




ESM – Subsequent referral



Note: The following QRG is relevant to subsequent referrals received for patients who have not yet received an initial appointment (i.e. pending request), for the same condition.

When a referral is upgraded from a lower category (e.g. 3) to a higher category (e.g. 1), the days wait must be reset to 0 days (Specialist Outpatient Service Implementation Standard – SOSIS). As such, the following process must be followed to ensure the days wait is accurately reflected on the specialty *request lists*.

1. Click the *ESM scheduling appointment book*  icon from the App Bar.
2. Perform an *appointment inquiry* search (*ESM – request - person search*)
3. Locate the correct request on the *request list* (e.g. patient below is a Cat 2, waiting 94 days).

Days Waiting	Appointment Type	Category	Name
94	Paeds - Dev New	2	DUMMY, Pt cardiac

4. Right click the request and select *modify*.
5. Go to the detail tab and enter *scheduling comments* that indicate a new referral has been received (e.g. 17/08/18 – RB - 2nd ref rec Dr Jones, Townsville Family Practice).
6. Click *OK*.

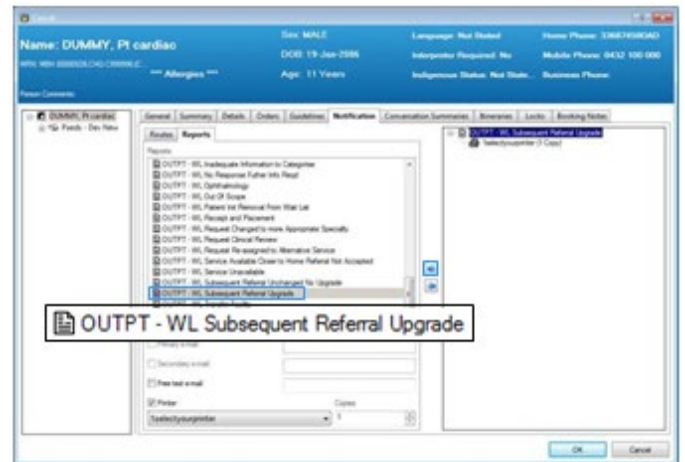
Clinical decision – upgrade category

1. Perform an *appointment inquiry* search (*ESM – request - person search*)
2. Locate the correct request on the *request list*.
3. Right click the appointment record, *modify*.
4. Go to the detail tab and over-key required fields:
 - *new case category* (upgraded category)
 - *named referral*
 - *length of referral*
 - *date referral received* (new date)
 - *date on referral* (new date)
 - *referral source* (if different)
 - *referring clinician* details (if different)
 - *last clinical update* (enter the date of referral triage)

Last Clinical Update:
09-Sep-2017

5. At *scheduling comments*, enter (above previous comments), comments to indicate the 2nd referral has been upgraded (e.g. 20/08/18 – RB - Ref upgraded to Cat 1 as per Dr Smith) (above previous comments).

6. Click the *notification* tab, navigate to the *reports* tab. Select the *OUTPT – WL subsequent referral upgrade* letter, select your printer and right arrow. Click *OK*.



Clinical decision - no upgrade to category

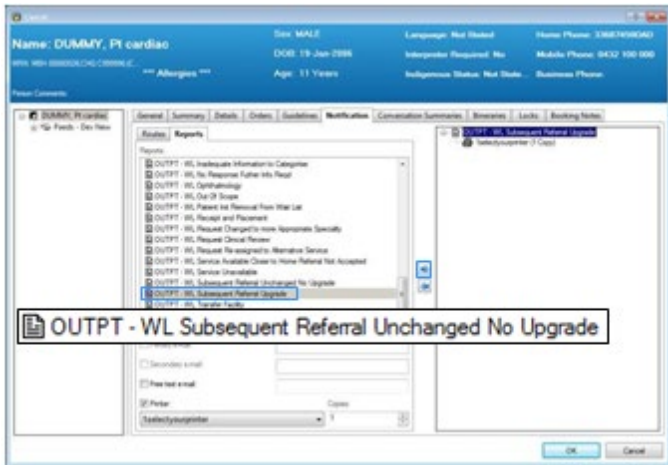
1. Perform an *appointment inquiry* search (*ESM – request - person search*)
2. Locate the correct request on the *request list*.
3. Right click the appointment record, *modify*.
4. Go to the detail tab and scroll down to the *last clinical update* field and enter the date the decision was made to retain the same category.

Last Clinical Update:
09-Sep-2017

5. Scroll down to the *scheduling comments* and enter comments to indicate the 2nd referral will remain the same category (e.g. 17/08/18 – RB - 2nd ref still cat 2).

Note - If the subsequent referring practitioner is different to the original referring practitioner – *modify* the referring *clinician name* and *address* prior to printing the letter. Once the letter is printed, change the referring practitioner details back to the original.

6. Click the *notification* tab, navigate to the *reports* tab, select the *OUTPT – WL subsequent referral unchanged no upgrade* letter, select your printer and right arrow. Click *OK*.



Search for referral history

1. Perform an *appointment inquiry* search (*ESM – request - person search*)
2. Locate the correct request on the *request list*.
3. Right click and select *inquiry*, then *appointment history view*.
4. The *appointment history view* window will open. Click on the *event details* tab.
5. Choose the event details you wish to view by clicking on the events listed under Schedule 1 (e.g. *Request Book* is the original request details; *Modify* is the 2nd request details).

