

USER MANUAL

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

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.

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.

System requirements

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

	∧ Date	Title	First name	Surname	Patient ID	UR Number	Assignee	Speciality	Service	Practice	Status	View detail
0	02/05/2017	Ms	Sasha	ANDREWS			Unassigned	Gynaecology	Outpatients	Mock PMS D	Received	View detail
	02/05/2017	Ms	Sasha	ANDREWS			Unassigned	Falls and Ba	Ambulatory	Mock PMS		
0	02/05/2017	Ms	Heather	Andrews			Unassigned	Respiratory	Outpatients	Mock PMS		💄 Add UR number
0	02/05/2017	Mr	Felix	Adams			Unassigned	Parkinson's	Ambulatory	Mock PMS D		
	02/05/2017	Mr	Alan	Abbott			Unassigned	Gastroenter	Outpatients	Mock PMS	Received	Accept
	02/05/2017	Mrs	Mary	Abey			Unassigned	Cardiac Re	Ambulatory	Mock PMS	Received	✓ Action
0	02/05/2017	Ms	Sasha	ANDREWS			Unassigned	Gastroenter	Outpatients	Mock PMS D	Received	
												Received Ready for triage Declined Triage complete Actioned Archived Referral tools Print referral Add note
												Forward Reply to referral
												Neply to relenan

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





Referral detail view

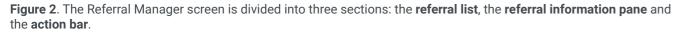
The Referral Manager detail screen consists of three sections, the referral list, the referral information panel and the action bar. These are shown in Figure 2 below.

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.

Show	archived referrals	>>	Viewing referral for patient	Ms Sasha ANDREWS		>>
^ [Date Patient name	UR Number	Summary			View list
02/0	05/2017 Ms Sasha ANDREWS	i i	Patient name	Ms Sasha ANDREWS	Referral attachments	S VIEW IISt
02/0	05/2017 Ms Heather Andrews	5	Patient DoB	12 Jul 2007	Additional attachments	
02/0	05/2017 Mr Felix Adams		Patient gender	Female		🔒 Add UR numbe
02/0	05/2017 Mr Alan Abbott		Patient ID			
02/0	05/2017 Mrs Mary Abey		UR Number			Accept
02/0	05/2017 Ms Sasha ANDREWS	i i i i i i i i i i i i i i i i i i i	Referring GP name	Dr A Practitioner		
02/0	05/2017 Mrs Mary Abey		Referring GP practice	Mock PMS Data Routine		✓ Action
			GP urgency Triage urgency	Urgency Not Defined		× Decline
			Status	Open		▲ Decimie
			Date/Time	02 May 2017 11:30 am		Archive referral
			Organisation	Eastern Health Eastern Health Angliss Hospital Outpatients Albert St Upper Femtree Gully T: 1300 342 255		Referral status Received Received Ready for triag
			Service	Outpatients		Declined
			Specialty Notes	Gastroenterology		Triage complet
			Replies			
			History			Actioned
			Referral information			Archived
			Clinical information			Referral tools
			Patient information			Print referral
			Insurance information			Add note
			Referring GP's information			Forward
						Reply to referra
lef	erral list		Referral info	ormation pane		Action b



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.

•	Sho	w archived referrals				
		▲ Date	Patient name	Speciality		
0	0	03/11/2016	Mrs Mary Abey	Gastroenter		
•	0	26/10/2016	Ms Heather Andrews	Gynaecolog		
•	0	26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog		
•	0	26/10/2016	Mr Felix Adams	Gastroente		
•	0	26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog		
•	0	26/10/2016	Ms Heather Andrews	Endocrinol		
•	0	26/10/2016	Mr Alan Abbott	Endocrinol		
•	0	26/10/2016	Mr Felix Adams	Gastroente		
•	0	26/10/2016	Mrs Madeline Abbott	Orthopaedi		
•	0	26/10/2016	Mr Alan Abbott	Colorectal		
•	0	05/11/2016	Ms Heather Andrews	Endocrinol		
•	0	03/11/2016	Mrs Mary Abey	Orthopaedi		
•	0	26/10/2016	Mr Felix Adams	Gastroente		

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

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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.

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.

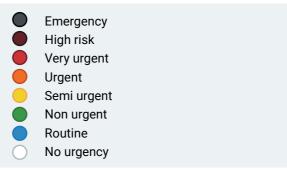


Figure 4. The meaning of the urgency colours, from most urgent to least urgent.

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.

Refer	rral Manager						
>>	Viewing referral for patient Mrs Mary Abe						
	Summary						
	Patient name	Mrs Mary Abey					
~	Patient DoB	14 Feb 1979					
	Patient gender	Female					
	Patient ID						
	UR Number						
	Referring GP name	Mr Admin Admin					
*	Referring organisation	A Hospital					
	GP urgency	Routine					

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 redisplays 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.

	A Hunter User	
		«
Referral attachments <u>af-btn-groups PNG</u> <u>go-to-link.png</u> <u>edb-ultrasounds.png</u> <u>popover-top.PNG</u> Additional attachments		

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.

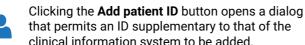


Clicking the Add note button opens a dialog that allows a note to be entered. Once saved the note content, date and user information will be copied into the Notes section of the referral.

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.



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).

Login to Referral Manager

0	Please login wit	h your email and password.
EMAI	L	
PASS	WORD	
	Login	Forgot password?

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).

	🐣 Hunter User	=
	Change password	×
tory	Old password	
ents		
tory	New password	
ents		
tory		
ents	Confirm password	
ents		
	Submit Cance	Ϊ

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).

	Sho	w archived ref	errals	~~	Viewing referral for	or patient Mrs Madmax A
		^ Date	Patient name	Speciality	Summary	
		03/11/2016	Mrs Mary Abey	Gastroenter	Patient name	Mrs Madmax Abey
	0	26/10/2016	Ms Heather Andrews	Gynaecolog	Patient DoB	14 Feb 1979
,		26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog	Patient gender	Female
	0	26/10/2016	Mr Felix Adams	Gastroente	Patient ID	
,	0	26/10/2016	Mrs Mini Mouse-Ree	Gynaecolog	UR Number	
	0	26/10/2016	Ms Heather Andrews	Endocrinol	Referring GP name	
5	0	26/10/2016	Mr Alan Abbott	Endocrinol	Referring organisation	A Hospital
5	0	26/10/2016	Mr Felix Adams	Gastroente	GP urgency	Routine
5	0	26/10/2016	Mrs Madeline Abbott	Orthopaedi	Triage urgency	Urgency Not Defined
	0	26/10/2016	Mr Alan Abbott	Colorectal	Referral received by	
	0	05/11/2016	Ms Heather Andrews	Endocrinol	Status	Open
5	0	03/11/2016	Mrs Mary Abey	Orthopaedi	Date/Time	3 Nov 2016
	1	1			Dr Alan Lewis Private Roo Dr Alan Lewis Private Roo Gastroenterology Services Private Rooms 36 Gordon Avenue Hamilton 2303 T 02 4969 3822	
					Specialty Attachments	F: 02 4962 1074 Gastroenterology Services
					Attachments	
					Attachments Notes	
					Attachments Notes Replies	
					Attachments Notes Replies History	Gastroenterology Services
					Attachments Notes Replies History Referral information	Gastroenterology Services
					Attachments Notes Replies History Referral information Specialty clinical info	Gastroenterology Services
					Attachments Notes Replies History Referral information Specialty clinical info Standard clinical info	Gastroenterology Service:

Figure 9. The Referral Manager generic version.



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		Hunter User 📃
bey		»
15 15 15	Referral attachments af-bin-groups PNG go-bi-link.ong edb-ultrasounds.ong ppoover-loop PNG Additional attachments	Print referral Add note Forward Archive referral Add patient ID Artriage urgency
	<pre> 4 5 6 6 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7</pre>	•



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).

Show archived	referrals	**	Viewing referral for	or patient Mrs Mini Mouse-Ree		>>
▲ Date	Patient name	Speciality	Summary			
0 03/11/201		Gastroenter	Patient name	Mrs Mini Mouse-Ree	Referral attachments	View list
0 26/10/201		Gynaecolog	Patient DoB	16 Aug 1986	Additional attachments	
20/10/201		Cynaccolog	Patient gender	Female		Ready for triage
			Patient ID			Y Ready for triage
			UR Number			Awaiting informa
			Referring GP name	Mr Admin Admin		
			Referring GP	Main Practice		🖌 Accept
			practice			
			GP urgency Triage urgency	Very Urgent Urgency Not Defined		× Decline
			Status	Open		Action
			Date/Time	26 Oct 2016		- ACUSTI
			Organisation	Newcastle Fertility		🐴 Archive referral
				Newcastle Fertility		
				Newcastle Fertility Gynaecology Services		Referral status
				193 Corlette Street		Received
				The Junction		Received
				2291 T: 02 49086555		Ready for triage
				F: 02 49695135		
			Specialty	Gynaecology Services		Awaiting inform
			Notes			Accepted
			Replies			Declined
			History			Actioned
			Referral information			Archivod
			Specialty clinical infe			Alciived
			Standard clinical infe	ormation		Referral tools
			Patient information			Print referral
			Insurance information			Add note
			Referring GP's infor	mation		Forward
						Reply to referra
						🔺 Add UR number
						A Triage urgency
						Powered by BPAC Clinical Solutions ©

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 realtes 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)

	Add note		×	
	Reason for referral		-	»
Re				View list
Ad				ready for triage
	Save	Cancel		

Figure 11. Action button popover prompt.



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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 clicked 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.

		🐣 Mi	urray User 📃
			>>
Service Complex Ps	Practice Mock PMS D	Status Awaiting in	View detail
			Ready for triage
			Awaiting information
			✓ Accept
			X Decline
			► Action
			Archive referral
			Referral status
			Received
			Ready for triage
			Awaiting information
			Accepted
			Declined
			Actioned
			Archived

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.

dd note		×	View detail
Reason for accept	Please select		
	Accepted	^	Ready for triage
	First episode with consultancy team		Awaiting information
	No first episode with the consultancy team		🖌 Accept
	Not specified		× Decline
	Referral accepted – new appointment	Ш	Action
Save	Referral accepted – review appointment		Archive referral
	Referral accepted -	•	Referral status
			Relenarstatus
			🕢 Ready for triage
			Awaiting information
			Accepted

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).

Show archived referrals 🔣 🔧			**	Viewing referral for patient Ms Sasha ANDREWS			>>
Т	▲ Date	Patient name	UR Number	Summary			
1	02/05/2017	Ms Sasha ANDREWS		Patient name	Ms Sasha ANDREWS	Referral attachments	💋 💋 🖉 🖉
	02/05/2017	Ms Sasha ANDREWS		Patient DoB	12 Jul 2007	Additional attachments	
+	02/05/2017	Ms Sasha ANDREWS		Patient gender	Female		🔒 Add UR nur
+	02/05/2017	Ms Sasha ANDREWS		Patient ID			- ride ortina
	02/05/2017	Ms Sasha ANDREWS		UR Number			Accept
_	02/05/2017	Ms Sasha ANDREWS		Referring GP name	Dr A Practitioner		
_	02/05/2017	Ms Sasha ANDREWS		Referring GP practice			🖌 Action
1	02/05/2011	M3 Gasha / WDITE WO		GP urgency	Routine		
				Triage urgency	Urgency Not Defined		× Decline
				Status	Open		
				Date/Time	02 May 2017 11:33 am		Archive refe
				Organisation	Eastern Health Eastern Health Wantirna Health		Referral status
					Ambulatory Mountain Hwy		Received
				Service	Wantirna T: 1300 342 255 Ambulatory		Ready for tr
				Specialty	Cardiac Rehabilitation		Declined
				Notes			Triage com
				Replies			Actioned
				History			Archived
				Referral information Clinical information			Referral tools
				Patient information			Print referra
				Insurance information			Add note
				Referring GP's informat	ion		Forward
							Reply to ref
							Powered by BPAC Clinical Solution

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 realtes 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)

	💄 Vi	ictoria User 🛛 🗮
		»
s Add patient UR number	×	View detail
C Enter patient UR number s Information System patient UR number		Add UR number
G Save	Cancel	Accept
Falls and Ba Ambulatory	Mock PMS D Actioned	Action
		× Decline
		Archive referral

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 bu 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.

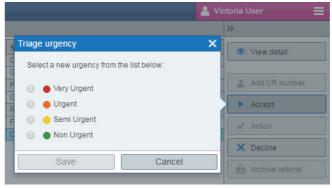


Figure 17. Accepting and triaging a referral.

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).



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	🔒 Vi	ctoria User 📃		
		»		
Practice	Status	View detail		
Mock PMS D	Received			
Mock PMS D	Received			
Mock PMS D	Received	Add UR number		
Mock PMS D	Ready for t	h Assest		
Mock PMS D	Actioned	Accept		
Mock PMS D	Actioned	✓ Action		
Mock PMS D	Declined			
		× Decline		
		Archive referral		
		Referral status		
		Received		
		Ready for triage		
		Declined		
		✓ Triage complete		
		Actioned		
		Archived		

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



