# eReferral Client Community/PHOs

# Coordinator User Manual







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# **1 GENERAL INFORMATION**

This section explains in general terms the system and the purpose for which it is intended.

# **1.1 System Overview**

The **eReferral Client** is an application run on Google Chrome or Internet Explorer. This application was created for the purpose of assisting in the transfer of electronic referrals (eReferral) and helping to manage the exchange of information between health providers.

# 1.2 Organisation of the Manual

This document aims to support users of the **eReferral Client** with information around the use of the application.

The following user guide contains five main sections:

- General Information
- System Summary
- Getting started
- Using the System
- Security

# 2 SYSTEM SUMMARY

## 2.1 System Configuration

The eReferral Client is a module in best practice, which operates on Google Chrome or Internet Explorer. After installation of the eReferral Client, no further configuration should be required.

Internet Explorer may need to be optimised to run the eReferral client, please contact 'your helpdesk' to do this.

#### 2.2 User Roles & Access Levels

eReferral Client has 9 different user roles/security groups:

Administrator, Coordinator, Service, Queue, Clinician, Reviewer, Viewer, Cancer Administrator and XML. The level of access for the user roles/security groups is managed by the Administrator (Super User)

#### 2.2.1 Coordinator

The Coordinator oversees the referral process and assigns each referral to the correct Clinician, Service or Queue. The Coordinator user will have full processing ability for all assigned specialties.

#### 2.2.2 Level of access

The following table contains the default level of access and process when a new eReferral Client Coordinator is set up.

|--|

<sup>&</sup>lt;sup>1</sup> An email notification is received every time the referral is updated and the status is changed

<sup>&</sup>lt;sup>2</sup> The referring GP is notified and a reply is sent by the relevant referral client user



Coordinator	✓	~	✓	~	~	Yes, if set up	✓
							<ul> <li>✓ = Yes</li> <li>× = No</li> </ul>

# **3** GETTING STARTED

#### 3.1 Access

eReferral Client runs on Google Chrome or Internet Explorer.

 $\bigcirc \oslash$ 

To access eReferral Client, click on the bestpractice link below

- 1) eReferral Client **TEST** environment
  - <u>https://pilot.bestpractice.org.nz</u> Used for training purpose
  - <u>https://pilot1.bestpractice.org.nz</u>
     Is where all new enhancements are loaded and is used for User Acceptance Training (UAT)
- 2) eReferral Client LIVE environment https://bestpractice.org.nz

# **4 USING THE SYSTEM**

# 4.1 Opening and Viewing eReferral Client

4.1.1 Enter Username and Password





#### Outstanding Referrals – Main Menu 4.1.2

Welcome Shelly Wad Not you? Chan	<b>Ihwa (Coordinator)</b> nge pass word Delegates Main Menu										
Referral Clientv3.0											
Context [al]											
Outstanding Referrals											
Print Reply F	File Refresh Show Notes	)									

Field Name	Field Description
Not you	Click to log out of application
Change Password	Change your password
Delegate	Assign delegates
Main Menu	Click to return back to the Outstanding Referrals screen
Context	Click to select Department/Service
Print	Print selected referrals
Reply	Reply to referrer
File	File referral
Refresh	Refresh details
Show Notes	Show referral note

# 4.2 Outstanding Referrals Summary Screen

W Si No	'elcome hellyWa tyoa?Cha	dhwa (Co	o <b>ordinator)</b> d Delegates Ma	in Mena								<b>6</b>	<b>est</b> practice
Refer													
C	ontext [a	al)		✓ [all]		~							
Outsta	nding Refe	errais											
Print	Reply	File	Refresh Show	w Notes									
	rt by	×											Search 🔎 🔽
U	rgency 🏺	Status	, Date	Service	Referrer 🗘	Referrer nam e	Patient 🖗	Patient nam e	, Reason for referral	Date queued +	Date returned 🗘	Triage 🗘	Triage queue
		Printed	11/01/19 11:35	Asthma	Acme Medica	Demo Midlands Health	ZAA2566	SMITH, ANRULD	Evolution v1.14 update test				
		Read	08/01/19 17:54	Paediatric Medicine	Waikato DHB	Christine Scott	a	HSL Taranaki Set up test, a	HSL Taranaki Set up test	08/01/19	08/01/19	1	Queued to Taranaki Paeds Tria
		Replied	08/01/19 17:52	Paediatric Medicine	Waikato DHB	Christine Scott	a	Taranaki test 4, a	Taranaki test 4			2	
		Read	08/01/19 17:51	Paediatric Medicine	Waikato DHB	Christine Scott	a	Taranaki test 3, a	Taranaki test 3			Dec ine	
		Read	08/01/19 17:50	Paediatric Medicine	Waikato DHB	Christine Scott	s	Taranaki Test 2, s	Taranaki test 2	15/01/19			Queued to Taranaki Paeds Triag
		Read	08/01/19 17:49	Paediatric Medicine	Waikato DHB	Christine Scott	s	Taranaki Test 1, t	Taranaki Test 1	15/01/19			Queued to Taranaki Paeds Triag

Field Name	Field Description
Urgency	Urgency/Priority generated by the referrer
Status	System generated status of the referral
Date	System generated Date/Time status of referral
Service	Service/Speciality referred to
Referrer Org.	Name of the organisation/Health centre
Referrer name	Name of the referrer
Patient NHI	Patient National Health Index (unique identifier)
Patient name	Patient full name
Reason for referral	Reason indicated by the referrer (free-text)
Date queued to service	System generated Date indicator when the referral was forwarded to



	a service
Date returned to coordinator	System generated Date indicator when the referral was returned to
	the coordinator
Triage level	Triage level generated by the co-ordinator OR service specialist
Triage queue	Indicates referral is now "Queued to service"

# 4.3 e-Referrals – How To

# 4.3.1 Context

Context selection box will have one or multiple department options.

You can select a specific department OR leave the Department and Service settings as ALL applicable

	Welcome Shelly War Not you? Che	dhwa (Co	ordinator) Delegates 1											
Re	Referral Clientv3.0													
Context [al] V  [al] V														
Out	Dutstanding Referrals													
Pr	Print Reply File Refresh Show Notes													
	Sot by													
	Urgency 🏺	Status 🗘	Date	Service	Referrer org.	\$ ¥	Referrer name	Ŷ	Patient ≑ NHI ∀	Patient name	¢ Y	Reason for referral	Y	
	•	Unread	19/09/18 15:1	0 Dental	A cme Medical Centre		Demo Midlands Health		ABC1235	Gump, Forrest		Support for dementia		
	•	Unread	03/09/18 11:0	9 Bariatric gastric Sleeve	A cme Medical Centre		Demo Midlands Health		ABC1235	Gump, Forrest		Bariatric gastric sleeve surgery		
	•	Unread	29/05/18 12:0	4 Asthma	A cme Medical Centre		Demo Midlands Health		ZAA 2566	SMITH, A RINOLD JOHN		test		
		Unread	29/05/18 10:1	1 A sthma	A cme Medical Centre		Demo Midlands Health		ZAA2566	SMITH, A RINOLD JOHN		test		

# 4.3.2 **Status**

#### Filter unread referrals

	Weicome Shelly W	achwa (c	Coordinator)	etters:											
Re	lerral Cher														
	Context	[el]		<b>~</b> []#		v									
0ut	sanding R	eferrais													
Pr	int Reply	File	Rebesh Sho	er Notes											
	Sort har	V						100 C							
	Urgency	Status	Date 🤤	Service	÷.	Referrer org.	Ŷ	Referrer name	Ŷ	Patient	ų V	Patient name	3	Reason for referral	
		Unread	1909/18 15:10	Dental		A cire Medical Centre		Cerro Midands Health		ABC1235		Gump. Forrest		Support for dementia	
		Unread	0309/1811.09	Barutric gastric Sleeve		A cree Medical Centre		Deno Midanda Heath		ABC1235		Gung, Forrest		Barlathic gastric slew e surgery	
		Urread	2905/18 12:04	Asthra		A crea Medical Centre		Cerre Midlands Health		ZAA2566		SMITH ARNOLD JOHN		test	
	•	Uwead	2905/18 10 11	A sthma		A citre Medical Centre		Demp Midlands Health		ZAA2566		SMITH ARNOLD JOHN		test	

# 4.3.3 Unread

Click on a referral to begin triaging

Sort by	~									last 2	referrals	Search P	
Urgency 🏺	Status 🏺	Date 🍦	Service $\begin{array}{c} \bullet\\ \forall\end{array}$	Referrer org. 💡	Referrer name	Patient ≎ NHI V	Patient name	Reason for referral	Date queued to service	Date returned to coordinator V	Triage ≑ level ¥	Triage queue	Ŷ
•	Unread	08/12/17 12:58	Asthma	A cme Medical Centre	Jason Hall	ZAN0143	LOWNDES, Jessica	x					

# 4.3.4 View Referral Details

Click on the <u>View</u>.... button to see the attached referral details. This will open the referral in a separate tab. To open the referral in a new window, right click on the <u>View</u>... link and select open in new window.



Welcome Shelly Wad Not you? Char	<b>Ihwa (Coordinator)</b> Ige pass word Delegates Main Menu			
Referral Clientv3				
Context [al]	✓ [al]	~		
Outstanding Refe				
Print Reply F	File Forward Refresh Clo	ise		
Sort by	✓ Message			
Jessica LOW	NDES	DoB: 26 Mar 1996	(Female)	NHI# ZAN0143
Asthma Re Referring: Jas	<b>ferral</b> son Hall. (Acme Medical Centr	e) NZMC# 99992		
Attachment	#1: 310461_002.html			(HTML) <u>View</u>
Referral ID	20870			
Urgency	Routine			
Status	Read			
Date / Time	08 Dec 2017 12:58			
Organis ation	Waikato District Health	Board		
Referral Cent	re Referral Coordination C	entre		
Specialty	Asthma			
Notes 🛨	<u>כ</u>			
Audit Trail				
Read:	21-Jan-2019 09:36			ShellyWadhwa
Sent:	08-Dec-2017 12:58			Jason Hall

# Add a Note

Click on the blue button 🕖 beside 'Notes' to add a note for the Coordinator (please note that the Coordinator will not receive a notification when a note is added. If the note is urgent, it should be communicated via email or phone)

# Audit Trail

Shows who has accessed the referral, when it was accessed and any comments between the Coordinator and Referrer



#### 4.3.5 **Check referral details**

Please ensure all data is accurate and patient is eligible for treatment.

Refe	erralTo			
	Name	Outpatient Referral (RCC)		
	Department			
	Specialty	Asthma		
	Urgency	Routine		
	Re:			
	Company	Referral Coordination Centre		
	Address	Portacom Village		
		Waikato Hospital		
		Hamilton		
	Phone Number	07 839 8899		
	Fax Number	07 839 8817		
	Referral Sent	08/12/2017 12:58		
Pati	ent Details			
	Family Name	LOWNDES	Title	n/a
	FirstName(s)	Jessica	Gender	Female
	Preferred Name(s)		NHI	ZAN0143
	Date of Birth	26/03/1996	Age	21
	Address	45, Cambridge Terrace		
		Kaiti Cisharna		
	Deet Cede	4040		
	Post Code	4010	Country of Dioth	- (-
	Mobile Phone	n/a	Country of birth	n/a European NZ
		n/a	Ethnicity	European - NZ
	Fax	n/a	Ethnicity 2	n/a
	WORK Phone	n/a	Ethnicity 3	n/a
	Patient / Guardian gi	ven consent for this referral	Yes	
	5			
	Interpreter required	No		
	Interpreter Commen	nt n/a		
ACC	;			
	Is this referral the re	esult of an Accident?	No	
Clini	ical Information			
	Reason for referral/	х		
	Dagnosis / Problem	×		
	Long Torm Modic -th		Depent Media -	-

Click the X to close





# 4.3.6 Reply to referrer – Accept/Decline referral

Click on the Reply button

Reply message will go back to the referrer.

Referral Client v3.0				
Context [al]	✓ [al]		~	
Outstanding Referrals				
Print Reply File	Forward Queue Refresh Close enter any comments			
Test 1 HP		^	1950	(Female)
Adult-Pr Referring:	1. I.	~	rral	
Attachme Cor	tinue Cancel			
Referral ID	150305			
Urgency	Urgent			
Status	Read			
Date / Time	27 Feb 2019 10:38			

*Triage status will change to "Replied"* 

# 4.4 Forward

Forward allows the user to forward eReferral to **another service** 

Triage status will change to "Redirected"

Outs	tanding Referrals		
Pri	int Reply File	Forward         Queue         Refresh         Close           Adult-Primary Mental Health Co-ordination Service         OOPD Service (Hanilton and surrounds)	
	Test 1 HPHO		0 (Fe
	Adult-Primary Me Referring: testuser10	ental Health Co-ordination Service Referral D. (Leamington Medical Centre) NZMC# ""	
	Attachment #1: 8	94611_002.html	
	ReferralID	150305	

# 4.5 Queue

Queue allows the user to forward the referral to the service specific queue Triage status will change to "Queued"

Outstanding Referrals								
Print Reply File	Forward Queue Refresh Close							
Sort by	Anaru Haumaha BIT Counselling Workx Heart Counselling	0	(Male)					
Adult-Primary Me	Phoenix Psychology		(maic)					
Attachment #1: 8	☐ PMH Queue 2 ☐ Triskele Assessment & Therapy Services							
Referral ID 150960								
	Advice only							





# 4.5.1 Practitioner/Clinician – Service Queue

Outstanding Referrals	
Print Reply File Forward C	Queue Coordinator Refresh Close
Sort by	
Test 1 HPHO	DoB: 01 Jan 1950
Adult-Primary Mental Healt Referring: testuser10. (Leaming	h Co-ordination Service Referral ton Medical Centre) NZMC# ""
Atta a hara ant 114 - 004044 - 000	h fa da a d

## **Coordinator**

Coordinator function allows the practitioner/clinician to send the referral back to the coordinator. Referral will be removed from the Practitioner/Clinician queue

Referral will acquire "Returned" status

	Urgency 🏺	Status 🍦	Date 🗘	Service $\stackrel{\blacklozenge}{\vee}$	Referrer ≑ org. ४४	Referrer name 🏺	Patient ≑ NHI ¥	Patient name 🗘	Reason for referral V	Date queued to service	Date returned to coordinator
		Returned	27/02/19 10:38	A dult-Primary Mental	Leamingto	testuser10	GHI1111	HPHO, Test 1	?A nxiety	27/02/19	13/03/19

# 4.6 File

File will allow you to file the referral once you are finished with processing it. This will remove the referral from the eReferral client view. However, you can retrieve it by searching by "including filed" or "actioned by me" enhanced search options.

	Sort by	~							
	Urgency $\frac{2}{7}$	Status $\Rightarrow$	Date ♀	Service $\begin{array}{c} \clubsuit \\ Y \end{array}$	Referrer ¢ org.  √	Referrer name 🔶	Patient ♦ NHI ♥	Patient name 🗘	Reason for referral $\gamma$
l		Read	12/03/19 09:20	Audiology	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	test

#### Click on File

Outstanding Referrals				
Print Reply File	Forward Refresh Close			
Sort by	Message			
Patient Practice		DoB: 01 Jan 1990	(Male)	NHI# ABC1235
Audiology Refe Referring: Demo M	<b>rral</b> lidlands Health. (Acme Medical C	Centre) NZMC# ""		

# Click OK & Click Close

Outstanding Referrals										
Print Reply File Forward Ref	resh									
Sort by V Message	Message from webpage									
Patient Practice	, , ,	NHI# ABC1235								
Audiology Referral Referring: Demo Midlands Health.	WARNING! Referral has not been printed									
Attachment #1: 896720_002.h	Referral has not been replied to Click OK to continue.	(HTML) <u>View</u>								
Referral ID 150866										
Urgency Urgent										
Status Read Date / Time 12 Mar 2019 (	Cancel									



Outs	tanding Ref	errals								
Pr	Print Reply File Refresh Show Notes									
	Sort by	~								
	Urgency $\frac{2}{7}$	Status 🗘	Date 🗘	Service $\begin{tabular}{c} $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $$	Referrer ≑ org. ∀	Referrer name 🕴	Patient ≑ NHI Ƴ	Patient name	Reason for referral $\gamma$	
		Filed	12/03/19 09:20	Audiology	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	test	

# Refresh page

# Result: eReferral task has been filed

Out	utstanding Referrals									
P	Print Reply File Refresh Show Notes									
	Sort by 🗸									
	Urgency $\frac{2}{\gamma}$	Status 🗘	Date 🗘	Service $\begin{array}{c} \clubsuit\\ Y\end{array}$	Referrer ¢ org. ∀	Referrer name 🝦	Patient ≑ NHI ∀	Patient name 🔶	Reason for referral $\gamma$	
		Read	12/03/19 09:11	Dermatology - General	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	Test	
		Unread	12/03/19 08:38	Asthma	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	Test	
		Dead	12/03/10 08:33	Cardiology	Acme Medice	Demo Midlande Health	ABC1235	Gump Finns	teet	

# Click on Extended Search

Ref	Referral Client v3.0																
	Context [a	1]		✓ [all]		~											
Outs	standing Ref	errals															
Pri	int Reply	File F	Refresh Show	v Notes													
	Sort by	~											last 5 referrals		✓ S	earch	_
	Urgency $\frac{2}{7}$	Status 🗘	Date ↓	Service	Referrer 🗘	Referrer name 🗘	Patient ≑ NHI √	Patient name	¢ Y	Reason for referral $\gamma$	Date queued to service	¢ Ƴ	Date returned to coordinator	♦ Tria V leve	ge ≑ I Y	Triage queue	Ý
	-	Read	12/03/19 09:11	Dermatology - Gene	a Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient		Test							
		Unread	12/03/19 08:38	Asthma	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest		Test							
		Read	12/03/19 08:33	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Fiona		test							

Re	Referral Client v3.0												
	Context [a	]		✓ [all]		<b>~</b>							
Out	Outstanding Referrals - Extended Search is Active												
Pr	Print Reply File Clear Refresh Show Notes												
	Sort by	~											
	Urgency $\stackrel{\diamondsuit}{\vee}_{V}$	Status 🗘	Date ♀	Service $\begin{tabular}{c} $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $$	Referrer ≑ org. ∀	Referrer name 🔶	Patient ≑ NHI Ƴ	Patient name	Reason for referral	7 D			
		Recalled	12/04/19 12:30	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Baby	test	00			
		Unread	12/04/19 12:25	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Fiona	test				
	•	Unread	12/04/19 12:22	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	test				
		Read	11/04/19 12:05	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	test				
	•	Read	28/03/19 16:02	Strength and Balance	Acme Medica	Demo Midlands Health	ABC1235	DUCK, JILL	Test Record please ignor	e			
		Read	12/03/19 11:11	Strength and Balance	Acme Medica	Demo Midlands Health	ABC1235	DUCK, JILL	Test - please ignore				
		Replied	12/03/19 10:56	Endocrinology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	Test				
		Filed	12/03/19 09:20	Audiology	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	test				
		Read	12/03/19 09:11	Dermatology - General	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	Test				

# 5 eReferral Client features

# **New Referral Alert**

A red alert will flash across the screen when a new referral has arrived. This alert will only occur if the user is currently logged in.

# Viewing referrals in edit mode



All referrals will be opened in edit mode. The status of the referral will update as per current state, depending on the action of the user.

## **Referral Summary Alert**

When launching the eReferral Client, an alert will appear if there are active eReferrals (i.e. not filed) for the current patient.

#### **Visibility of Referral**

Users can view all referrals that they have actioned on an ongoing basis. By default, those that have been actioned should not display within their queue, however will be accessible via the search function.

# 5.1 Sorting and Filtering eReferrals using the Column Headings

Referral Clie														
Context	[all]		✓ [all]		~									
utstanding	Referrals													
Print Rep	ly File	Refresh S	Show Notes											
Sort by	~												[	Search 🔎 🚺
Urgency	$\frac{2}{Y}$ Status $\frac{2}{Y}$	Date 🍦	Service 🗘	Referrer org.	Referrer na	me 🍦	Patient ≑ NHI ¥	Patient name	Ŷ	Reason for referral 🛛 😽	Date queued to service	Date returned to coordinator	Triage devel	Triage queue
	Read	• equals				nds Health	ABC1234	JACOBS, JAYNE	E	BPAC TEST - DON'T TOU			1	
]	Read	O loss than				ott	AAC1234	MOUSE, MINNIE	c	d				
	Pending in	O groater t	han		-	airweather	ABC1234	MOUSE, MARY-GRACE	t	test				
] 🔳	Read	Cleater			a	nds Health	ABC1234	MOUSE, MARY-GRACE	t	test			5	
] 🛛	Read	Detween				TestGP3	RRR7777	Sarah, Peters	t	testing	28/01/16		2	Queued to Physiotherapy Ser
] 🛛	Response			Clear	OK	TestGP3	FGH4587	Peter, Peters	F	Physio required	28/01/16	28/01/16	2	Queued to Physiotherapy Ser
	Read	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato	TestGP3	RYT8457	Smith, John	t	test	28/01/16	28/01/16	2	
]	Read	27/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	CCE8305	PILOT, JANE	0	Consideration for Terminati				
] 📕	Read	26/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	AAA9998	MOUSE, DAISIE	0	Consideration for Terminati				
]	Read	25/01/16	Cardiology	Acme Medica	Demo Midla	nds Health	FKK7074	SMITH, ARNOLD JAMES	a	a test for messaging			<b>1</b>	
	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato	TestGP1	asdfasdfa	mr, Accept clinician	1	asdfasd	20/01/16	20/01/16	2	
]	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato	TestGP1	asdfasdf	MNr, Decline clinician	a	asdfas	20/01/16	20/01/16	Decline	
]	Read	20/01/16	Renal	Waikato DHB	Dr Waikato	TestGP1	asdfasdf	Mr, Accept RCC	1	asdfa			3	
	Read	20/01/16	Renal	Waikato DHB	Dr Waikato	TestGP1	asdfasdf	mr, Decline RCC	a	asdfasdfa			Decline	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato	TestGP1	asdfasdf	Scratcher, margaret	1	asdfasdf	20/01/16	20/01/16	<b>1</b>	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato	TestGP1	asdfasdf	Burns, Mr	8	asdf	20/01/16	20/01/16	Decline	
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	ZAA2701	SMITH, JENNY	0	Consideration for Terminati				
]	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	AAA7777	MOUSE, MINNIE	0	Consideration for Terminati				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	AAA7777	MOUSE, MINNIE	0	Consideration for Terminati				
]	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midla	nds Health	AAA7777	MOUSE, MINNIE	0	Consideration for Terminati				

Sorting and filtering can both be done through the column headings:

- 1. To **Sort**, hover over the column header icon that you wish to sort and click on it. To revert to original setting click on it again.
- 2. To **Filter**, in the column header, click on and select the criteria that you wish to appear in the results
- 3. Click OK
- 4. To remove the filter click on *solution*, click **Clear** then **OK**

# 5.2 Status of the referral

#### 5.2.1 Urgency Colours

Urgency column is an indicator of the urgency generated by the referrer.

Urgency Colour	Annotation
Orange	Urgent
Yellow	Semi-Urgent



Green	Routine
Purple	High suspicion of cancer
Red	Acute
Grey	Advice only
#	Number of attachments
Q	Queued to provider

Note: You can hover over the coloured box to show urgency and priority label

Welcome glen coordinator (Coordinator) Not you? Change password Delegates Main Meru												est practice
Referral Client v3.0 (l	Referral Client v3.0 (UAT)											
Context [all]			✓ [all]		~							
Outstanding Referrals												
Print Reply File	Refr	resh Sl	how Notes									
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Urgency 🏺 State	us 🍦 Dat	te 🍦	Service 🗘	Referrer org.	Referrer name 🛛 🏺	Patient NHI Y	Patient name	Reason for referral 💡	Date queued to service	Date returned to coordinator	Triage 🗘 level Y	Triage queue
Read	05/0	02/16	Cardiology	Acme Medica	Demo Midlands Health	ABC1234	JACOBS, JAYNE	BPAC TEST - DON'T TOU			1	
Read	04/0	02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE	d				
Pend	ing in 03/0	02/16	Cardiology	Hillcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test				
Read	03/0	02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			5	
🗌 🖸 Read	28/0	01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16		2	Queued to Physiotherapy Servi
🗌 🖸 Resp	onse 28/0	01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	FGH4587	Peter, Peters	Physio required	28/01/16	28/01/16	2	Queued to Physiotherapy Servi
Read	28/0	01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RYT8457	Smith, John	test	28/01/16	28/01/16	2	
Read	27/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	CCE8305	PILOT, JANE	Consideration for Terminati				
Read	26/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA9998	MOUSE, DAISIE	Consideration for Terminati				
Read	25/0	01/16	Cardiology	Acme Medica	Demo Midlands Health	FKK7074	SMITH, ARNOLD JAMES	a test for messaging			<b>1</b>	
Printe	ed 20/0	01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdfa	mr, Accept clinician	asdfasd	20/01/16	20/01/16	2	
Printe	ad 20/0	01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	MNr, Decline clinician	asdfas	20/01/16	20/01/16	Decline	
Read	20/0	01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Mr, Accept RCC	asdfa			3	
Read	20/0	01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	mr, Decline RCC	asdfasdfa			Decline	
Printe	ed 20/0	01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Scratcher, margaret	asdfasdf	20/01/16	20/01/16	1	
Printe	ed 20/0	01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Burns, Mr	asdf	20/01/16	20/01/16	Decline	
Read	19/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	ZAA2701	SMITH, JENNY	Consideration for Terminati				
Read	19/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminati				
Read	19/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminati				
Read	19/0	01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminati				
Page: [prev]   1   2   3 bestpractice © 2005 -	Page: [prev]   1   2   3   4   5   [next] bestpractice © 2005 - 2016 Support Line: 0800 633 236											

# 5.2.2 Referral Status Messages

Each referral has a status assigned to it. This status of the referral will update as per current state, depending on the action of the user. Referral status changes can be viewed in the referral audit trail.

Referral Status	Action	Displayed on eReferral Client	Displayed on eReferral form in the patient record
Unread	User has been notified but no action has been taken	Unread	Awaiting processing
Read	User highlights referral row and clicks to open in edit-mode (default)	Read	Read Show time and date
Printed	User prints from patient audit OR ticks box next to referral line and clicks print to bulk print	Printed	Printed Show time and date
Replied	User has redirected the referral back to Coordinator with a reply	Replied	Replied Show time and date (subject of reply)
Queued	Coordinator allocates referral	Queued to (Name of	Queued



Referral Status	Action	Displayed on eReferral Client	Displayed on eReferral form in the patient record
	to a Queue endpoint to be processed	Service)	Show time and date Queued to (name of Service/Department)
Redirected	User redirects referral to another Service/Specialty ("Assign to other Centres/Specialties" box must be set up and ticked)	Redirected	Redirected to (Name of Service/Department)
Returned	Queue has completed processing referral and it is returned to Coordinator	Returned	Returned Show time and date
Filed - Read	Read a filed eReferral	Filed	Read – Historic date
Filed - Reply	Reply to a filed eReferral	Remains Filed	Replied
Filed - Redirect	Redirect a filed eReferral	Redirected remains Filed	
Upgraded	Referral administrators upgrade the urgency allocated by the referrer, prior to triage	Upgraded	Upgraded Show time and date (Referral upgraded from 'old urgency status' to 'new urgency status'
Downgraded	Referral administrators downgrade the urgency allocated by the referrer, prior to triage	Downgraded	Downgraded Show time and date (Referral upgraded from 'old urgency status' to 'new urgency status'
Viewed	User views the referral in read- only mode	Viewed	Viewed
Recalled	Triage Clinicians recall a referral which was sent in error to another Clinician or Administrator. Referrals with the status Filed (modified by administrator will not be able to be recalled. Referrals can be retrieved up to the point where the referral is modified by an Administrator	Recalled	
Pending Information	Triage Clinicians request the referrer to provide further information. Clinician selects 'other' button on the eTriage pop up to generate RSD message	Pending Information	
Information Provided	Referrer amends information on original referral as a result of Triage Clinician request to referrer to provide further information. Referrer clicks on	Information Provided	



Referral Status	Action	Displayed on eReferral Client	Displayed on eReferral form in the patient record
	Settings—Message Logging – Clicks on '?' icon		
Queried	Referral Administrator returns a referral to a Clinician or Service Queue for further clarification on their decision or to ask a question about a referral – without a reply being sent back to the referrer	Queried	Queried (Name of Service) Triage
Answered	Clinician or Service Queue answers to a returned referral without a reply being sent back to the referrer	Answered	Answered (Name of Service) Triage

# 5.3 Delegating eReferrals

The 'Delegate' button allows users to grant permission for users to access other user's eReferrals. Go to the **Outstanding Referrals** view and click on **Delegate** 

	Click	< on th	ne 🗄 to	add a deleg	ate									
Welcome glen coor Not you? Ch	<b>dinator (C</b> ange passwor	Coordinato	<b>r)</b> Main Menu									<b>ø</b> best	practio	Ce
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Attachmer	nt #1: 58	8439_003.	.html		(1	HTML) <u>Vie</u>	w							
Referral ID		4599												
Urgency		Advice onl	у											
Status		Pending in	formation											
Date / Time		03 Feb 20	16 13:31											
Organisatio	n	Waikato D	istrict Health Board											
Referral Ce	ntre	Outpatient	Referral (RCC)											
Specialty		Cardiology	1											
Notes 🔠														
09-Feb-2016	6 09:14	glen coord	linator this is	me										
Audit Trail														
Read:	09-Feb-2	2016 11:29				glen coo	dinator							
Read:	09-Feb-2	2016 09:35				glen coo	dinator							
Read:	09-Feb-2	2016 09:11				glen coo	dinator							
Read:	Read: 09-Feb-2016 08:44		glen coo	dinator										
Read: 05-Feb-2016 16:19 glen cr			glen coo	dinator										
Read:	05-Feb-2	2016 14:39				BPAC te	st Coordinator							
Pending information:	04-Feb-2	2016 11:00	Note to referrer: Other F	Request further information	n	glen coo	dinator							
internation.			Chocolate cake goes re please	eally well with Whiskey ca	n you provide a test	result								
Read:	04-Feb-2	2016 10:56				glen coo	dinator							
Information	04-Feb-2	2016 10:56	Note to triaging clinician	h: ha vermouth is better		Dr Angel	a Fairweather							

- 1. Fill in the **three fields** and click **the to add**:
  - delegated user
  - start date (a blank start date means start immediately)
  - end date (a blank end date means delegate indefinitely)



Delegates for glen co	ordinator		×
Delegate to	From 09/02/2016	To	1.

2.	Remove a <b>delegate</b> by clicking on the	$ \simeq $

Delegates for glen	coordinator			×
Delegate to	From	То		
chris.clinician	09/02/2016	16/02/2016		
			+	

# 5.4 Search for Referrals

## 5.4.1 Quick Search

- 1. Enter the referral you are searching for into the search bar
- 2. **Execute** using one of the following mechanisms
  - Hit enter on keyboard
  - Click on the search icon
  - Click the submit button

W gi No	elcome en coor tyou? Ch	dinator (C	Coordina d Delegate	i <b>tor)</b> 18 Main Menu								<b>6 (</b>	<b>est</b> practice
Referr													
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So	rt by	~										ſ	Search 🥥 🕅
U	rgency 🗘	Status 🖓	Date	🗘 Service 🗘	Referrer ÷	Referrer name	Patient +	Patient name	Reason for referral	Date queued to service	Date returned to coordinator 7	Triage Filevel	Triage queue
		Read	05/02/16	Cardiology	Acme Medica	Demo Midlands Health	ABC1234	JACOBS, JAYNE	BPAC TEST - DON'T TOU			1	
		Read	04/02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE	d				
		Pending in	03/02/16	Cardiology	Hillcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test				
		Read	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			5	
		Read	28/01/16	Physiotherapy (inc Sc.	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16		2	Queued to Physiotherapy Servi
		Response	28/01/16	Physiotherapy (inc Sc	Waikato DHB	Dr Waikato TestGP3	FGH4587	Peter, Peters	Physic required	28/01/16	28/01/16	2	Queued to Physiotherapy Servi
		Read	28/01/16	Physiotherapy (inc Sc	a Waikato DHB	Dr Waikato TestGP3	RYT8457	Smith, John	test	28/01/16	28/01/16	2	
		Read	27/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	CCE8305	PILOT, JANE	Consideration for Terminat				
		Read	26/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	AAA9998	MOUSE, DAISIE	Consideration for Terminat				
		Read	25/01/16	Cardiology	Acme Medica	Demo Midlands Health	FKK7074	SMITH, ARNOLD JAMES	a test for messaging			1	
		Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdfa	mr, Accept clinician	asdfasd	20/01/16	20/01/16	2	
		Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	MNr, Decline clinician	asdfas	20/01/16	20/01/16	Decline	
		Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Mr, Accept RCC	asdfa			3	
		Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	mr, Decline RCC	asdfasdfa			Decline	
		Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Scratcher, margaret	asdfasdf	20/01/16	20/01/16	1	
		Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Burns, Mr	asdf	20/01/16	20/01/16	Decline	
		Read	19/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	ZAA2701	SMITH, JENNY	Consideration for Terminat				
		Read	19/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
		Read	19/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	AAA77777	MOUSE, MINNIE	Consideration for Terminat				
		Read	19/01/16	Gynaecology-Termina	t Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
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# 5.4.2 Extended Search

- 1. Click on the 🔳 icon beside the search bar to navigate to the Extended Search
- 2. Filter by one or more of the search options



- 3. **Execute** using one of the following mechanisms
  - Hit enter on keyboard
  - Click on the search icon
  - Click the submit button

	Welcome glen coordir Not you? Chang	ator (C e password	oordinato	<b>r)</b> Main Menu										<b>e</b> <sup>NS</sup>
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		1	Refresh											
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	Date from Urgency Reason for re Date prioritise	ferral differral	All	✓	to Service Date queu service Date prior	All		Include fi     Triage level     Date returne     coordinator	led referrals  Exclude All d to	replied referrals	Actioned by me Triage queue	All	~	
	By Patient													
	NHI No.				Surname			First name(s	)					
	Sex	1	Any	~	Date of bi	th		Or age						
	By Referre	er												
	NZMC / NCN				Referrer s	urname		Referrer first names			Practice	Enter a ne	w favourite search ⊞ Clear Submit	
	Urgency 🍦 S	tatus 🗘	Date 🍦	Service	Referrer org.	Referrer name 🍦	Patient 🗘	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue	÷ Y
	R	ead	05/02/16	Cardiology	Acme Medica	Demo Midlands Health	ABC1234	JACOBS, JAYNE	BPAC TEST - DON'T TOU	1		1		
	R	ead	04/02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE	d					
	P P	ending in	03/02/16	Cardiology	Hillcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test					
	R	ead	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test	29/01/16		5	Overved to Dhusiatheren	Cani
H		Bau	28/01/16	Physiotherapy (inc Sca	Waikato DHP	Dr Waikato TestGP3	EGH4587	Datar, Peters	Dhueio required	28/01/16	28/01/16	2	Queued to Physiotherapy	Servi
	- R	esponse	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RYT8457	Smith John	test	28/01/16	28/01/16	2	Queueu to Physiotherapy	Jervi
	-	000	20/01/10	in againtin apy (include	markato brib	D. Maikato reatOFJ	Decisionor.	Contract, Contract		20001010	20101110	- 4		

5.4.3 Useful extended search functions:

Referral Search		1 2	3
Date from	to	Include filed referrals	Actioned by me
Urgency All V	Service All V	Triage level All	Triage queue All
Reason for referral	Date queued to	Date returned to	
Date prioritised from	Date prioritised to	coordinator	
By Patient			
NHI No.	Surname	First name(s)	
Sex Any 🗸	Date of birth	Or age	
By Referrer			
NZMC / NCN	Referrer surname	Referrer first names	Practice
			Clear Submit

- 1. **Include Filed referrals** allows you to look at referrals including those that that have dropped off your list because they have been **Filed**.
- 2. Exclude all replied referrals allows you to remove referrals you have replied to already
- 3. Actioned by me option allows you to look for all referrals that you have been involved with including those in the past

# 5.4.4 Favourite search

Any user is able to create, name and save favourite searches to be used at a later stage (maximum of 10). Users can modify and delete any saved searches.

- 1. Go to the extended search
- 2. Enter a new favourite search

			Widland district health boards' shared services agency
Welcome glen coordinator (Coordinator) Not you? Change password Delegates Main Menu			
Referral Client v3.0 (UAT)			
Context [all]	<b>~</b>		
Outstanding Referrals			
Refresh			
Sort by			Search 🔎 🔺
Referral Search			
Date from Urgency All V Reason for referral Date prioritised from	to Service Cardiology  Date queued to Service Date prioritised to	Include filed referrals     Exclude replied referrals     Actioned by me Triage level     All     Triage queue Date returned to coordinator	All
By Patient			
NHI No.	Surname	First name(s)	
Sex Any V	Date of birth	Or age	
By Referrer NZMC / NCN	Referrer surname	Referrer first Practice names	Enter a new favourite search

#### To add a Favourite search to a list

- 1. Go to Enter a new favourite search option
- 2. Choose search options and name the search i.e. Audiology then click the  $^{igodot}$
- 3. Select a position on the drop down list

Welcome glen coordinator (Coordinator) Not you? Change password Delegates Main Menu			<b>best</b> practice
Referral Client v3.0 (UAT)			
Context [all]	<b>~</b>		
Outstanding Referrals - Extended Search is Active			
Refresh			
Sort by		Search	🔎 select a favourite search 🗸 🔺
Referral Search			
Date from Urgency All  Reason for referral  Date prioritised from	to Audiology V Date queued to service account of the prioritised to th	Include filed referrats     Exclude replied referrats     Actioned by me Triage level     All     Triage queue Date returned to coordinator	All
By Patient			
NHI No.	Surname	First name(s)	
Sex Any V	Date of birth	Or age	
By Referrer NZMC / NCN	Referrer surname	Referrer first Practice names	Audiology
Urgency $\hat{\mathbb{Y}}$ Status $\hat{\mathbb{Y}}$ Date $\hat{\mathbb{Y}}$ Service $\hat{\mathbb{Y}}$ Referrer org. $\hat{\mathbb{Y}}$	Referrer name 👻 Patient NHI 👻 Patient name 👻 Reasc	on for referral $ _{V} $ Date queued to service $\frac{2}{V} $ Date returned to coordinator $\frac{2}{V} $ Tria	Place soluci sava position           Audiology         - available -           - available -         - available -

#### Removing a Favourite search

- 1. Before extended search is opened, go to select a favourite search
- 2. Use the arrow to get the list of saved favourites
- 3. Choose the option you want to deleted by clicking on the X

Health



	÷.,
Welcome glen coordinator (Coordinator) Not you? Change password Delegates Main Menu	<b>best</b> practice
Referral Client v3.0 (UAT)	
Context [all]	
Outstanding Referrals - Extended Search is Active	
Print Reply File Clear Refresh Show Notes	
Son by V	arch 🔎 select a favourite search 💌 🗵
Urgency $\frac{1}{Y}$ Status $\frac{1}{Y}$ Date $\frac{1}{Y}$ Service $\frac{1}{Y}$ Referrer org. $\frac{1}{Y}$ Referrer name $\frac{1}{Y}$ Patient NHI $\frac{1}{Y}$ Patient name $\frac{1}{Y}$ Reason for referral $\frac{1}{Y}$ Date queued to service $\frac{1}{Y}$ Date returned to coordinate	nator 👻 Triage level 👻 T 📴 Audiology Urgent

#### 5.4.5 Other Functions

**Refresh** allows the user to refresh the client list.

Actioned by me search options.

Last Referrals will allow user to retrieve recently worked with referrals (maximum of 30):

	Welcome glen coord Not you? Cha	dinator (C ange password	<b>Coordinato</b> d Delegates	<b>r)</b> Main Menu								<b>6 b</b>	estpractice
Re	ferral Client v												
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	Urgency 🏺	Status 🏺	Date 🍦	Service $\hat{\vec{Y}}$	Referrer ≑ org. ¥	Referrer name 🍦	Patient 🜩 NHI Y	Patient name	Reason for referral	Vate queued to service	Date returned to coordinator	Triage ≑ level ¥	Triage queue
		Read	05/02/16	Cardiology	Acme Medica	Demo Midlands Health	ABC1234	JACOBS, JAYNE	BPAC TEST - DON'T T	DU:		<b>1</b>	
		Read	04/02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE	d	10/02/16	10/02/16		
		Printed	03/02/16	Cardiology	Hillcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test				
	•	Read	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			5	
	-	Message	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16	10/02/16	2	
	Q	Read	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	FGH4587	Peter, Peters	Physio required	28/01/16	28/01/16	2	Queued to Physiotherapy Servi
	-	Read	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RYT8457	Smith, John	test	28/01/16	28/01/16	2	
	-	Read	27/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	CCE8305	PILOT, JANE	Consideration for Termi	nati			
		Read	26/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA9998	MOUSE, DAISIE	Consideration for Termi	nati			
		Read	25/01/16	Cardiology	Acme Medica	Demo Midlands Health	FKK7074	SMITH, ARNOLD JAMES	a test for messaging			<b>1</b>	
	-	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdfa	mr, Accept clinician	asdfasd	20/01/16	20/01/16	2	
	-	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	MNr, Decline clinician	asdfas	20/01/16	20/01/16	Decline	
	-	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Mr, Accept RCC	asdfa			3	
	-	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfasdf	mr, Decline RCC	asdfasdfa			Decline	
	-	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Scratcher, margaret	asdfasdf	20/01/16	20/01/16	1	
	-	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfasdf	Burns, Mr	asdf	20/01/16	20/01/16	Decline	
		Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	ZAA2701	SMITH, JENNY	Consideration for Termi	nati			
		Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Termi	nati			
		Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Termi	nati			
	•	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Termi	nati			

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# 6 Security

The e-Referral client now has additional security features which are described below:

#### 6.1 Session locking

User sessions must be locked after a maximum of 15 minutes of system or user inactivity. The lock should be configured in such a way as to completely conceal all information on screen (i.e. BPAC). Users shall be required to re-authenticate themselves to unlock the session. Users shall not be able to disable the session locking mechanism via user role maintenance. In addition, session locking is to be provided for by manual user activation.

#### 6.2 Suspension of access

System lock must be activated on user accounts following three failed login attempts. System administrators/Designated Super Users have the ability to reset locked accounts in these situations.

#### 6.3 Password requirement

These password standards are:



- at least eight characters in length ٠
- Contains characters from three of the following four categories: •
  - English upper case letters (A through Z)
  - English lower case letters (a through z) 0
  - Base 10 digits (0 through 9) 0
  - Non-alphabetic characters (for example: !, \$, #, %) 0

#### 6.4 **Change password**

Welcome glen coordinator (Coordinator) Not you? Charge password Delegates Man Menu	
Referral Client v3.0 (UAT)	
Context [all] V [all] V	
Outstanding Referrals	

You must follow the prescribed format for passwords as stipulated in the password requirements

Administration	Ó	
ABC Change Password Current Password New Password Confirm New Password	Main Menu	Send Feedback Logout
	© bestpractice 2005 - 2016	

#### 6.5 **Help Desk**

Please contact your Super User as a first point of contact.