

eReferral Client Community/PHOs

Coordinator User Manual



1	GENERAL INFORMATION	4
1.1	SYSTEM OVERVIEW	4
1.2	ORGANISATION OF THE MANUAL	4
2	SYSTEM SUMMARY	4
2.1	SYSTEM CONFIGURATION	4
2.2	USER ROLES & ACCESS LEVELS.....	4
2.2.1	Coordinator	4
2.2.2	Level of access.....	4
3	GETTING STARTED	5
3.1	ACCESS	5
4	USING THE SYSTEM	5
4.1	OPENING AND VIEWING eREFERRAL CLIENT.....	5
4.1.1	Enter Username and Password.....	5
4.1.2	Outstanding Referrals – Main Menu.....	6
4.2	OUTSTANDING REFERRALS SUMMARY SCREEN.....	6
4.3	E-REFERRALS – HOW TO	7
4.3.1	Context.....	7
4.3.2	Status	7
4.3.3	Unread	7
4.3.4	View Referral Details.....	7
4.3.5	Check referral details	9
4.3.6	Reply to referrer – Accept/Decline referral	10
4.4	FORWARD	10
4.5	QUEUE.....	10
4.5.1	Practitioner/Clinician – Service Queue	11
4.6	FILE.....	11
5	EREFERRAL CLIENT FEATURES	12
5.1	SORTING AND FILTERING eREFERRALS USING THE COLUMN HEADINGS.....	13
5.2	STATUS OF THE REFERRAL.....	13
5.2.1	Urgency Colours	13
5.2.2	Referral Status Messages	14
5.3	DELEGATING eREFERRALS	16
5.4	SEARCH FOR REFERRALS	17
5.4.1	Quick Search.....	17
5.4.2	Extended Search	17
5.4.3	Useful extended search functions:	18
5.4.4	Favourite search.....	18

5.4.5	Other Functions	20
6	SECURITY.....	20
6.1	SESSION LOCKING	20
6.2	SUSPENSION OF ACCESS.....	20
6.3	PASSWORD REQUIREMENT	20
6.4	CHANGE PASSWORD	21
6.5	HELP DESK.....	21

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.

Referral Client User	View	Print	Forward	Reply	File	Email Notification ¹	Reply to GP Inbox ²

¹ An email notification is received every time the referral is updated and the status is changed

² The referring GP is notified and a reply is sent by the relevant referral client user

Coordinator	✓	✓	✓	✓	✓	Yes, if set up	✓
							✓ = Yes ✗ = No

3 GETTING STARTED

3.1 Access



eReferral Client runs on Google Chrome or Internet Explorer.

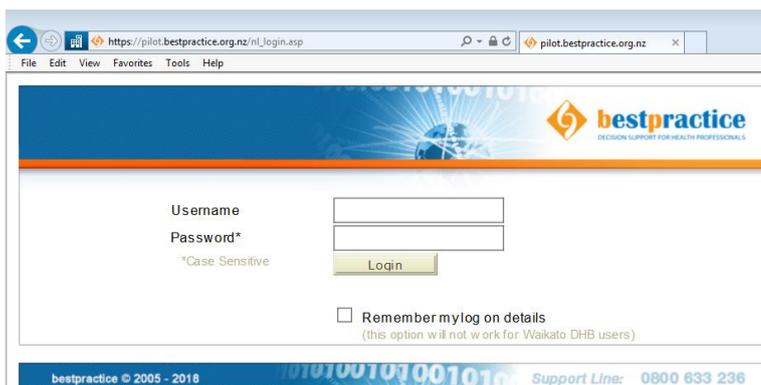
To access eReferral Client, click on the bestpractice link below

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

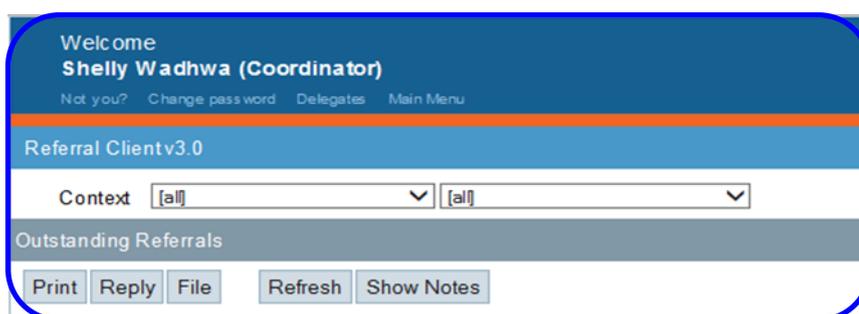
4 USING THE SYSTEM

4.1 Opening and Viewing eReferral Client

4.1.1 Enter Username and Password



4.1.2 Outstanding Referrals – Main Menu



Welcome
Shelly Wadhwa (Coordinator)
Not you? Change password Delegates Main Menu

Referral Client v3.0

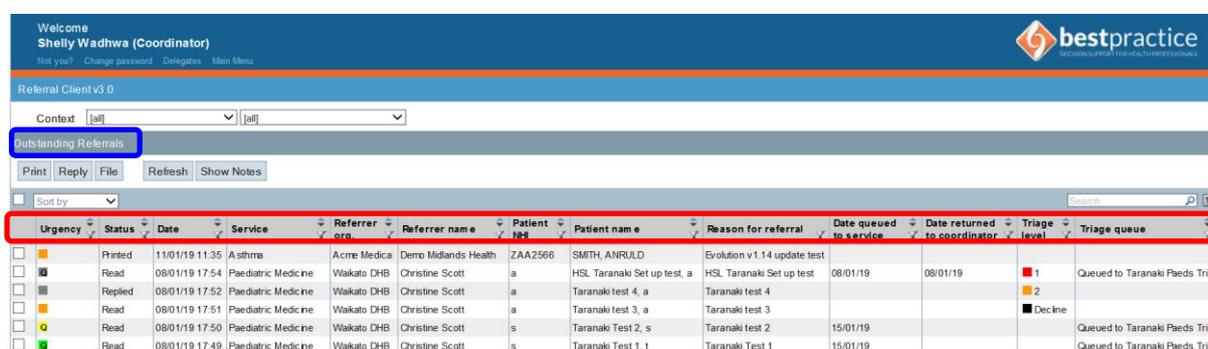
Context [all] [all]

Outstanding Referrals

Print Reply 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



Welcome
Shelly Wadhwa (Coordinator)
Not you? Change password Delegates Main Menu

Referral Client v3.0

Context [all] [all]

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue
	Printed	11/01/19 11:35	Asthme	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			Decline	
	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 Tria
	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 Tria

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

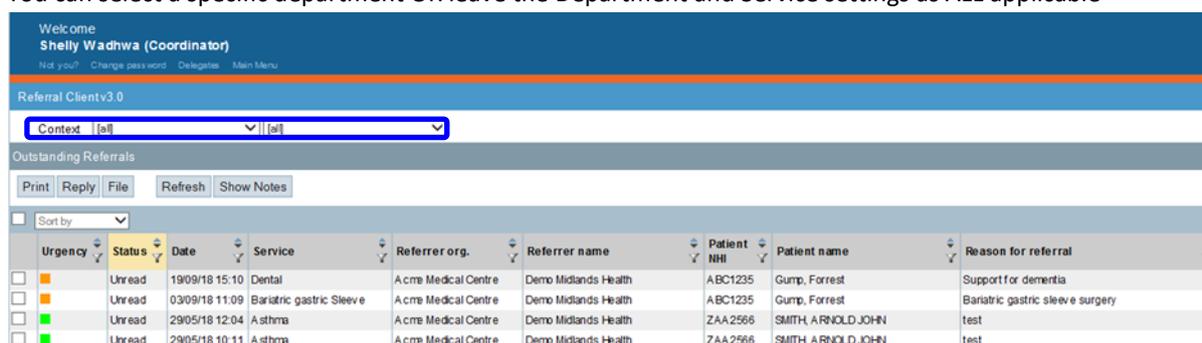
	a service
Date returned to coordinator	System generated Date indicator when the referral was returned to the coordinator
Triage level	Triage level generated by the co-ordinator OR service specialist
Triage queue	Indicates referral is now "Queued to service"

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 Wadhwa (Coordinator)
Not you? Change password Delegate Main Menu

Referral Client v3.0

Context: [all] [all]

Outstanding Referrals

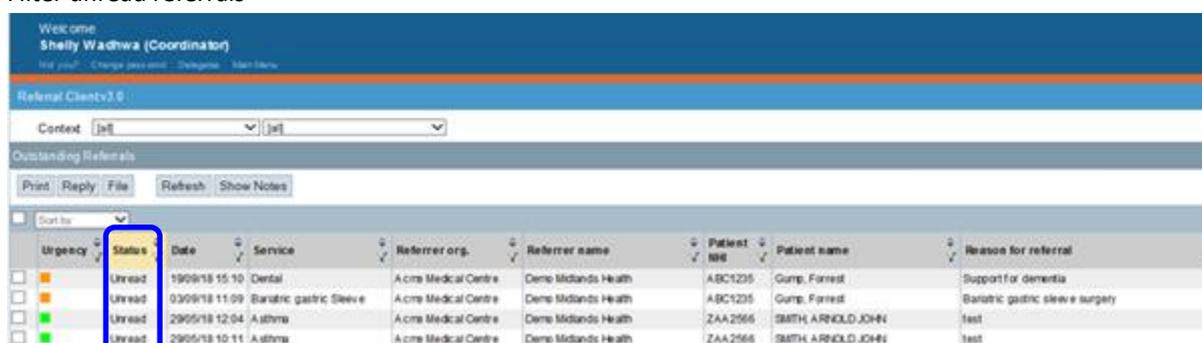
Print Reply File Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NH	Patient name	Reason for referral
	Unread	19/09/18 15:10	Dental	Acm Medical Centre	Demo Midlands Health	ABC1235	Gump, Forrest	Support for dementia
	Unread	03/09/18 11:09	Bariatric gastric Sleeve	Acm Medical Centre	Demo Midlands Health	ABC1235	Gump, Forrest	Bariatric gastric sleeve surgery
	Unread	29/05/18 12:04	Asthma	Acm Medical Centre	Demo Midlands Health	ZAA2566	SMITH, ARNOLD JOHN	test
	Unread	29/05/18 10:11	Asthma	Acm Medical Centre	Demo Midlands Health	ZAA2566	SMITH, ARNOLD JOHN	test

4.3.2 Status

Filter unread referrals



Welcome
Shelly Wadhwa (Coordinator)
Not you? Change password Delegate Main Menu

Referral Client v3.0

Context: [all] [all]

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NH	Patient name	Reason for referral
	Unread	19/09/18 15:10	Dental	Acm Medical Centre	Demo Midlands Health	ABC1235	Gump, Forrest	Support for dementia
	Unread	03/09/18 11:09	Bariatric gastric Sleeve	Acm Medical Centre	Demo Midlands Health	ABC1235	Gump, Forrest	Bariatric gastric sleeve surgery
	Unread	29/05/18 12:04	Asthma	Acm Medical Centre	Demo Midlands Health	ZAA2566	SMITH, ARNOLD JOHN	test
	Unread	29/05/18 10:11	Asthma	Acm Medical Centre	Demo Midlands Health	ZAA2566	SMITH, ARNOLD JOHN	test

4.3.3 Unread

Click on a referral to begin triaging



Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NH	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue
	Unread	09/12/17 12:58	Asthma	Acm Medical Centre	Jason Hall	Z416143	LOWNDEN, Jessica	x				

4.3.4 View Referral Details

Click on the [View ...](#) 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 [View ...](#) link and select open in new window.

Welcome
Shelly Wadhwa (Coordinator)
 Not you? Change pass word Delegates Main Menu

Referral Client v3.0

Context [all] [all]

Outstanding Referrals

Print Reply File Forward Refresh Close

Sort by Message

Jessica **LOWNDES** DoB: 26 Mar 1996 (Female) NHI# ZAN0143

Asthma Referral
 Referring: Jason Hall. (Acme Medical Centre) NZMC# 99992

Attachment #1: **310461_002.html** (HTML) [View](#)

Referral ID 20870
 Urgency ■ Routine
 Status Read
 Date / Time 08 Dec 2017 12:58
 Organisation Waikato District Health Board
 Referral Centre Referral Coordination Centre
 Speciality Asthma

Notes 

Audit Trail

Read:	21-Jan-2019 09:36	Shelly Wadhwa
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.

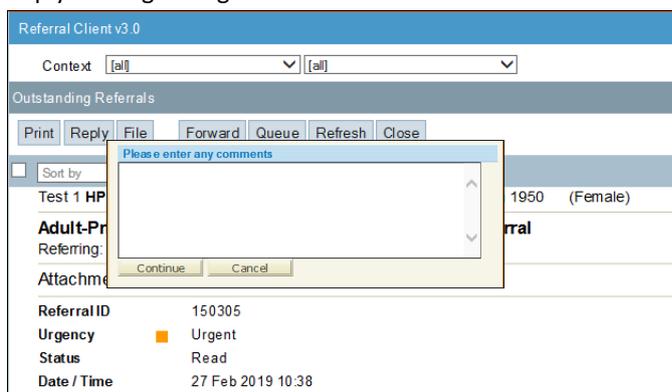
Referral To			
Name	Outpatient Referral (RCC)		
Department			
Specialty	Asthma		
Urgency	Routine		
Re:			
Company	Referral Coordination Centre		
Address	Portacom Village Waikato Hospital Hamilton		
Phone Number	07 839 8899		
Fax Number	07 839 8817		
Referral Sent	08/12/2017 12:58		
Patient Details			
Family Name	LOWNDES	Title	n/a
First Name(s)	Jessica	Gender	Female
Preferred Name(s)		NHI	ZAN0143
Date of Birth	26/03/1996	Age	21
Address	45, Cambridge Terrace Kaiti Gisborne		
Post Code	4010		
Mobile Phone	n/a	Country of Birth	n/a
Home Phone	n/a	Ethnicity	European - NZ
Fax	n/a	Ethnicity 2	n/a
Work Phone	n/a	Ethnicity 3	n/a
Patient / Guardian given consent for this referral		Yes	
Interpreter required	No		
Interpreter Comment	n/a		
ACC			
Is this referral the result of an Accident?		No	
Clinical Information			
Reason for referral / Diagnosis / Problem	x		
Details	x		
Long Term Medications	Recent Medications		

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.

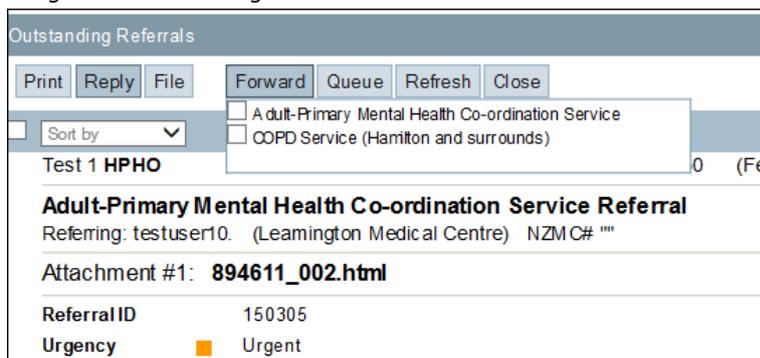


Triage status will change to “Replied”

4.4 Forward

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

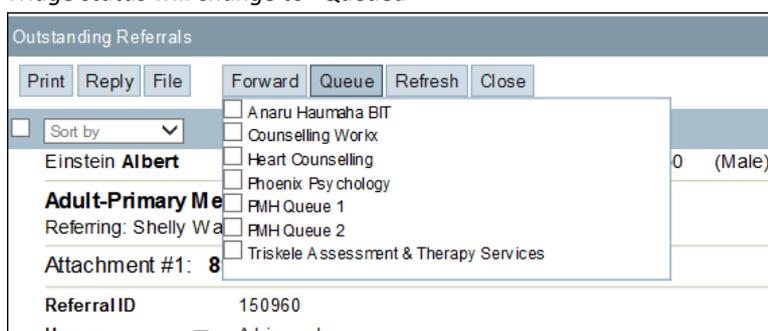
Triage status will change to “Redirected”



4.5 Queue

Queue allows the user to forward the referral to the **service specific queue**

Triage status will change to “Queued”



4.5.1 Practitioner/Clinician – Service Queue

Outstanding Referrals

Print Reply File Forward Queue **Coordinator** Refresh Close

Sort by

Test 1 HPHO DoB: 01 Jan 1950

Adult-Primary Mental Health Co-ordination Service Referral
Referring: testuser10. (Leamington Medical Centre) NZMC# ""

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	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date queued to service	Date returned to coordinator
	Returned	27/02/19 10:38	Adult-Primary Mental	Leamington	testuser10	GH1111	HPHO, Test 1	?Anxiety	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.

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral
	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 Referral
Referring: Demo Midlands Health. (Acme Medical Centre) NZMC# ""

Click OK & Click Close

Outstanding Referrals

Print Reply File Forward Refresh **Close**

Sort by Message

Patient Practice DoB: 01 Jan 1990 (Male) NHI# ABC1235

Audiology Referral
Referring: Demo Midlands Health.

Attachment #1: 896720_002.h

Referral ID 150866
Urgency Urgent
Status Read
Date / Time 12 Mar 2019

Message from webpage

WARNING!
Referral has not been printed
Referral has not been replied to
Click OK to continue.

OK Cancel

(HTML) [View...](#)

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral
High	Filed	12/03/19 09:20	Audiology	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	test

Refresh page

Result: eReferral task has been filed

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral
High	Read	12/03/19 09:11	Dermatology - General	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	Test
Low	Unread	12/03/19 08:38	Asthma	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	Test
Low	Read	12/03/19 08:33	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Fiona	test

Click on Extended Search

Referral Client v3.0

Context [all] [all]

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by

last 5 referrals Search

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue
High	Read	12/03/19 09:11	Dermatology - General	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	Test				
Low	Unread	12/03/19 08:38	Asthma	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	Test				
Low	Read	12/03/19 08:33	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Fiona	test				

Referral Client v3.0

Context [all] [all]

Outstanding Referrals - *Extended Search is Active*

Print Reply File Clear Refresh Show Notes

Sort by

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral
Low	Recalled	12/04/19 12:30	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Baby	test
Low	Unread	12/04/19 12:25	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Fiona	test
Low	Unread	12/04/19 12:22	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	test
Low	Read	11/04/19 12:05	Cardiology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	test
Low	Read	28/03/19 16:02	Strength and Balance	Acme Medica	Demo Midlands Health	ABC1235	DUCK, JILL	Test Record please ignore
Low	Read	12/03/19 11:11	Strength and Balance	Acme Medica	Demo Midlands Health	ABC1235	DUCK, JILL	Test - please ignore
Low	Replied	12/03/19 10:56	Endocrinology	Acme Medica	Demo Midlands Health	ABC1235	Gump, Forrest	Test
High	Filed	12/03/19 09:20	Audiology	Acme Medica	Demo Midlands Health	ABC1235	Practice, Patient	test
Low	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.

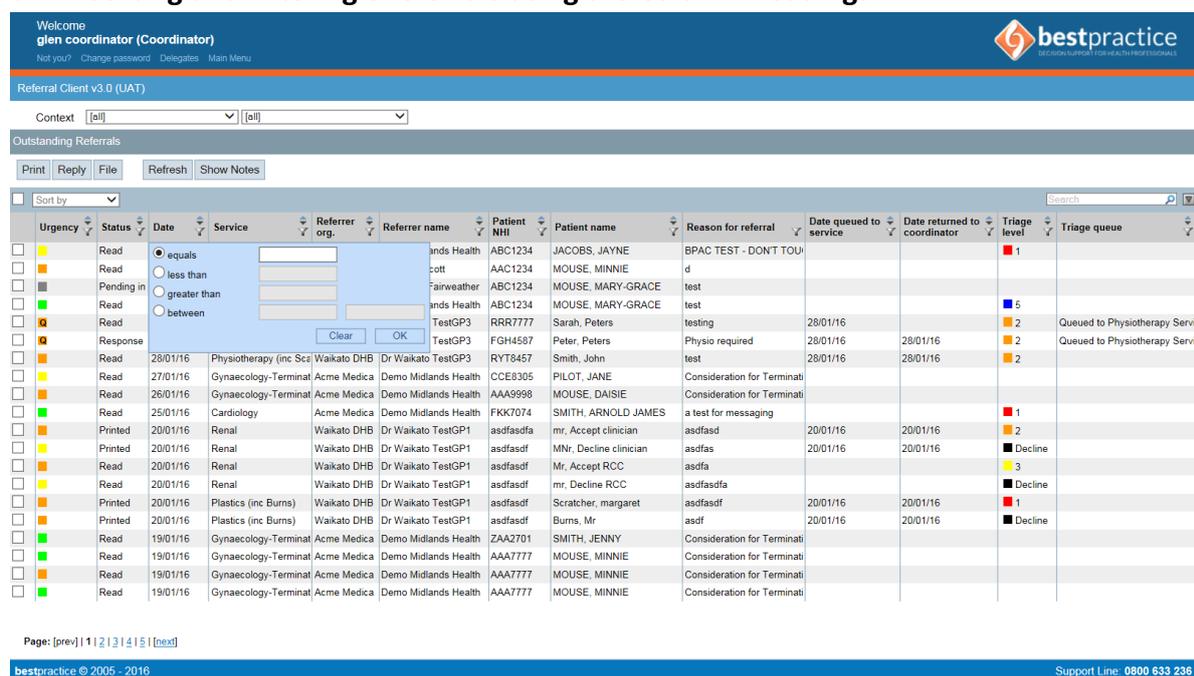
Referral Summary Alert

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



The screenshot shows the 'Outstanding Referrals' section of the eReferral Client. It includes a search bar, a 'Sort by' dropdown, and a table of referrals. The table columns are: Urgency (with color-coded icons), Status (with dropdown), Date (with dropdown), Service, Referrer org., Referrer name, Patient NHI, Patient name, Reason for referral, Date queued to service, Date returned to coordinator, Triage level (with dropdown), and Triage queue. The table contains 20 rows of referral data.

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 , click **Clear** then **OK**

5.2 Status of the referral

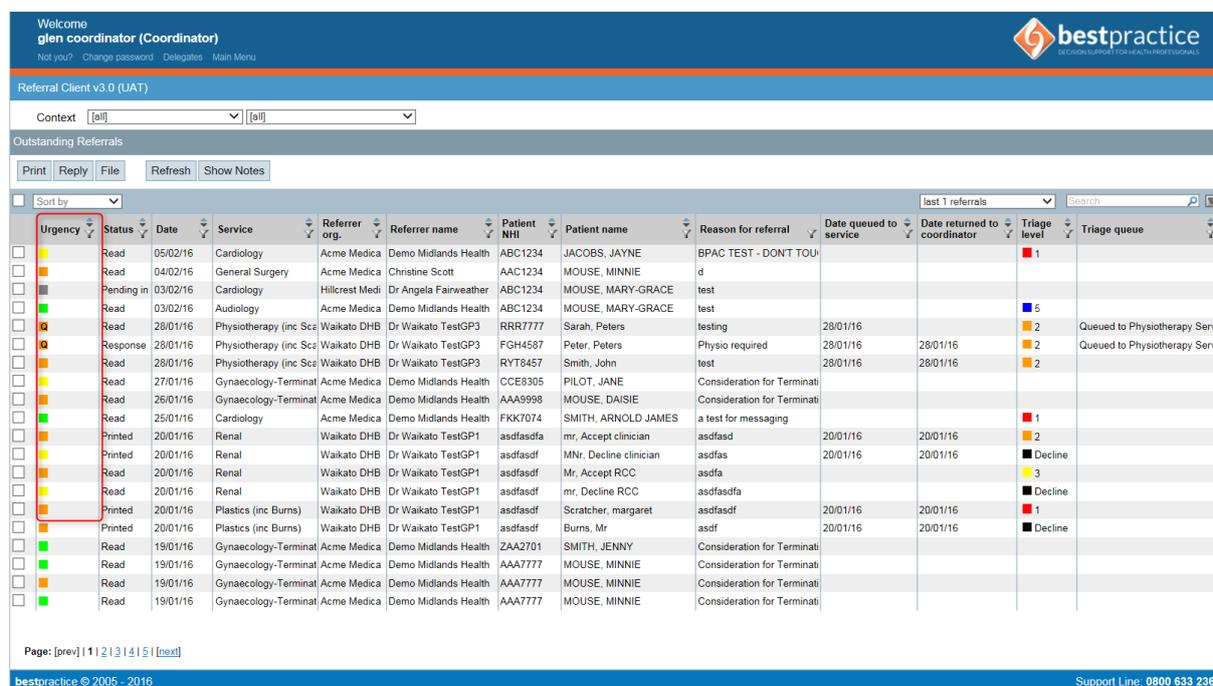
5.2.1 Urgency Colours

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
		Queued to provider

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



The screenshot shows the 'Referral Client v3.0 (UAT)' interface. At the top, there is a navigation bar with 'Welcome glen coordinator (Coordinator)', 'Not you?', 'Change password', 'Delegates', and 'Main Menu'. The 'bestpractice' logo is on the right. Below the navigation bar, there are search and filter options for 'Context' and 'Outstanding Referrals'. A table of referrals is displayed with columns: Urgency, Status, Date, Service, Referrer org., Referrer name, Patient NHI, Patient name, Reason for referral, Date queued to service, Date returned to coordinator, Triage level, and Triage queue. The 'Urgency' column contains colored boxes (green, purple, red, grey) and a '#' icon. The 'Triage level' column contains numbers (1, 2, 3, 5) and a '#' icon. The 'Triage queue' column contains text like 'Queued to Physiotherapy Servi'. At the bottom, there is a footer with 'bestpractice © 2005 - 2016' and '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

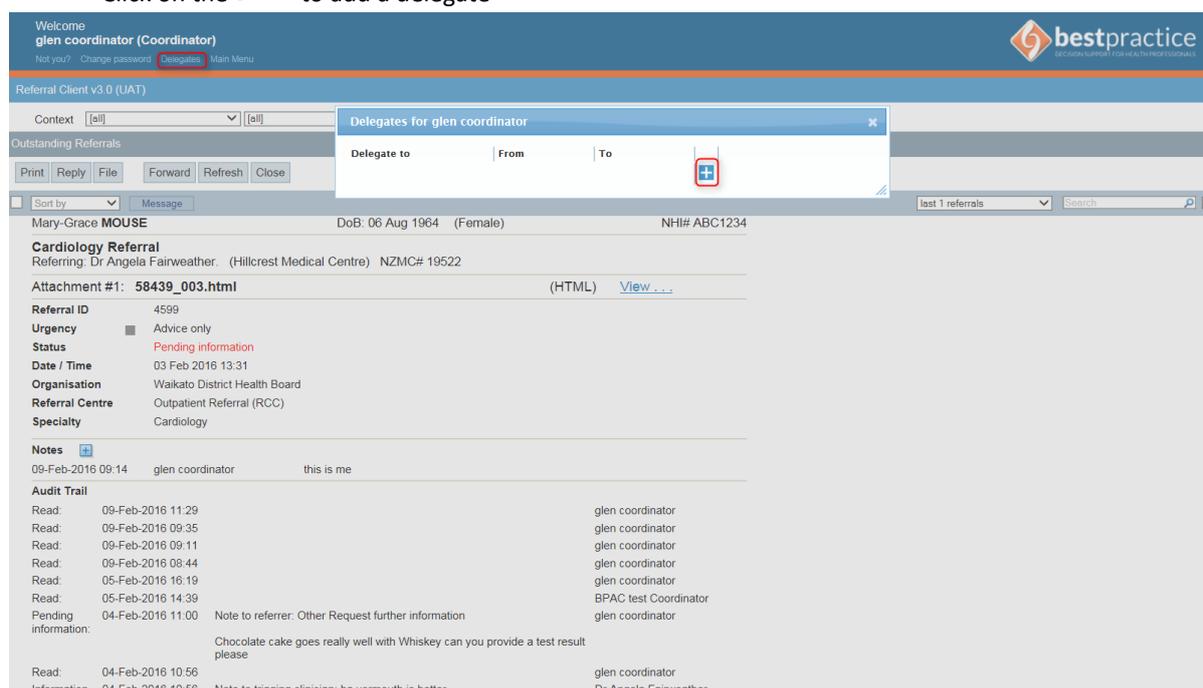
Referral Status	Action	Displayed on eReferral Client	Displayed on eReferral form in the patient record
	to a Queue endpoint to be processed	Service)	Show time and date Queued to (name of Service/Department)
Redirected	User redirects referral to another Service/Specialty (“Assign to other Centres/Specialties” 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 the  to add a delegate



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 coordinator

Delegate to: From: To:  

2. Remove a delegate by clicking on the 

Delegates for glen coordinator

Delegate to: From: To:   

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

Welcome glen coordinator (Coordinator)
Not you? [Change password](#) [Delegates](#) [Main Menu](#)

Referral Client v3.0 (UAT)

Context:

Outstanding Referrals

[Print](#) [Reply](#) [File](#) [Refresh](#) [Show Notes](#)

Sort by:

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date 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...			1	
	Read	04/02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE				2	
	Pending in	03/02/16	Cardiology	Hilcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test			5	
	Read	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			2	Queued to Physiotherapy Servi
	Read	28/01/16	Physiotherapy (inc Sci)	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16		2	Queued to Physiotherapy Servi
	Response	28/01/16	Physiotherapy (inc Sci)	Waikato DHB	Dr Waikato TestGP3	FGH4567	Peter, Peters	Physio required	28/01/16	28/01/16	2	
	Read	28/01/16	Physiotherapy (inc Sci)	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 Terminat			1	
	Read	26/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA9998	MOUSE, DAISIE	Consideration for Terminat			2	
	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	asdfsdf	mr, Accept clinician	asdfsdf	20/01/16	20/01/16	2	
	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	MNr, Decline clinician	asdfsdf	20/01/16	20/01/16	Decline	
	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Mr, Accept RCC	asdfsdf			3	
	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	mr, Decline RCC	asdfsdf			Decline	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Scratcher, margaret	asdfsdf	20/01/16	20/01/16	1	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Burns, Mr	asdfsdf	20/01/16	20/01/16	Decline	
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	ZAA2701	SMITH, JENNY	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				

Page: [prev] 1 | 2 | 3 | 4 | 5 | [next]

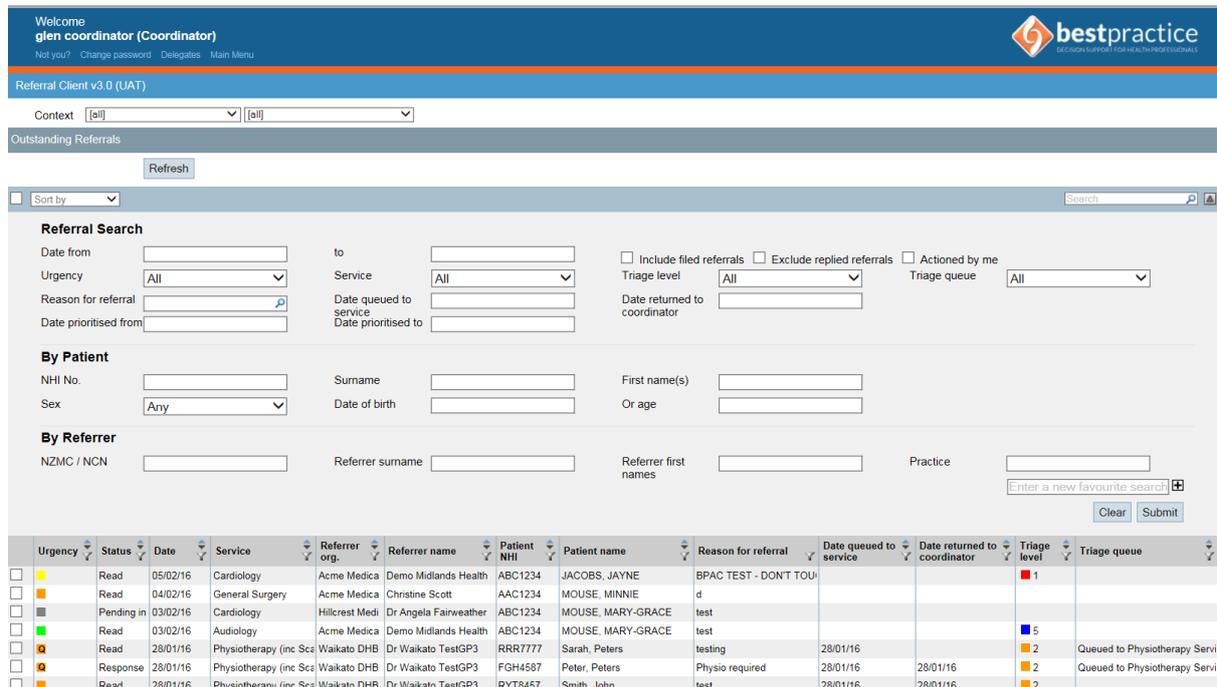
bestpractice © 2006 - 2016 Support Line: 0800 633 236

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 coordinator (Coordinator)
Not you? Change password Delegates Main Menu

Referral Client v3.0 (UAT)

Context [all] [all]

Outstanding Referrals

Refresh

Sort by [v] Search [v]

Referral Search

Date from [] to [] Include filed referrals Exclude replied referrals Actioned by me

Urgency [All] Service [All] Triage level [All] Triage queue [All]

Reason for referral [] Date queued to service [] Date returned to coordinator []

Date prioritised from [] Date queued to service [] Date prioritised to []

By Patient

NHI No. [] Surname [] First name(s) []

Sex [Any] Date of birth [] Or age []

By Referrer

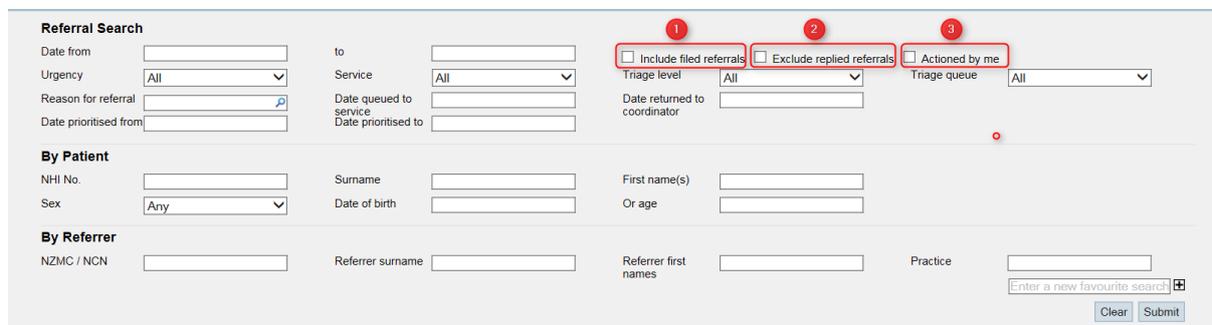
NZMC / NGN [] Referrer surname [] Referrer first names [] Practice []

Enter a new favourite search [v]

Clear Submit

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue
<input type="checkbox"/>	Read	05/02/16	Cardiology	Acme Medica	Demo Midlands Health	ABC1234	JACOBS, JAYNE	BPAC TEST - DONT TOU			1	
<input type="checkbox"/>	Read	04/02/16	General Surgery	Acme Medica	Christine Scott	AAC1234	MOUSE, MINNIE	d				
<input type="checkbox"/>	Pending in	03/02/16	Cardiology	Hillcrest Medi	Dr Angela Fairweather	ABC1234	MOUSE, MARY-GRACE	test				
<input type="checkbox"/>	Read	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			5	
<input type="checkbox"/>	Read	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16		2	Queued to Physiotherapy Servi
<input type="checkbox"/>	Response	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
<input type="checkbox"/>	Read	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RYT8457	Smith, John	test	28/01/16	28/01/16	2	

5.4.3 Useful extended search functions:



Referral Search

Date from [] to [] Include filed referrals Exclude replied referrals Actioned by me

Urgency [All] Service [All] Triage level [All] Triage queue [All]

Reason for referral [] Date queued to service [] Date returned to coordinator []

Date prioritised from [] Date queued to service [] Date prioritised to []

By Patient

NHI No. [] Surname [] First name(s) []

Sex [Any] Date of birth [] Or age []

By Referrer

NZMC / NGN [] Referrer surname [] Referrer first names [] Practice []

Enter a new favourite search [v]

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**

Welcome
glen coordinator (Coordinator)
Not you? Change password Delegates Main Menu

Referral Client v3.0 (UAT)

Context [all] [all]

Outstanding Referrals - **Extended Search is Active**

Print Reply File Clear Refresh Show Notes

Sort by [v] Search [v] select a favourite search [v]

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date queued to service	Date returned to coordinator	Triage level	Triage queue

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 coordinator (Coordinator)
Not you? Change password Delegates Main Menu

Referral Client v3.0 (UAT)

Context [all] [all]

Outstanding Referrals

Print Reply File Refresh Show Notes

Sort by [v] Search [v] select a favourite search [v]

Urgency	Status	Date	Service	Referrer org.	Referrer name	Patient NHI	Patient name	Reason for referral	Date 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 - DONT TOU			1	
	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			5	
	Read	03/02/16	Audiology	Acme Medica	Demo Midlands Health	ABC1234	MOUSE, MARY-GRACE	test			2	
	Message	28/01/16	Physiotherapy (inc Sca	Waikato DHB	Dr Waikato TestGP3	RRR7777	Sarah, Peters	testing	28/01/16	10/02/16	2	
	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 Terminat				
	Read	26/01/16	Gynaecology-Terminat	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	asdfsdfa	mr, Accept clinician	asdfsdf	20/01/16	20/01/16	2	
	Printed	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	MN, Decline clinician	asdfsdf	20/01/16	20/01/16	Decline	
	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Mr, Accept RCC	asdfsdf			3	
	Read	20/01/16	Renal	Waikato DHB	Dr Waikato TestGP1	asdfsdf	mr, Decline RCC	asdfsdf			Decline	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Scratcher, margaret	asdfsdf	20/01/16	20/01/16	1	
	Printed	20/01/16	Plastics (inc Burns)	Waikato DHB	Dr Waikato TestGP1	asdfsdf	Burns, Mr	asdfsdf	20/01/16	20/01/16	Decline	
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	ZAA2701	SMITH, JENNY	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				
	Read	19/01/16	Gynaecology-Terminat	Acme Medica	Demo Midlands Health	AAA7777	MOUSE, MINNIE	Consideration for Terminat				

Page: [prev] | 1 | 2 | 3 | 4 | 5 | [next]

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

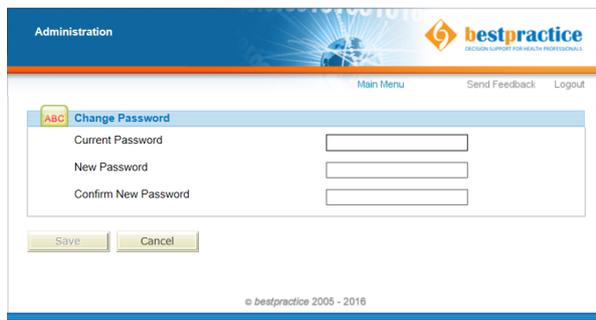
These password standards are:

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

6.4 Change password



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



6.5 Help Desk

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