RMS LITE VERSION 1.5.0

USER GUIDE

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3.1 Final	16 April 2012	Jenna Jacobsen Toeono	Third Release of document with updates describing new ePrioritisation functionality.
3.2 Final	30 April 2012	Edwina Cooper	Corrections: Updated Add notes transition screen for Received to Ready for Triage workflow to show the status update to referrer displayed, unchecked and enabled.

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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 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 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

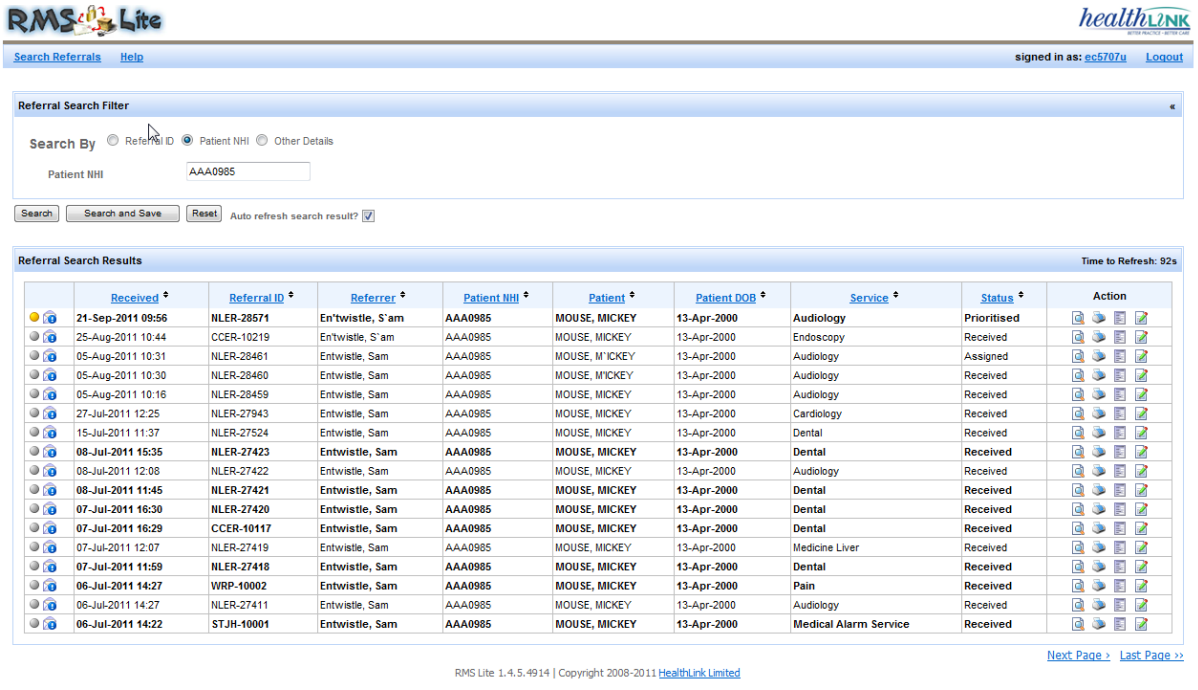
3.1 ACCESSING RMS LITE

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

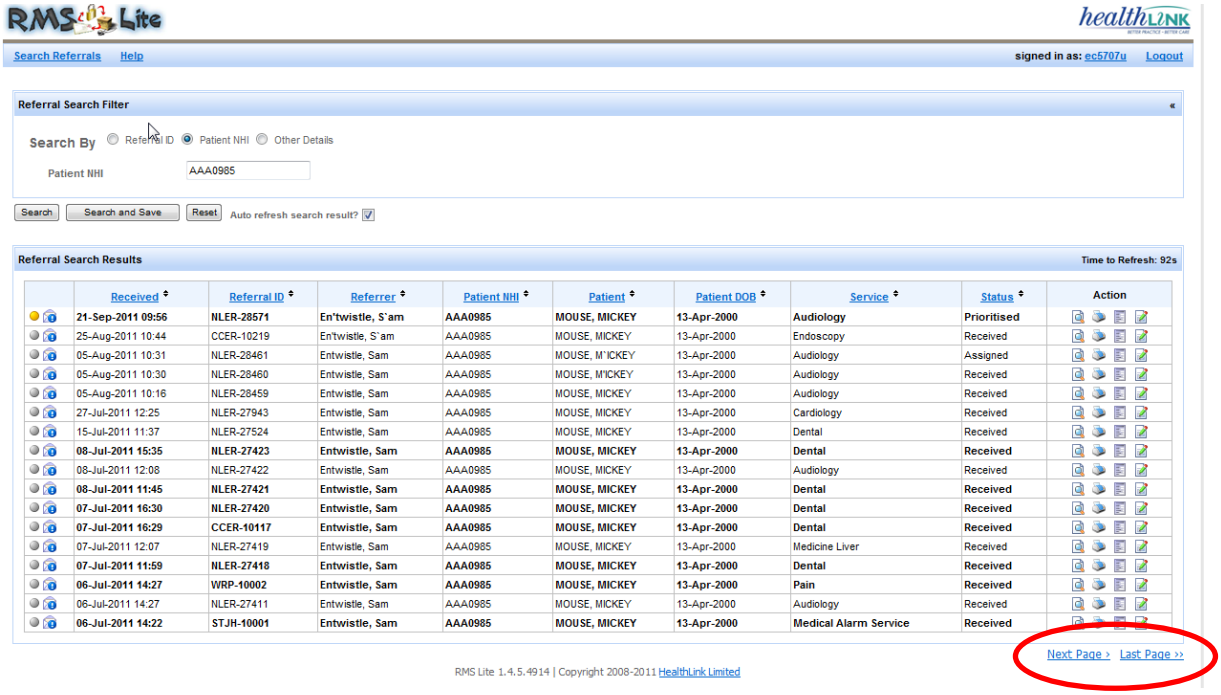
The RMS Lite Main screen will appear:


RMS Lite
healthLINK
Search Referrals
Help
signed in as: ec5707u
Logout
Referral Search Filter
Search By
Referral ID
Patient NHI
Other Details
Patient NHI
AAA0985
Search
Search and Save
Reset
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 En'twistle, S`am AAA0985 MOUSE, MICKEY 13-Apr-2000 Audiology Prioritised
25-Aug-2011 10:44 CCER-10219 En'twistle, S`am AAA0985 MOUSE, MICKEY 13-Apr-2000 Endoscopy Received
05-Aug-2011 10:31 NLER-28461 Entwistle, Sam AAA0985 MOUSE, M`ICKEY 13-Apr-2000 Audiology Assigned
05-Aug-2011 10:30 NLER-28460 Entwistle, Sam AAA0985 MOUSE, M'ICKEY 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
Next Page ›
Last Page ››
RMS Lite 1.4.5.4914 | Copyright 2008-2011 HealthLink Limited

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 right side of the referral list.

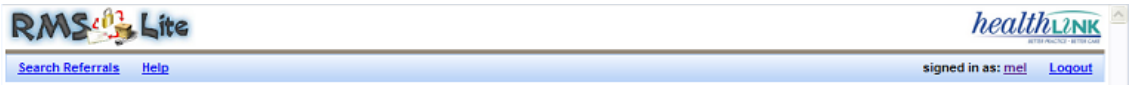


3.3 VIEWING REFERRALS

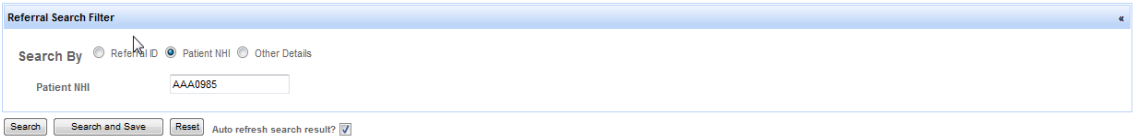
3.3.1 REFERRAL LIST OVERVIEW

The RMS Lite Main screen has the following three sections:

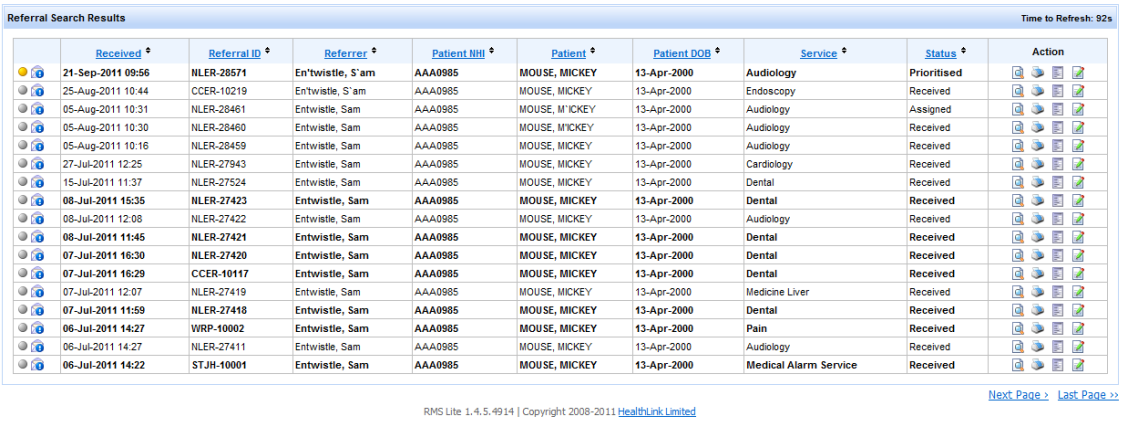
- **Menu Bar:** Containing more options and sub-menus



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

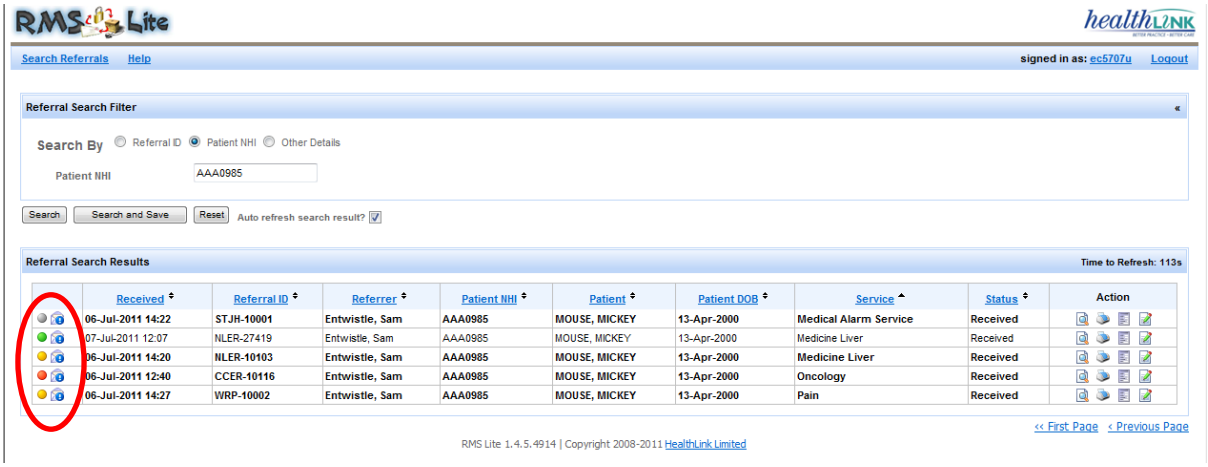


- **Referral Search Results Section:** Displays the list of referrals that matches the search criteria (by default or when reset, this contains the list of all referrals received starting with the most recently received). Clicking on each column header will sort the list of referrals in ascending or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



3.3.2 INDICATOR COLUMN (SEARCH LIST)

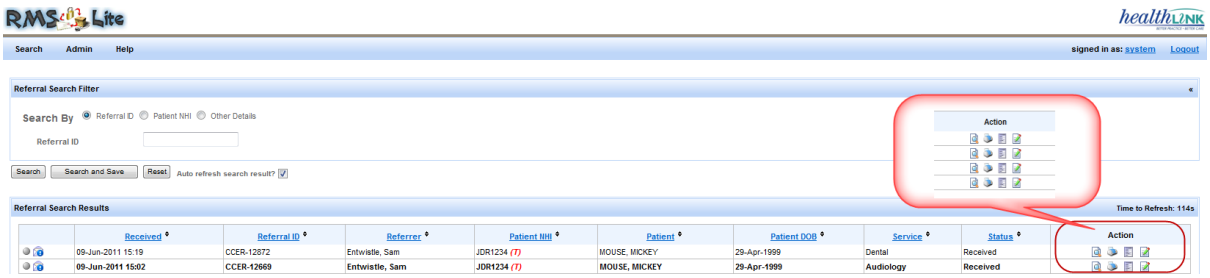
There are a number of colour indicators and icons displayed on the far left of the referrals queue that reflect the current priority for each referral received and any associated information. Clinical users can record (and update) the progress of a referral by accessing the triage option under the 'Record 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.



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.

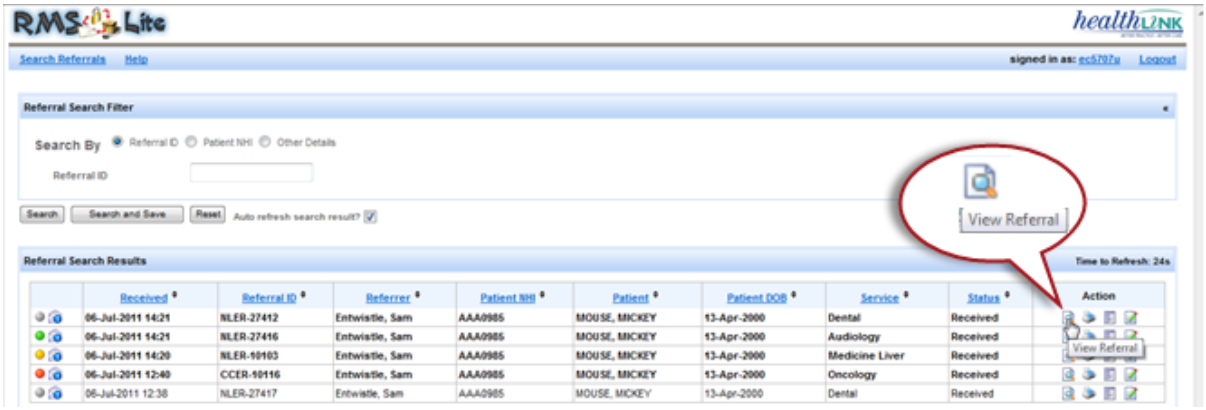


The purposes of the Action icons are listed as follows:

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 • Funding • Patient details • Referrer • Regular GP • Allergies /Alerts
	Record progress	This function allows specific user roles to • 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

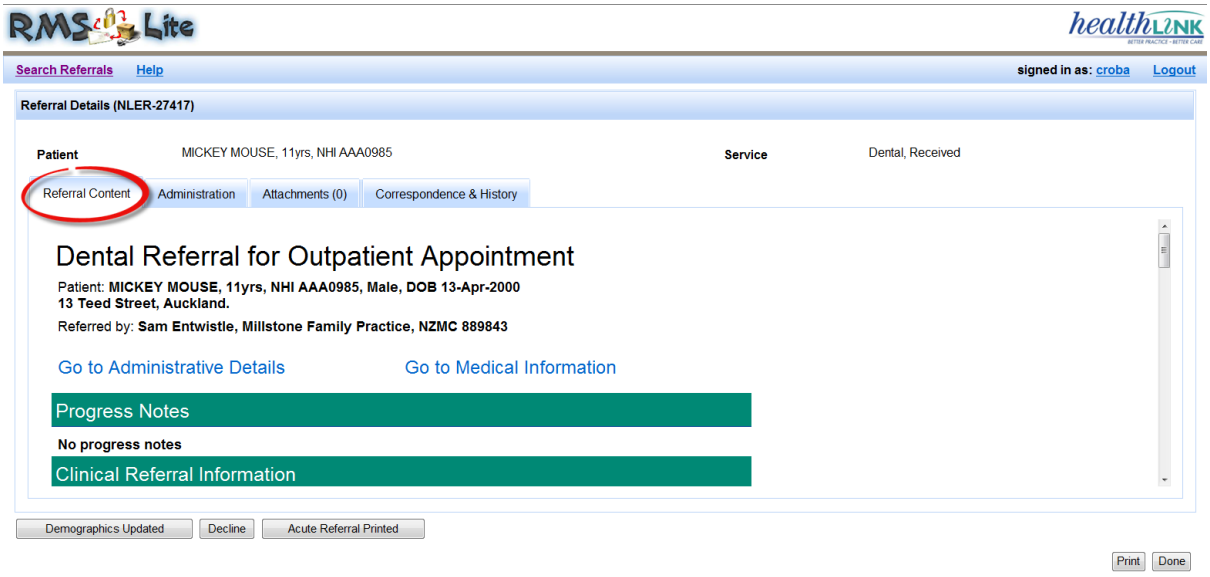
When you find the right referral in the list, click the 'View Referral' icon to open the Referral Details screen and view the referral particulars.



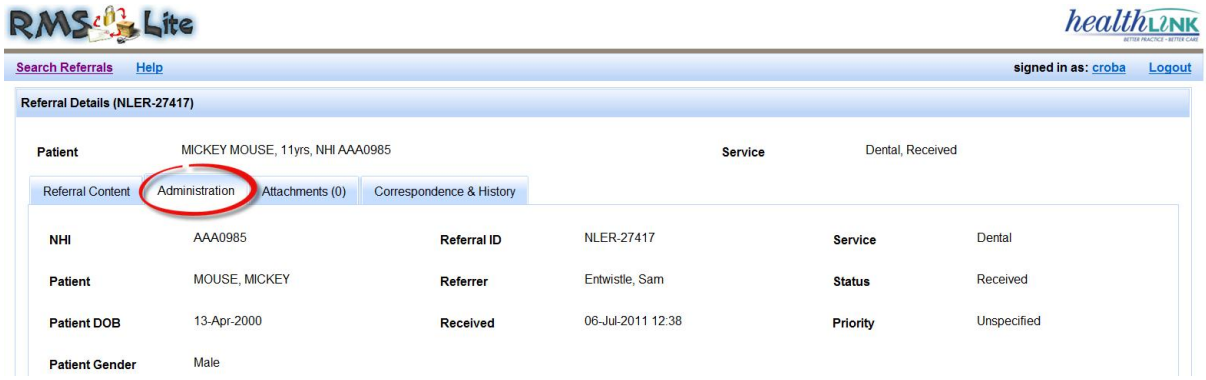
The Referral Details screen has four tabs:

- **Referral Content**
- **Administration**
- **Attachment**
- **Correspondence History**

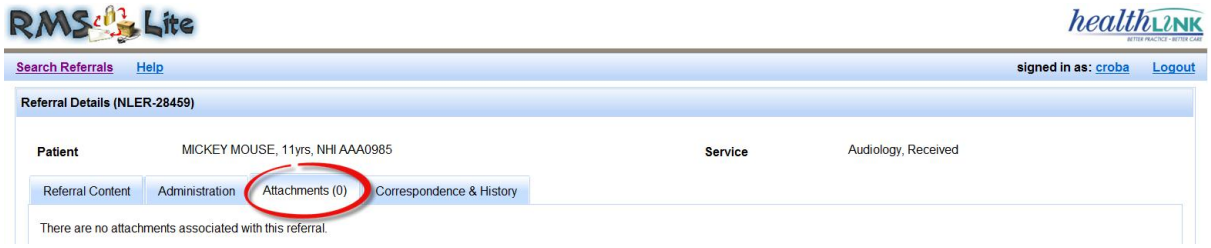
Referral Content – This is the default active tab that contains all the details of the referral. You can browse through the referral contents by using the scroll bar.



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.

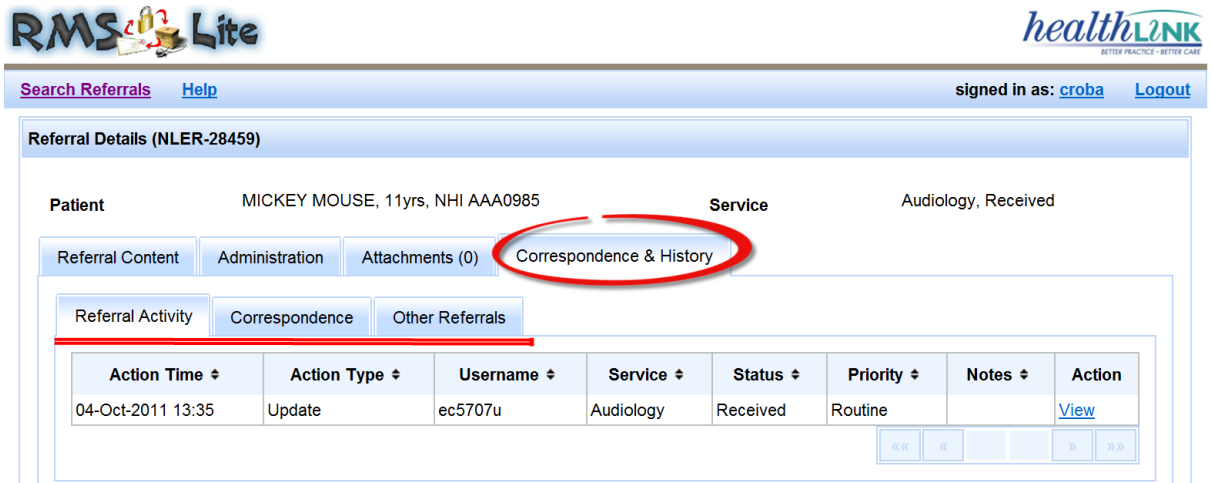


Attachments – This tab lists any file attachments that came in with the referral. Attachments, if any, can be one or many. You can view and print the attachments by clicking Download.



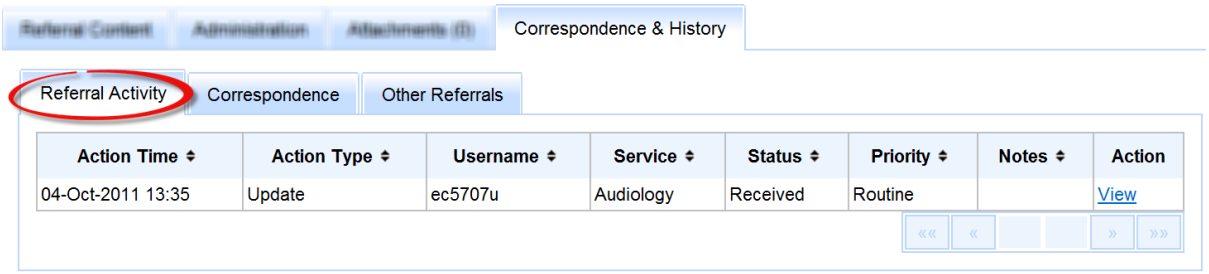
Correspondence & History – This tab contains three sub-tabs:

- Referral Activity
- Correspondence
- Other Referrals tabs



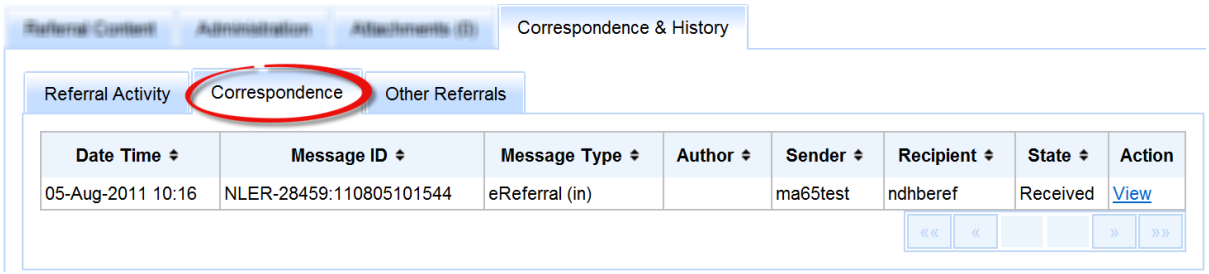
CORRESPONDENCE & HISTORY SUB TABS

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.



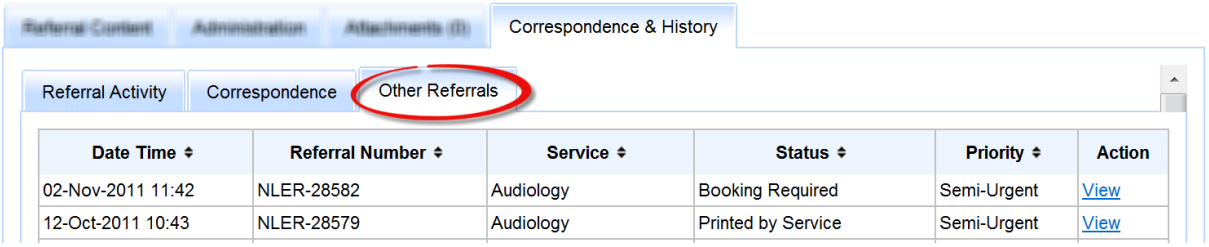
Action Time	Action Type	Username	Service	Status	Priority	Notes	Action
04-Oct-2011 13:35	Update	ec5707u	Audiology	Received	Routine		View

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.

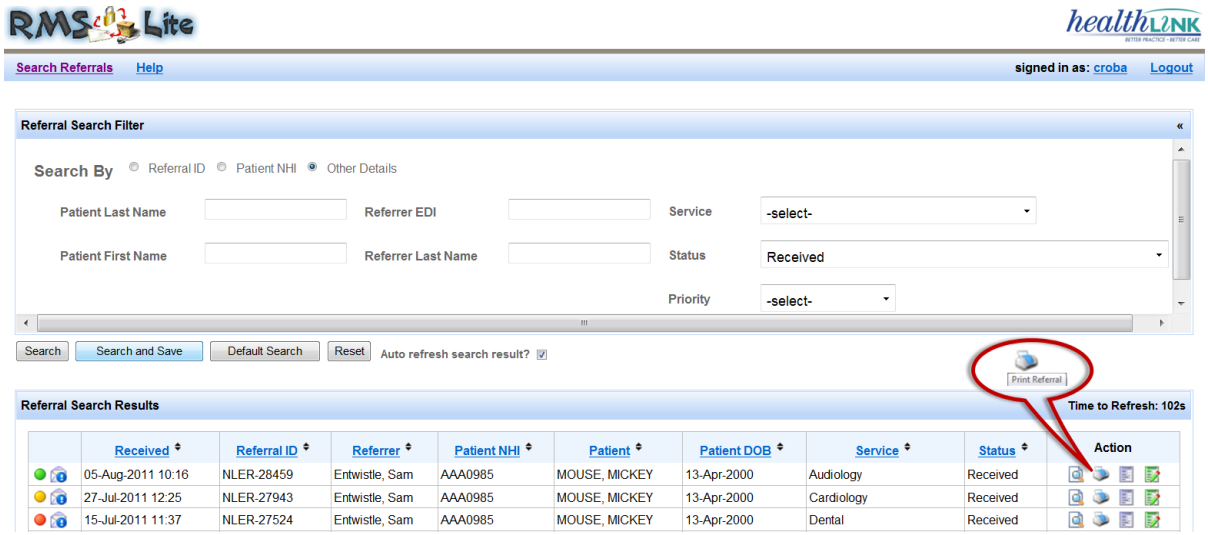


Date Time	Referral Number	Service	Status	Priority	Action
02-Nov-2011 11:42	NLER-28582	Audiology	Booking Required	Semi-Urgent	View
12-Oct-2011 10:43	NLER-28579	Audiology	Printed by Service	Semi-Urgent	View

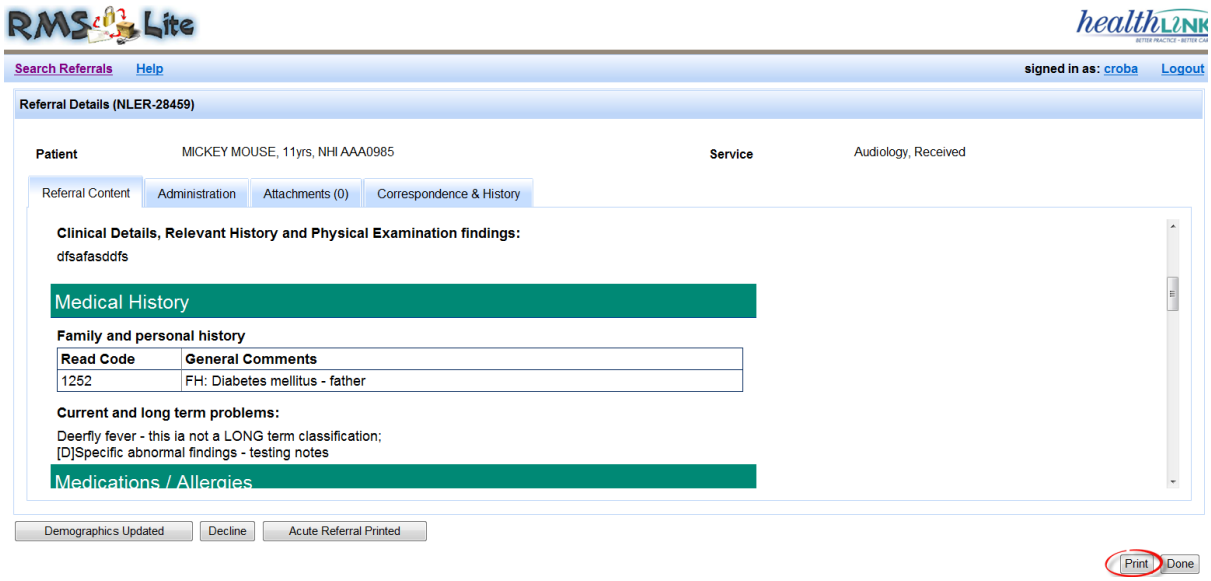
4.2 PRINTING REFERRALS

To print a referral:

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



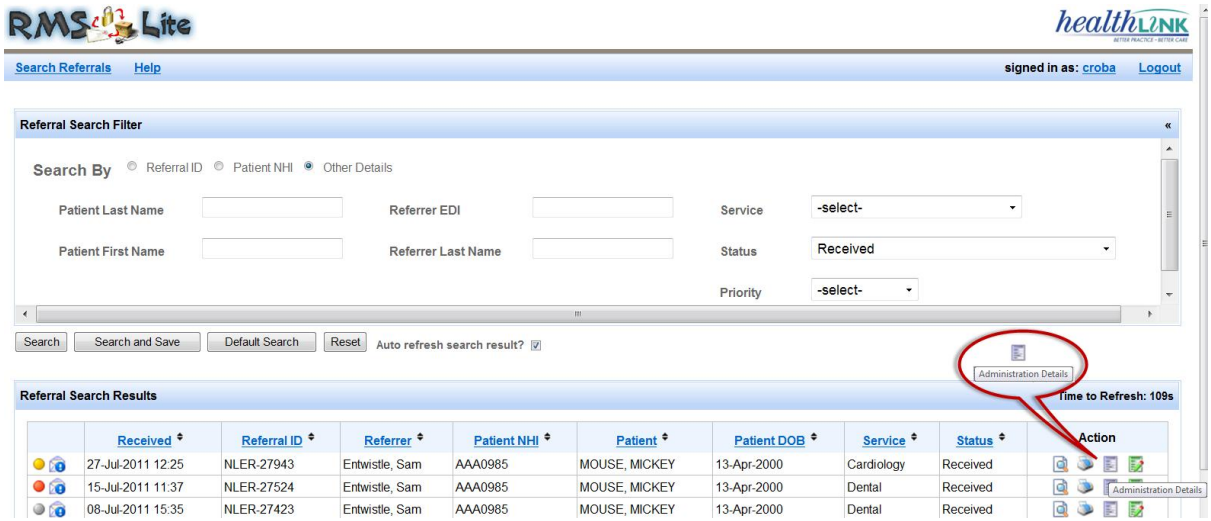
2. ***Alternatively,*** on the Referral Search Results section of the Main screen, click on **'View Referral'** icon the Referral Details screen will appear
3. On the Referral Details screen, click on **'Print' button** at the bottom of the screen.
4. Select your printer settings and preferences.
5.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

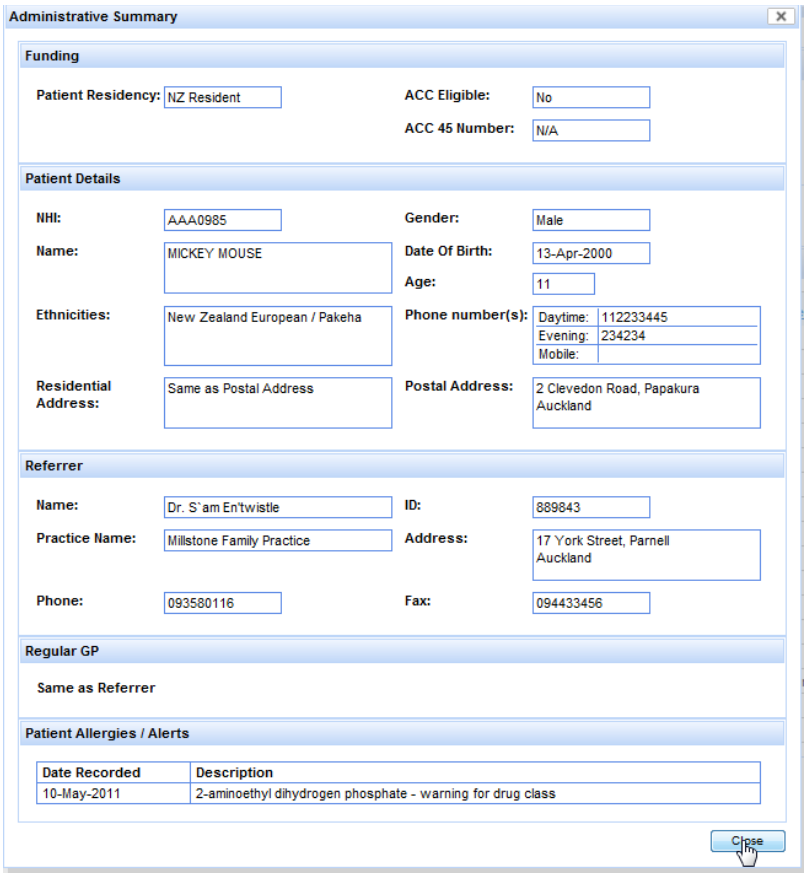


Any notes or tracking information recorded using the RMS Lite 'Record Progress' function will be incorporated into the header of the printed referral along with the date/time and username.

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





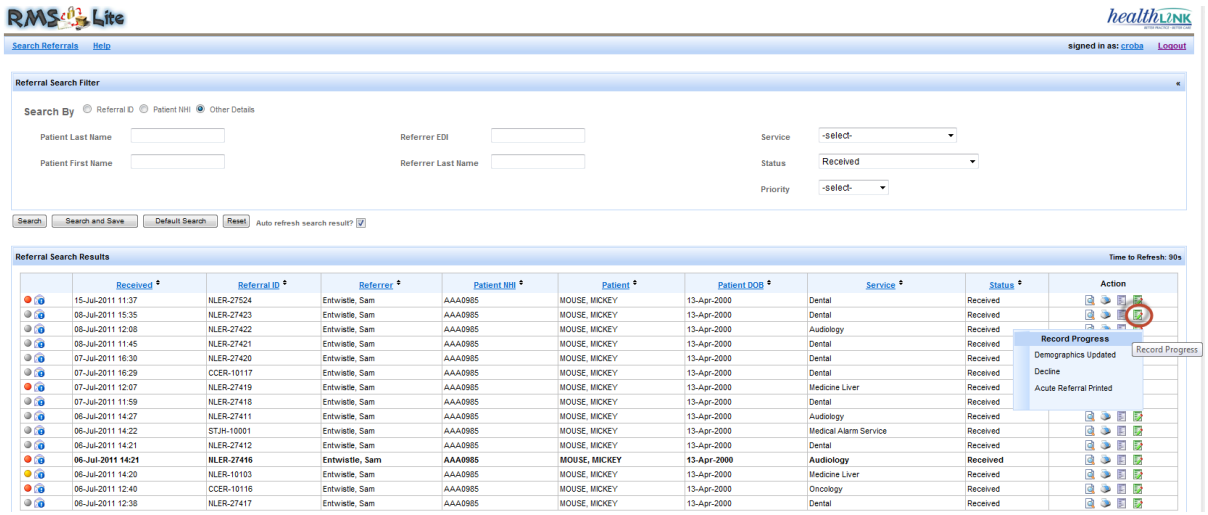
4.4 Recording Referral Progress

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

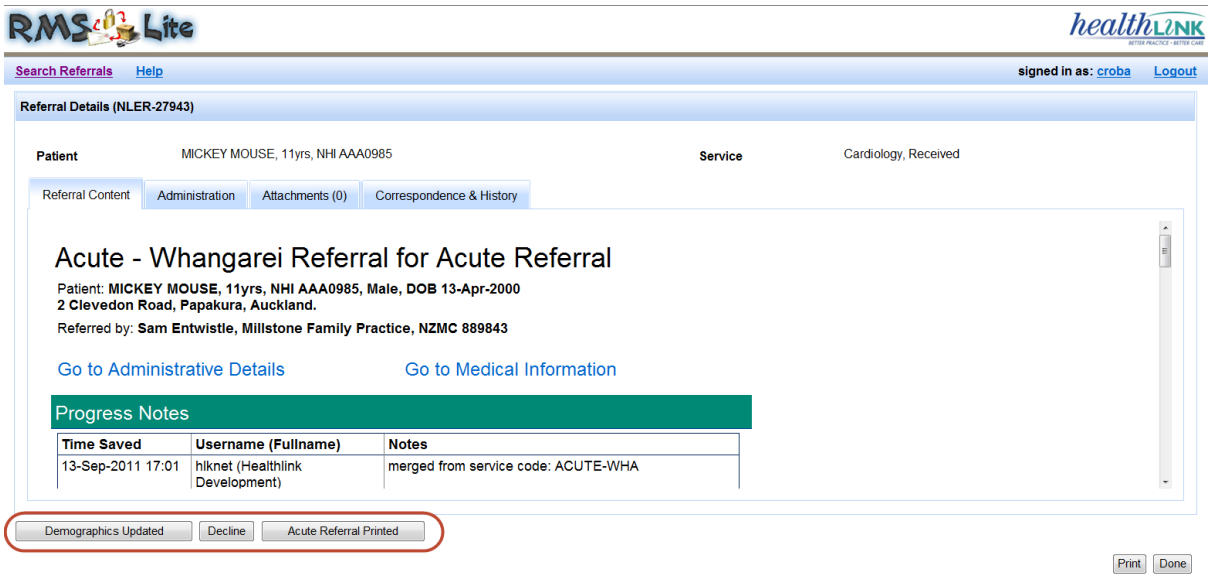
To record the progress of the referral:

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**

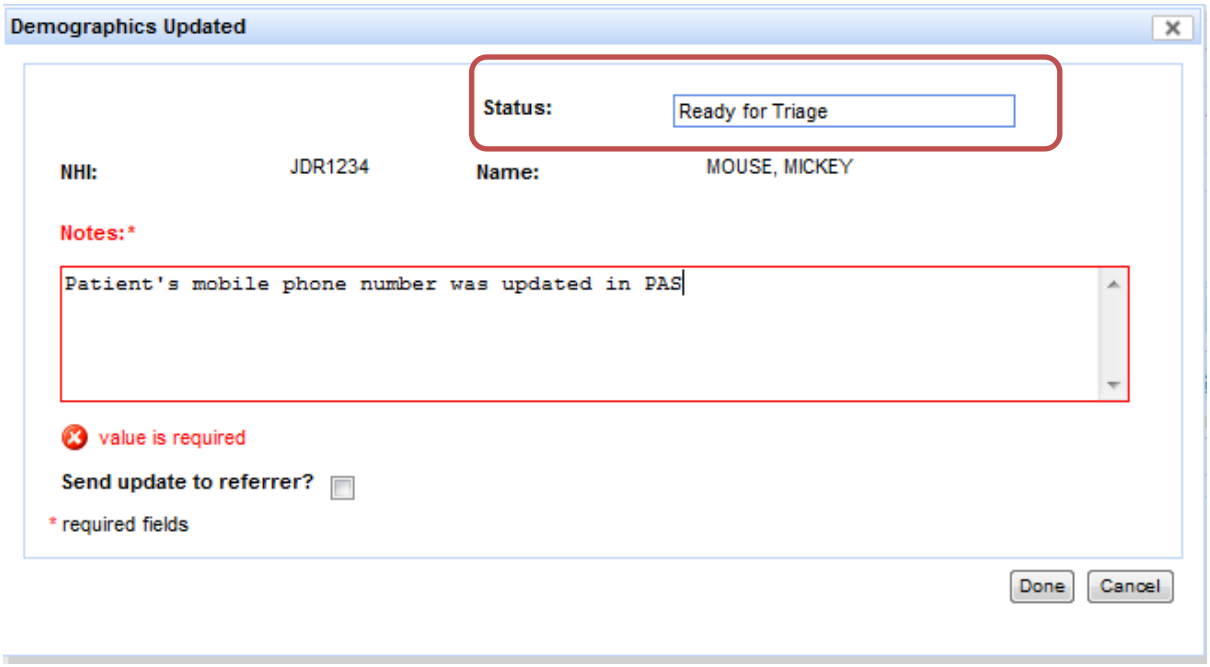


4. ***Alternatively,*** on the Referral Search Results section of the Main screen, click **'View Referral'** icon

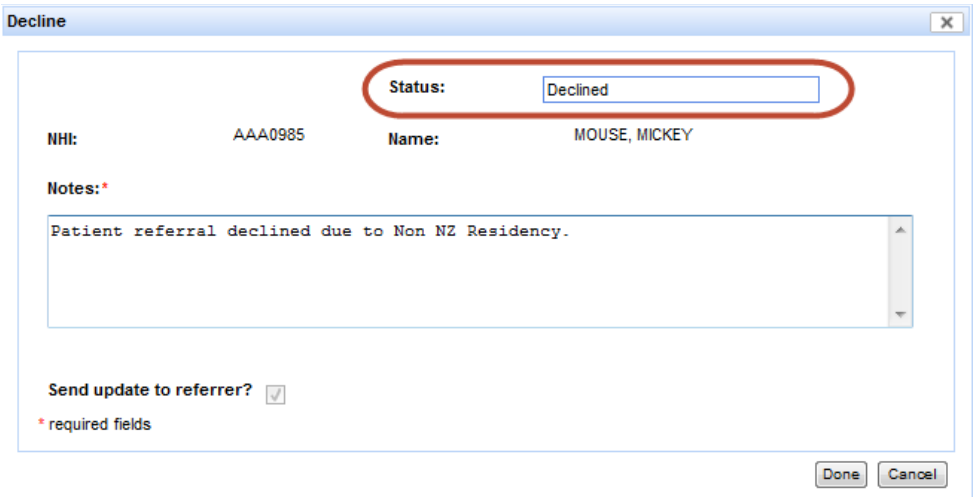
   The Referral Details screen will appear. Select the relevant options.



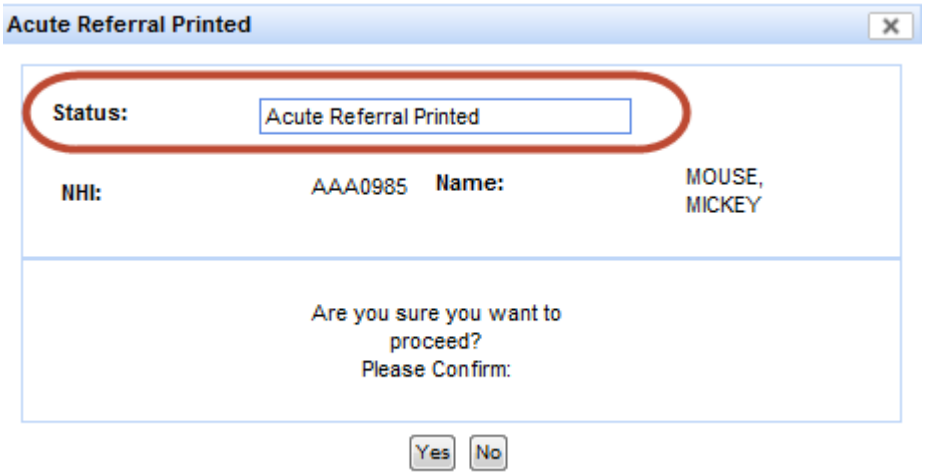
a. **Demographics Updated –** Patient details in the referral have been confirmed in correlation with the Patient Administration System (PAS).



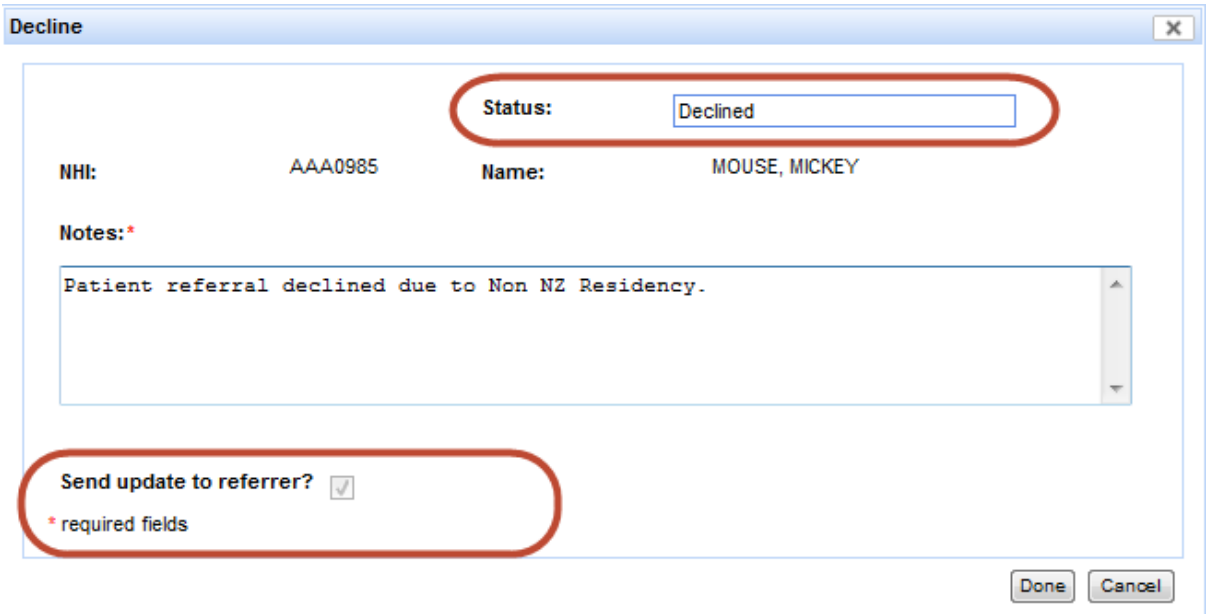
b. **Decline –** Patient has been declined for the referral service



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

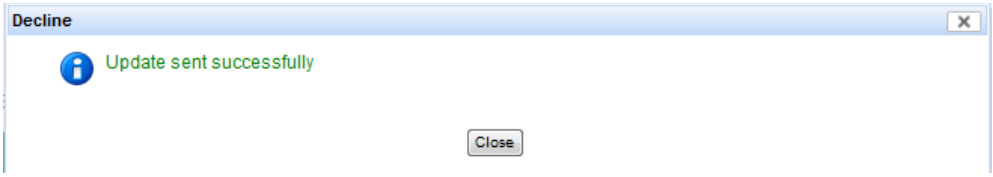


A copy of the current progress description can be sent to the original referrer by clicking on the **'Send update to referrer'** checkbox (this will be sent via the HealthLink store and forward service). In some circumstances (e.g. in the 'Decline' screen shot displayed below), the **'Send update to 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.



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

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



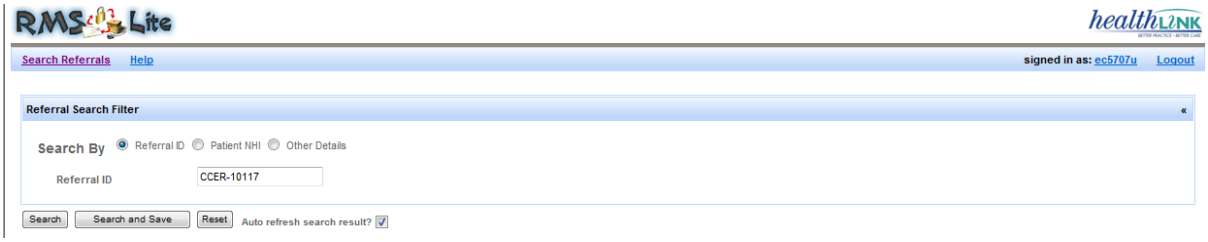
5 SEARCHING FOR SPECIFIC REFERRALS

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.

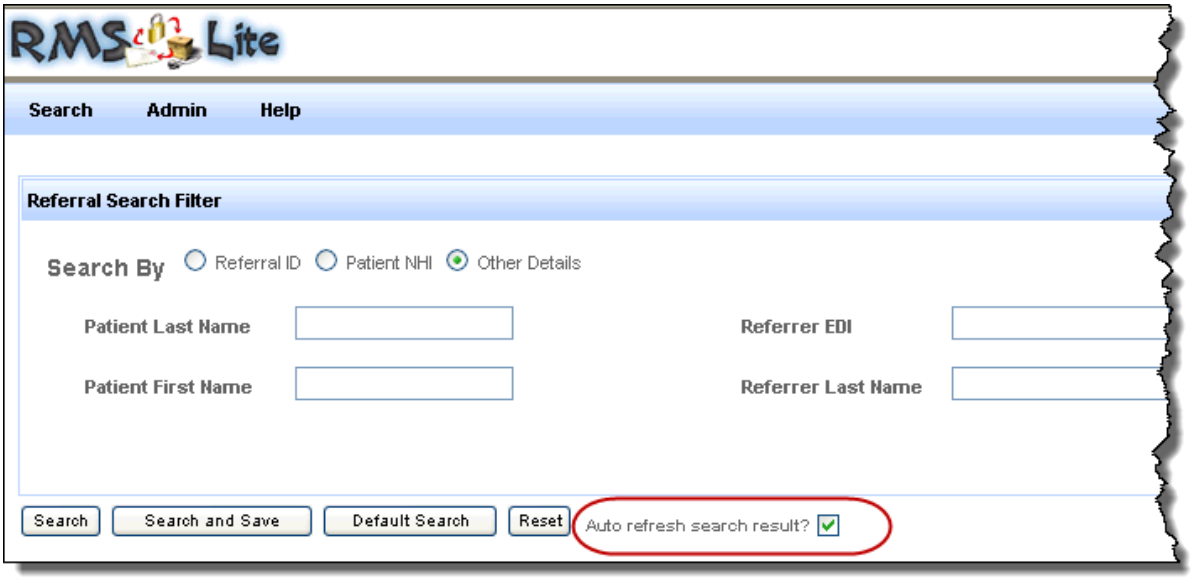
5.1 SEARCH USING REFERRAL ID

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.



5.1.1 SEARCH REFRESH



Ensure that the **"Auto refresh search result"** tick box is always ticked

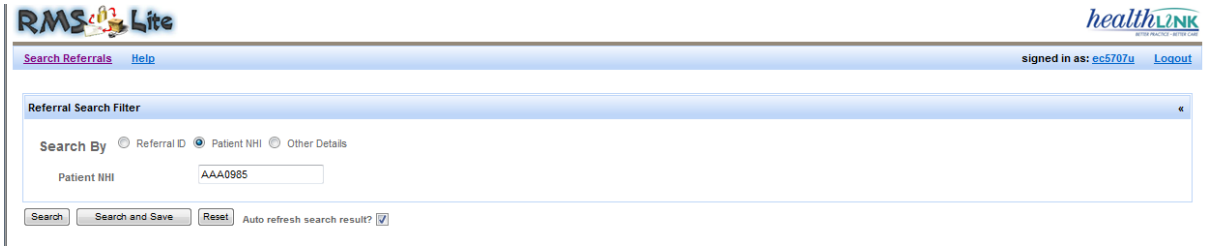
This will refresh the system every ***2 minutes***, important for when acute referrals are being received.

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.



5.3 Search Using Other Details

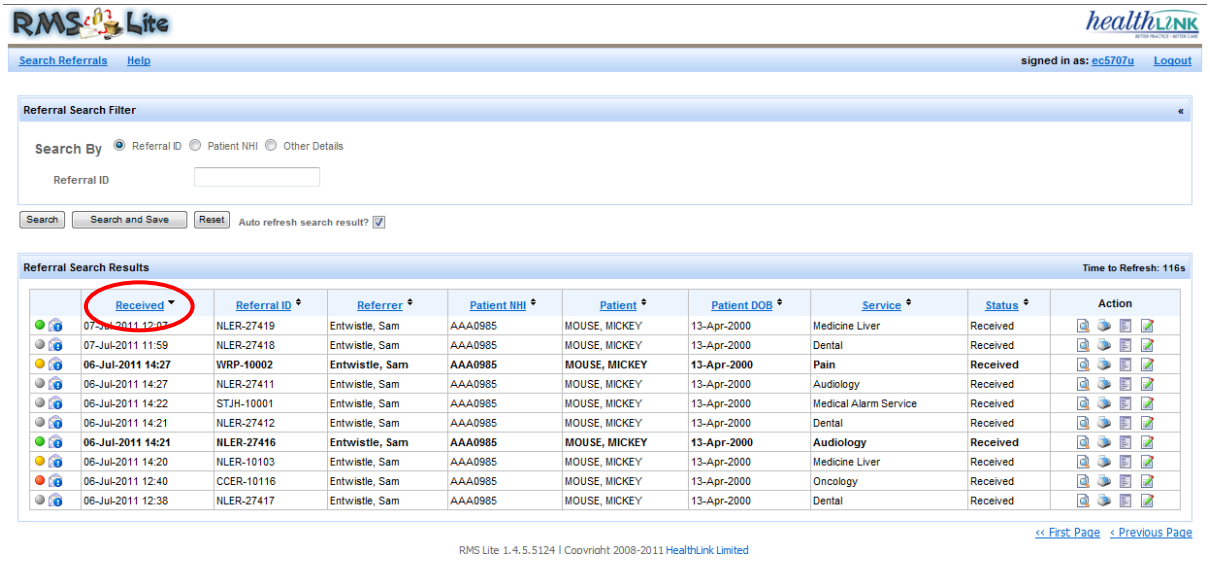
To search referral using other details:

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.

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.

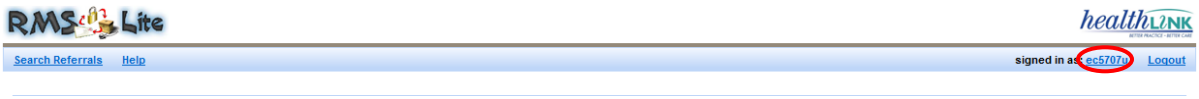


6 User Maintenance

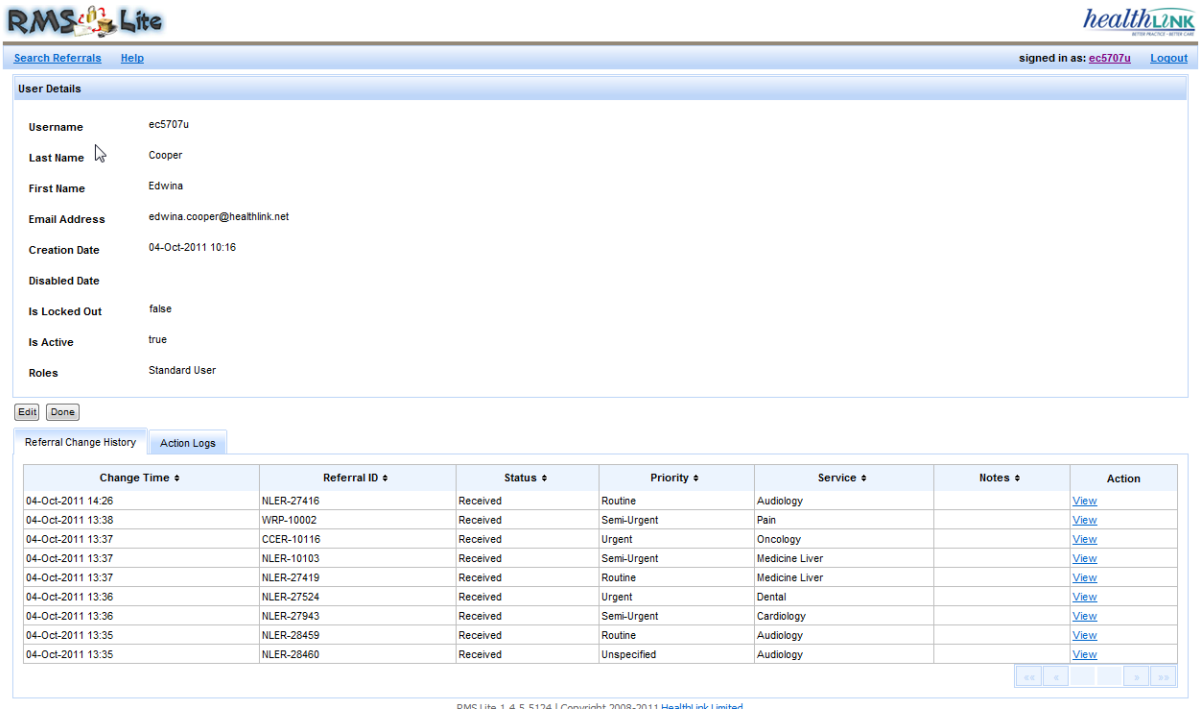
You can view your user profile details and make change to them like your password, name and email address. You can also view the record of your activities on the system.

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.



6.2 Updating User Details

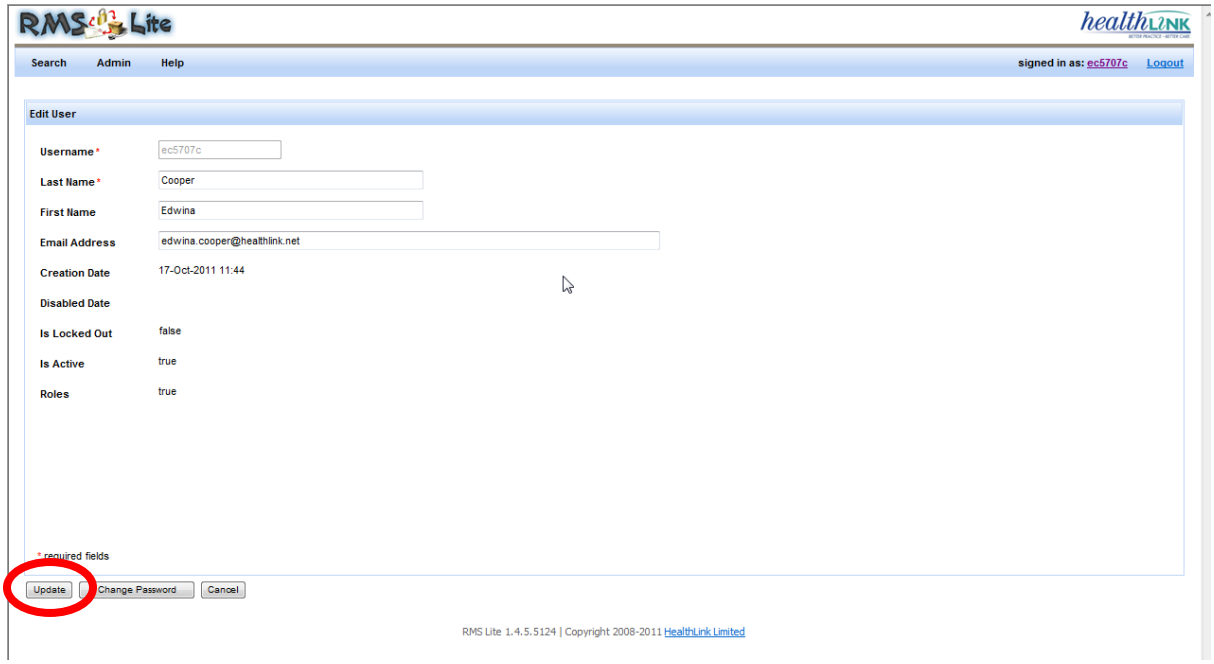
6.2.1 To update your user details

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

The Edit User screen will appear

2. On the Edit User screen, make your changes or updates

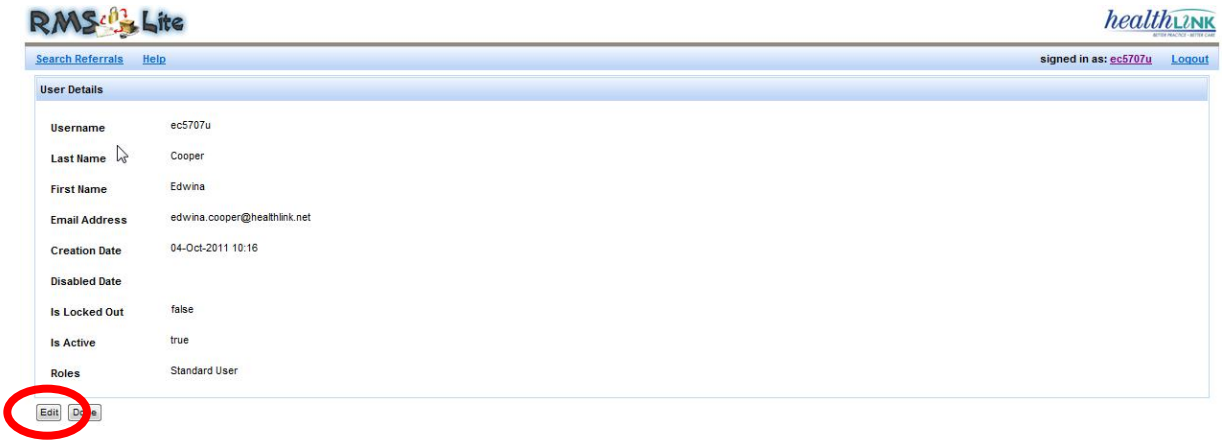
3. Click the 'Update' button to save the changes.



6.3 CHANGING PASSWORD

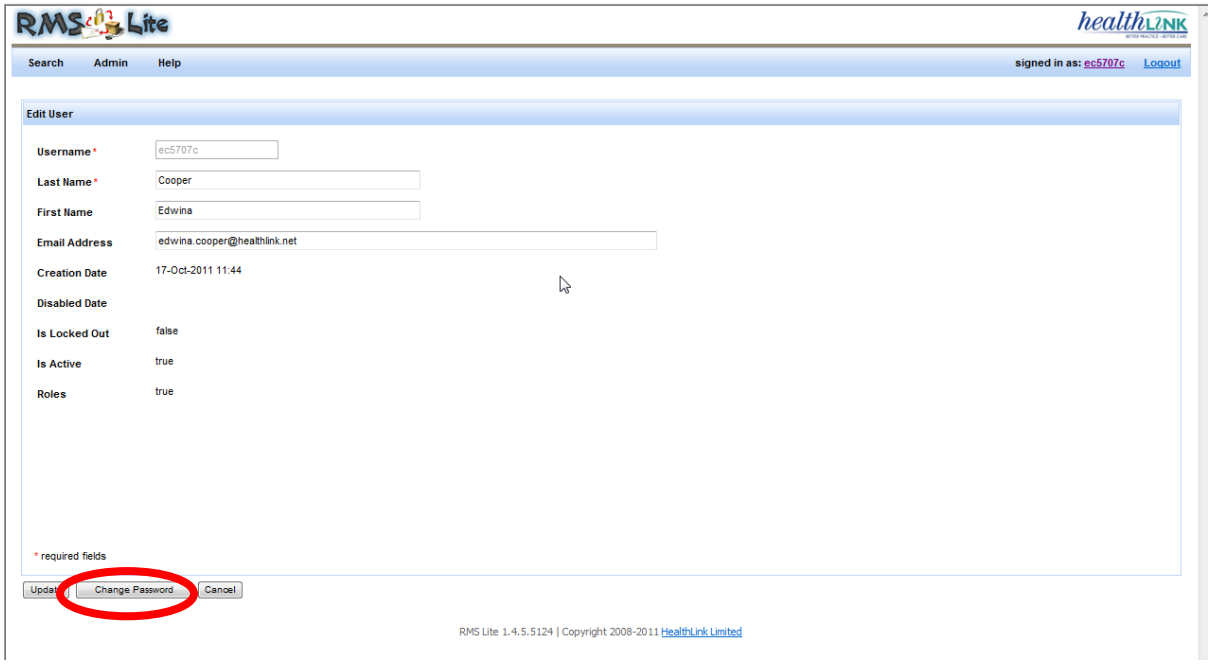
To change your password:

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



The Edit User screen will appear

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



The Change Password screen will appear

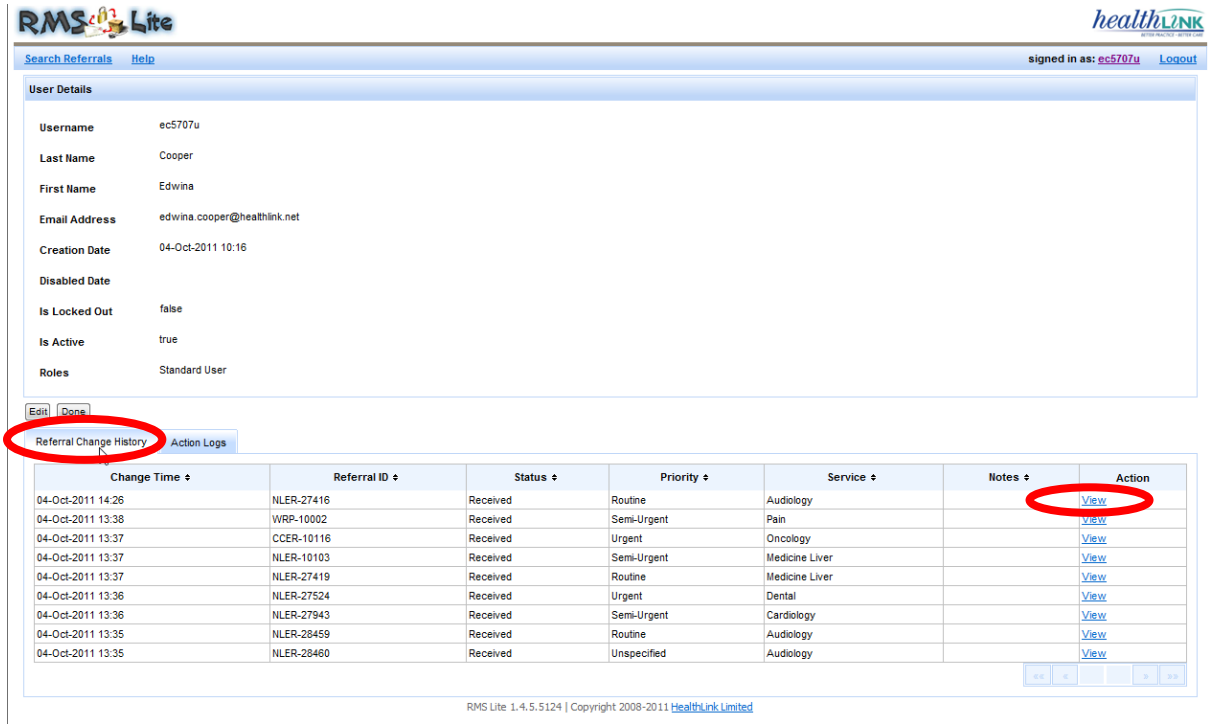
3. On the Change Password screen, type and retype your new password

4. Click the Save button when done.

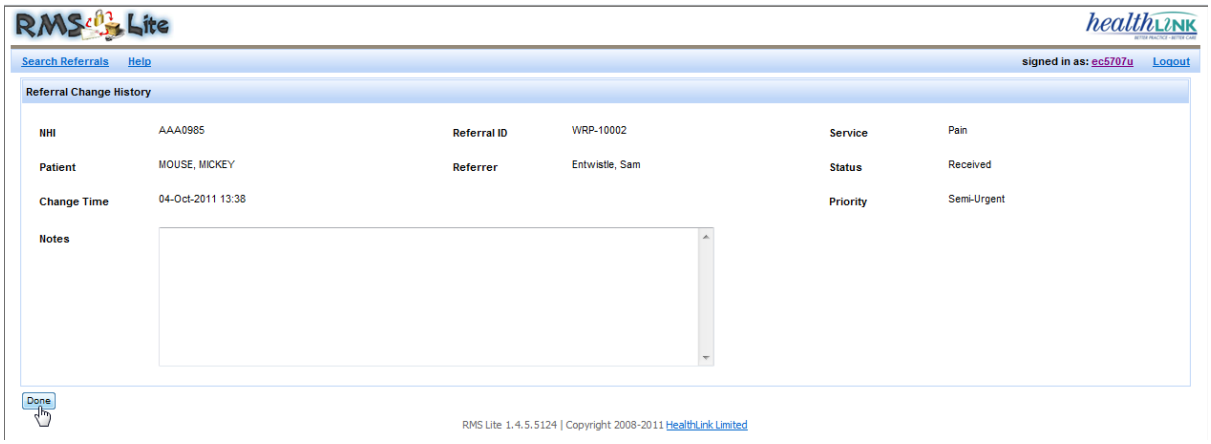
6.4 Reviewing Changes Made on Referrals

To review changes made on referrals:

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



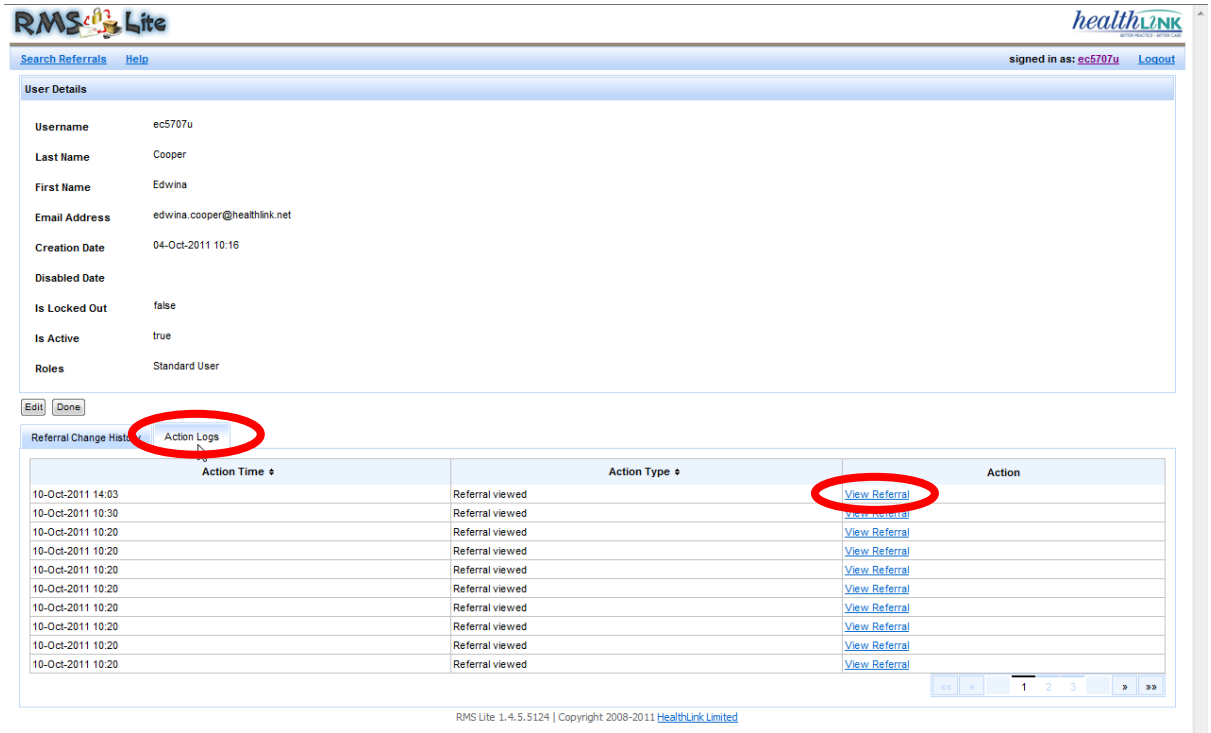
2. Click 'View' to open and view the details



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



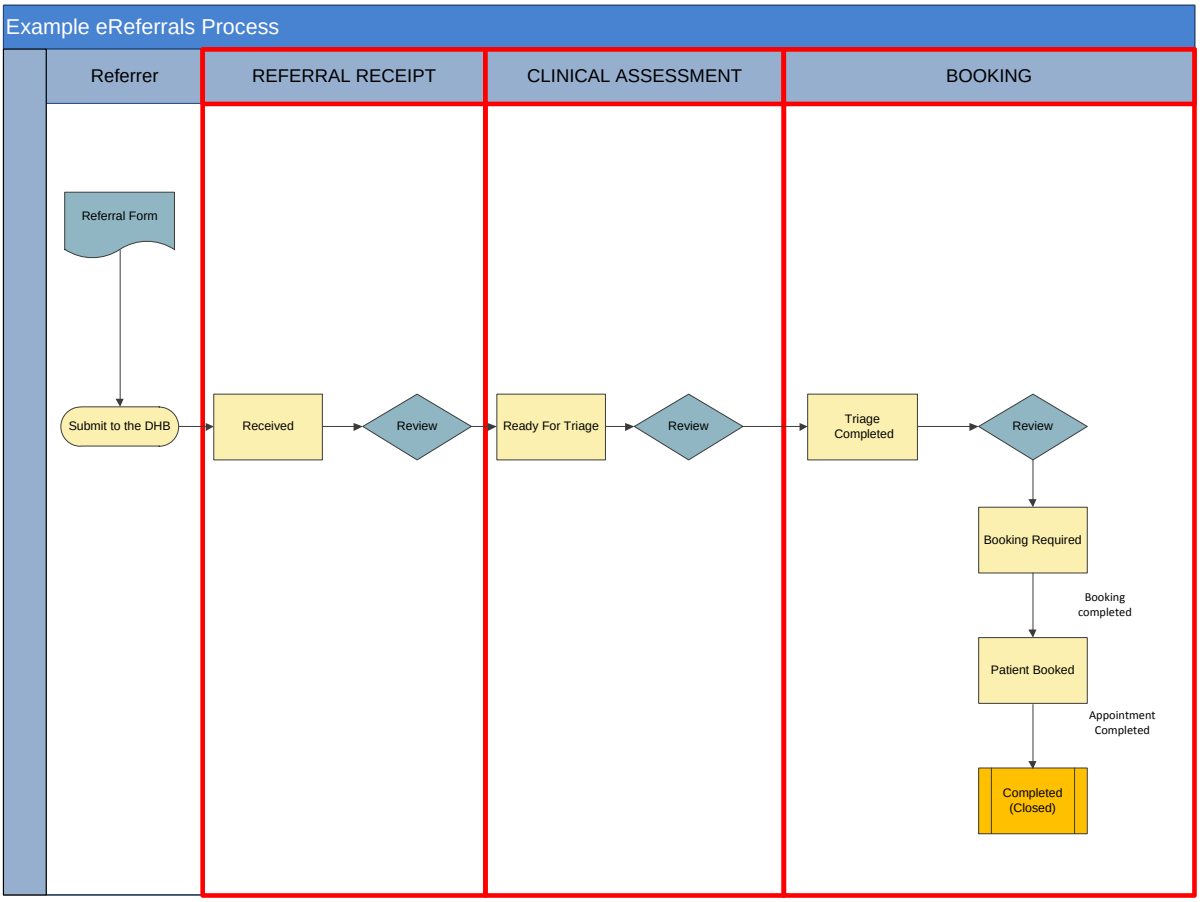
7 eReferral Management Workflows

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.

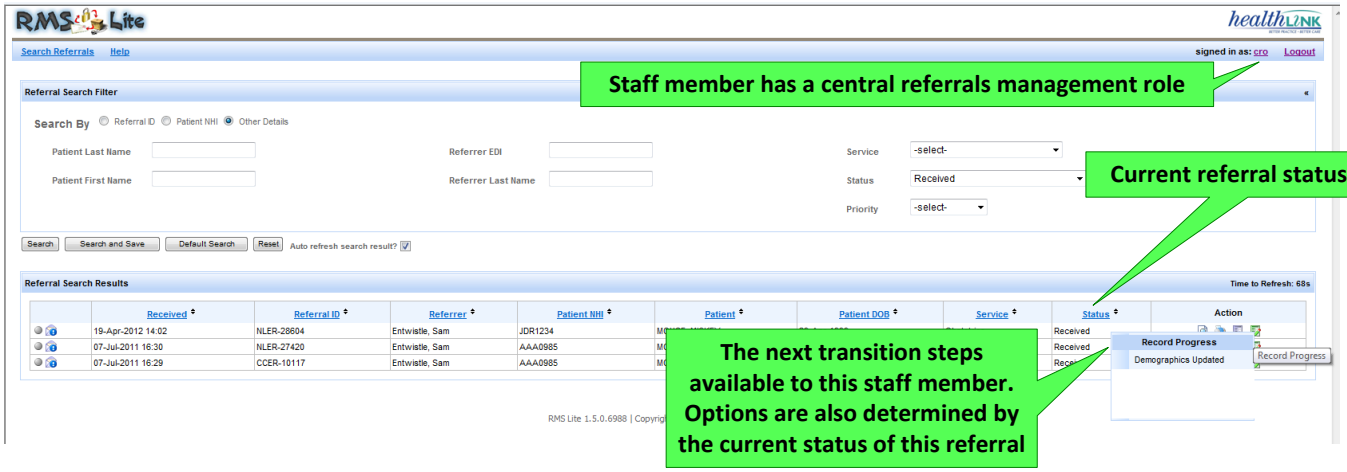
Please note: *This 'standard' scenario does not display variations to the workflow (i.e.: decline eReferral, acute referral printed, change service.)*



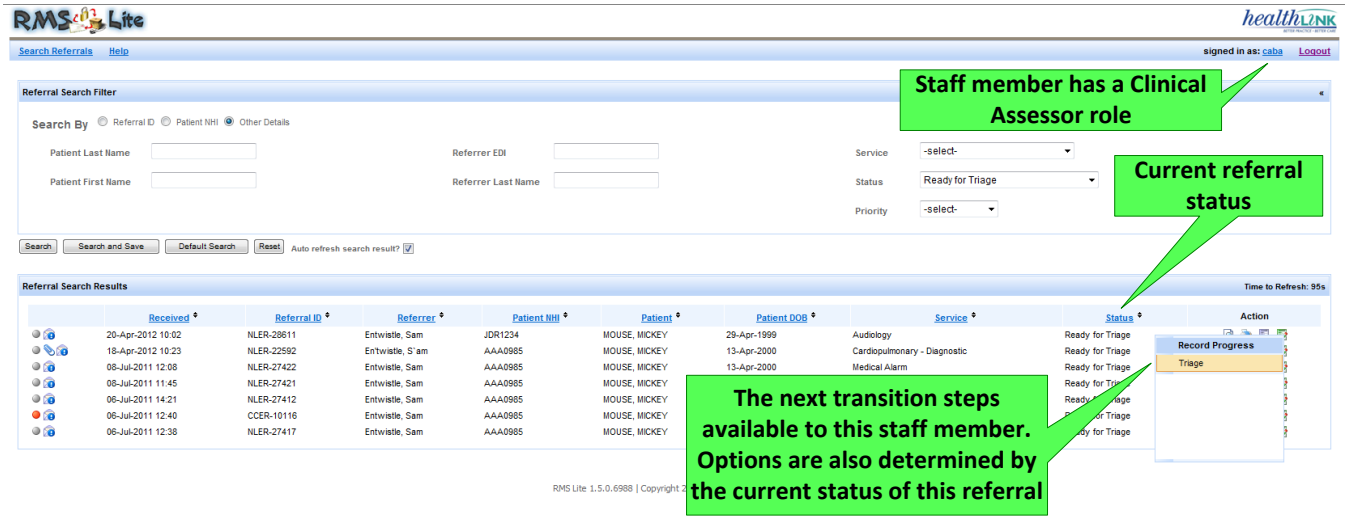
7.2 TRANSITION WORKFLOWS IN RMS LITE

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

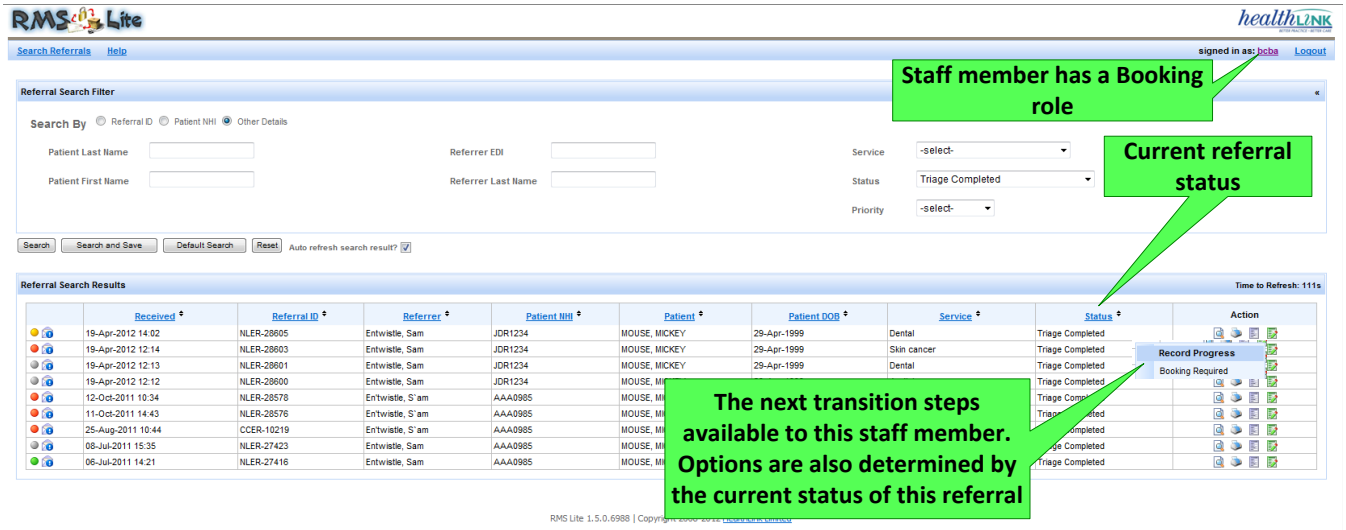
7.2.1 REFERRAL RECEIPT



7.2.2 CLINICAL ASSESSMENT

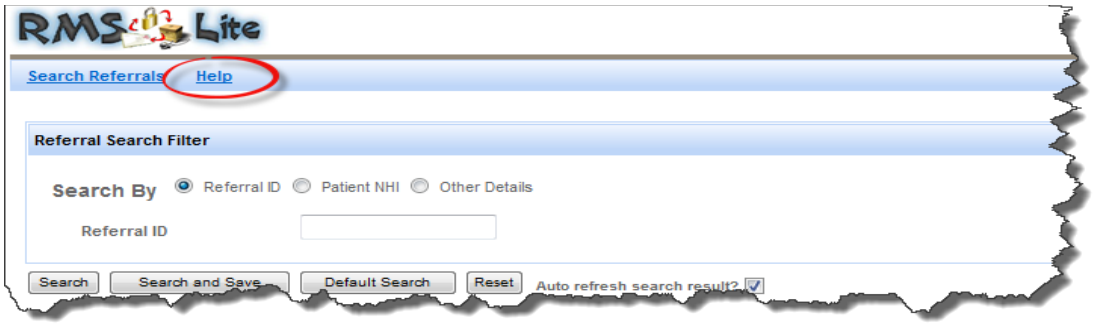


7.2.3 BOOKING


RMS Lite
healthLINK
Search Referrals
Help
signed in as: bcba
Logout
Staff member has a Booking role
Referral Search Filter
Search By
Referral ID
Patient NHI
Other Details
Patient Last Name
Patient First Name
Referrer EDI
Referrer Last Name
Service
-select-
Status
Triage Completed
Priority
-select-
Current referral status
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
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, MI Triage Completed
12-Oct-2011 10:34 NLER-28578 En'twistle, S'am AAA0985 MOUSE, MI Triage Comp
11-Oct-2011 14:43 NLER-28576 En'twistle, S'am AAA0985 MOUSE, MI Triage
25-Aug-2011 10:44 CCER-10219 En'twistle, S'am AAA0985 MOUSE, MI
08-Jul-2011 15:35 NLER-27423 Entwistle, Sam AAA0985 MOUSE, MI
06-Jul-2011 14:21 NLER-27416 Entwistle, Sam AAA0985 MOUSE, MI Triage Completed
Record Progress
Booking Required
The next transition steps available to this staff member. Options are also determined by the current status of this referral
RMS Lite 1.5.0.6988 | Copyright

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

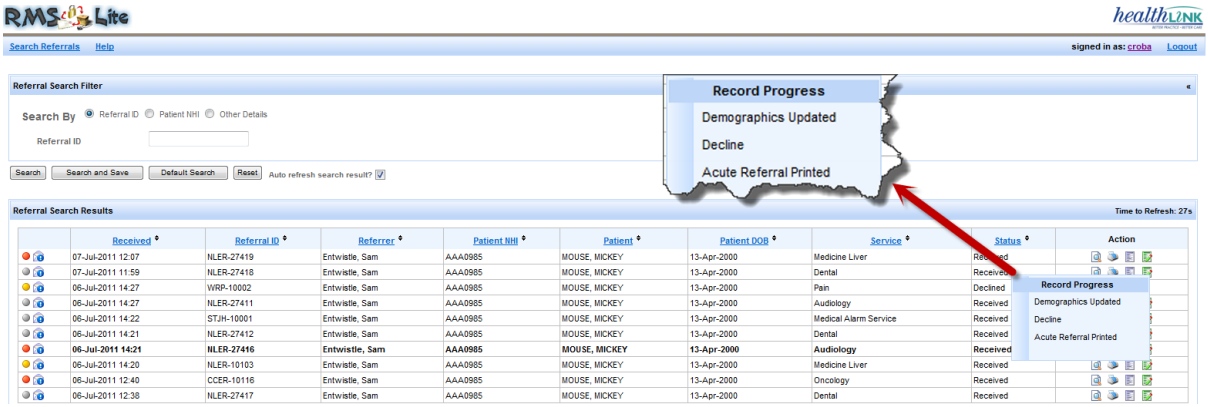
The **CRO administrator cannot perform** the following functions in RMS Lite:

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

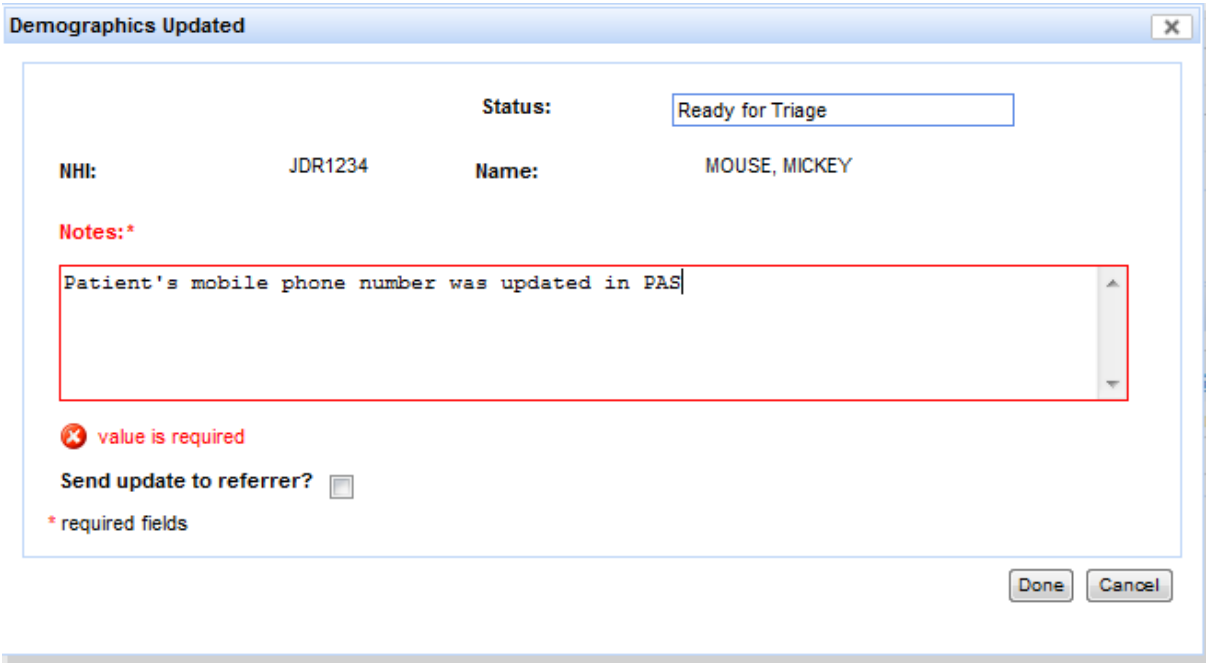
10.2.1 CENTRAL OFFICE REFERRAL ADMINISTRATOR – USER VIEWS

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**

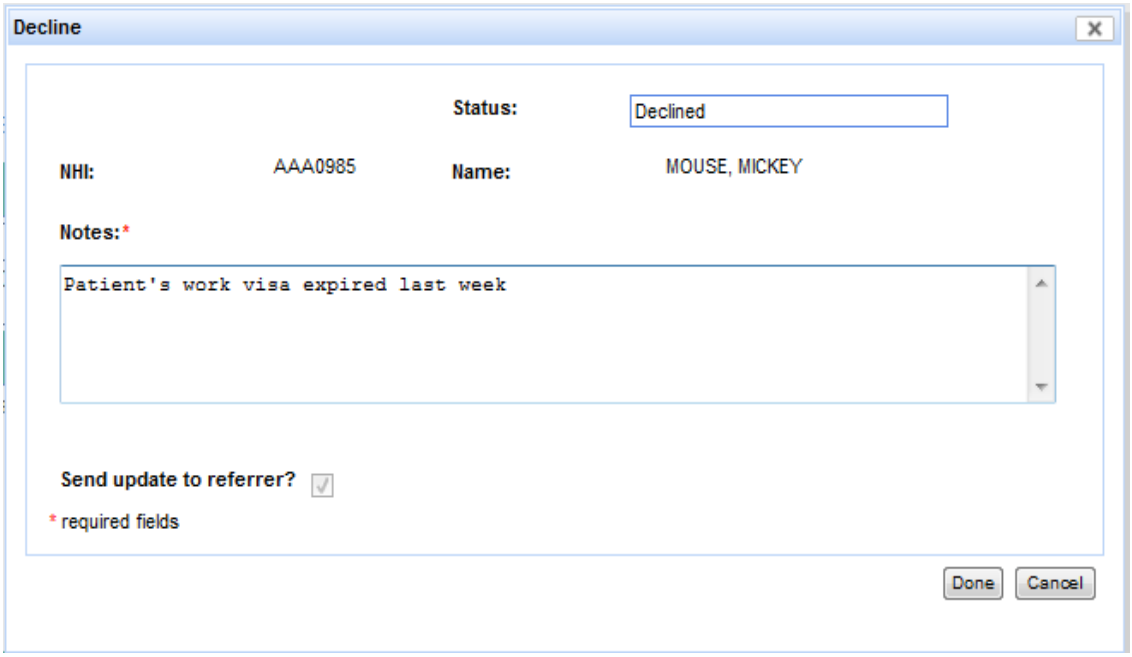


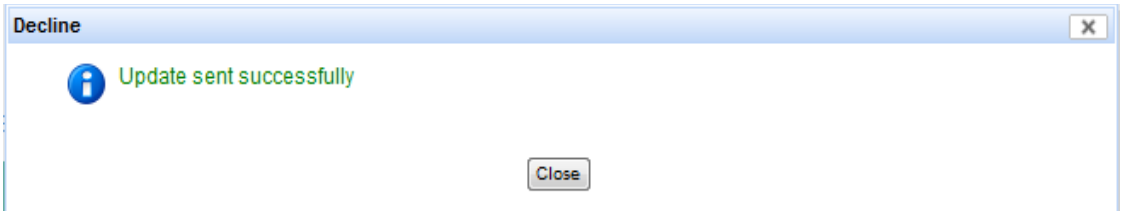
Demographics Updated – Patient referral information is compared towards information in the Patient Administration System (PAS)



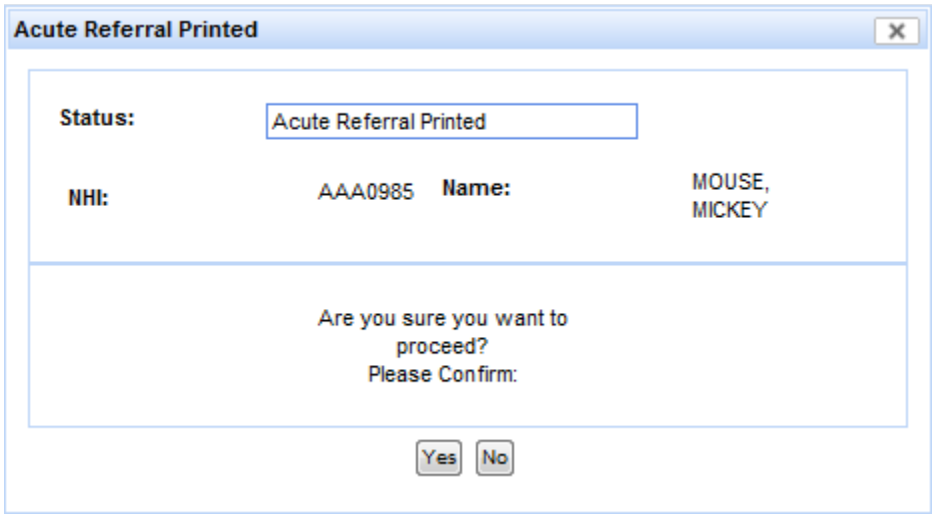
NEW **Decline** - If a referral is **'Declined'** the reason must be recorded in the **Notes'** section.

This function is Mandatory.





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



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:

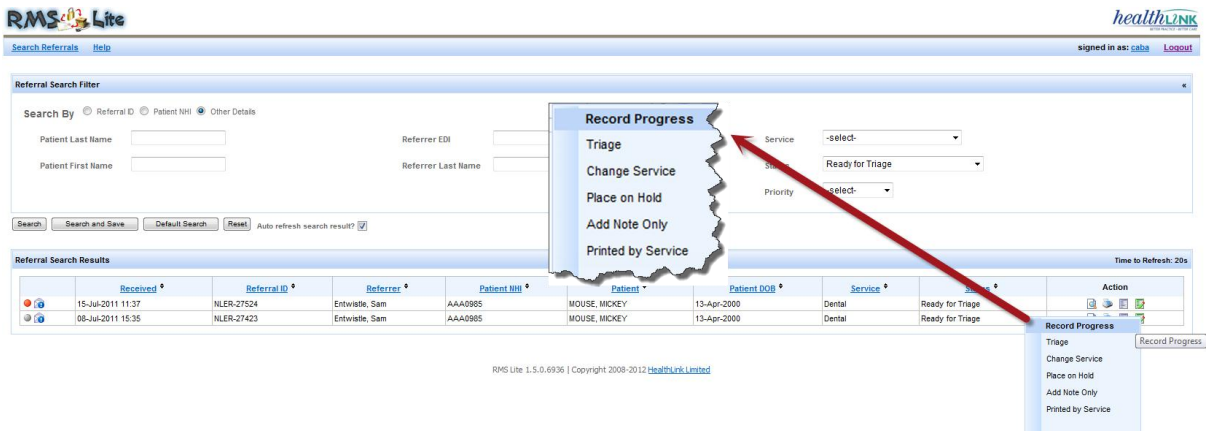
- ✓ Perform searches on all open eReferrals
- ✓ Set up a default search of all eReferrals in a 'Ready for Triage', 'Triage Completed' or 'On Hold' status
- ✓ View all the Progress Notes and Triage Information in the 'View Referral' screen
- ✓ Select 'Triage', 'Change Service', 'Add Note Only', 'Place 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

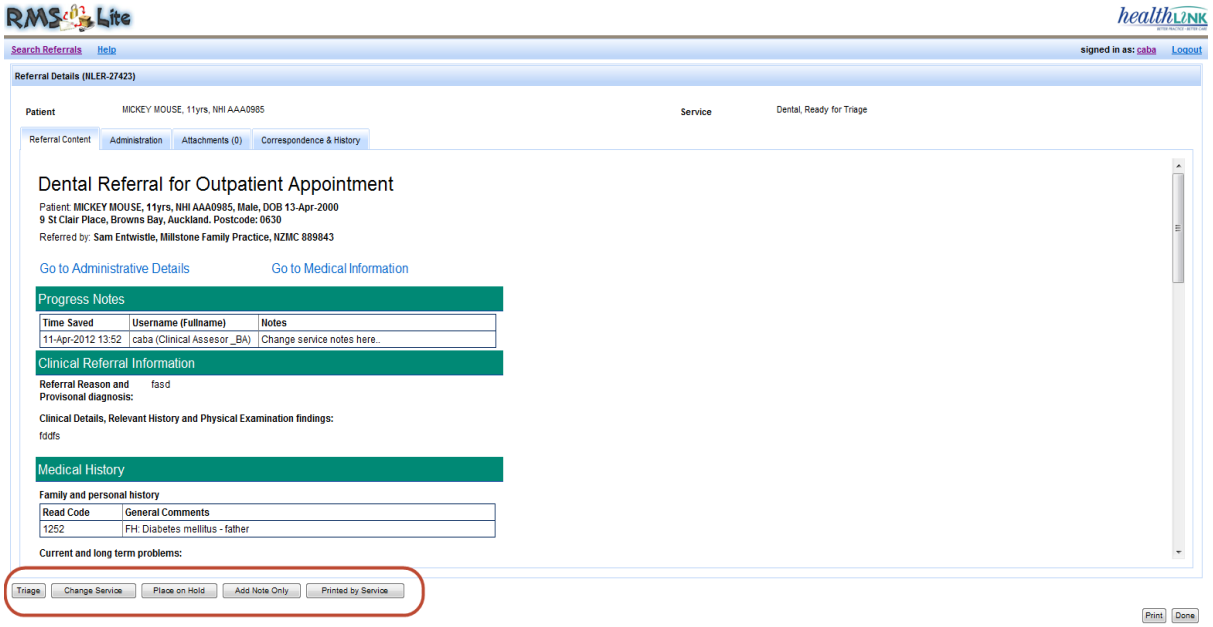
The main functions of what this user role is able to perform are displayed in the following screenshot displays.



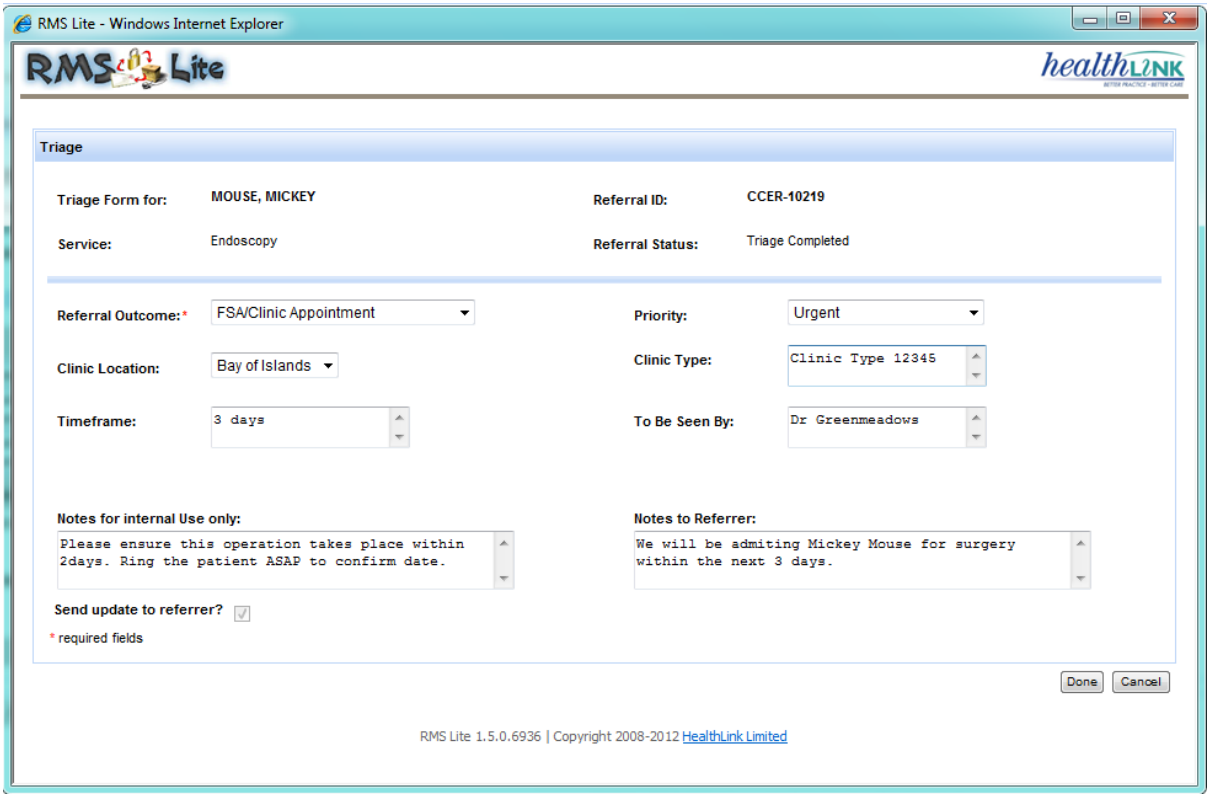
By clicking on **'Record Progress'** or the **'View Document Icon'** you will be presented with several options

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

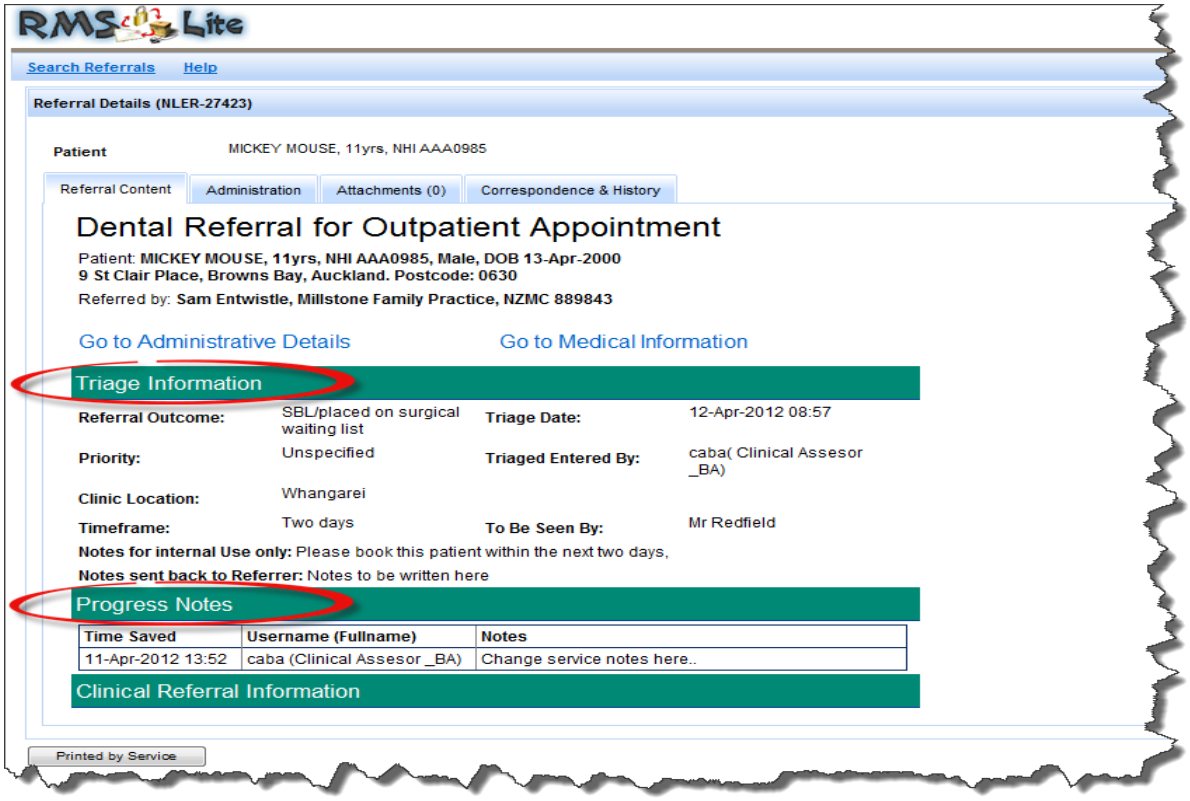
You are presented with the same options when 'View Document icon' is selected.



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



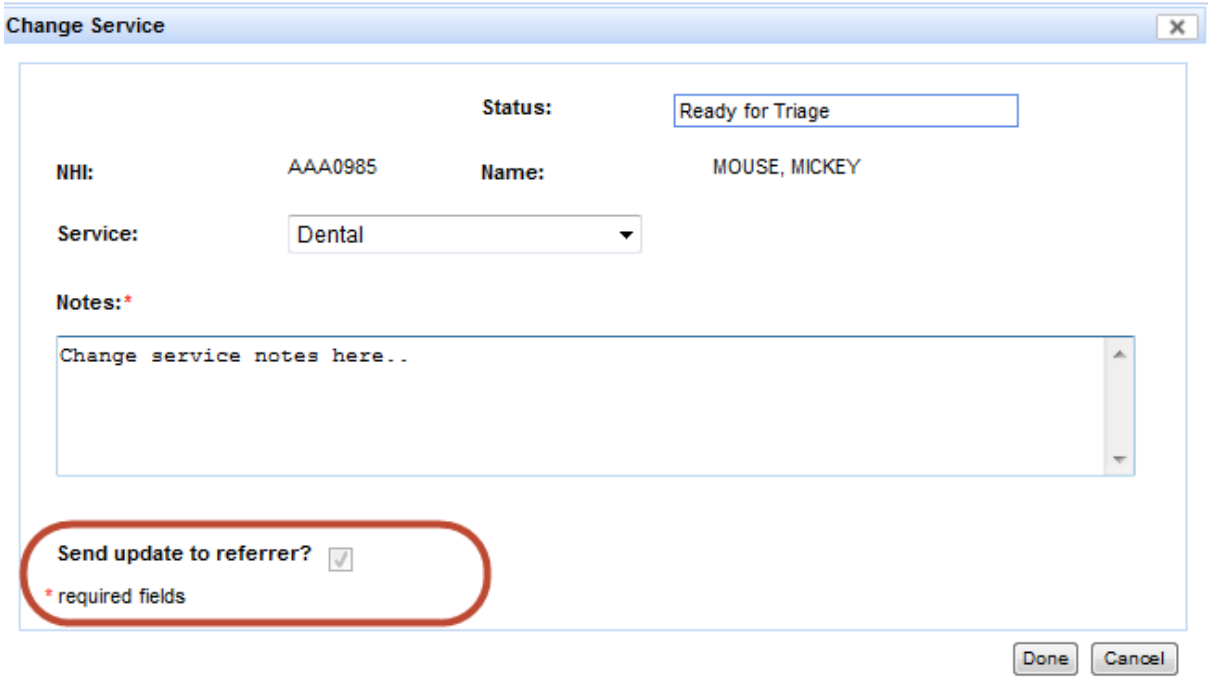
NEW **Triage Information and Progress notes are updated and displayed in the Referral.** This information is viewed internally. These updates can be seen when using the role of a Booking Clerk.



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.

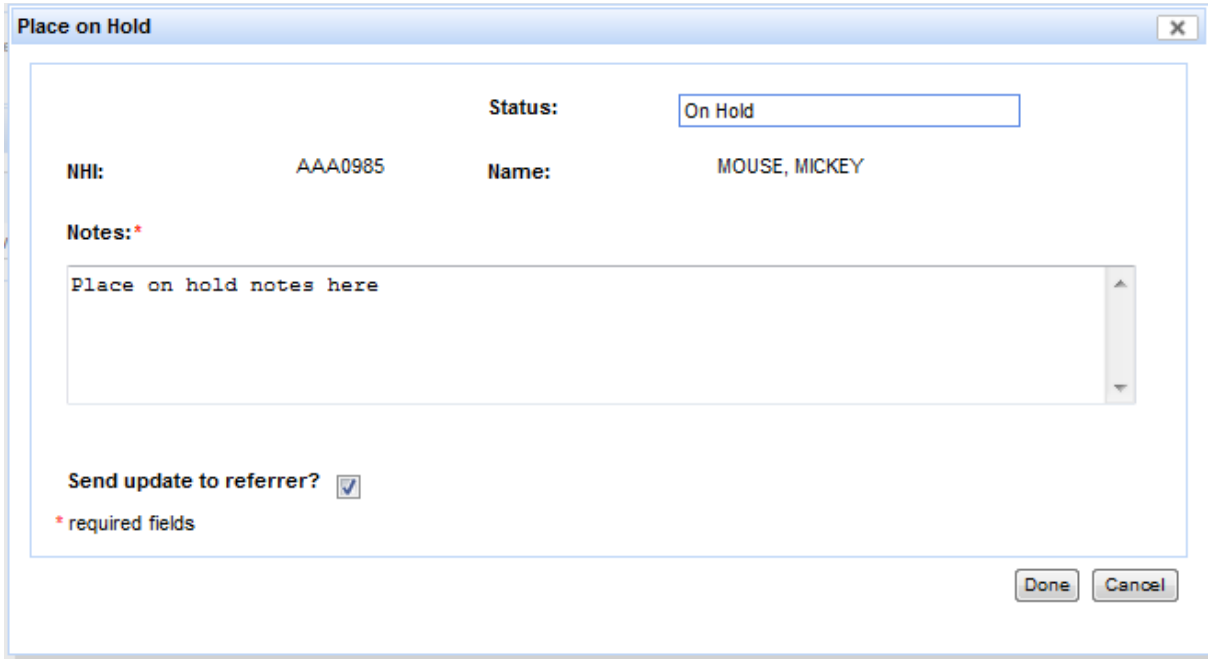
CHANGE SERVICE – Add relevant notes in the required fields and click **'Done'** when completed.

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

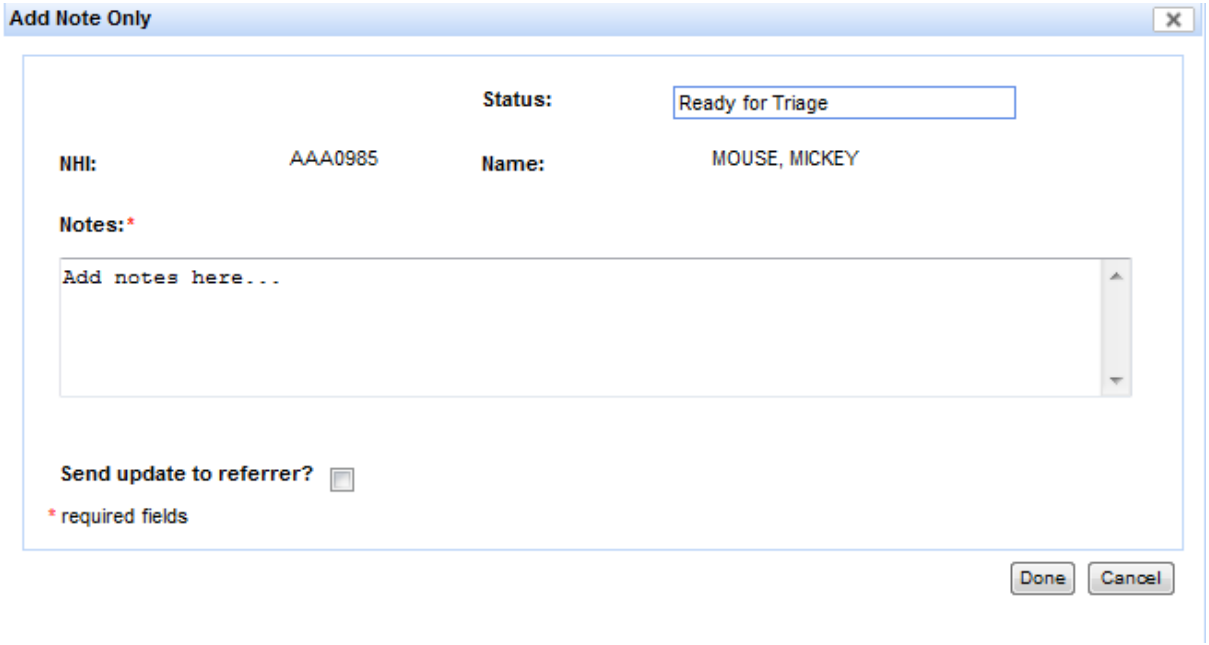


PLACE ON HOLD – Add relevant notes in the required fields and click **'Done'** when completed.

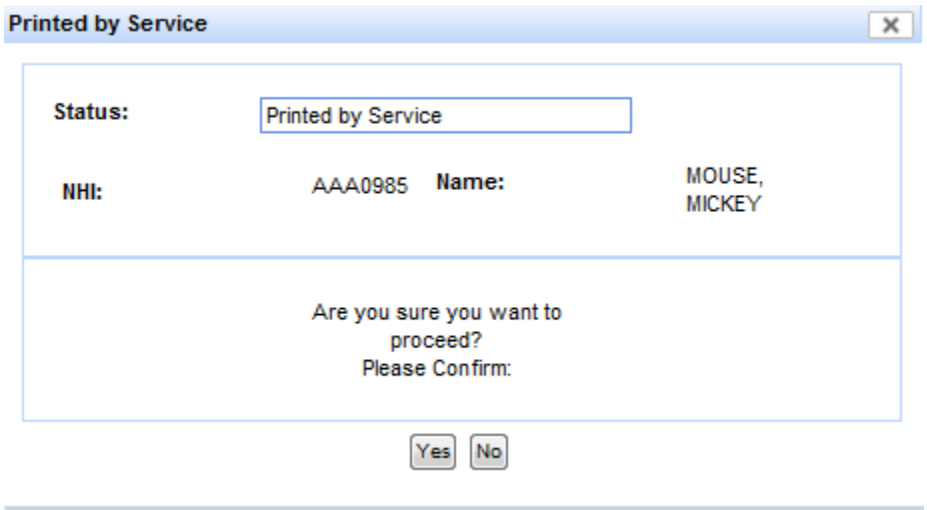
The ***'Send update to referrer?'*** tick box can is ticked by default. You may un-tick if required.



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



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.



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:

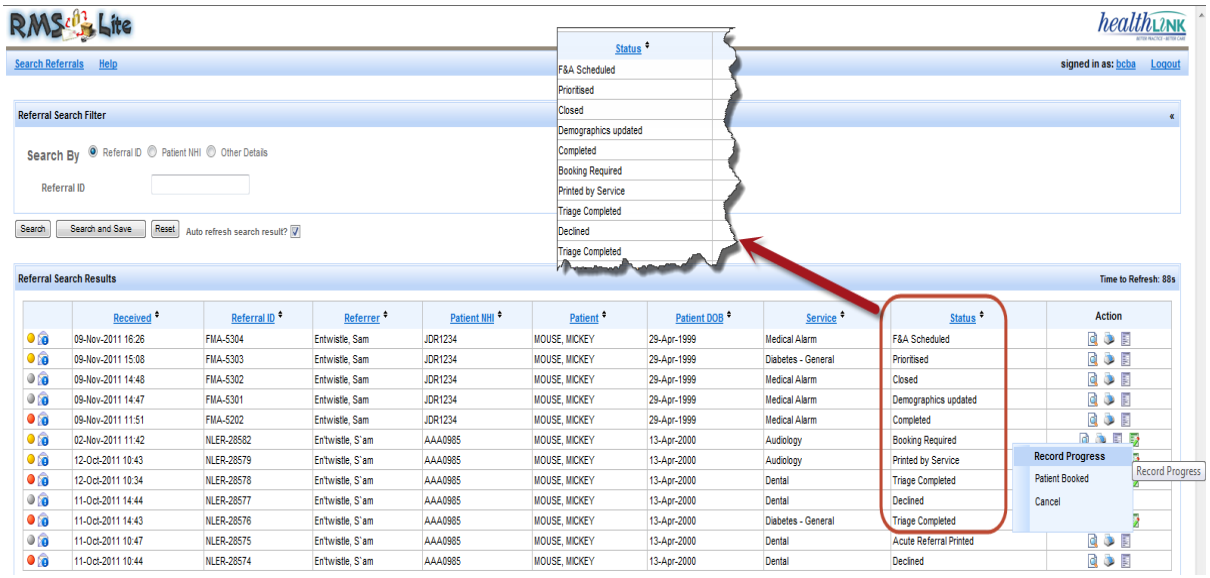
- ✗ Change a referral's status to any other value other than those listed above
- ✗ Triage a referral

10.4.1 BOOKING CLERK ROLE – USER VIEWS

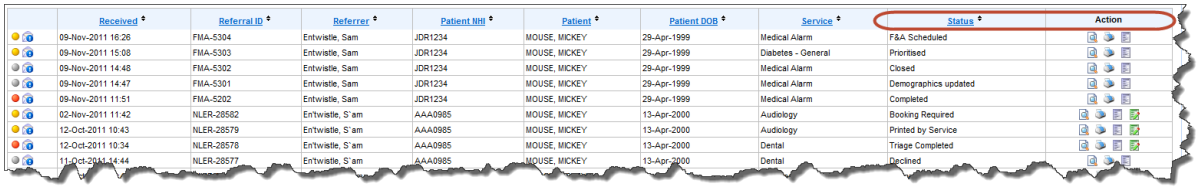
The status of the eReferral will determine what functions are available to be selected in the Action column.

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.

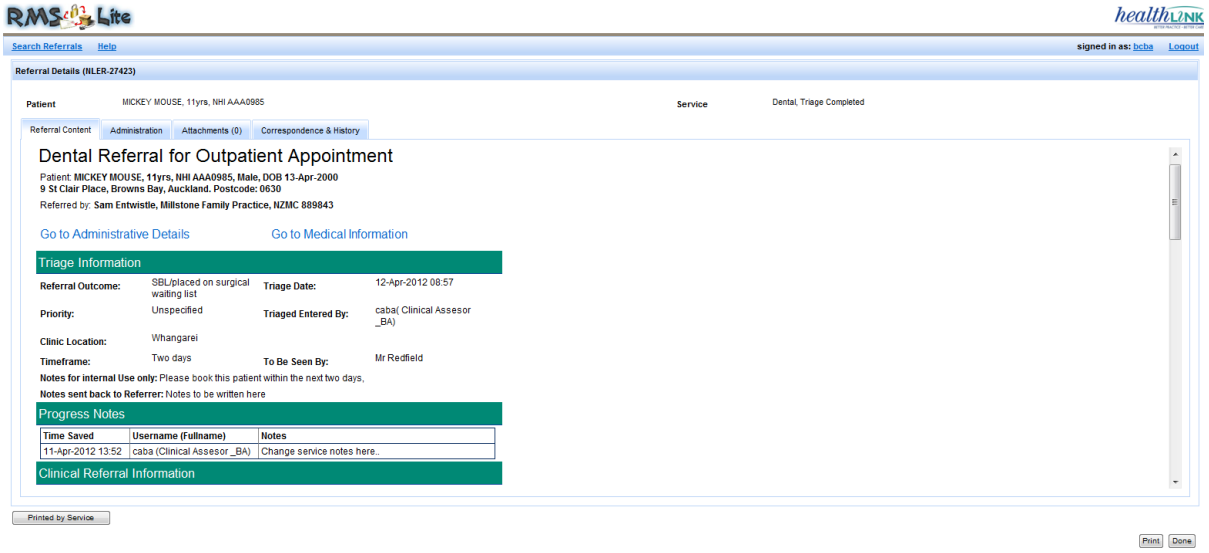
When the **'Action'** column presents only with these icons



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.



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.


RMS Lite
healthLINK
Search Referrals
Help
signed in as: bcba
Logout
Referral Details (NLER-27423)
Patient
MICKEY MOUSE, 11yrs, NHI AAA0985
Service
Dental, Triage Completed
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
Print
Done