



## Add referral information to a record and a request list

**Note:** Before entering any information into ESM, patient demographic details must be checked, updated and filed off in HBCIS. If no updates are required, navigate to field 27, add a space and file off.

1. Click the **ESM scheduling appointment book** icon from the App Bar.
2. Click on the **appointment inquiry** icon, perform an **ESM person search (Person tab)** and **ESM – request – person search (Request List tab)** to ensure this is not a duplicate referral.

### Create a referral

1. Select the **appointment** tab on the **appointment scheduling book**.
2. Enter a wildcard \* and the first few letters of the **appointment type** name to help find the appropriate appointment type.

3. Select the **appointment type** from the drop down list e.g. Ortho Gen New (Orthopaedics General New).

4. Review the **appointment location** box. The location should reflect where the service will be delivered (note, this often defaults automatically but if there are multiple options the user will have to select one before proceeding).

\*Appointment location:  
LCCH 1B ORTP

5. Click the **person name ellipsis** button. The **person search** window will open.

\*Person name:

6. Enter the patient details in the **search field** pane. Click **search**.
7. Select the correct patient from the **patient search** results.

8. Click **add encounter**.
9. The encounter **available conversations** window will display.

### Option 1: Community (CYCHS) registration

10. Select **community registration** and click **ok**.
11. The **community registration** window will display. Complete all relevant mandatory fields (in yellow) and click **ok**.

### Option 2: Pre-arrival (hospital) add encounter

10. Select **pre-arrival add encounter** and click **ok**.
11. The **pre-arrival add encounter** window will display. The following fields must be checked and updated before clicking **ok**.
12. Start date and start time.





13. Building and patient location.
14. Treating clinician (use the search box or start typing the clinician's full name and it will populate).
15. Chargeable status (public).
16. Payment class (Medicare).

17. The document selection window will display. Ensure the do not print documents box is checked and click ok.

18. The pre-arrival add encounter confirmation window will display. Click ok.

19. Complete the remaining appointment fields in the appointment tab as required:

- primary resource (optional)
- new case category (UC: uncategoryed)
- length of referral
- date referral received
- date on referral
- referral source.

20. Referring clinician (note, these are free text fields and must be entered accurately. Information in this field will directly print on administrative referring doctor letters):

- Provider number is used for Winscribe. If no provider number is entered, referring clinician matching in Winscribe may not be possible.
- If the postcode field is left blank, **no administrative letters will print** for the referring clinician.

21. Scheduling comments (refer to comments)
22. Click move to transfer the referral information to WIP.

23. The appointment attributes window will display. Review (and update) any relevant tabs to ensure the information is correct and click ok.

24. The new appointment details will display in the WIP window.

### Placing a referral on a request list

1. If the referral is in the WIP, click request. The request for book will appear.

2. Ensure request list for the correct location is selected in the selected request list field. Take note of the selected request list as this is the list where you will find your patient and click ok.

