

Access and Set Up - Managing Inpatient Referrals



Digital Health
CONNECTING BEST CARE

Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

Manage Inpatient Referrals in EMR

Definitions:

Task Manager – A useful tool for managing non-urgent ward tasks and receiving/reviewing/responding to inpatient consult referrals



Important

- This will NOT replace the paging system or verbal communication with colleagues

You will only need to set up your list once

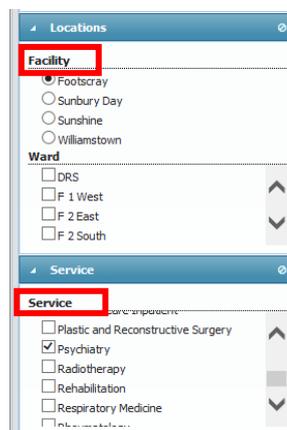
1. Click on **Task Manager** in the navigational toolbar.



2. Click **+** (New List)



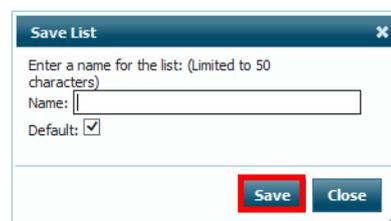
3. Select **Location (Facility)** and **Service**



4. Click **Save**



5. **Save List window opens.** Name your list. Click **Save**



Important

- Any tasks that have been sent to **your unit** should populate. (These are all “Orders” that have been placed by others and sent to your unit, not you as an individual doctor).

6. Click on Patient Name and Details window opens.

The screenshot shows a 'Current Tasks' list with columns for Patient Information, Priority, Required By, Task, Action, and Last 3 Comments. The task for TESTWHS MO1, PATIENT01 MS is highlighted. To the right, the 'Details' window is open, showing patient information such as Name, DOB, Age, Gender, UR#, FID, Visit Reason, Admit/Reg, Service, LOS, and Loc.

7. Click on **Handover**, **Task Details** or **Comments** (communicate with the team) to see further information, e.g. reason for consult.

A row of four buttons: Patient Information, Handover, Task Details, and Comments.

8. Action options are:

- a) "Acknowledge" to notify the referring clinician their task has been viewed but not yet completed.
- b) "Complete" when you have completed the task and want it to disappear from this list.
- c) "Cancel" for reasons including inappropriate referral, ask no longer necessary, patient refused etc.

An 'Action' menu with three radio button options: Acknowledge, Complete, and Cancel.

9. Click the patient's name to view their medical record.

A screenshot of a table showing patient information and tasks. The patient TESTWHS MO1, PATIENT01 MS is highlighted. The task 'Antimicrobial (AMS) Medication Review- Doctor Order' is also highlighted, with the status 'Task Acknowledged' visible in the comments column.

10. Click Orders from the Table of Contents (TOC).

Buttons for 'Orders and Referrals' and '+ Add'.

11. Locate the Referral order, you can see that the order has been acknowledged.

A screenshot of the 'Orders and Referrals' table. The order 'Antimicrobial (AMS) Medication Review- Doctor Order' is highlighted, with the status 'Ordered' and 'Task Acknowledged' visible.

12. Right click on the order and select order information for further details

A screenshot of the 'Order Information' window for the referral order. It shows patient details, allergies, and the order details, including the requested start date/time, service, priority, and special instructions.

13. Go back to Task Manager and tick complete once consult is finished. If planning to review or follow up, leave unchecked and the referral will remain on your list.