

Referrals - Adding Internal & External Referrals for Triage



This Quick Reference Guide will explain how to:

Add an internal and external referral for triage



Important

To ensure the referral is sent for triage, the **Referral Status/Priority** and **Specialty** fields must be completed correctly.

* Referral Status/Priority:
Triage Required

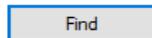
* Specialty:
ASC Nurse Triage

Internal Referral

1. On **Scheduling Appointment Book**, click the **Request List Inquiry** button



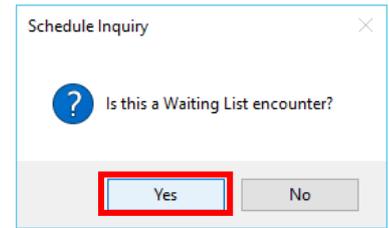
2. **Schedule Inquiry** window will open
 - **Inquiry: Referrals Add Encounter**
 - **Request List Queues: ASC Surgical & Critical Care Services**
 - Click **Find**



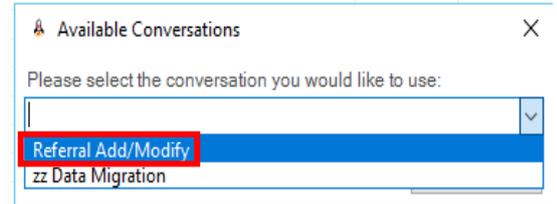
3. Right click on patient
 - **Person > Add Encounter**



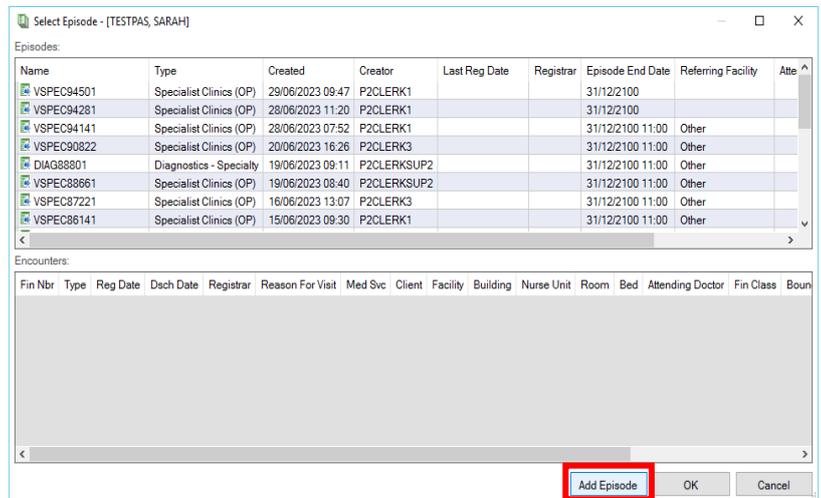
4. Schedule Inquiry window pop up open, select **Yes**



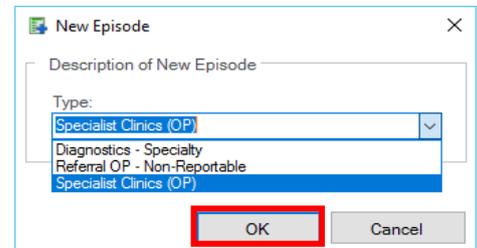
5. Available Conversations window opens, select **Referral Add/Modify**



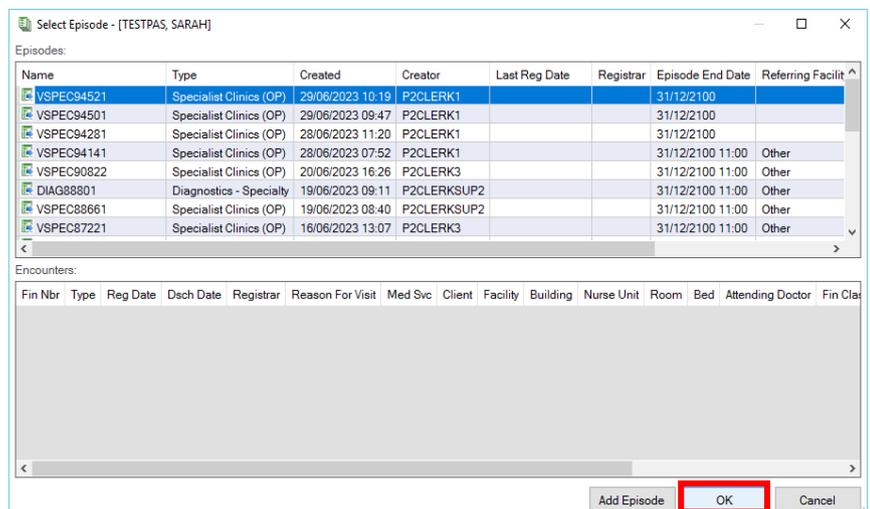
6. Click **Add Episode**



- **New Episode** window opens. Select **Specialist Clinics (OP)** from the list then click **OK**



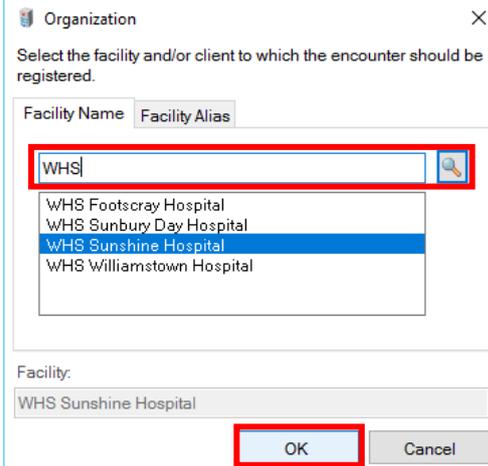
- Select the created episode, see the **Created** time and **Creator** to ensure the correct one is selected and Click **OK**





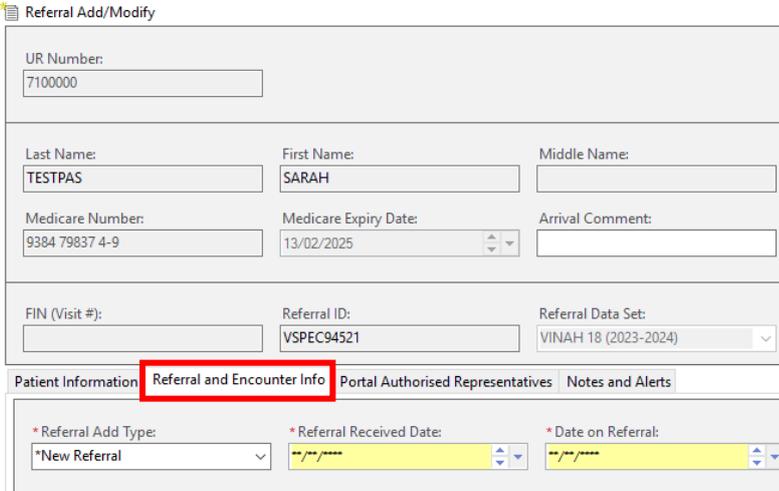
7. Select the relevant clinic campus

- Enter "WHS"
- Click the **magnifying glass** 
- Select the campus
- Click **OK**



The dialog box titled "Organization" allows selecting a facility. It has two tabs: "Facility Name" and "Facility Alias". The "Facility Name" tab is active, showing a search input field with "WHS" entered and a magnifying glass icon. Below the search field is a list of results: "WHS Footscray Hospital", "WHS Sunbury Day Hospital", "WHS Sunshine Hospital" (highlighted in blue), and "WHS Williamstown Hospital". Below the list is a "Facility:" label and a text field containing "WHS Sunshine Hospital". At the bottom right are "OK" and "Cancel" buttons, both highlighted with red boxes.

8. Referral Add/Modify window opens, select the Referral and Encounter Info tab



The "Referral Add/Modify" window contains several fields: "UR Number" (7100000), "Last Name" (TESTPAS), "First Name" (SARAH), "Middle Name" (empty), "Medicare Number" (9384 79837 4-9), "Medicare Expiry Date" (13/02/2025), "Arrival Comment" (empty), "FIN (Visit #)" (empty), "Referral ID" (VSPEC94521), and "Referral Data Set" (VINAH 18 (2023-2024)). Below these fields are tabs: "Patient Information", "Referral and Encounter Info" (highlighted with a red box), "Portal Authorised Representatives", and "Notes and Alerts". Under the "Referral and Encounter Info" tab, there are three mandatory fields marked with an asterisk and highlighted in yellow: "* Referral Add Type" (set to "New Referral"), "* Referral Received Date" (empty), and "* Date on Referral" (empty).

9. Complete the fields as required, **mandatory fields** are marked with an * and **highlighted in yellow**

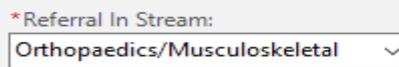
- **Referral Type: Internal**
- **Referral Stats/Priority: Triage Required**
- **Referral In Stream and Referral (Episode) Stream:** select the department where the referral is to be sent for triage
- **Specialty: ASC Nurse Triage**
- **Account Class: Medicare Bulk Bill / Public: Eligible**
- Once all necessary fields are entered, click **Complete**



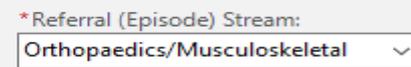
Referral Type: Internal



* Referral Status/Priority: Triage Required



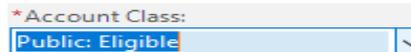
* Referral In Stream: Orthopaedics/Musculoskeletal



* Referral (Episode) Stream: Orthopaedics/Musculoskeletal



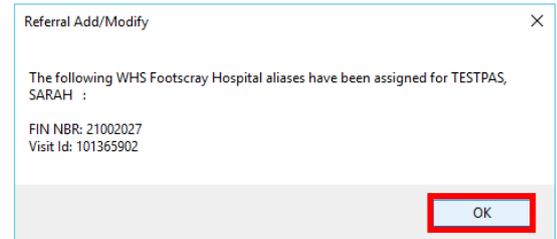
* Specialty: ASC Nurse Triage



* Account Class: Public: Eligible



- Click **OK** in the following window detailing the identification numbers



10. An **Internal Referral** has been added and it has dropped off the **Referral Add Encounter** worklist

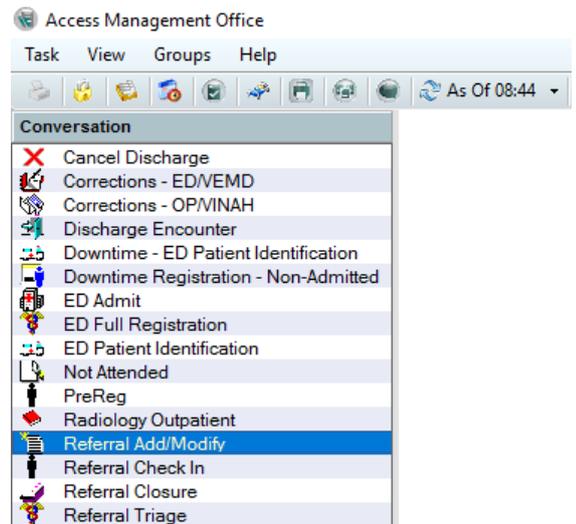


Handy Hint

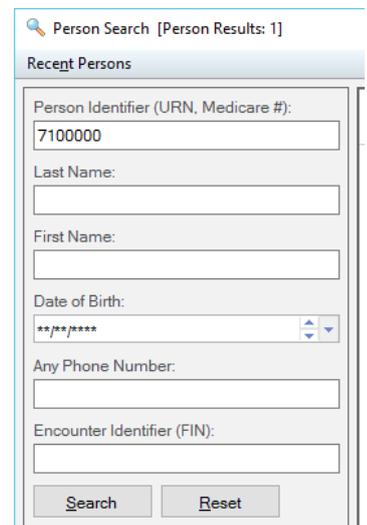
- Press **T** on the keyboard in fields that require a date to quickly enter today's date
- Some fields will flow through from the referral order
- Fields will also autocomplete depending on options chosen

External Referral

1. Open **PMOffice**
 - **Conversation > Referral Add/Modify**



2. **Search** for the patient using appropriate identifiers





- Click **Add Encounter** in the bottom right

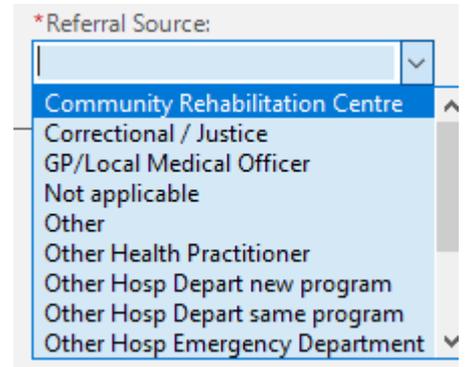


3. Follow *Steps 4 – 7* from adding an **Internal Referral**

- Choose **External** for the **Referral Type**



- Ensure the correct **Referral Source** is selected



4. An **External Referral** has been added for the patient