



ESM - Restoring migrated open referral information from HBCIS



Note: In addition to appointment and waitlist information being migrated from HBCIS, referrals that have not yet been discharged in HBCIS have been migrated to ESM. These referrals can be used as a template to schedule a review appointment.

1. To schedule a review appointment without having to copy the referral information from the HBCIS record, locate the migrated and cancelled referral by clicking the *request list inquiry* button from the ESM action bar.



2. Change the *inquiry* to *cancelled request by person*. This will display cancelled referral information for a specific patient. Locate the correct patient by clicking on the *ellipsis* under the *person* section.
3. Change the *start date* back one year then click *find*.

4. On the results screen, locate the *appointment type* for the corresponding specialty (e.g. allergy review)

Person Name	Appointment Type	Action	State	Type	Made Date	C
DUMMY, PATTIENT CHART	Allergy Review	Book	Canceled	Appointment	23-Sep-2017 2:59 PM	

5. Double click on the entry and navigate to the *scheduling comments* tab. Ensure this is the correct referral for the appointment (same condition).

6. If you are unsure, view the referral in the ieMR by clicking on the *correspondence* tab, changing the search criteria and viewing the referral from this screen. Click *close*.

Option 1: This is not the correct referral

- Open HBCIS and perform a referral search. If the referral still does not exist, a referral is required for this appointment.
- Do not proceed further with this guide.

Option 2: This is the correct referral and the same sub-specialty

1. Right click on the appointment and click *restore request*.

Person Name	Appointment Type	Action	State
DUMMY, PATTIENT CHART	Allergy Review	Book	Canceled



2. Enter *restore request reason* as *data triaging* then click *ok*.

3. A *schedule inquiry window* may display if no cancel request remains in the search. Click *ok* to proceed.

4. On the *request list* tab, change the *inquiry* to *ESM – request – person*. The patient information will remain in the *person* box. Select *find*.

5. Locate the entry you just restored. The *wait list name* of the referral will be *HBCIS Historical - TTH*.

6. Right click the record, *complete request*. When *appointment attributes* window opens scroll to the *scheduling comments* section and add your appointment comments (e.g. 25/6/18 – BR – appointment as per Dr Smith). Click *ok*.

7. Click *schedule* to schedule the appointment to the required date and time.

- For further assistance in scheduling, refer to Scheduling New appointments or Scheduling review appointments

Option 3: This is the correct referral but different sub-specialty

1. Click *next* and modify the *appointment type* to reflect the correct sub-specialty. Scroll to the *scheduling comments* section and add your appointment comments (e.g. 25/6/18 – BR – appointment as per Dr Smith). (e.g. Ortho Hand review from Ortho Gen Review). Click *move*.

2. Cancel the original referral from the *WIP*.
3. Select the *cancel reason* as *data triaging* and enter an *action comment* (e.g. 23/09/17 – BR - HBCIS referral no longer required).

4. Click *schedule* to schedule the appointment to the required date and time.
5. The referral has now returned to the *cancelled* status.