by hovering the mouse over it.

Sorting

To sort the referral summaries by a particular column, click the header of that column. An arrow will appear in the header to show that the list is sorted by that column. A second click on the header reverses the sort and the arrow will be inverted to illustrate this. The **Patient ID** and **UR number** columns are NOT sortable.

Show archived referrals				
		^ Date	Patient name	Speciality
<input type="radio"/>	<input type="radio"/>	03/11/2016	Mrs Mary Abey	Gastroenter...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Ms Heather Andrews	Gynaecolog...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mr Felix Adams	Gastroente...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Ms Heather Andrews	Endocrinol...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mr Alan Abbott	Endocrinol...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mr Felix Adams	Gastroente...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mrs Madeline Abbott	Orthopaedi...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mr Alan Abbott	Colorectal...
<input type="radio"/>	<input type="radio"/>	05/11/2016	Ms Heather Andrews	Endocrinol...
<input type="radio"/>	<input type="radio"/>	03/11/2016	Mrs Mary Abey	Orthopaedi...
<input type="radio"/>	<input type="radio"/>	26/10/2016	Mr Felix Adams	Gastroente...

Figure 3. The referral list contains summaries of the referrals to which you have access.

Archived referrals

By default, archived referrals are not displayed in the referral list. To show archived referrals, click the **Show archived referrals** checkbox above the referral list. Archived referrals are displayed in gray italic text to differentiate them.

Urgency

The first two fields of the referral summary are **GP urgency** and **triage urgency**. These fields indicate via a colour-coded circle the urgency set by the GP and that set by a Referral Manager user. Hovering the mouse over the field will display an explanation of what the colour means.

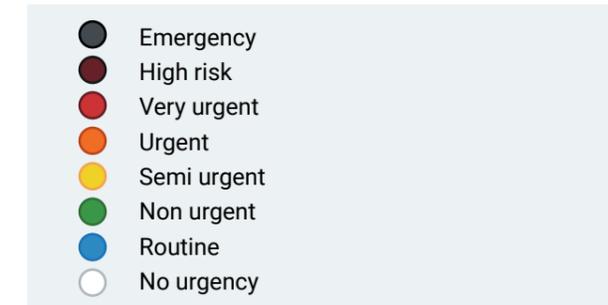


Figure 4. The meaning of the urgency colours, from most urgent to least urgent.

Collapsing the referral list

The referral list can be collapsed to give more space to the central **referral information pane**. This is achieved by clicking the double left arrow in the right corner of the referral list header.

◀◀ Click the double left arrow in the header to collapse the referral list.

▶▶ Click the double right arrow in the header to expand the referral list.

When the referral list is collapsed it displays as a bar on the left with the referral summaries replaced by five buttons (see Figure 5). This permits referrals to be navigated and viewed without the list being visible.

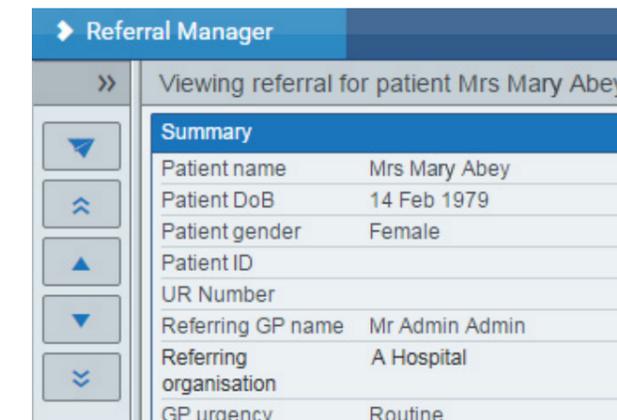


Figure 5. The referral list on the left of the screen has been collapsed down to five buttons.

The button functions are as follows:

▶ Clicking the dart button expands the sidebar and redisplay the referral list. This is the same as clicking the right double arrow button in the header.

⏪ Clicking the double up arrow button selects the first referral summary in the list and displays its content in the referral information panel.

▲ Clicking the up arrow button selects the previous referral summary in the list and displays its content in the referral information panel.

▼ Clicking the down arrow button selects the next referral summary in the list and displays its content in the referral information panel.

⏩ Clicking the double down arrow button selects the last referral summary in the list and displays its content in the referral information panel.

Referral information pane

When a referral summary has been selected in the referral list, the content of that referral, as it was sent by the referrer, will be displayed in the referral information panel. This content is separated into 11 sections which are displayed in accordions. Click the blue accordion header to open or close the section. The summary accordion is open by default. The sections are:

- Summary
- Attachments
- Notes
- Replies
- History
- Referral information
- Specialty clinical information
- Standard clinical information
- Patient information
- Insurance information
- Referring GP's information

Action bar

When a referral summary has been selected in the referral list, the buttons in the action bar become clickable and offer the following functionality:

Collapsing the action bar

The action bar can be collapsed to give more space to the central **referral information pane**. This is achieved by clicking the double right arrow in the left corner of the action bar header.

When the action bar is collapsed the buttons become smaller and the captions are removed (see Figure 6).

➔➔ Click the double right arrow in the header to collapse the action bar.

⬅️⬅️ Click the double left arrow in the header to expand the action bar.

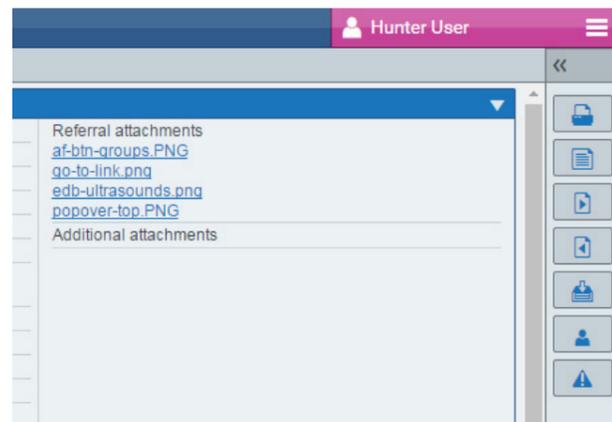


Figure 6. The action bar on the right of the screen has been collapsed, making the six buttons smaller.

🖨️ Clicking the **Print** button creates a PDF document of the original referral, including attachments, and opens it in another window. This document can then be printed.

📄 Clicking the **Add note** button opens a dialog that allows a note to be entered. Once saved the note content, date and user information will be copied into the **Notes** section of the referral.

▶️ Clicking the **Forward** button opens a dialog that allows the referral to be forwarded to another person or to a department. The recipient is selected from a drop down list.

📧 Clicking the **Reply** button opens a dialog that permits a reply to be sent to the referrer. A note must be entered in order to send the reply. Select the decline checkbox to decline the referral.

📁 Clicking the **Archive referral** button changes the status of the referral to 'Archived' which will hide it in the standard referral list view. A history item is added to the referral data.



Clicking the **Add patient ID** button opens a dialog that permits an ID supplementary to that of the clinical information system to be added.



Clicking the **Triage urgency** button opens a dialog that permits a triage urgency to be set for the referral. This urgency will be displayed in the second column of the referral list.

Account management

Resetting a password

Forgotten passwords can be reset by clicking **Forgot password?** beside the login button on the login to Referral Manager screen (see figure 7).

Figure 7. The Referral Manager login section, featuring the password reset link.

Please note: the password reset link will only be sent if the email address has been registered. The reset link is only valid for one hour.

A password can be changed once logged into Referral Manager. This can be achieved by clicking **Change password** under the user menu (see Figure 8).

Figure 8. The Referral Manager change password popover in the application.

Regional variations

There will be some regional variation of functionality within the action bar. The variations are in the referral workflow, this includes the use of action buttons and the referral status in addition to the referral tools. The variations are listed below.

Generic Referral Manager

By default the action bar will include only the referral tools and no specific workflow items (see Figure 9).

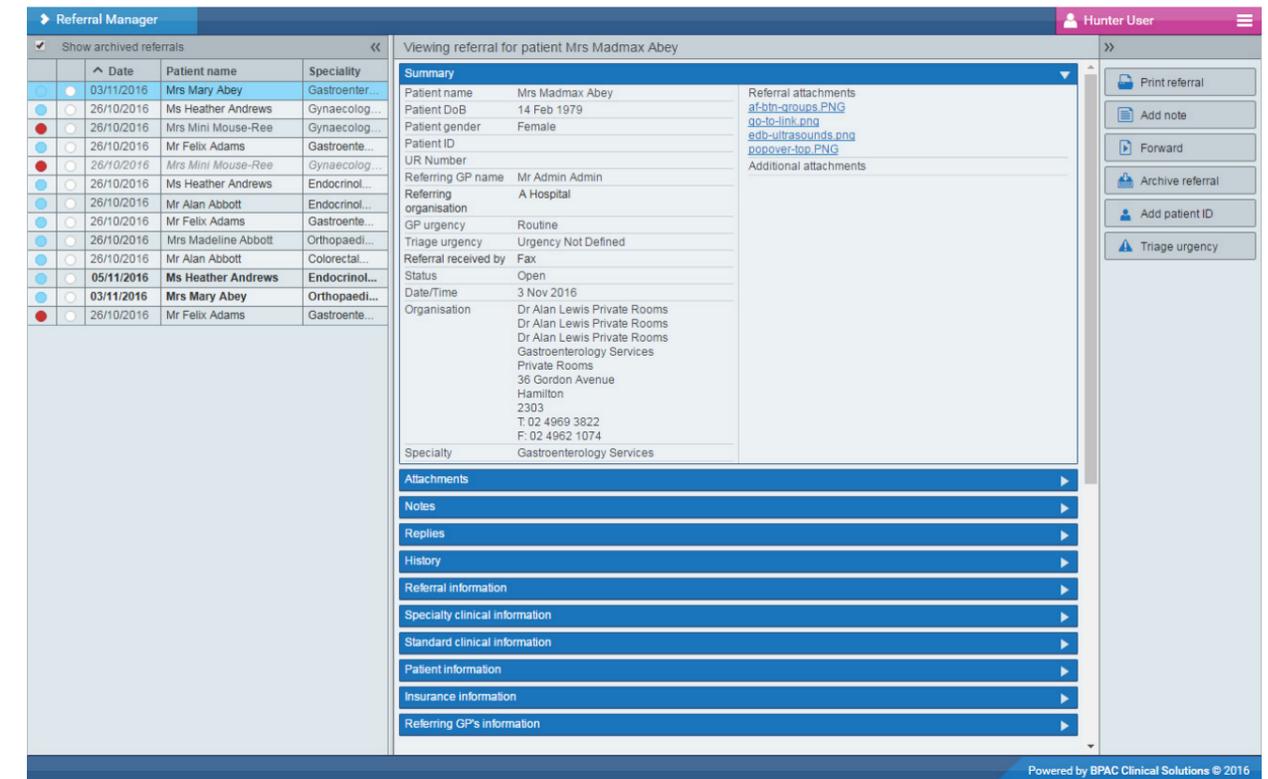


Figure 9. The Referral Manager generic version.

Murray Referral Manager

The Murray region workflow includes referral actions, the referral status and referral tools. The status is updated depending on the action that has been completed, the active status

will be shown in green and inactive in light blue.

An action is unavailable when it has been completed or when the previous workflow step is incomplete (see Figure 10).

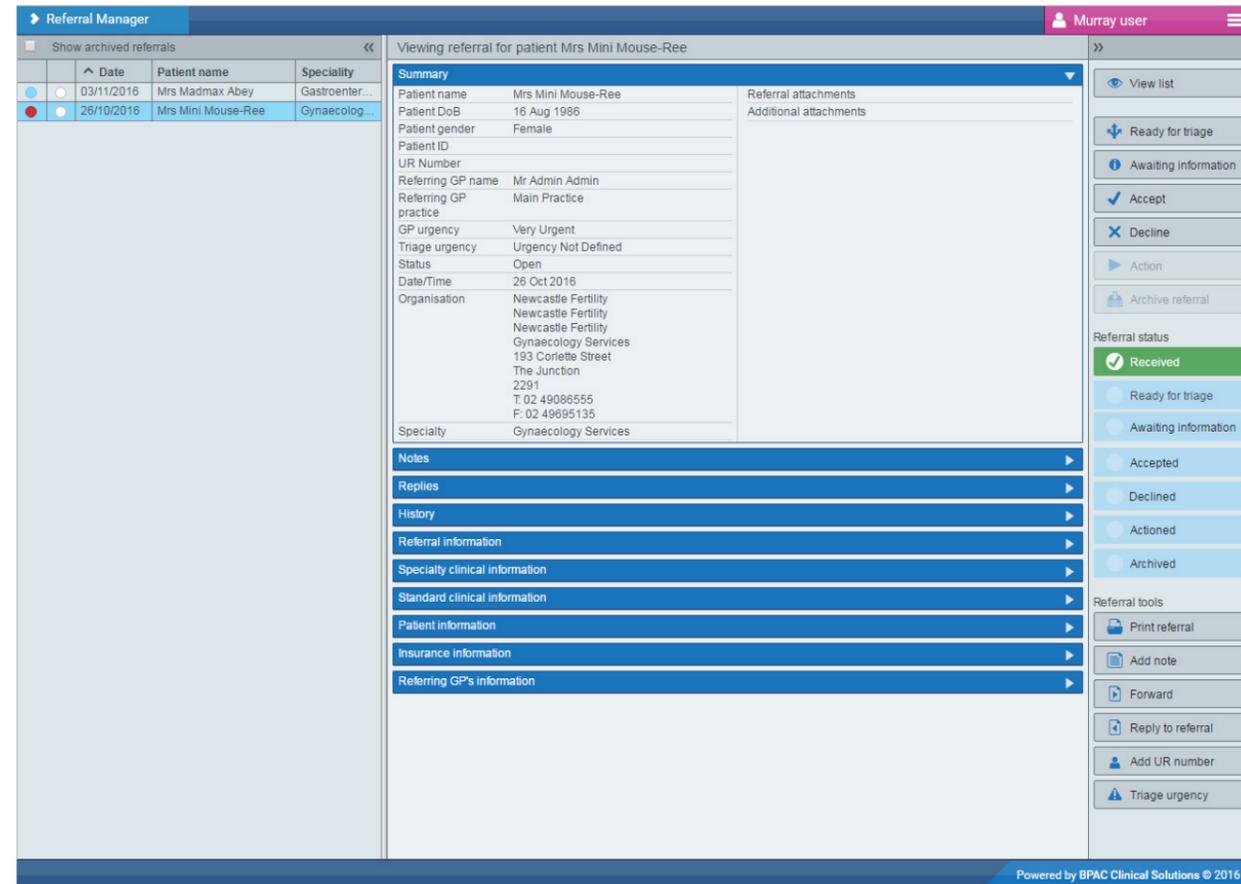


Figure 10. The Referral Manager Murray region workflow.

Murray workflow

Action buttons

At each step of the workflow a popover will prompt for required information that relates to the action to be entered. For example: clicking Ready for triage will prompt to enter a reason for referral and notes. (See Figure 11)

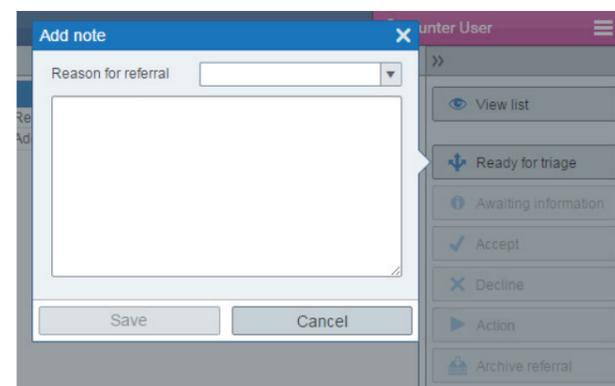


Figure 11. Action button popover prompt.

Step one - a referral is opened

When a referral is opened the status is set to received. The actions available are:

- Ready for triage
- Awaiting information
- Accept
- Decline

Step two - a referral is ready for triage

When ready for triage is selected a dialog is opened that allows an urgency to be selected. After an urgency has been set the referral status will include ready for triage. The actions available are:

- Awaiting information
- Accept
- Decline

Step three - a referral is awaiting information

Clicking awaiting information will display a dialog that allows a message to be sent to the referring GP.

The referral status is set to received, ready for triage, and awaiting information (see Figure 12).

The referral can now be accepted or declined.

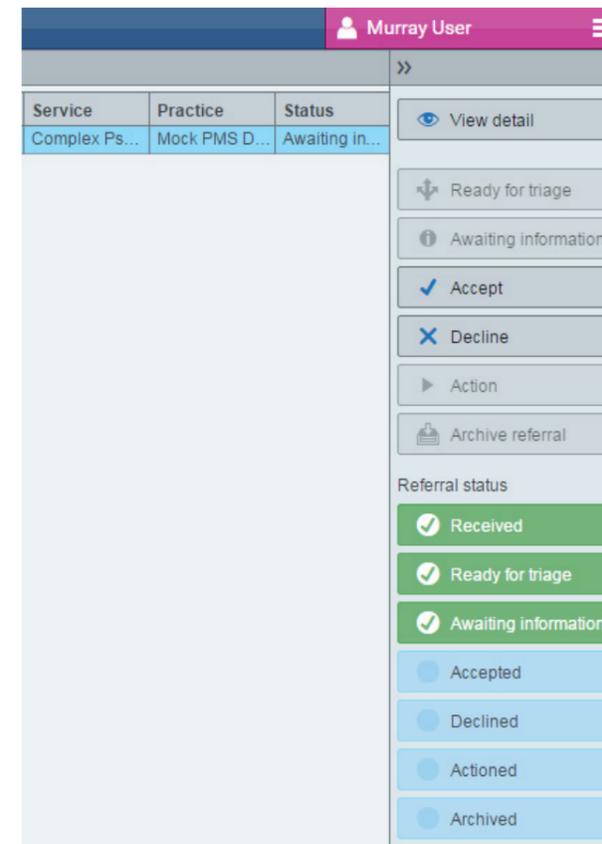


Figure 12. The referral status and action buttons at step three of the workflow.

Step four - a referral is accepted

Clicking accept displays a dialog that requires a reason for accept and an optional free text note (see Figure 13).

The referral status now includes accepted and the referral can only be actioned or archived.

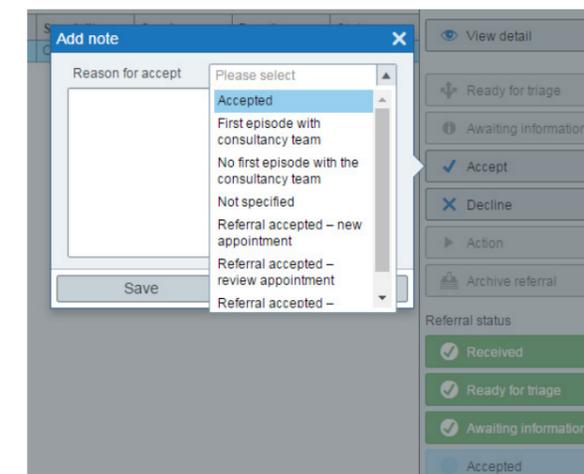


Figure 13. Selecting a reason for accepting a referral.

Step five - a referral is actioned

A referral can be actioned only after it has been accepted. When action is clicked a dialog is opened that requires booking details to be selected and an optional free text note.

The referral status now includes actioned and the referral can now be archived.

Step six - a referral is declined

Clicking decline opens a dialog that requires a reason for decline and an optional free text field.

The referral status now includes declined and the referral can only be archived.

Step seven - a referral is archived

A referral can only be archived once it has been accepted or declined. Archived referrals are not displayed in the referral list but can be shown by clicking **Show archived referrals**.

The referral status now includes archived. Archiving a referral is the final step in the workflow (see Figure 14).

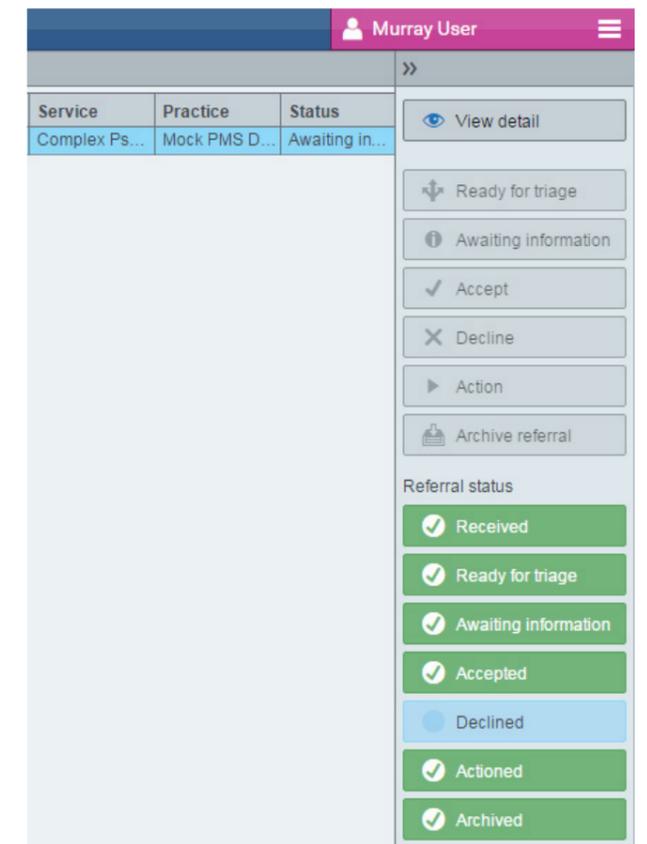


Figure 14. The status of an accepted and archived referral.

Eastern Referral Manager

The Eastern region workflow includes referral actions, the referral status and referral tools. The status is updated depending on the action that has been completed, the active status

will be shown in green and inactive in light blue.

An action is unavailable when it has been completed or when the previous workflow step is incomplete (see Figure 15).

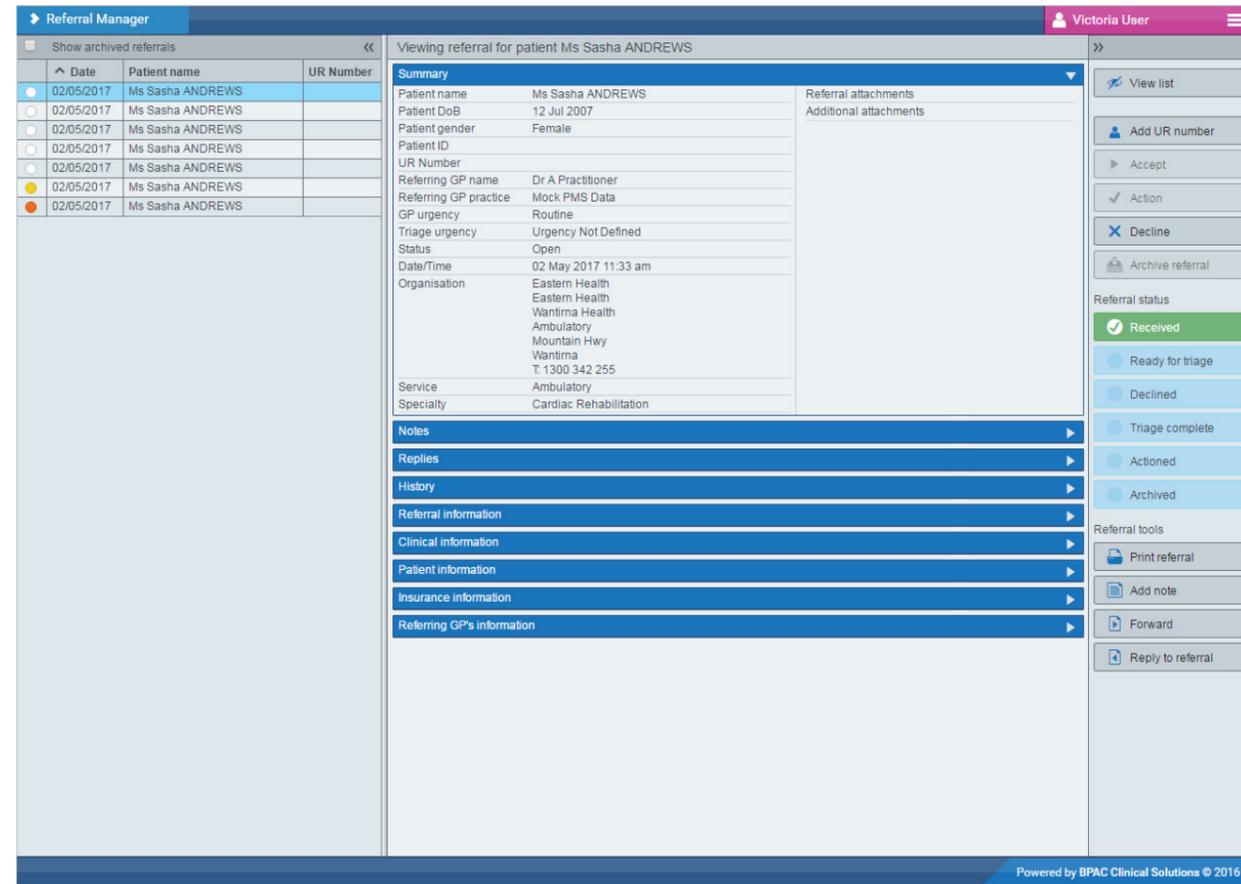


Figure 15. The Referral Manager Eastern region workflow.

Eastern workflow

Action buttons

At each step of the workflow a popover will prompt for required information that relates to the action to be entered. For example: clicking Ready for triage will prompt to enter a reason for referral and notes. (See Figure 16)

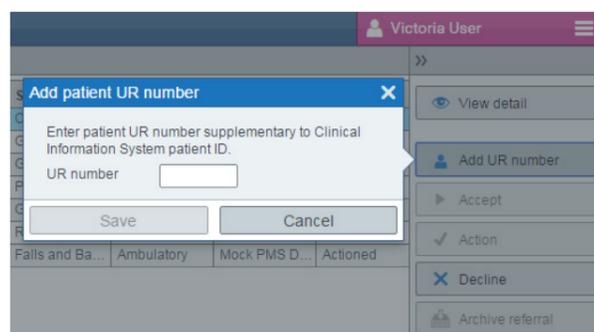


Figure 16. Action button popover prompt.

Step one - a referral is opened

When a referral is opened the status is set to received. The actions available are Add UR number or decline.

Step two - add a UR number

Before a referral can be accepted and triaged a UR number needs to be added. A UR number is added by clicking **Add UR number**. The referral status is now ready for triage and can be accepted or declined.

Step three - a referral is accepted

When a referral is accepted it also needs to be triaged. Clicking accept opens a dialog that allows an urgency to be selected (see Figure 17).

After an urgency has been set the referral status will include triage complete. The referral can now be actioned.

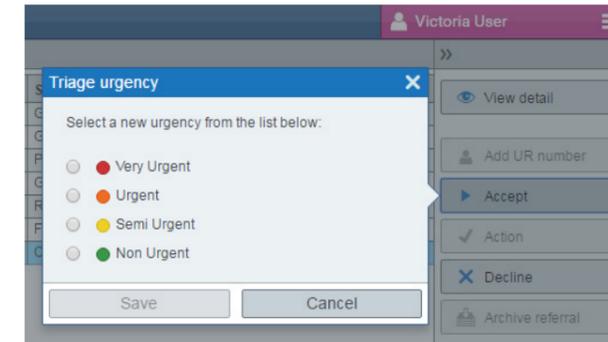


Figure 17. Accepting and triaging a referral.

Step four - a referral is actioned

A referral can be actioned only after it has been accepted. Clicking action opens a dialog that requires booking details to be selected and additional information to be added.

Once the action is complete the status will include actioned. The referral can only be archived.

Step five - a referral is declined

Clicking decline opens a dialog that requires a reason for decline to be selected and additional information to be added.

Once the referral has been declined it can only be archived.

Step six - a referral is archived

A referral can only be archived once it has been accepted or declined. Archived referrals are not displayed in the referral list but can be shown by clicking Show archived referrals.

After a referral is archived the status will include archived. Archiving a referral is the final step in the workflow (see Figure 18).

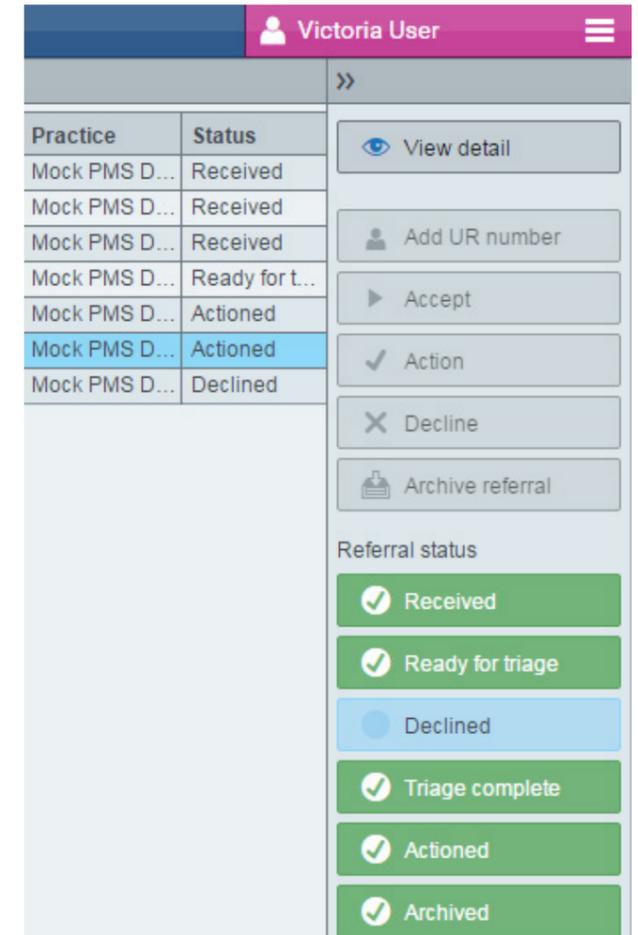


Figure 18. The status of an accepted and archived referral.

