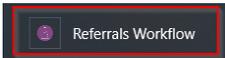




Smart Referrals Workflow Solution

Referral Finalisation

1. Search for Referrals Workflow in start menu, or access from desktop icon.



2. Use email address or QH\Novell Login) and enter Novell password.



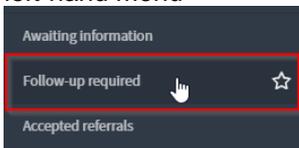
Follow-up required

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



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

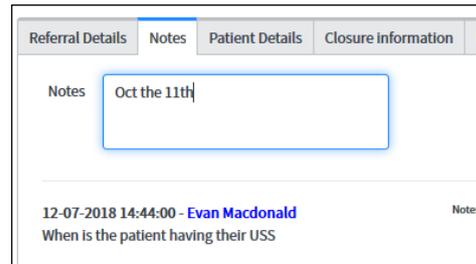
1. Navigate to the **Follow-up Required** screen from the left-hand menu



2. Select a referral in the queue by clicking on the **Referral ID**.

Referral ID	State	Specialty / Service Delivery Unit	Clinic list	Patient URN
REF121748	Awaiting Categorisation	Dermatology_OCH	(empty)	(empty)
REF1218239	Awaiting Categorisation	Genetics_OCH	(empty)	(empty)
REF1221398	Awaiting Categorisation	Physiotherapy_OCH	(empty)	(empty)

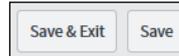
3. Review the referral, including any notes on the **Notes** tab and complete the required action.



4. De-select the follow up required check box when complete.



5. 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.

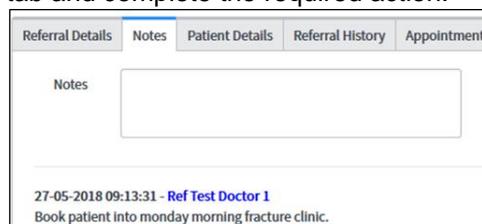
Accepted referrals

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

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

Referral ID	State	Specialty / Service Delivery Unit	Clinic list	Patient URN
REF121748	Awaiting Categorisation	Dermatology_OCH	(empty)	(empty)
REF1218239	Awaiting Categorisation	Genetics_OCH	(empty)	(empty)
REF1221398	Awaiting Categorisation	Physiotherapy_OCH	(empty)	(empty)

2. Review the referral, including any notes on the **Notes** tab and complete the required action.



Note: All referrals are required to be uploaded from SRWS in to ieMR. An encounter must be created prior to finalisation.

- Review the referral details such as, category and Clinic list. Additional booking details relevant to referral creation may be available on the Scheduling tab in SRWS.

Category: Category 2
 Clinic list: Spinal - Rhys Edwards
 Okay to overbook:
 Telehealth:
 Clinician required at Telehealth site:
 Outreach:

Referral Details | **Scheduling** | Notes | Patient Details | Referral History
 Category: Category 2
 Clinic: Ongoing care

- Review Scheduling appointment book (ESM) and add/update the Patient's referral details according to the ESM/HBCIS business rules.

The Referral ID from the referral (*found in SRWS*) should be copied and pasted into the [Cross-platform ID](#) field in ESM.

Referral ID: QHREF0003076

- Copy the encounter FIN number from ieMR into the [ieMR ID](#) field in Smart Referrals.

ieMR ID: 4657897

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

Referral Details | **Notes** | Patient Details | Referral History | Appointment
 Notes: Patient contacted to confirm current address.

- If correspondence is required, navigate to the [Correspondence](#) tab. (See *Correspondence QRG* for more details).

- Change the [State](#) to Closed

State: Closed

- Select a [Close code](#) and add any [Close notes](#) as required.

Close code: Accepted

- Click [Save](#) to confirm the changes or [Save & Exit](#) to confirm and return to the queue.

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.

IMPORTANT:

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

Declined Referrals

Referrals can be re-assigned to another specialty by changing the [Specialty](#) field.

Users will be shown the Previous Specialty whenever the Specialty has been saved.

- Review the referral, including any notes on the [Notes](#) tab.

Non-Acceptance reason: Out of Area

- Generate correspondence from [Correspondence](#) tab. (See the *Correspondence QRG* for details)

- Create a Pre-Arrival encounter and encounter FIN number from ieMR into the [ieMR ID](#) field.

ieMR ID: 4657897

- Change the [State](#) to Closed.

State: Closed

- Select a [Close code](#) and add any [Close notes](#) as required.

Close code: Declined

- Click [Save](#) to confirm the changes or [Save & Exit](#) to confirm and return to the queue.

Save & Exit | Save

Return referral for reconsideration

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

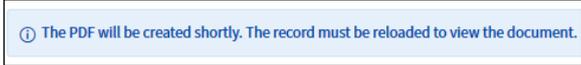
To return a referral for clinical review:

- Change the category or non-acceptance reason fields to [--None--](#)
 This will revert the State to [Awaiting categorisation](#)

- The referral will now appear in the clinician's queue.
- To continue the follow-up or clarification process, the clinician should be contacted direct, or by using the tasks feature. (See *Tasks QRG* for details).

Coversheets

- Once a referral has been *closed*, the system will automatically generate a new coversheet. This will include any notes attached to the referral details in SRWS to be included and added to the patient's medical record.



- Refresh the page to prompt the new coversheet version of the referral to display. (See the *Add to medical record QRG* for more details).

Patient History

The patient's history will be visible in the [Referral history](#) and [Appointments](#) tabs.

Previous referrals for the patient will display in the [Referral history](#) tab.

Additional patient information can be obtained for a patient by accessing [The Viewer](#).

Click [The Viewer](#) button, and a new window will display. The patient summary page will display.



Note: Patient history will not display 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 following flags will be applied to the referral:

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



- Suspected duplicate referrals** – The system has identified another referral has been received for the same patient, to the same specialty, with the same date on referral.



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



These flags allow early identification that additional follow up may be required prior to progressing the referral.

Records that aren't referrals

Occasionally records are 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 clinically processed.

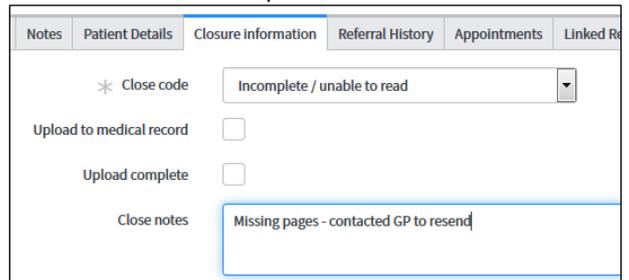
- Change the State to [Closed](#).



- Select a valid [Close code](#).



- Add [Close notes](#) if required



- Click [Save](#) to confirm the changes or [Save & Exit](#) to confirm and return to the queue.



Create encounter queue

As part of the finalisation process, the [ieMR ID](#) field *must* be updated for the referral to be uploaded into the patient's medical record on ieMR.

This field is required to be updated with the FIN number of the patient's encounter that has been created in ieMR/ESM.

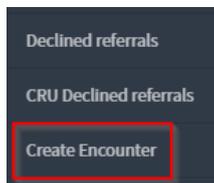


For referrals that have **not** had the FIN number updated in the ieMR ID field, these records will display on the [Create Encounter](#) queue until updated and completed.

These records will **not** be uploaded in to ieMR until the referral has been updated.

Users in each specialty are responsible for managing this queue in a timely manner to ensure referrals are uploaded to ieMR.

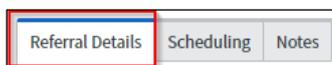
1. Navigate to the **Create Encounter** tab on the left-side menu.



2. Open a referral by selecting the **Referral ID** from the queue.
3. Click the **Reopen** button.



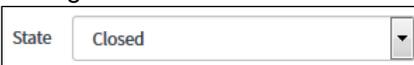
4. Click the **Referral Details** tab



5. In the **ieMR ID** field, enter the FIN number from the patient's encounter that has been created in ieMR/ESM.



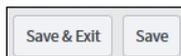
6. Change the State back to **Closed**.



7. Re-select the appropriate **Close code**.



8. 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 Health Informatics team by email at CHQ_DigitalFuture@health.qld.gov.au or by calling 3068 1999 (select option 1).

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