

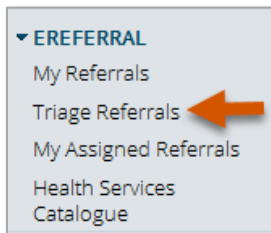
# eREFERRAL QUICK REFERENCE: How to Manage/Triage a Consult Request

## 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** dashboard from the **Homepage**.

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

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

Referrals	Total	Consults	Advice
Drafts	0	0	0
Undelivered	0	0	0
Action Required	10	5	5
Triage	105	29	76
Waiting for Response	64	3	61
Waiting for Appointment/Waitlisted	1	1	-
Deferred	10	10	-
Scheduled	7	7	-
Completed/Cancelled/Declined	107	7	100

Click on a worklist from the **Triage Referrals** dashboard to display a listing of all referrals within the selected category. For example, click on **Triage**, a list of all triage requests will appear in a new window. Select **Consult** and click **Search** to display all consult requests in this worklist. Click on any consult request from the worklist to open the current version of that consult request.

A screenshot of the Triage dashboard search filters. The filters include: Received Date (range), PHN/ULI, Referral Reason (search), Status (checkboxes for Reassigned, Clinical Triage in Progress, Waiting for Clerical Triage, Information Provided, Clerical Triage in Progress, Appointment Missed, Waiting for Clinical Triage, Priority), Request Type (checkboxes for Consult (checked), Advice), and Referrals for Review (radio buttons for All, Yes). The Search button is highlighted with a red arrow.

Use the **Action Bar** to select **Workflow**, **Edit**, **Add Note**, or **Print** and make changes to the referral.



**Workflow:** Use to change the referral status.

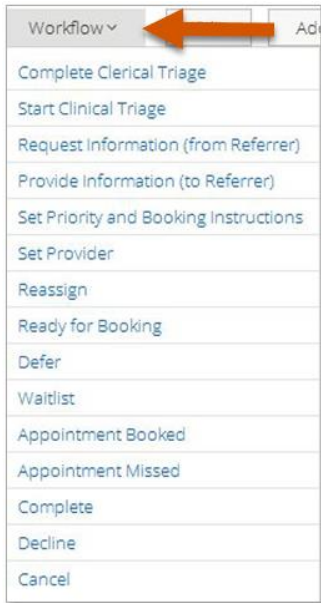
**Edit:** Use to make changes to the referral such as update address or add documents/attachments.

**Add Note:** Use to add a note (ie. general, clinical or clerical).

**Print:** Use to print from a local printer or save as a document to your computer.

## Updating the Consult Request Status

Use the **Workflow** menu within the consult request 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 access to review consult requests. Referral actions in the workflow menu include:



### Workflow Actions

**Complete Clerical Triage:** Status of the consult request will change to **Waiting for Clinical Triage**.

**Start Clinical Triage:** Status of the consult request will change to **Clinical Triage in Progress**.

**Request Information (from Referrer):** This workflow action places the consult request on the **Action Required** worklist of the referring provider. It will appear on the receiving provider's **Triage** dashboard on the **Waiting for Response** worklist. Once this workflow action is selected, a pop-up will appear.

1. Select a **Reason** for requesting information:
  - Missing clear clinical question.
  - Missing information.
  - Missing required patient demographics.
  - Missing required investigations.
2. Enter a **Comment** (required).

**Provide Information (to Referrer):** This workflow action allows you to provide information and enter a **Comment** (required) as needed to the referring provider. The consult request will then appear on the **Action Required** worklist of the referring provider. It will appear on the receiving provider's **Triage** dashboard on the **Waiting for Response** worklist.

**Set Priority and Booking Instructions:** Based on the consult request's clinical content, you will be able to set the priority of the consult request. 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 set to a higher priority.

1. Select priority:
  - Routine
  - Semi Urgent
  - Urgent
2. Enter a **Comment** (optional).

**Set Provider:** Select this workflow action and type in the service provider's name. Provide a **Comment** (optional).

*Note: this is not used for Oncology*

**Reassign:** This workflow action changes the status of the consult request to **Reassigned**. Once the **Reassign** workflow action is selected, a pop-up will appear.

1. Assign the consult request to another triage facility.
2. Select a **Reason** for reassigning the consult request:
  - Referral assigned to next available site/provider.
  - Referral assigned to requested site/provider.
  - Referral reassigned to another provider due to shorter wait time.
  - Requested provider does not see this type of referral.
  - Requested provider is not accepting new patients at this time.
3. Enter a **Comment** (optional).

**Ready for Booking:** Status of the consult request 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:** Changes the status of the request for service to **Deferred**. Once the **Defer** action is selected, a pop-up will appear.

1. Select a **Review Date**.
2. Select a **Reason** for deferring the referral:
  - Patient medically not ready.
  - Patient functionally not ready.
  - Patient socially not ready.
3. Enter a **Comment** (optional).

**Best Practice Point:** Enter a comment to provide further details for deferring the request.

**Waitlist:** Status of the consult request will change to **Waitlisted**.

**Best Practice Point:** As a comment box is not available for changing the status to waitlisted, select **Add Note** and choose **Clerical** to enter a note regarding the patient's waitlist status.

**Appointment Booked:** Status of the consult request will change to **Appointment Booked**.

1. Select the date and time of the appointment. It will then appear in the header of the referral.
2. Enter a **Comment** (optional).

**Best Practice Point:** Enter a comment to indicate how the patient is to be notified.

**Appointment Missed:** Status of the consult request 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.
2. Enter a **Comment** (optional).

**Best Practice Point:** Enter a comment to provide further details on the appointment missed. If choosing the **Reason of Patient will not be rebooked and is returned to your care** – also **Cancel** the request to move it off the Triage list

**Complete:** Status of the consult request will change to **Completed**. Complete the consult request.

1. Enter **Date Consult Letter Sent**.
2. Select a **Reason**.
3. Select an **Outcome**.
4. Enter a **Comment** (optional).

**Decline:** Changes the status of the request for service to **Declined**. Once the **Decline** action is selected, a pop-up will appear.

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** (optional).

**Cancel:** Changes the status of the consult request to **Cancelled**. Once the **Cancel** action is selected, a pop-up will appear.

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** (optional).

**Best Practice Point:** Enter a comment to provide further details for declining or cancelling the request.