



RMS LITE VERSION 1.5.0

USER GUIDE

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1 ICONS USED IN THIS GUIDE

You will see helpful icons used in this guide to draw attention to a subject, action or information.



The light bulb icon indicates information that assists the process being described.



The exclamation icon highlights a warning or an action you need to take. When you see this icon, pay attention and proceed with caution.



The 'i' for information icon indicates an area that assists in a decision.



This icon indicates that a new feature added to enhance RMS Lite usage.

2 INTRODUCTION

2.1 RMS Lite Overview

RMS Lite is a web-based application that allows healthcare service providers the ability to manage the referral process within their organisation using a simplified interface.

The system is configurable to allow referrals to be segregated by groups or departments involved in processing the referral. Individual referrals can be searched or groups of referrals can be listed onscreen. User roles can be associated with a specific referral management step and a referral can be transitioned using site-configured pathways. All actions taken or notes made regarding a referral are available using shared progress and triage notes.

RMS Lite can be securely accessed using a computer with an internet browser, a pre-configured network access and a user account. The referral printing capability allows it to integrate with or support an existing paper-based workflow or it can be used to replace a paper based system.

2.2 Product Features

2.2.1 *Current Features*

- RMS Lite facilitates the real time submission of electronic referrals via HealthLink. This means the referrals are available in RMS Lite as soon as they are submitted from the practice
- Referrals are searchable on a number of criteria such as date range, service, status, priority etc.
- Referral lists can be sorted, making it easier to locate a particular referral
- Referral workflow is supported through status and service assignments (or re-assignments) and inclusion of administrative and triage notes against the referrals
- User definable referral workflow stages such as service, status and priority
- Printing of a referral and any associated attachments
- Audit log of user access and actions (e.g. viewed referral)
- Printing of referral changes history and notes
- A 'status update' message that can be sent to the referrer as desired or on demand
- A 'test referral' message that can be sent from the practice to RMS Lite. These test referral messages will use test NHI numbers and are useful in testing and troubleshooting
- Ability to monitor status messages sent and the acknowledgement received, including the ability to resend a status update message

2.2.2 *New Features*



- Ability to configure specific referral management pathways
- Specific pathway steps and referral statuses can be associated with specific user roles
- When a referral transitions through the configured pathway, additional forms or Y/N confirmation screens can be triggered
- Ability to view and triage eReferrals onscreen
- All progress notes and triage notes dynamically incorporated into the referral

3 USING RMS LITE

3.1 ACCESSING RMS LITE

RMS Lite can be accessed through an Internet browser from a computer that has been configured to connect to HealthLink through a secure IPSEC tunnel over the Internet. Please contact your system/network administrator or HealthLink for more details on how to configure a connection to RMS Lite from your computer.

To log on to RMS Lite:

1. Type your *user name* on the Username field
2. Type your *password* on the Password field
3. Click the Login button

The screenshot shows the login interface for RMS Lite. At the top left is the 'RMS Lite' logo, and at the top right is the 'healthLINK' logo. The main content area is titled 'Login' and contains the instruction 'Please login here'. There are two input fields: 'Username' with the text 'mel' and 'Password' with masked characters. Below these fields is a link for administrators: 'Please contact your [administrator](#) if you have any difficulty in accessing this system'. A 'Login' button is located at the bottom left of the form. At the bottom of the page, the text 'RMS Lite 1.2.0.2305 | Copyright: 2008-2009 [HealthLink Limited](#)' is displayed.

The RMS Lite Main screen will appear:

Referral Search Filter

Search By Referral ID Patient NHI Other Details

Patient NHI

Auto refresh search result?

Referral Search Results Time to Refresh: 92s

	Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
	21-Sep-2011 09:56	NLER-28571	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Prioritised	
	25-Aug-2011 10:44	CCER-10219	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Endoscopy	Received	
	05-Aug-2011 10:31	NLER-28461	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Assigned	
	05-Aug-2011 10:30	NLER-28460	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
	05-Aug-2011 10:16	NLER-28459	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
	27-Jul-2011 12:25	NLER-27943	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiology	Received	
	15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
	08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	
	07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	06-Jul-2011 14:27	WRP-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Received	
	06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
	06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	

3.2 RECEIVING REFERRALS

The submission of an electronic referral is done in real time, that is, once the referrer has successfully submitted a referral, it is immediately available in RMS Lite. The list of all the referrals that have been received in RMS Lite can be viewed on the RMS Lite Main screen immediately after a successful log on.

You can browse through the referral list using the page links (e.g., Next Page, Previous Page) on the bottom rightside of the referral list.

The screenshot shows the RMS Lite interface. At the top left is the 'RMS Lite' logo, and at the top right is the 'healthLINK' logo. Below the logos is a navigation bar with 'Search Referrals' and 'Help' links, and a user status indicator 'signed in as: ec5707u Logout'.

The main content area is titled 'Referral Search Filter'. It includes a 'Search By' section with radio buttons for 'Referral ID', 'Patient NHI', and 'Other Details'. The 'Patient NHI' radio button is selected, and the text 'Patient NHI' is displayed above a text input field containing 'AAA0985'. Below the input field are buttons for 'Search', 'Search and Save', and 'Reset', along with a checkbox for 'Auto refresh search result?' which is checked.

Below the filter is the 'Referral Search Results' section, which includes a table with 10 columns: Received, Referral ID, Referrer, Patient NHI, Patient, Patient DOB, Service, Status, and Action. The table contains 20 rows of referral data. At the bottom right of the table, there are navigation links: 'Next Page >' and 'Last Page >>', which are circled in red in the original image.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
21-Sep-2011 09:56	NLER-28571	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Prioritised	[Icons]
25-Aug-2011 10:44	CCER-10219	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Endoscopy	Received	[Icons]
05-Aug-2011 10:31	NLER-28461	Entwistle, Sam	AAA0985	MOUSE, M'ICKEY	13-Apr-2000	Audiology	Assigned	[Icons]
05-Aug-2011 10:30	NLER-28460	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
05-Aug-2011 10:16	NLER-28459	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
27-Jul-2011 12:25	NLER-27943	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiology	Received	[Icons]
15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
08-Jul-2011 16:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[Icons]
07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
06-Jul-2011 14:27	WRP-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Received	[Icons]
06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	[Icons]

RMS Lite 1.4.5.4914 | Copyright 2008-2011 HealthLink Limited

Next Page > Last Page >>

3.3 VIEWING REFERRALS

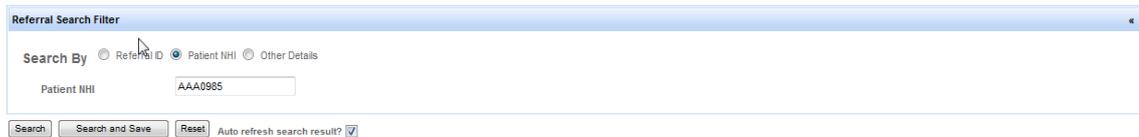
3.3.1 REFERRAL LIST OVERVIEW

The RMS Lite Main screen has the following three sections:

- **Menu Bar:** Containing more options and sub-menus



- **Referral Search Filter Section:** Allows you to search for specific referrals



- **Referral Search Results Section:** Displays the list of referrals that matches the search criteria (by default or when reset, this contains the list of all referrals received starting with the most recently received). Clicking on each column header will sort the list of referrals in ascending or descending order.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
21-Sep-2011 09:56	NLER-28571	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Prioritised	
25-Aug-2011 10:44	CCER-10219	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Endoscopy	Received	
05-Aug-2011 10:31	NLER-28461	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Assigned	
05-Aug-2011 10:30	NLER-28460	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
05-Aug-2011 10:16	NLER-28459	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
27-Jul-2011 12:25	NLER-27943	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiology	Received	
15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	
07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
06-Jul-2011 14:27	WRP-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Received	
06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	

3.3.2 INDICATOR COLUMN (SEARCH LIST)

There are a number of colour indicators and icons displayed on the far left of the referrals queue that reflect the current priority for each referral received and any associated information. Clinical users can record (and update) the progress of a referral by accessing the triage option under the 'Record Progress' function (this is detailed later in the guide). In addition to the colour indicators and icons on screen, a textual 'hover-over' explanation will be displayed that details what information the icon reflecting. A quick key for each colour indicator and icon is shown below.

The screenshot shows the 'RMS Lite' interface. At the top, there are navigation links for 'Search Referrals' and 'Help', and a user login 'signed in as: ec5707u'. Below this is a 'Referral Search Filter' section with radio buttons for 'Referral ID', 'Patient NHI' (selected), and 'Other Details'. A search box contains 'AAA0985'. Below the filter are buttons for 'Search', 'Search and Save', and 'Reset', along with a checkbox for 'Auto refresh search result?'.

The 'Referral Search Results' section displays a table with the following columns: Received, Referral ID, Referrer, Patient NHI, Patient, Patient DOB, Service, Status, and Action. The first column contains icons: a blue folder with a plus sign, a paperclip, a grey sphere, a green sphere, a red sphere, and a yellow sphere. The first row of data is circled in red in the original image.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	[Icons]
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[Icons]
06-Jul-2011 14:20	NLER-10103	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[Icons]
06-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Oncology	Received	[Icons]
06-Jul-2011 14:27	WRP-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Received	[Icons]

At the bottom of the screenshot, there is a copyright notice: 'RMS Lite 1.4.5.4914 | Copyright 2008-2011 HealthLink Limited' and navigation links for '<< First Page' and '< Previous Page'.

ICON	EXPLANATION
	Other Referrals exist for this patient
	This referral has attachments
	GREY: Priority Unspecified
	GREEN: Other Referrals
	RED: Priority Urgent
	YELLOW: Priority Semi-urgent

4 ACTION COLUMN (SEARCH LIST)

There are a number of Action icons displayed on the far right of the referrals queue that show the possible actions that can be taken for each referral received. Referral management staff can view the details of a referral, print a referral, view the administrative details and change the status of a referral directly from the Search Results screen.

The screenshot shows the RMS Lite web application interface. At the top, there is a navigation bar with 'Search', 'Admin', and 'Help' links, and a user login area showing 'signed in as: system' and a 'Logout' link. Below this is a 'Referral Search Filter' section with a 'Search By' dropdown set to 'Referral ID', a text input field for 'Referral ID', and buttons for 'Search', 'Search and Save', and 'Reset'. There is also a checkbox for 'Auto refresh search result?'. The main area displays 'Referral Search Results' in a table format. The table has columns for 'Received', 'Referral ID', 'Referrer', 'Patient NHI', 'Patient', 'Patient DOB', 'Service', and 'Status'. Two rows of data are visible. On the far right of the table, there is an 'Action' column containing three icons: a magnifying glass, a printer, and a document with a checkmark. A red box highlights these icons in the screenshot.

The purposes of the Action icons are listed as follows:

Icon	Action	Purpose
	View referral	This enables the user to view the referral.
	Print referral	Enables the user to print the referral.
	Administrative details (Administrative summary)	Supplies information about core administrative details such as <ul style="list-style-type: none"> • Funding • Patient details • Referrer • Regular GP • Allergies /Alerts
	Record progress	This function allows specific user roles to <ul style="list-style-type: none"> • Transition a referral • Update the status of the referral • Specify the priority and triage details of the referral • Add progress notes applicable to the referral

4.1 VIEWING THE REFERRAL DETAILS

When you find the right referral in the list, click the 'View Referral' icon to open the Referral Details screen and view the referral particulars.

The screenshot shows the 'Referral Search Results' page in RMS Lite. The table below lists search results with columns for Received, Referral ID, Referrer, Patient NHI, Patient, Patient DOB, Service, Status, and Action. A red callout bubble points to the 'View Referral' icon in the Action column of the second row.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
06-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[View Referral]
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[View Referral]
06-Jul-2011 14:20	NLER-19163	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[View Referral]
06-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Oncology	Received	[View Referral]
06-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[View Referral]

The Referral Details screen has four tabs:

- Referral Content
- Administration
- Attachment
- Correspondence History

Referral Content – This is the default active tab that contains all the details of the referral. You can browse through the referral contents by using the scroll bar.

The screenshot shows the 'Referral Details (NLER-27417)' screen. The 'Referral Content' tab is selected and circled in red. The content displays patient information, service details, and progress notes.

Patient: MICKEY MOUSE, 11yrs, NHI AAA0985
Service: Dental, Received

Referral Content | Administration | Attachments (0) | Correspondence & History

Dental Referral for Outpatient Appointment

Patient: MICKEY MOUSE, 11yrs, NHI AAA0985, Male, DOB 13-Apr-2000
13 Teed Street, Auckland.
Referred by: Sam Entwistle, Millstone Family Practice, NZMC 889843

[Go to Administrative Details](#) [Go to Medical Information](#)

Progress Notes
No progress notes

Clinical Referral Information

Demographics Updated | Decline | Acute Referral Printed

Print | Done

Administration – This tab contains the administrative details of the referral including Service, Status and Priority codes to reflect the current progress of the referral within the organisation.



The screenshot shows the 'Administration' tab selected for referral NLER-27417. The patient is MICKEY MOUSE, 11yrs, NHI AAA0985. The service is Dental, Received. The 'Administration' tab is circled in red. Below the tabs, a table displays key details:

NHI	AAA0985	Referral ID	NLER-27417	Service	Dental
Patient	MOUSE, MICKEY	Referrer	Entwistle, Sam	Status	Received
Patient DOB	13-Apr-2000	Received	06-Jul-2011 12:38	Priority	Unspecified
Patient Gender	Male				

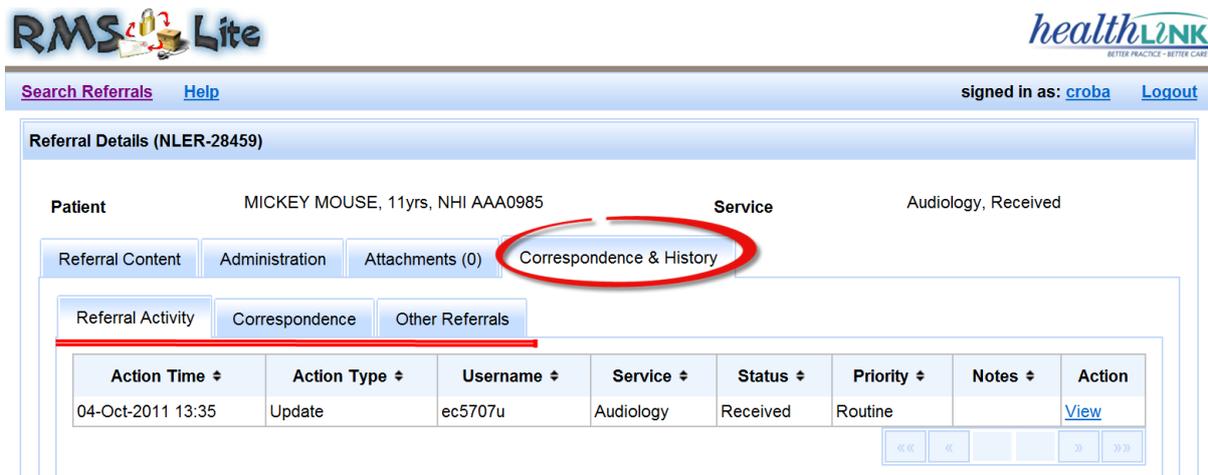
Attachments – This tab lists any file attachments that came in with the referral. Attachments, if any, can be one or many. You can view and print the attachments by clicking Download.



The screenshot shows the 'Attachments' tab selected for referral NLER-28459. The patient is MICKEY MOUSE, 11yrs, NHI AAA0985. The service is Audiology, Received. The 'Attachments (0)' tab is circled in red. Below the tabs, a message states: "There are no attachments associated with this referral."

Correspondence & History – This tab contains three sub-tabs:

- Referral Activity
- Correspondence
- Other Referrals tabs



The screenshot shows the 'Correspondence & History' tab selected for referral NLER-28459. The patient is MICKEY MOUSE, 11yrs, NHI AAA0985. The service is Audiology, Received. The 'Correspondence & History' tab is circled in red. Below the tabs, a table displays activity details:

Action Time	Action Type	Username	Service	Status	Priority	Notes	Action
04-Oct-2011 13:35	Update	ec5707u	Audiology	Received	Routine		View

CORRESPONDENCE & HISTORY SUB TABS

Referral activity – This contains a list of the actions that were made on the administrative details of the referral as it goes through the referral process or workflow.

Action Time ↕	Action Type ↕	Username ↕	Service ↕	Status ↕	Priority ↕	Notes ↕	Action
04-Oct-2011 13:35	Update	ec5707u	Audiology	Received	Routine		View

Correspondence – This contains the transmission details of the original referral as it is sent from one provider to another (e.g., from GP to DHB, from Lab to referrer, etc.). It also contains entries for other correspondence associated to the original referral, although this is currently limited to status update messages sent by RMS Lite users back to the original referrer.

Date Time ↕	Message ID ↕	Message Type ↕	Author ↕	Sender ↕	Recipient ↕	State ↕	Action
05-Aug-2011 10:16	NLER-28459:110805101544	eReferral (in)		ma65test	ndhberef	Received	View

Other Referrals – This contains a list of other referrals for the same patient which can be useful in reviewing the patient history of referrals. The details of these other referrals can also be viewed in a similar way.

Date Time ↕	Referral Number ↕	Service ↕	Status ↕	Priority ↕	Action
02-Nov-2011 11:42	NLER-28582	Audiology	Booking Required	Semi-Urgent	View
12-Oct-2011 10:43	NLER-28579	Audiology	Printed by Service	Semi-Urgent	View

4.2 PRINTING REFERRALS

To print a referral:

1. Use the 'Print Referral' icon on the main Referral Search Results screen

RMS Lite healthLINK
BETTER PRACTICE - BETTER CARE

Search Referrals Help signed in as: croba Logout

Referral Search Filter

Search By Referral ID Patient NHI Other Details

Patient Last Name Referrer EDI Service

Patient First Name Referrer Last Name Status

Priority

Search Search and Save Default Search Reset Auto refresh search result?

Referral Search Results Time to Refresh: 102s

	Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
	05-Aug-2011 10:16	NLER-28459	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
	27-Jul-2011 12:25	NLER-27943	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiology	Received	
	15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	

2. **Alternatively**, on the Referral Search Results section of the Main screen, click on 'View Referral' icon the Referral Details screen will appear
3. On the Referral Details screen, click on 'Print' button at the bottom of the screen.
4. Select your printer settings and preferences.
5. Click on 'Print' button when completed.

RMS Lite healthLINK
BETTER PRACTICE - BETTER CARE

Search Referrals Help signed in as: croba Logout

Referral Details (NLER-28459)

Patient MICKEY MOUSE, 11yrs, NHI AAA0985 Service Audiology, Received

Referral Content Administration Attachments (0) Correspondence & History

Clinical Details, Relevant History and Physical Examination findings:
dfsasdfs

Medical History

Family and personal history

Read Code	General Comments
1252	FH: Diabetes mellitus - father

Current and long term problems:
Deerfly fever - this ia not a LONG term classification;
[D]Specific abnormal findings - testing notes

Medications / Allergies

Demographics Updated Decline Acute Referral Printed



Any notes or tracking information recorded using the RMS Lite 'Record Progress' function will be incorporated into the header of the printed referral along with the date/time and username.

4.3 ADMINISTRATIVE SUMMARIES

1. Use the **'Administrative Details'** icon on the main Referral Search Results screen to access a summary of the patient's administrative details

Referral Search Filter

Search By: Referral ID Patient NHI Other Details

Patient Last Name: Referrer EDI: Service:

Patient First Name: Referrer Last Name: Status:

Priority:

Buttons: Search, Search and Save, Default Search, Reset, Auto refresh search result?

Referral Search Results Time to Refresh: 109s

	Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
	27-Jul-2011 12:25	NLER-27943	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiology	Received	
	15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
	08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	

Administrative Summary

Funding

Patient Residency: ACC Eligible:

ACC 45 Number:

Patient Details

NHI: Gender:

Name: Date Of Birth:

Age:

Ethnicities: Phone number(s): Daytime:
Evening:
Mobile:

Residential Address: Postal Address:

Referrer

Name: ID:

Practice Name: Address:

Phone: Fax:

Regular GP

Same as Referrer

Patient Allergies / Alerts

Date Recorded	Description
10-May-2011	2-aminoethyl dihydrogen phosphate - warning for drug class

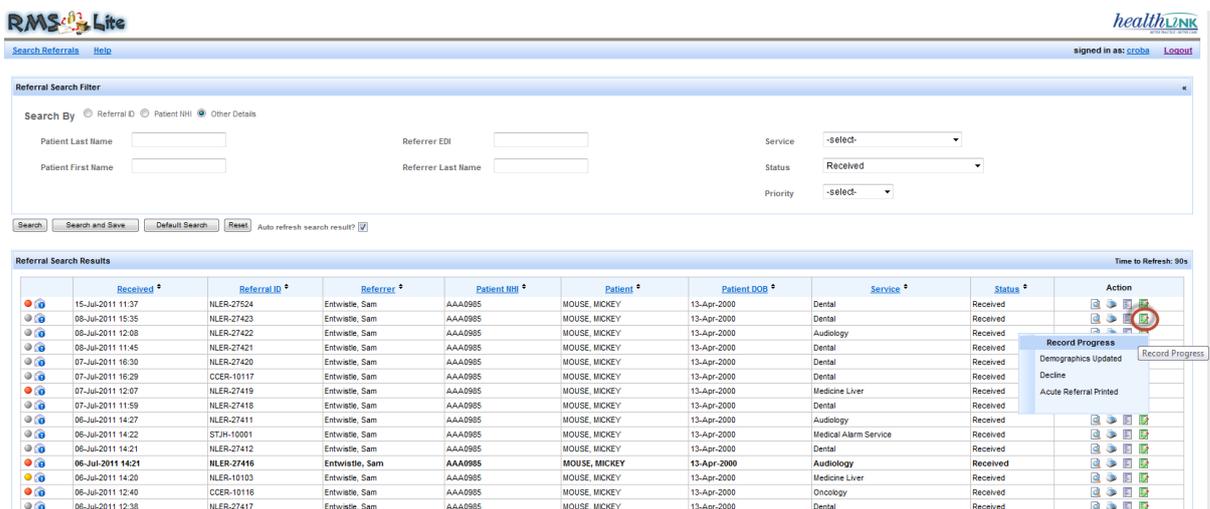
4.4 RECORDING REFERRAL PROGRESS

The progress of the referral can be recorded as it goes through the referral process / workflow within your organisation. The following updates can be completed on the referral:

- **Service:** the referral may be assigned or directed to another group or service within the organisation
- **Status:** for example Received, Accepted, Declined
- **Notes:** any relevant remarks or instructions
- **Priority:** for example Routine, Urgent, Semi-urgent

To record the progress of the referral:

1. Use the **'Record Progress'**  icon on the main Referral Search Results screen.
2. Different user roles will have access to the transition options appropriate to their role.
3. As an example shown below, a CRO (Central Referrals Office) staff member can be presented with options of **Demographics Updated, Decline, Acute Referral Printed**



Received	Referral ID	Referrer	Patient.NHI	Patient	Patient.DOB	Service	Status	Action
15-Jul-2011 11:37	NLER-27524	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	   
08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	   
07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	   
06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	   
06-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	   
06-Jul-2011 14:20	NLER-10103	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	   
06-Jul-2011 14:20	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Oncology	Received	   
06-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	   

4. **Alternatively**, on the Referral Search Results section of the Main screen, click **'View Referral'**  icon. The Referral Details screen will appear. Select the relevant options.

Referral Details (NLER-27943)

Patient MICKEY MOUSE, 11yrs, NHI AAA0985 Service Cardiology, Received

Referral Content Administration Attachments (0) Correspondence & History

Acute - Whangarei Referral for Acute Referral

Patient: MICKEY MOUSE, 11yrs, NHI AAA0985, Male, DOB 13-Apr-2000
2 Clevedon Road, Papakura, Auckland.

Referred by: Sam Entwistle, Millstone Family Practice, NZMC 889843

[Go to Administrative Details](#) [Go to Medical Information](#)

Progress Notes

Time Saved	Username (Fullname)	Notes
13-Sep-2011 17:01	hiknet (Healthlink Development)	merged from service code: ACUTE-WHA

Demographics Updated Decline Acute Referral Printed

Print Done

- a. **Demographics Updated** – Patient details in the referral have been confirmed in correlation with the Patient Administration System (PAS).

Demographics Updated X

Status:

NHI: JDR1234 **Name:** MOUSE, MICKEY

Notes:*

Patient's mobile phone number was updated in PAS

✖ value is required

Send update to referrer?

* required fields

- b. **Decline** – Patient has been declined for the referral service

Decline

Status: Declined

NHI: AAA0985 Name: MOUSE, MICKEY

Notes:
Patient referral declined due to Non NZ Residency.

Send update to referrer?

* required fields

Done Cancel

- c. **Acute Referral Printed** – Patient referral requires printing for Urgent processing

Acute Referral Printed

Status: Acute Referral Printed

NHI: AAA0985 Name: MOUSE, MICKEY

Are you sure you want to proceed?
Please Confirm:

Yes No

A copy of the current progress description can be sent to the original referrer by clicking on the **'Send update to referrer'** checkbox (this will be sent via the HealthLink store and forward service). In some circumstances (e.g. in the 'Decline' screen shot displayed below), the **'Send update to referrer'** checkbox will be ticked already and you will not be able to untick the box. Whether these updates are sent automatically or not and whether you can choose to tick or untick the box are configuration settings made by your RMS Lite administrator.

Decline [X]

Status: Declined

NHI: AAA0985 **Name:** MOUSE, MICKEY

Notes:*

Patient referral declined due to Non NZ Residency.

Send update to referrer?

* required fields

Done Cancel

5. When finished click the **'Done'** button.

6. An update sent message will appear after selecting **'Done'**

Decline [X]

 Update sent successfully

Close

5 SEARCHING FOR SPECIFIC REFERRALS

You can search a specific referral by entering the search criteria on the Referral Search Filter section of the Main screen. You can search using the Referral ID, the patient NHI or other details such as the patient's name or referrer's name.

5.1 SEARCH USING REFERRAL ID

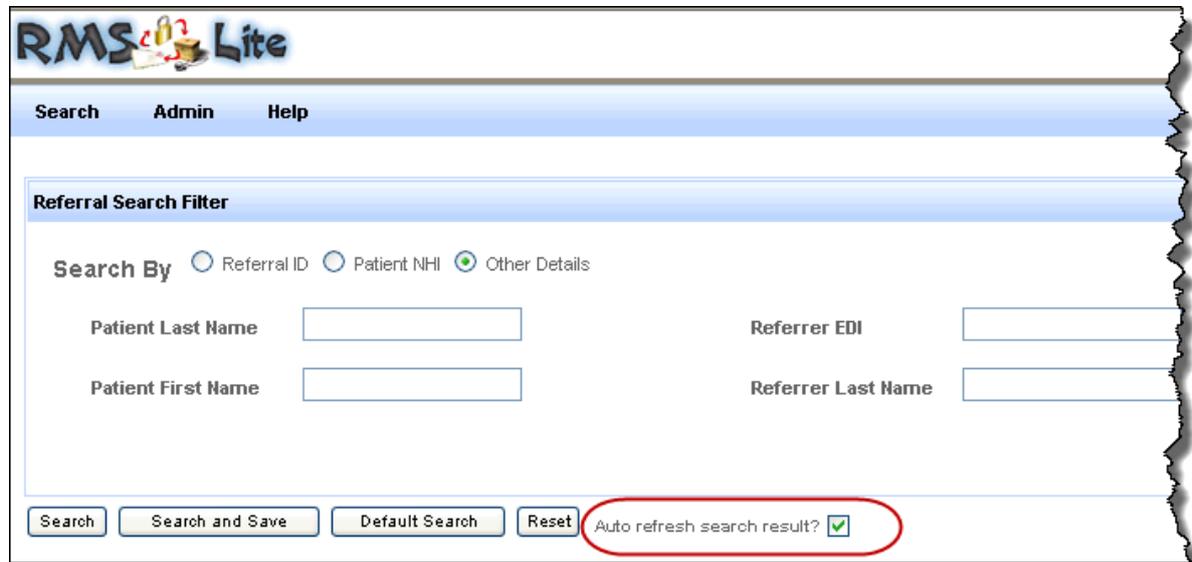
To search referral using Referral ID:

1. On the Referral Search Filter section of the Main screen, click on 'Referral ID' button
2. Type the *referral number or ID* on the Referral ID field
3. Click the 'Search' button
4. The search result will appear on the Referral Search Results section.



The screenshot shows the 'Referral Search Filter' section of the RMS Lite application. The 'Search By' dropdown is set to 'Referral ID'. The 'Referral ID' field contains the text 'CCER-10117'. Below the field are buttons for 'Search', 'Search and Save', and 'Reset'. A checkbox labeled 'Auto refresh search result?' is checked. The top navigation bar includes 'Search Referrals', 'Help', and 'signed in as: ec5707u Logout'.

5.1.1 SEARCH REFRESH



The screenshot shows the 'Referral Search Filter' section of the RMS Lite application. The 'Search By' dropdown is set to 'Other Details'. The search criteria fields are: 'Patient Last Name', 'Patient First Name', 'Referrer EDI', and 'Referrer Last Name'. Below the fields are buttons for 'Search', 'Search and Save', 'Default Search', and 'Reset'. The 'Auto refresh search result?' checkbox is checked and highlighted with a red circle. The top navigation bar includes 'Search', 'Admin', and 'Help'.



Ensure that the “Auto refresh search result” tick box is always ticked

This will refresh the system every **2 minutes**, important for when acute referrals are being received.

5.2 SEARCH USING PATIENT NHI

To search referral using Patient NHI:

1. On the Referral Search Filter section of the Main screen, click on 'Patient NHI' button
2. Type the *Patient NHI* on the Patient NHI field
3. Click the 'Search' button

The search result will appear on the Referral Search Result section. There can multiple results from this search.



The screenshot shows the 'Referral Search Filter' window in the RMS Lite application. The 'Search By' section has three radio buttons: 'Referral ID', 'Patient NHI' (which is selected), and 'Other Details'. Below this, there is a text input field labeled 'Patient NHI' containing the value 'AAA0985'. At the bottom of the window, there are buttons for 'Search', 'Search and Save', and 'Reset', along with a checkbox for 'Auto refresh search result?' which is checked. The top of the application shows the 'RMS Lite' logo and the 'healthLINK' logo, with a user status bar indicating 'signed in as: ec5707u' and a 'Logout' link.

5.3 SEARCH USING OTHER DETAILS

To search referral using other details:

1. On the Referral Search Filter section of the Main screen, click on '**Other Details**' button
2. Enter your search criteria:
 - a. **Patient Last Name:** type value on field
 - b. **Patient First Name:** type value on field
 - c. **Referrer EDI:** type value on field
 - d. **Referrer Last Name:** type value on field
 - e. **Service:** select from pick list
 - f. **Status:** select from pick list
 - g. **Priority:** select from pick list
3. Click the '**Search**' button

The search result will appear on the Referral Search Result section. There can multiple results from this search.



The screenshot shows the 'Referral Search Filter' window in the RMS Lite application with the 'Other Details' search option selected. The 'Search By' section has three radio buttons: 'Referral ID', 'Patient NHI', and 'Other Details' (which is selected). Below this, there are several input fields and dropdown menus: 'Patient Last Name' (Brown), 'Patient First Name' (Elizabeth), 'Referrer EDI' (empty), 'Referrer Last Name' (Mitchell), 'Service' (Endocrinology), 'Status' (-select-), and 'Priority' (-select-). At the bottom of the window, there are buttons for 'Search', 'Search and Save', and 'Reset', along with a checkbox for 'Auto refresh search result?' which is checked. The top of the application shows the 'RMS Lite' logo and the 'healthLINK' logo, with a user status bar indicating 'signed in as: ec5707u' and a 'Logout' link.

5.4 SORTING THE REFERRAL LIST

Browsing through the complete list of referrals or through a search with multiple results can be facilitated by sorting the referral list. This can be done by clicking on the column name. Click the column name once and it will sort the list on that column in ascending order. Click the column name again and it will sort the list on that column in descending order.

The screenshot shows the RMS Lite interface. At the top left is the 'RMS Lite' logo. At the top right is the 'healthLINK' logo. Below the logos are navigation links: 'Search Referrals', 'Help', and 'signed in as: ec5707u Logout'. A 'Referral Search Filter' section contains a 'Search By' dropdown menu with options 'Referral ID', 'Patient NHI', and 'Other Details'. Below this is a 'Referral ID' input field and buttons for 'Search', 'Search and Save', and 'Reset'. A checkbox for 'Auto refresh search result?' is checked. The main section is 'Referral Search Results' with a 'Time to Refresh: 116s' indicator. It contains a table with the following columns: 'Received', 'Referral ID', 'Referrer', 'Patient NHI', 'Patient', 'Patient DOB', 'Service', 'Status', and 'Action'. The 'Received' column header is circled in red. The table lists 10 referral records with their respective dates, IDs, referrers, patients, DOBs, services, and statuses.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	
07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
06-Jul-2011 14:27	WRP-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Received	
06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
06-Jul-2011 14:22	STJH-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	
06-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	
06-Jul-2011 14:20	NLER-10103	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	
06-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Oncology	Received	
06-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	

At the bottom of the page, there is a footer: 'RMS Lite 1.4.5.5124 | Copyright 2008-2011 HealthLink Limited' and navigation links: '<< First Page < Previous Page'.

6 USER MAINTENANCE

You can view your user profile details and make change to them like your password, name and email address. You can also view the record of your activities on the system.

6.1 ACCESSING USER MAINTENANCE

To access user maintenance, click your user name (located on the top right hand corner of screen)



The User Details screen will appear.

User Details

Username: ec5707u
Last Name: Cooper
First Name: Edwina
Email Address: edwina.cooper@healthlink.net
Creation Date: 04-Oct-2011 10:16
Disabled Date:
Is Locked Out: false
Is Active: true
Roles: Standard User

Referral Change History

Change Time	Referral ID	Status	Priority	Service	Notes	Action
04-Oct-2011 14:26	NLER-27416	Received	Routine	Audiology		View
04-Oct-2011 13:38	WRP-10002	Received	Semi-Urgent	Pain		View
04-Oct-2011 13:37	CCER-10116	Received	Urgent	Oncology		View
04-Oct-2011 13:37	NLER-10103	Received	Semi-Urgent	Medicine Liver		View
04-Oct-2011 13:37	NLER-27419	Received	Routine	Medicine Liver		View
04-Oct-2011 13:36	NLER-27524	Received	Urgent	Dental		View
04-Oct-2011 13:36	NLER-27943	Received	Semi-Urgent	Cardiology		View
04-Oct-2011 13:35	NLER-28459	Received	Routine	Audiology		View
04-Oct-2011 13:35	NLER-28460	Received	Unspecified	Audiology		View

DMC | v1.4.5.5126 | Copyright 2008-2011 Healthlink Limited

6.2 UPDATING USER DETAILS

6.2.1 TO UPDATE YOUR USER DETAILS

1. On the User Details screen, click the 'Edit' button

The screenshot shows the 'User Details' page in the RMS Lite application. The page header includes the 'RMS Lite' logo and the 'healthLINK' logo. The user is signed in as 'ec5707u'. The user details are as follows:

Username	ec5707u
Last Name	Cooper
First Name	Edwina
Email Address	edwina.cooper@healthlink.net
Creation Date	04-Oct-2011 10:16
Disabled Date	
Is Locked Out	false
Is Active	true
Roles	Standard User

At the bottom left of the details section, there is an 'Edit' button circled in red.

The Edit User screen will appear

2. On the Edit User screen, make your changes or updates
3. Click the 'Update' button to save the changes.

The screenshot shows the 'Edit User' page in the RMS Lite application. The page header includes the 'RMS Lite' logo and the 'healthLINK' logo. The user is signed in as 'ec5707c'. The form contains the following fields:

Username *	ec5707c
Last Name *	Cooper
First Name	Edwina
Email Address	edwina.cooper@healthlink.net
Creation Date	17-Oct-2011 11:44
Disabled Date	
Is Locked Out	false
Is Active	true
Roles	true

At the bottom left of the form, there is an 'Update' button circled in red. Below the form, there is a note: '* required fields'. At the bottom of the page, there is a footer: 'RMS Lite 1.4.5.5124 | Copyright 2008-2011 HealthLink Limited'.

6.3 CHANGING PASSWORD

To change your password:

1. On the User Details screen, click the 'Edit' button

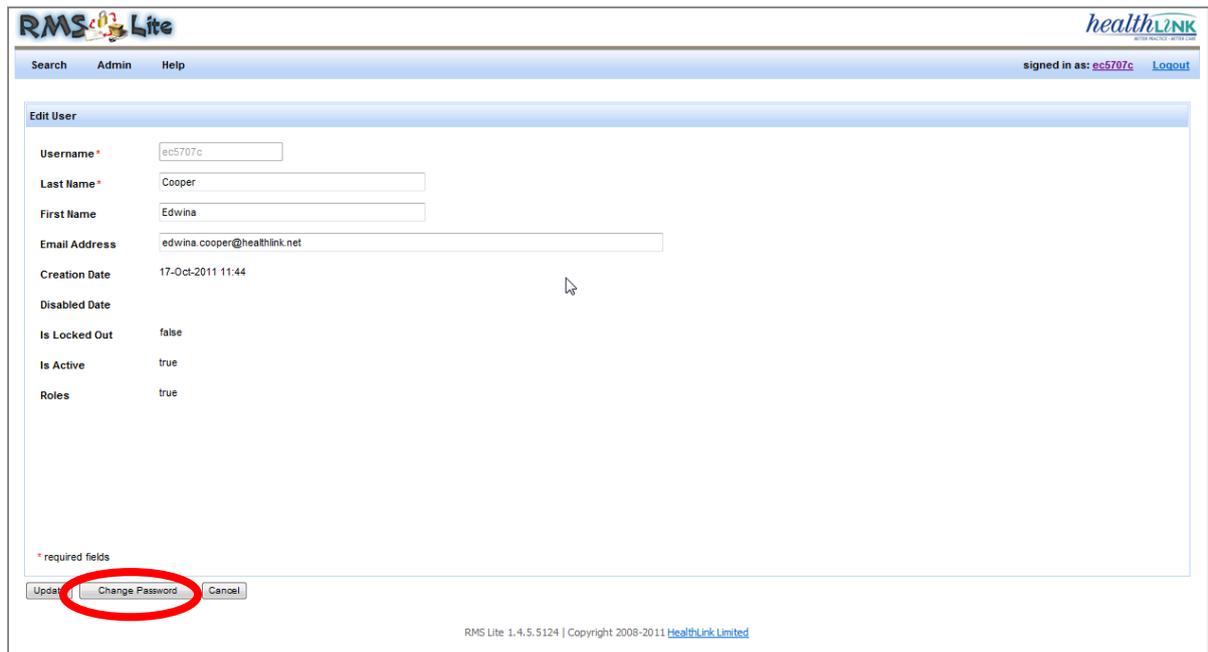


The screenshot shows the 'User Details' screen in the RMS Lite application. The user's information is displayed in a table-like format. At the bottom left, there are two buttons: 'Edit' and 'Delete'. The 'Edit' button is circled in red.

User Details	
Username	ec5707u
Last Name	Cooper
First Name	Edwina
Email Address	edwina.cooper@healthlink.net
Creation Date	04-Oct-2011 10:16
Disabled Date	
Is Locked Out	false
Is Active	true
Roles	Standard User

The Edit User screen will appear

2. On the Edit User screen, click on the 'Change Password' button



The screenshot shows the 'Edit User' screen in the RMS Lite application. The user's information is displayed in a form with input fields. At the bottom, there are three buttons: 'Update', 'Change Password', and 'Cancel'. The 'Change Password' button is circled in red.

Edit User	
Username *	ec5707c
Last Name *	Cooper
First Name	Edwina
Email Address	edwina.cooper@healthlink.net
Creation Date	17-Oct-2011 11:44
Disabled Date	
Is Locked Out	false
Is Active	true
Roles	true

The Change Password screen will appear

3. On the Change Password screen, type and retype your new password

- Click the Save button when done.

RMS Lite **healthLINK**

Search Referrals Help signed in as: ec5707u Logout

Change User Password

Username*

Password*

Retype Password*

* required fields

Save **Cancel**

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6.4 REVIEWING CHANGES MADE ON REFERRALS

To review changes made on referrals:

- On the User Details screen, click on or go to the Referral Change History tab

RMS Lite **healthLINK**

Search Referrals Help signed in as: ec5707u Logout

User Details

Username: ec5707u

Last Name: Cooper

First Name: Edwina

Email Address: edwina.cooper@healthlink.net

Creation Date: 04-Oct-2011 10:16

Disabled Date:

Is Locked Out: false

Is Active: true

Roles: Standard User

Edit **Done**

Referral Change History **Action Logs**

Change Time	Referral ID	Status	Priority	Service	Notes	Action
04-Oct-2011 14:26	NLER-27416	Received	Routine	Audiology		View
04-Oct-2011 13:38	WRP-10002	Received	Semi-Urgent	Pain		View
04-Oct-2011 13:37	CCER-10116	Received	Urgent	Oncology		View
04-Oct-2011 13:37	NLER-10103	Received	Semi-Urgent	Medicine Liver		View
04-Oct-2011 13:37	NLER-27419	Received	Routine	Medicine Liver		View
04-Oct-2011 13:36	NLER-27524	Received	Urgent	Dental		View
04-Oct-2011 13:36	NLER-27943	Received	Semi-Urgent	Cardiology		View
04-Oct-2011 13:35	NLER-28459	Received	Routine	Audiology		View
04-Oct-2011 13:35	NLER-28460	Received	Unspecified	Audiology		View

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- Click 'View' to open and view the details

RMS Lite healthlink

Search Referrals Help signed in as: ec5707u Logout

Referral Change History

NHI	AAA0985	Referral ID	WRP-10002	Service	Pain
Patient	MOUSE, MICKEY	Referrer	Entwistle, Sam	Status	Received
Change Time	04-Oct-2011 13:38			Priority	Semi-Urgent
Notes	<div style="border: 1px solid gray; height: 40px;"></div>				

Done

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6.5 REVIEWING ACTIVITIES

To review your activities on referrals:

1. On the User Details screen, click on or go to the Action Logs
2. Click the 'View Referral' link to open and view the details

RMS Lite healthlink

Search Referrals Help signed in as: ec5707u Logout

User Details

Username	ec5707u
Last Name	Cooper
First Name	Edwina
Email Address	edwina.cooper@healthlink.net
Creation Date	04-Oct-2011 10:16
Disabled Date	
Is Locked Out	false
Is Active	true
Roles	Standard User

Edit Done

Referral Change History **Action Logs**

Action Time	Action Type	Action
10-Oct-2011 14:03	Referral viewed	View Referral
10-Oct-2011 10:30	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral
10-Oct-2011 10:20	Referral viewed	View Referral

RMS Lite 1.4.5.5124 | Copyright 2008-2011 HealthLink Limited

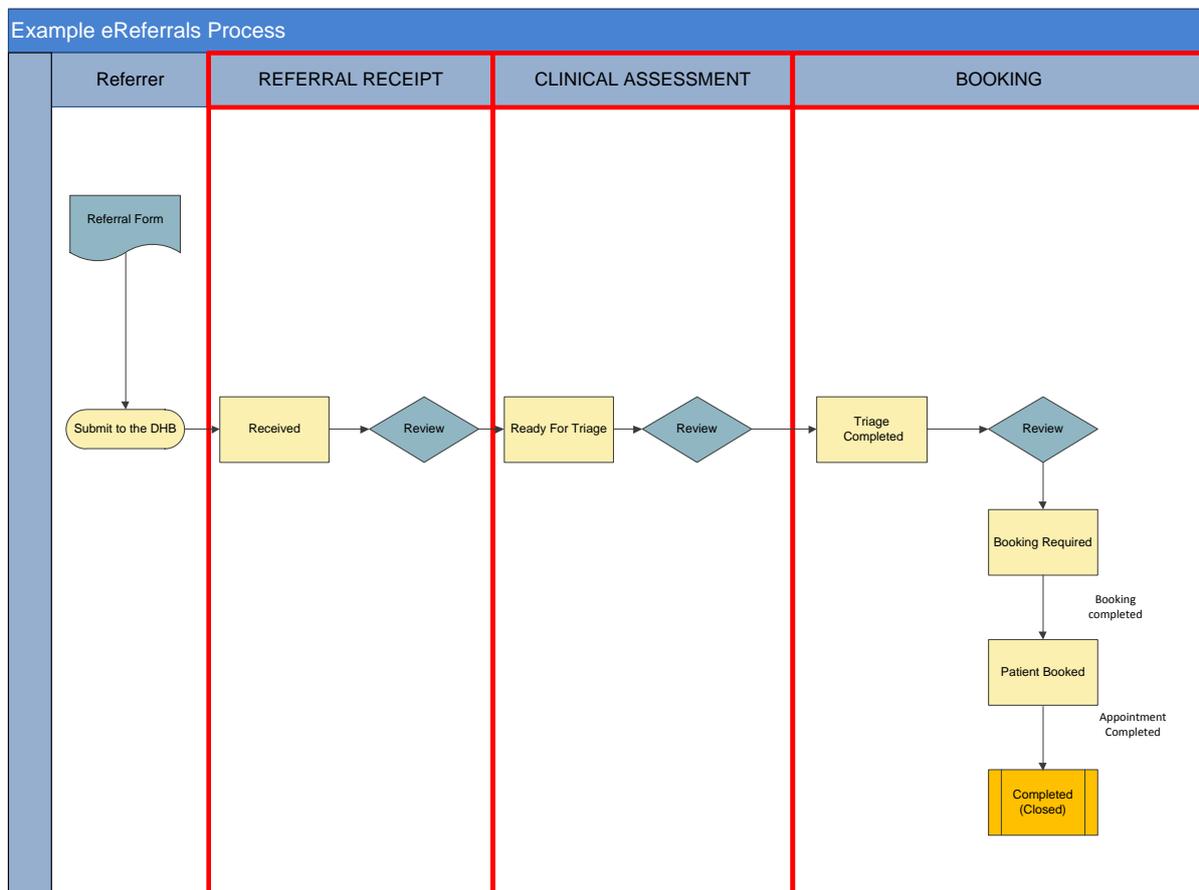
7 eREFERRAL MANAGEMENT WORKFLOWS

As part of an ePrioritisation upgrade in RMS Lite, each site can now configure their own eReferral management workflows, the user roles that access those workflows and the confirmations screen that appear when a transition step is confirmed. RMS Lite administrators can configure workflows by using the RMS Lite Administrator guide.

7.1 IDENTIFYING YOUR TRANSITION WORKFLOW

RMS Lite sites can map the way eReferrals are managed and triaged within their organisation. Here is an example of a standard process flow a site might utilise and the different roles referral staff at that site may play in that pathway. The referral transitions through different steps by staff checking demographic details, making a clinical assessment on the content of the referral and scheduling staff reviewing referral outcomes and progress notes.

Please note: This 'standard' scenario does not display variations to the workflow (i.e.: decline eReferral, acute referral printed, change service.)



7.2 TRANSITION WORKFLOWS IN RMS LITE

Once the transition workflow has been identified, the workflow steps for each user role are configured in RMS Lite. If you use the example workflow diagram shown above, here are the screens in RMS Lite that allow each role to perform those transition steps:

7.2.1 REFERRAL RECEIPT

Staff member has a central referrals management role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

Record Progress
Demographics Updated

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
19-Apr-2012 14:02	NLER-23804	Entwistle, Sam	JDR1234	MICKEY, MOUSE	29-Apr-1999	Audiology	Received	Record Progress
07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Cardiopulmonary - Diagnostic	Received	Record Progress
07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Received	Record Progress

7.2.2 CLINICAL ASSESSMENT

Staff member has a Clinical Assessor role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

Record Progress
Triage

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
20-Apr-2012 10:02	NLER-28611	Entwistle, Sam	JDR1234	MICKEY, MOUSE	29-Apr-1999	Audiology	Ready for Triage	Record Progress
18-Apr-2012 10:23	NLER-22592	Entwistle, S'am	AAA0985	MICKEY, MOUSE	13-Apr-2000	Cardiopulmonary - Diagnostic	Ready for Triage	Record Progress
08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Ready for Triage	Triage
08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Ready for Triage	Record Progress
08-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Ready for Triage	Record Progress
08-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Ready for Triage	Record Progress
08-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MICKEY, MOUSE	13-Apr-2000	Medical Alarm	Ready for Triage	Record Progress

7.2.3 BOOKING

RMS Lite | healthLINK

signed in as: jsba Logout

Referral Search Filter

Search By: Referral ID Patient NHI Other Details

Patient Last Name: Referrer EDI: Service: -select-

Patient First Name: Referrer Last Name: Status: Triage Completed

Priority: -select-

Search Search and Save Default Search Reset Auto refresh search result?

Referral Search Results Time to Refresh: 111s

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
19-Apr-2012 14:02	NLER-28605	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	Record Progress Booking Required
19-Apr-2012 12:14	NLER-28603	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Skin cancer	Triage Completed	
19-Apr-2012 12:13	NLER-28601	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
19-Apr-2012 12:12	NLER-28600	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
12-Oct-2011 10:34	NLER-28578	Entwistle, S'am	AAA0985	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
11-Oct-2011 14:43	NLER-28576	Entwistle, S'am	AAA0985	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
25-Aug-2011 10:44	CCER-10219	Entwistle, S'am	AAA0985	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	

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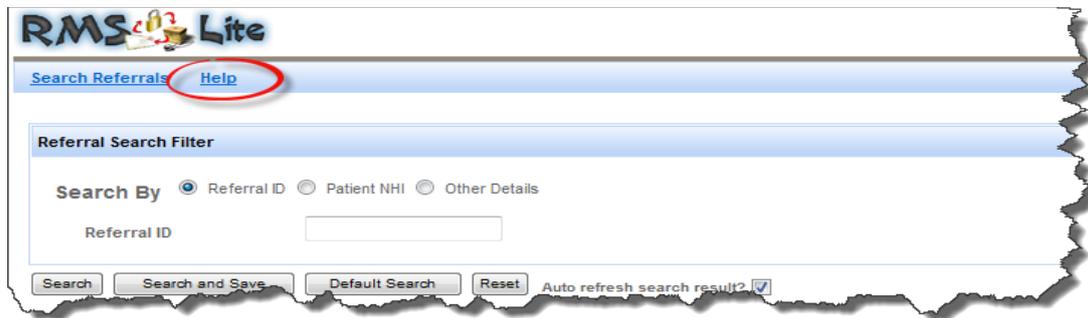
Staff member has a Booking role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

8 HELP

You can access the RMS Lite User Guide by clicking on Help from the Menu bar in the Main screen.



9 HEALTHLINK SUPPORT DETAILS

You can contact HealthLink for RMS Lite assistance and support through the following:

9.1.1 Phone

New Zealand Toll Free Phone: **0800 288 887**

Monday to Friday: 8am to 6pm (New Zealand Standard Time)

9.1.2 Fax

New Zealand Toll Free Fax: **0800 288 885**

9.1.3 Email

helpdesk@healthlink.net

9.1.4 Website

www.healthlink.net

10 NDHB-SPECIFIC WORKFLOW CONFIGURATION

10.1 NDHB USER ROLES AND EPRIORITISATION FUNCTIONS

User roles primarily ensure that an NDHB user is not presented with an eReferral or progress an eReferral to a stage that is not consistent to their role within the eReferral workflow.

There are three main roles in this process

1. **Central Referral Office (CRO) Administrator**
2. **Clinical Assessor**
3. **Booking Clerk**

The following sections explain functions to each individual role. Specific screenshots for each user role is located in the 'User Views' section .

10.2 CENTRAL OFFICE REFERRAL ADMINISTRATOR

The Central Referrals Office (CRO) Administrator is mainly focussed on processing the eReferral pre-triage.

The **statuses the CRO administrator requires** access to are:

Role Permissions	Progress Option	Resulting Status	Type
CRO only	(None)	Received	Open
CRO Only	Demographics Updated	Ready for Triage	Open
CRO Only	Declined	Declined	Closed
CRO Only	Acute Referral Printed	Acute Referral Printed	Closed

The **CRO administrator can perform** the following functions in RMS Lite:

- ✓ Perform searches on all available eReferrals
- ✓ Set up a default search of all eReferrals in a 'Received' status
- ✓ View the Administrative Summary
- ✓ Select 'Demographics Updated', 'Declined' or 'Acute Referral Printed' actions from the 'View Referral' screen.
- ✓ Select 'Demographics Updated', 'Declined' or 'Acute Referral Printed' actions from the 'Record Progress' icon on the Referrals Search page.
- ✓ Enter a mandatory reason when the status of a referral is updated to 'Declined' or 'Acute Referral Printed' and automatically send a status message update back to the referrer.
- ✓ View all the Progress Notes in the View Referral screen
- ✓ Print the referral

The **CRO administrator cannot perform** the following functions in RMS Lite:

- ✗ Change a referral's status to any other value other than those listed above
- ✗ Triage a referral

10.2.1 CENTRAL OFFICE REFERRAL ADMINISTRATOR – USER VIEWS

There are 3 main functions that this role is able to perform. The following record progress will display what you will be presented with:

1. Demographics Updated
2. Decline
3. Acute Referral Printed

The screenshot displays the 'RMS Lite' interface for 'Referral Search Results'. The search filter is set to 'Referral ID'. The results table includes columns for Received, Referral ID, Referrer, Patient NH, Patient, Patient DOB, Service, Status, and Action. A 'Record Progress' popup is shown, listing 'Demographics Updated', 'Decline', and 'Acute Referral Printed'. A red arrow points from the popup to the 'Record Progress' button in the table's action column.

Received	Referral ID	Referrer	Patient NH	Patient	Patient DOB	Service	Status	Action
07-Jul-2011 12:07	NLER-27419	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[Icons]
07-Jul-2011 11:59	NLER-27418	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
06-Jul-2011 14:27	WRR-10002	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Pain	Declined	[Icons]
06-Jul-2011 14:27	NLER-27411	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
06-Jul-2011 14:22	STJA-10001	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm Service	Received	[Icons]
06-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Received	[Icons]
06-Jul-2011 14:20	NLER-10103	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medicine Liver	Received	[Icons]
06-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Oncology	Received	[Icons]
06-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Received	[Icons]

Demographics Updated – Patient referral information is compared towards information in the Patient Administration System (PAS)

Demographics Updated

Status: Ready for Triage

NHI: JDR1234 Name: MOUSE, MICKEY

Notes:*

Patient's mobile phone number was updated in PAS

✘ value is required

Send update to referrer?

* required fields

Done Cancel



Decline - If a referral is **'Declined'** the reason must be recorded in the **Notes'** section.

This function is Mandatory.

Decline

Status: Declined

NHI: AAA0985 Name: MOUSE, MICKEY

Notes:*

Patient's work visa expired last week

Send update to referrer?

* required fields

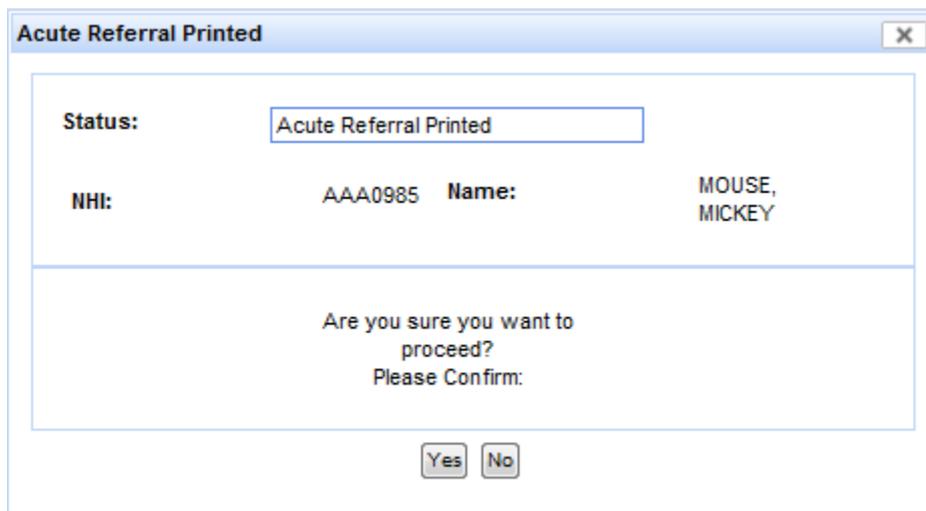
Done Cancel

Decline

Update sent successfully

Close

Acute Referral Printed – This option is available for a referral that requires immediate attention and will require printing for urgent processing.



The image shows a software dialog box titled "Acute Referral Printed" with a close button (X) in the top right corner. The dialog contains a form with the following fields:

Status:	<input type="text" value="Acute Referral Printed"/>		
NHI:	AAA0985	Name:	MOUSE, MICKEY

Below the form, there is a confirmation message: "Are you sure you want to proceed? Please Confirm:". At the bottom of the dialog, there are two buttons: "Yes" and "No".

10.3 CLINICAL ASSESSOR ROLE

A Clinical Assessor is new to the RMS Lite application and will be focused on the Triage and Referral Outcome stages of the workflow.

The **actions/statuses the Clinical Assessor requires** access to are:

Role Permissions	Progress Action	Resulting Status	Status Type
Clinical Assessor only	(Triggered by last action taken by previous role)	Ready for Triage	Open
Clinical Assessor only	Triage	Triage Completed	Open
Clinical Assessor only	Place on Hold	On Hold	Open
Clinical Assessor only	Remove from Hold	Ready for Triage	Open
Clinical Assessor only	Add Note Only	Ready for Triage	Open

The **Clinical Assessor can perform** the following functions in RMS Lite:

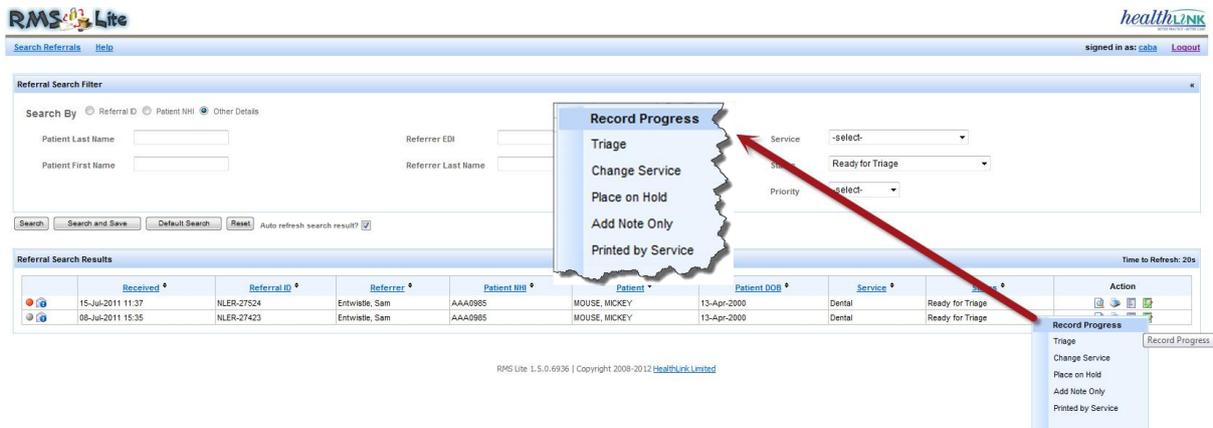
- ✓ Perform searches on all open eReferrals
- ✓ Set up a default search of all eReferrals in a 'Ready for Triage', 'Triage Completed' or 'On Hold' status
- ✓ View all the Progress Notes and Triage Information in the 'View Referral' screen
- ✓ Select 'Triage', 'Change Service', 'Add Note Only', 'Place on Hold' or 'Remove from Hold' actions from the 'View Referral' screen.
- ✓ Select 'Triage', 'Change Service', 'Add Note Only', 'Place on Hold' or 'Remove from Hold' actions from the 'Record Progress' icon on the Referrals Search page.
- ✓ Complete the new NDHB clinical Triage form.
- ✓ Access a 'Printed by Service' action button and Record Progress 'Printed by Service' menu option, although this action will be highlighted as not part of the standard Clinical Assessor workflow.
- ✓ Communicate notes internally to NDHB staff or externally back to the referrer where required
- ✓ Automatically change the status of a referral triggered by the completion of the 'Triage', 'Change Service', 'Place on Hold' or 'Remove from Hold' action functions
- ✓ Print the referral

The **Clinical Assessor cannot perform** the following functions in RMS Lite:

- ✗ Change a referral's status to any other value other than those listed in the table above

10.3.1 CLINICAL ASSESSOR ROLE – USER VIEWS

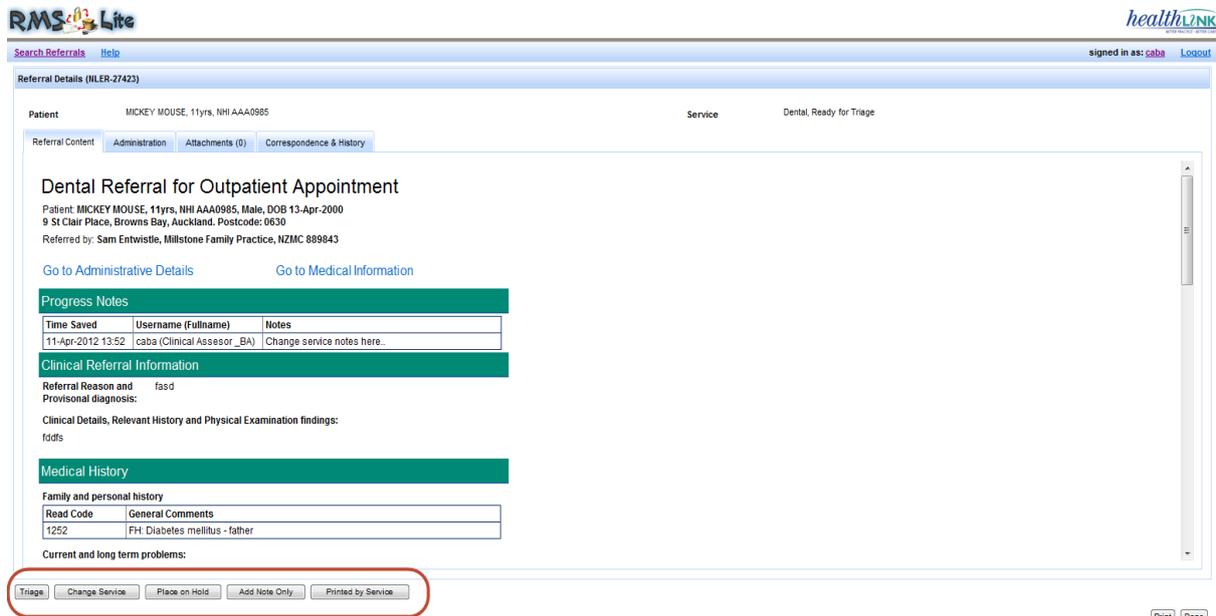
The main functions of what this user role is able to perform are displayed in the following screenshot displays.



By clicking on 'Record Progress' or the 'View Document Icon' you will be presented with several options

1. Triage
2. Change service
3. Place on hold
4. Add note only
5. Printed by service (not routinely used)

You are presented with the same options when 'View Document icon' is selected.



TRIAGE – Add the relevant notes/comments to the required fields. Click **Done** when completed

RMS Lite - Windows Internet Explorer

RMS Lite healthLINK
HEALTH PRACTICE GROUP LTD

Triage

Triage Form for: **MOUSE, MICKEY** Referral ID: **CCER-10219**

Service: **Endoscopy** Referral Status: **Triage Completed**

Referral Outcome: **FSA/Clinic Appointment** Priority: **Urgent**

Clinic Location: **Bay of Islands** Clinic Type: **Clinic Type 12345**

Timeframe: **3 days** To Be Seen By: **Dr Greenmeadows**

Notes for internal Use only:
Please ensure this operation takes place within 2days. Ring the patient ASAP to confirm date.

Notes to Referrer:
We will be admitting Mickey Mouse for surgery within the next 3 days.

Send update to referrer?

* required fields

Done Cancel

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Triage Information and Progress notes are updated and displayed in the Referral. This information is viewed internally. These updates can be seen when using the role of a Booking Clerk.

RMS Lite

[Search Referrals](#) [Help](#)

Referral Details (NLER-27423)

Patient: **MICKEY MOUSE, 11yrs, NHI AAA0985**

Referral Content Administration Attachments (0) Correspondence & History

Dental Referral for Outpatient Appointment

Patient: **MICKEY MOUSE, 11yrs, NHI AAA0985, Male, DOB 13-Apr-2000**
9 St Clair Place, Browns Bay, Auckland. Postcode: 0630
 Referred by: **Sam Entwistle, Millstone Family Practice, NZMC 889843**

[Go to Administrative Details](#) [Go to Medical Information](#)

Triage Information

Referral Outcome: **SBL/placed on surgical waiting list** Triage Date: **12-Apr-2012 08:57**

Priority: **Unspecified** Triaged Entered By: **caba (Clinical Assesor _BA)**

Clinic Location: **Whangarei**

Timeframe: **Two days** To Be Seen By: **Mr Redfield**

Notes for internal Use only: Please book this patient within the next two days.

Notes sent back to Referrer: Notes to be written here

Progress Notes

Time Saved	Username (Fullname)	Notes
11-Apr-2012 13:52	caba (Clinical Assesor _BA)	Change service notes here..

Clinical Referral Information

Printed by Service



In certain fields the **'Referrer Updated tickbox'** is either automatically ticked or can be manually unticked. In some options you are unable to uncheck the tick box.

CHANGE SERVICE – Add relevant notes in the required fields and click **'Done'** when completed.

Please note: The **'Send update to referrer?'** tick box cannot be un-ticked.

Change Service

Status: Ready for Triage

NHI: AAA0985 Name: MOUSE, MICKEY

Service: Dental

Notes: *

Change service notes here..

Send update to referrer?

* required fields

Done Cancel

PLACE ON HOLD – Add relevant notes in the required fields and click **'Done'** when completed.

The **'Send update to referrer?'** tick box can is ticked by default. You may un-tick if required.

Place on Hold

Status: On Hold

NHI: AAA0985 Name: MOUSE, MICKEY

Notes: *

Place on hold notes here

Send update to referrer?

* required fields

Done Cancel

ADD NOTE ONLY - Add relevant notes in the required fields and click **'Done'** when completed.

Add Note Only

Status: Ready for Triage

NHI: AAA0985 **Name:** MOUSE, MICKEY

Notes:*

Add notes here...

Send update to referrer?

* required fields

Done Cancel

PRINTED BY SERVICE – Some specialty services/departments may not be equipped with processing referrals electronically. This option can be used for manually printing the referral and processing it through to the next stage.

Printed by Service

Status: Printed by Service

NHI: AAA0985 **Name:** MOUSE, MICKEY

Are you sure you want to proceed?
Please Confirm:

Yes No

10.4 BOOKING CLERK ROLE

A new role in RMS Lite is required to better define the statuses (and referral transition actions) that an NDHB team member can perform.

The Booking Clerk is mainly focussed on processing the eReferral post-triage.

The **statuses the Booking Clerk requires** access to are:

Role Permissions	Progress Option	Resulting Status	Type
Booking Clerk Only	(None)	Triage Completed	Open
Booking Clerk Only	Printed by Service	Printed by Service	Open
Booking Clerk only	Add Note Only	Printed by Service	Open
Booking Clerk Only	Booking Required	Booking Required	Open
Booking Clerk Only	File	Filed	Closed
Booking Clerk Only	Patient Booked	Patient Booked	Open
Booking Clerk Only	Cancel	Cancel	Closed
Booking Clerk Only	Completed	Completed	Closed

The **Booking Clerk can perform** the following functions in RMS Lite:

- ✓ Perform searches on all available eReferrals
- ✓ Set up a default search of all eReferrals in a 'Triage Completed' status
- ✓ View the Administrative Summary
- ✓ Select 'Printed by Service', 'Add Note Only', 'Booking Required', 'Patient Booked', 'File', 'Cancel' and 'Completed' actions from the 'View Referral' screen.
- ✓ Select 'Printed by Service', 'Add Note Only', 'Booking Required', 'Patient Booked', 'File', 'Cancel' and 'Completed' actions from the 'Record Progress' icon on the Referrals Search page.
- ✓ Enter a mandatory reason when the status of a referral is updated to 'Cancelled' and automatically send a status message update
- ✓ View all the Progress Notes in the View Referral screen
- ✓ Print the referral

The **Booking Clerk cannot perform** the following functions in RMS Lite:

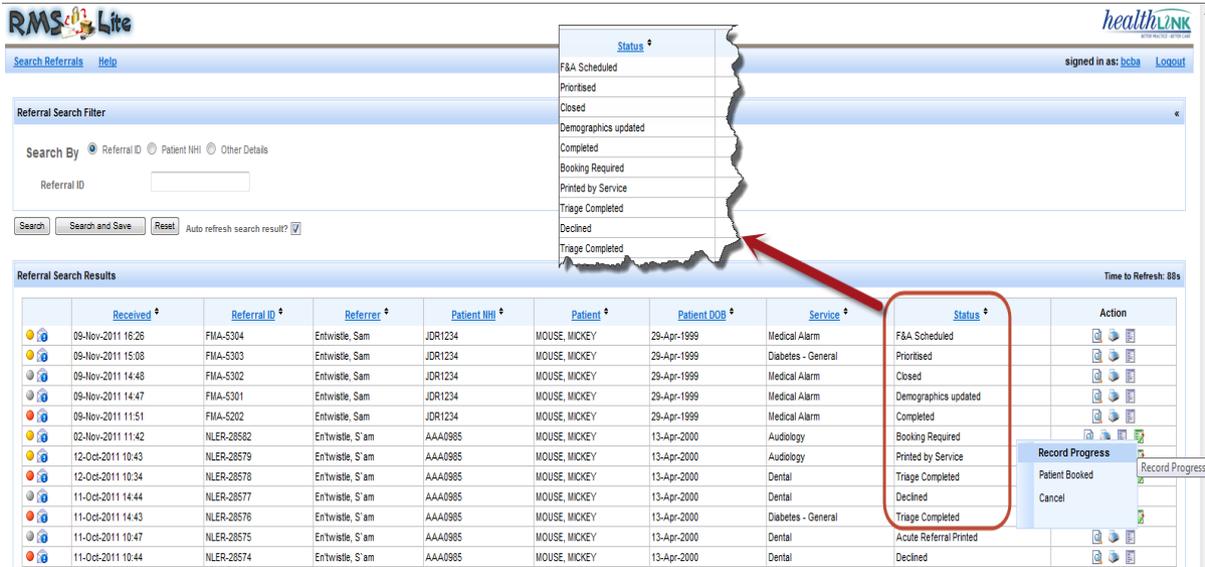
- ✗ Change a referral's status to any other value other than those listed above
- ✗ Triage a referral

10.4.1 BOOKING CLERK ROLE – USER VIEWS

The status of the eReferral will determine what functions are available to be selected in the Action column.

For example: If there is a record progress icon  in the 'Action' section, this will require the user to either make a patient booking, cancel, add note only. Please refer to **Booking Clerk Role** in the user guide.

When the 'Action' column presents only with these icons 



Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
09-Nov-2011 16:26	FMA-5304	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	F&A Scheduled	  
09-Nov-2011 15:06	FMA-5303	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Diabetes - General	Prioritised	  
09-Nov-2011 14:48	FMA-5302	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Closed	  
09-Nov-2011 14:47	FMA-5301	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Demographics updated	  
09-Nov-2011 11:51	FMA-5202	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Completed	  
02-Nov-2011 11:42	NLER-28582	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Booking Required	  
12-Oct-2011 10:43	NLER-28579	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Printed by Service	  
12-Oct-2011 10:34	NLER-28578	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Triage Completed	  
11-Oct-2011 14:44	NLER-28577	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Declined	  
11-Oct-2011 14:43	NLER-28576	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Diabetes - General	Triage Completed	  
11-Oct-2011 10:47	NLER-28575	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Acute Referral Printed	  
11-Oct-2011 10:44	NLER-28574	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Declined	  

This suggests that the referral has now reached the end of the eReferral workflow. Referrals can only be viewed and printed along with viewing the administrative summary details.

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
09-Nov-2011 16:26	FMA-5304	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	F&A Scheduled	  
09-Nov-2011 15:06	FMA-5303	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Diabetes - General	Prioritised	  
09-Nov-2011 14:48	FMA-5302	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Closed	  
09-Nov-2011 14:47	FMA-5301	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Demographics updated	  
09-Nov-2011 11:51	FMA-5202	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Medical Alarm	Completed	  
02-Nov-2011 11:42	NLER-28582	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Booking Required	  
12-Oct-2011 10:43	NLER-28579	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Audiology	Printed by Service	  
12-Oct-2011 10:34	NLER-28578	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Triage Completed	  
11-Oct-2011 14:44	NLER-28577	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Dental	Declined	  



Triage Information and Progress notes are updated and displayed in the Referral. It is presented when you view the eReferral through the Booking Clerk role.

Referral Details (HLER-27425)

Patient MICKEY MOUSE, 11yrs, NH AAA0985 Service Dental, Triage Completed

Referral Content Administration Attachments (0) Correspondence & History

Dental Referral for Outpatient Appointment

Patient: MICKEY MOUSE, 11yrs, NH AAA0985, Male, DOB 13-Apr-2000
9 St Clair Place, Browns Bay, Auckland, Postcode: 0630
Referred by: Sam Entwistle, Millstone Family Practice, NZMC 889843

[Go to Administrative Details](#) [Go to Medical Information](#)

Triage Information

Referral Outcome:	SBL/placed on surgical waiting list	Triage Date:	12-Apr-2012 08:57
Priority:	Unspecified	Triaged Entered By:	caba (Clinical Assessor _BA)
Clinic Location:	Whangarei	To Be Seen By:	Mr Redfield
Timeframe:	Two days		

Notes for internal Use only: Please book this patient within the next two days.
Notes sent back to Referrer: Notes to be written here

Progress Notes

Time Saved	Username (Fullname)	Notes
11-Apr-2012 13:52	caba (Clinical Assessor _BA)	Change service notes here

Clinical Referral Information

Printed by Service

Print Done