



## ESM – Referral Expiry Dates



**Note:** When scheduling review appointments in ESM, a mandatory referral expiry date field is required. This quick reference guide explains the use of the referral expiry date fields for the following scenarios:

- **01-Jan-2100:** Indefinite referral
- **02-Feb-2100:** Updated referral received, but not yet activated
- **03-Mar-2100:** Migrated appointment with no suitable linked referral
- **Other expiry date:** 18months, 5 years, Expired referral

### Migrated appointment with no suitable linked referral

ESM referral expiry date	01-Jan-1970
Description of date field	<ul style="list-style-type: none"> <li>▪ No Suitable linked referrals were located during migration</li> <li>▪ This date was chosen to ensure an 'expired' flag displays on daily appointment lists and is clearly visible as an error</li> </ul>
Check-in prompts	<ul style="list-style-type: none"> <li>▪ Ask patient/family if they have brought a new referral to appointment</li> </ul>
Updated referral received at check-in	<ul style="list-style-type: none"> <li>▪ Update referral <i>accept formats</i> with new referral information</li> <li>▪ Update the <i>referral expiry date</i> (today + the referral duration from updated referral)</li> <li>▪ Enter <i>Scheduled Comments</i>.</li> </ul>
No updated referral presented at appointment	<ul style="list-style-type: none"> <li>▪ Continue to use the current expiry date and remind patient/family that a new referral is required for future appointments; print <i>OUTPT – Expired Referral</i> letter for patient</li> </ul>

### Indefinite referral

ESM referral expiry date	01-Jan-2100
Description of date field	<ul style="list-style-type: none"> <li>▪ Indefinite referral has been received</li> <li>▪ This date was chosen to ensure indefinite referrals are flagged to not expire</li> </ul>
Check-in prompts	<ul style="list-style-type: none"> <li>▪ Nil</li> </ul>
New indefinite referral received on check-in	<ul style="list-style-type: none"> <li>▪ Update referral <i>accept formats</i> with new referral information</li> <li>▪ Update the <i>referral expiry date</i> to 01-Jan-2100</li> <li>▪ Enter <i>Scheduled Comments</i>.</li> </ul>

### Updated referral received, but not yet activated

ESM referral expiry date	02-Feb-2100
Description of date field	<ul style="list-style-type: none"> <li>▪ Updated referral has been received before appointment</li> <li>▪ When this date appears, it's a flag for reception staff to activate the referral expiry date on patient check-in / check-out</li> </ul>
Check-in prompts	<ul style="list-style-type: none"> <li>▪ Calculate and update the <i>referral expiry date</i> based on the duration of the referral (the accept format above the referral expiry date field)</li> </ul>

### Other previously expired date

ESM referral expiry date	Other expired date
Description of date field	<ul style="list-style-type: none"> <li>▪ The <i>referral expiry date</i> remains expired until an updated referral is received either before or during patient <i>check-in</i> for appointment</li> <li>▪ An 'expired' flag displays on <i>daily appointment list</i></li> </ul>
Check-in prompts	<ul style="list-style-type: none"> <li>▪ Ask patient/family if they have brought a new referral to appointment</li> </ul>
New referral received on check-in	<ul style="list-style-type: none"> <li>▪ Update referral <i>accept formats</i> with new referral information</li> <li>▪ Update the <i>referral expiry date</i> (today + the referral duration from updated referral)</li> <li>▪ Enter <i>Scheduled Comments</i>.</li> </ul>
No updated referral presented at appointment	<ul style="list-style-type: none"> <li>▪ Continue to use the current expiry date and remind patient/family that a new referral is required for future appointments; print <i>OUTPT – Expired Referral</i> letter for patient</li> </ul>

### Expired referrals reports

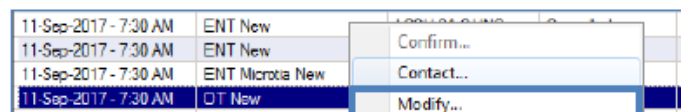
The Townsville Data Analytics and Reporting dashboard will provide a link to outpatient expired referral data. Refer to your line manager if unfamiliar with the dashboard.

**(Please note:** The dashboard is still under construction. Service Group Managers and Team Leaders will be advised once operational.)

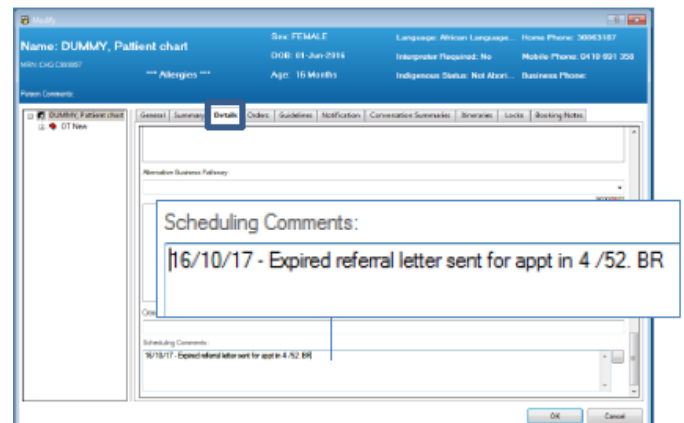
### Actioning the expired referral report

Open the link to the outpatient expired referrals.

1. Perform an *appointment inquiry* search to locate the corresponding patient.
2. Right click on the upcoming appointment, *modify*.

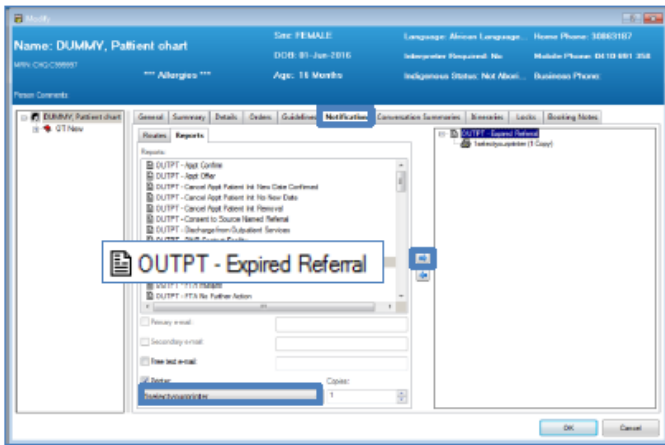


3. Click on the *details* tab, scroll to the bottom and add a scheduling comment (eg. 16/07/18 – BR - Expired referral letter sent for appt in 4/52.)





- Click on *notifications* tab, then *reports* tab. Select the *OUTPT – expired referral* report. Select your *printer* and move to the right window pane. Click *ok*.



- Continue with each patient on your report.
- Post the printed letters to patients and/or referring practitioners as appropriate.

Refer to *ESM – Schedule a Review Appointment* QRG for information regarding calculation of expiry date.