**Triage Management**

There are two methods available to access all triage referrals submitted to your facility.

**Method 1:**
Select *Triage Referrals* from the eReferral menu item on the **Menu Bar**.

**Method 2:**
Select the *Triage Referrals* windowlet from the Homepage.

For further information on how to configure your Homepage to display the *Triage Referrals* windowlet, refer to the ANP Quick Reference: How to Configure and Navigate the Homepage.

Both Method 1 and Method 2 will open the *Triage Referrals* summary.

Click on a category from the *Triage Referrals* window to display a listing of all referrals within the selected category. For example, if you click on *Triage*, a detailed listing of all triage referrals will appear in a new window.

Click on any referral in the category listing to open the current version of the referral. Use the **Action Bar** to edit, add notes, print and review changes to the referral.
Updating the Referral Status

Use the Workflow menu within the referral to update the referral status. Once the workflow action has been selected, the status will change and will be immediately reflected to all users who have to access to review referrals. Referral actions in the workflow menu include:

- Complete Clerical Triage
- Start Clinical Triage
- Request Additional Information
- Set Priority and Booking Instructions
- Set Provider
- Reassign
- Ready for Booking
- Defer
- Waitlist
- Appointment Booked
- Appointment Missed
- Complete
- Decline
- Cancel

Workflow Actions

Complete Clerical Triage: Status of the referral will change to Waiting for Clinical Triage.

Start Clinical Triage: Status of the referral will change to Clinical Triage in Progress.

Request Additional Information: This action changes the status of the referral to Additional Information Requested. Once the Request Additional Information workflow action is selected, a pop-up will appear that allows you to:

1. Select a reason for requesting additional information:
   - Missing clinical information.
   - Missing required patient demographics.
   - Missing required investigations.
2. Enter a comment.

Set Priority and Booking Instructions: Based on the referrals clinical content, you will be able to change the priority at any time. The priority levels available are for all specialties. There may be a situation where a provider contacts the triage centre and states the patient’s condition has worsened and as a result, the priority needs to be changed to a shorter access target.

1. Priorities can be set to:
   - Routine
   - Semi Urgent
   - Urgent
2. Enter a comment.

Set Provider: When this action is selected, a pop-up will appear that allows you to enter the service provider information. You will be able to enter the name of the provider from the Health Services Catalogue.

Note: this is not used for oncology.
**Reassign:** This action changes the status of the referral to **Reassigned.** Once the **Reassign** workflow action is selected, a pop-up will appear that allows you to:

1. Assign the referral to another triage facility.
2. Select a reason for reassigning the referral:
   - Requested provider does not see this type of referral.
   - Referral reassigned to another provider due to shorter wait time.
   - Requested provider is not accepting new patients at this time.
   - Patient requested different location
3. Enter a comment.

**Ready for Booking:** Status will change to **Waiting for Appointment.** This action will be used by facilities and specialties that do not have a waiting list and an appointment is scheduled as soon as triage is completed.

**Defer:** This action changes the status of the request for service to **Deferred.** Once the **Defer** action is selected, a pop-up will appear that allows you to:

1. Select a Review Date.
2. Select a reason for deferring the referral:
   - Medically not ready.
   - Functionally not ready.
   - Socially not ready.
3. Enter a comment.

**Waitlist:** Status will change to **Waitlisted.**

**Appointment Booked:** Status of the referral will change to **Appointment Booked.** Select the date and time of the appointment, it will then appear in the header of the referral.

**Appointment Missed:** Status will change to **Appointment Missed.**

1. Select a reason for missed appointment:
   - Will contact patient to rebook
   - Re-refer patient to rebook
   - Patient will not be rebooked and is returned to your care
   - Fee required to rebook patient

**Complete:** Status will change to **Completed.** The following reasons are available for completing a referral:

1. Enter: Date Consult Letter Sent.
2. Choose a reason.
3. Enter a comment.

**Decline:** This action changes the status of the request for service to **Declined.** Once the **Decline** action is selected, a pop-up will appear that allows you to:

1. Select a reason for declining the referral:
   - Duplicate Referral.
   - Incomplete: mandatory information has not been provided.
   - Referral does not meet criteria appropriateness.
2. Enter a comment.

**Cancel:** This action changes the status of the referral to **Canceled.** Once the **Cancel** action is selected, a pop-up will appear that allows you to:

1. Select a reason for cancelling the referral:
   - Patient has been unsuccessful attending appointments.
   - Unable to contact patient.
   - Patient has declined service.
   - Referral no longer needed.
   - Patient deceased.
   - Incorrect referring provider added to form.
   - Referral created against incorrect patient.
2. Enter a comment.