Quick Start Guide
Referral Status Management and Updates

The Referral Status Management and Updates capability allows a Provider to view and track the current status and history of a submitted referral, and also provides the ability to select an already submitted referral and provide additional information by creating and submitting an 'Addendum'.

1. **Access the Referral Status Management and Updates functionality**
   If your practice has been enabled for the Referral Status Management and Updates capability, you can access the screen via your EMR in one of two ways:
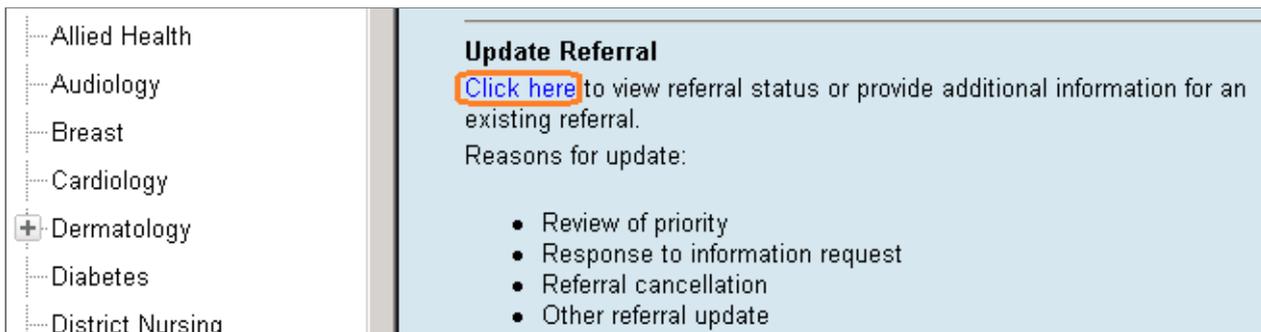
   a. **Via the HealthLink Homepage**
   An 'Update Referral' tab will be available for selection on your HealthLink Homepage. Click on the 'Update Referral' tab to display the Referral Status Management and Updates screen.

   b. **Via the eReferral Services Landing Page**
   An 'Update Referral' section will be available on the eReferral Services Landing Page. Within the 'Update Referral' section, click on the 'Click Here' link to be directed to the 'Update Referral' tab on the HealthLink Homepage which will display the Referral Status Management and Updates screen.

2. **Referral Status Management and Updates screen**
   The Referral Status Management summary table will provide you with access to see a summary for all referrals for the currently active Patient within the EMR that have been created by the current logged in user within the EMR.

   From the Referral Status Management and Updates screen you will be able to see the summary information for all submitted Patient referrals (including the latest status, priority and notes entered by the DHB clinician or administrator), filter the referral list accordingly, view the submitted referrals, and create and send a referral update (Addendum).

Referral ID	Sent	Referrer Name	Form Description	Status	Priority	Latest Note ▼	Action
AR-206185	01/03/2014	JOHN, Sam	Counties Manukau - Dermatology - General	Completed with Outcome		RMS, System Admin on 27/03/2015 Dear Dr Smith, Thank you for your referral. You were concerned about the patien...more	✎ 🕐
AR-590732	19/08/2015	WELBY, Marcus	Waitemata - Haematology	Declined		RMS, System Admin on 20/08/2015 123	✎ 🕐
AR-590723	19/08/2015	WELBY, Marcus	Waitemata - Cardiology	Prioritised	P1	RMS, System Admin on 20/08/2015 123	✎ 🕐
AR-590713	18/08/2015	WELBY, Marcus	Waitemata - General Medicine	Prioritised	P1	RMS, System Admin on 20/08/2015 123	✎ 🕐
AR-590096	14/07/2015	JOHN, Sam	Auckland - Paediatric Cardiology	Completed with Outcome	P1	RMS, System Admin on 14/07/2015 Ref 3	✎ 🕐

The Referral Status Management summary table is defaulted to show all referrals returned for the currently active patient with the default sort order by 'Sent' date with the latest date on top, followed by all other referrals in descending order from the most recent date.

You can click on the column headers in the Referral Status Management summary table to re-sort the data into a different order if required.

3. Filter the Referral Status Management summary table

To refine the list displayed in the Referral Status Management summary table use the 'Refine list by:' filter options that are present at the top of the screen.

Referral Status Management and Updates

Refine list by:

Referral ID	enter referral id
Referral type	CareConnect eReferrals only
Status	select status ▾
Date range	[___] 🗓 to [___] 🗓

Search reset

You will be able to enter a specific referral ID, select a specific status from the drop down list, or enter a specific date range.

When you have entered specific filter criteria, click on the 'Search' button to activate the filter, or click the 'reset' option to set the data back to its default values.

4. Navigation of the Referral Status Management summary table

Navigation of the Referral Status Management summary table can be completed in two different ways:

a. Via the 'Items listed per page' option

You are able to select how many referrals (items) you can see on a page within the Referral Status Management summary table.

By default you will be presented with 10 referrals per page, and using the 'items listed per page' option you will be able to change the number of items that are displayed to you.

Click on a row to view the record: Page 1 of 7 [10 ▾] Items listed per page

Referral ID	Sent ▼	Referrer Name	Form Description	Status	Priority	Latest Note	Action
AR-582963	20/08/2015	ENTWISTLE, Sam	Auckland - General Medicine	New			✎ 🕐

b. Via the 'Pagination' options

The page indicator will advise you which page you are currently viewing and how many pages are available to you. If there are no records or only 1 page (or part of a page) of records to be displayed, then the page indicator will not be displayed.

You will be able to move through the pages of referral items using the pagination control.

5. View a submitted referral

To view a submitted referral that is displayed in the Referral Status Management summary table, simply click on the referral listed in the summary table. The submitted referral view will be displayed.

If a referral has an associated addendum, then the original referral, with any addendums will be displayed to you.

6. Viewing Referral Comments

Where the referral comments presented to you in the 'Latest Note' column of the Referral Status Management summary table are too large to be displayed fully, a '…more' option will be provided at the end of the displayed comments to indicate that there is more to read.

The Referral Comments screen will be opened and displayed to you when you click on the '…more' option within the Comments field in the Referral Status Management table.

The Referral Comments screen will be populated with the full details of the Comments for the selected referral.

7. Viewing Referral History

A 'View Referral History' button (shown as a clock icon) is available in the Action column in the Referral Status Management summary table.

Each referral row of the Referral Status Management summary table will have an associated 'View Referral History' button so you can view the referral history associated with that referral record.

The Referral History screen will be opened and displayed to you when you click on the 'View Referral History' button within the Referral Status Management summary table.

The Referral History table will provide you with a summary of all referral history for the current referral that was selected. The default sort order is by 'Last Updated' date with the latest date on top, followed by all other records in descending order from the most recent date.

8. Launching an 'Additional Information' (Addendum) form

A 'Send Update' button (shown as a pencil icon) is available in the Action column in the Referral Status Management summary table.

Each referral row of the Referral Status Management summary table will have an associated 'Send Update' button.

An 'Additional Information' form is only able to be submitted for active referrals. If an 'Additional Information' form is able to be submitted for the currently selected referral, on selection of the 'Send Update' button in the Referral Status Management summary table, the Additional Information form will be launched and displayed to you for completion and submission.

9. Completing and Submitting an 'Additional Information (Addendum) form

The 'Additional Information' form template has been intentionally designed to be simple and should be utilised to only capture updated information relating to the referral in the form of 'free text' or 'new attachments'.

a. Select the relevant 'Reason for update' from the provided list
b. Enter any relevant information into the 'Additional Information' field, or use the 'Browse Consultation Notes' function to select relevant consultation notes from your EMR to populated into the form.
c. Select the Attachments / Reports tab and select any relevant documents you would like to include in the update.

Once you are ready, you can select the 'Submit' button to send the 'Additional Information' form through to the DHB.

Once the 'Additional Information' form has been submitted it will be bundled with the original referral and displayed to you in a single view. The referral update will be displayed on top of the original referral submitted for the patient.

If there is more than one 'Additional Information' (addendum) submitted for the referral they will be displayed in order of most recent to oldest.

10. Hints and Tips

a. Refreshing the Referral Status Management summary table

After submission of an Additional Information (Addendum) form, the Referral Status Management summary table can be updated immediately by clicking on the 'Search' button in the Refine list by:' filter options that are present at the top of the screen.

b. Referral Status Management and Updates help

Help for the Referral Status Management and Updates functionality and the Additional Information form can be found by clicking on the 'Help' menu and clicking on the link provided.

c. Access parked Additional Information form from patient electronic medical record

A parked Additional Information form can be found in the Parked Forms list in your electronic medical record (location of the Parked Forms list varies between EMR systems)

d. Access submitted Additional Information form from patient electronic medical record

A copy of a submitted Additional Information form can be found in the Submitted Patient Forms list in your electronic medical record (location of the Submitted Patient Forms list varies between EMR systems)

**For all queries, please call the
HealthLink Customer Support Line:**

Monday to Friday (except public holidays) 8am – 6pm
Phone: 0800 288 887   Support email: helpdesk@healthlink.net