

Northland District Health Board

WebPAS/Best Practice

Outpatient Referral User Guide

31/05/2018 This report contains 38 pages



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RED = Business Rule Black Bold = Action BLUE = View

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2 PERFORMING BASIC FUNCTIONS

2.1 LOGGING ON

For security reasons each user must use their own User Name and Password to log on.

1. Log onto your computer using your NDHB username and password



- 2. Click on the webpas icon found on your desk-top
- 3. The webPAS login screen will show
- 4. Type in Username and Password (this will be the same as your NDHB username and password)

2.2 LOGGING OUT OF WEBPAS

- 1. Click the Log Off button below the module name.
- 2. Avoid using the button in the top right hand corner of your screen as it may not log you out properly.

2.3 ENTERING DATA

When entering patient data it is important to note the background of some fields:

- Blue are mandatory and require data
 Address 31 MANGAKAHIA RD
- Grey are **read only** and data cannot be added
 Type of Residency
 Eligible
- White are **optional** and you may leave them empty
 Occupation

All views and functions in webPAS are controlled through security permissions; therefore you may not see all of the options used in this document.

Some options are restricted to avoid areas which deviate from standard practice which could create data errors.

REFERRAL ENTRY 3

A referral is a request for an outpatient assessment and or service for a patient for a particular problem or set of problems.

A referral received into a department will be prioritised by a clinician who assesses whether the referral is accepted and if accepted the referral will then be given a priority which corresponds to a waiting time.

A copy of the referral is entered into webPAS so that outpatient appointments can be booked off this.

3.1 **REFERRAL METHODS**

There are two types of methods used for referring patients:

EReferral (electronic referral)

These are electronic referrals sent via a software system (RMS). This will most commonly come from **General Practitioners.**

These referrals are entered into webPAS after they have been accepted and prioritised by the clinician.

Paper Referrals

In the absence of access to an electronic system, referrers use paper forms as a referral. Often these will come from other services in the hospital (internally) or other hospitals e.g. Auckland

These should be manually entered into webPAS prior to triage to act as receipt of the referral into NDHB and to avoid "lost" referrals. The referral details are then updated in webPAS once the clinician has prioritised the referral.

WEBPAS REFERRAL DEPARTMENT 3.2

In webPAS each referral is created under a Referral Department, which is the service (or Health Specialty) that the referral has been accepted into.

As most booking clerks are assigned to a particular service, webPAS has a default for this set against their login.

This is significant when you go to create a referral in webPAS as the screens will then display specific information related to that referral department.

N

3.3 PATIENT REFERRAL LIST

The following details how to navigate to a list of referrals entered for a patient.

- 1. Navigate to the required patient
- At the patient level, click on the licon > the Referral List will display:

Department All	My Department Standard Vie	ew Primary Vie	w Primary View 2	Stat	us	•		Add Referral Add	
Selected : 1	elected : 1 OP/RF Referral List Q								% B
Date	Department	Clinic Type	Reason For Referral	Referred By	Responsible HCP	Claim Type	Priority	Type/Link	Status
📴 21 Dec 2015	General Surgery		INGUINAL HERNIA	BRYANT Jan (DR)	SWAN Peter (MR)	NA	Routine	♦	Active

- This view displays a list of all referrals open or closed.
- You can click on the 📴 icon to view the management screen for the referral.

3.3.1 REFERRAL STATUS'

You will notice referrals displayed in this list have different statuses which reflect what has happened to the referral and what stage the patient is at in their outpatient journey:

- Waiting A <u>new</u> referral where the patient has not had a first appointment*
- Active A referral where the patient has past or future appointments.
- Rejected A paper referral that has been declined during the prioritisation process.
- Cancelled Referral no longer in use. Commonly where the DHB was notified a patient did not require their a first appointment e.g. *gone* private
- Closed Referral no longer in use. Where patient has finished their journey for that particular referral.

*Many referrals came across from the old patient management system with a status of "Waiting" but have already had appointments. These will have been added to the system prior to webPAS go-live of 20th March 2017.

3.4 ENTERING A REFERRAL

The following details how to add a triaged and accepted referral into the system:

- 1. Navigate to the patient
- 2. Navigate to the patient's referral list
- 3. Check this list before progressing to avoid duplicate referral entries

4. Click the Add Referral Add button (for default department) OR

Select "department" from the drop-down

> The Referral screen for the chosen department will display:

Def of herrar 12022077 0 Department Code Officipaedic Unit to Vist Received Receive		Orthopaedic	eferral		? = ×
Dide Lefter Received R	Date of Referral 13 Oct 2017 👸 💷		Department Code Orthopaedic		•
Refer al Source Cent. Plactitioner Refer al Source	Date Letter 15 Oct 2017 🝎 📖		Link to V isit		
Proferred Problem 3 Contract Proferred Horp Related Rel The Stated Control Referred State Problem 3 Contract Proferred Profe	Referral Source Gen. Practitioner		Prev Related Ref		
Defe Defe Defe Defe Defe			D Prev Related Ref	* 0	
Interest in all 122455 or Other Number Referral Referral Originator Referral DOXEC Contin (DR Referral Presson HOP Practice B333 Referral Presson Referral Presson Referral Presson Referral Presson Referral Vertice Referra	aDeferral		Date 🗌 🚟 Ti	me 🔮 🐨	
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Refering H2P QL400 DOCKE Conlin (DP ↓ Preferral Supal	InformGP Yes 🗸		Referral Originator		
HCP Hactice B839 PRUMANGA MEDICAL CENTRE ↓ Type of Referral Finispy Referral Referral Normal or Referral Referral Normal or Referral Normal or Referral Normal or Referral Normal or Normal or Referral Normal or Normal or Problem1 Antide Pain Diagnosis 1 Problem2 ✓ Diagnosis 2 Problem3 ✓ Diagnosis 3 Cancer Procedure 1 ↓ Health Purchaser 35 Base DHB-funded ✓ Score Procedure 2 ↓ Contract ✓ Procedure 1 Proferred Monagarei Hospital ✓ Preferred Ste Nu-He Outpatients ✓ Onic D Ern Retahl ✓ Preferred Ste Nu He Outpatients ✓ Outic Type ✓ Matt Be Sent By Ø Sectore Onic D Ern Retahl ✓ Ø Sectore ✓ Stot Type ✓ ✓ Ø Sectore Ø Sectore	Referring HCP CL400 LOCKE Conlin (DR)		Retain as Usual		
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Referral labels Copies 5 V Printer V	Print New Referral Letter to GP RF1 Referral A cknow ledgement	t to Pt 🗸	Printer hA-WHGISTEST	×	
	Referral Labels Copies 5 V		Printer	~	~

The above is an example of a standard referral > please see below for further detail on guidelines and variations:



Field	Description and Use										
Date of Referral	eReferral = Referral	Date;									
	Paper referral = Date	e Referral Written									
Date Letter Received	eReferral = Referral	Date;									
	Paper referral = Date	e Stamped Received									
	This date is used for	waiting time calculations									
Referral Source	Where the referral c	ame from (The health professional group of the referrer)									
	Do not use options s	tarting with "Adm"									
eReferral Number	eReferral = Last 6 dig	gits of the eReferral number									
	Paper Referral = Type the word "Other"										
Inform GP	Signifies patients' GF	gnifies patients' GP will be informed of the journey related to this referral.									
(defaults to Yes)	Only change to "No"	if requested by referrer or patient.									
	Who the referrer is.										
	It referrer name is no	ot available when searching select the practice or facility instead									
Referring HCP	HCP Practice 3260	AUCKLAND CITY HOSPITAL									
(HCP = Health Care	HEF Placifice 0200	and type their name in the keterra									
Provider)	Originator field.	erral Originator Dr John Smith ×									
	If neither practice no	If neither practice nor facility is available use "196GH" (Not in System) and type name									
	and practice in Refe	rral Originator and email helpdesk with details so they can be added.									
HCP Practice		action is displayed for the referred. If not as had, to Deferring LICD									
(defaults from	Check the correct pr	actice is displayed for the referral. If not go back to Referring HCP									
"Referring HCP")	field and choose the	right option.									
	Option	Description and Use									
	FSA 1st Specialist	A First Specialist Assessment (FSA) occurs when a Specialist,									
		Medical Officer (at registrar level or above) or a Registered Nurse									
		Practitioner sees a patient for the first time in a particular service									
		for that referral.									
		The healthcare user receives treatment, therapy, advice, diagnostic									
		or investigatory procedures at a health care facility and leaves									
		within three hours of the start of the consultation.									
		Service is provided in a ward and/or at designated outpatient									
		Clinic. Excludes									
Type of Poferral		for proodmission assossment/screening									
Type of Referral	E/Up After Acute	Follow-up after acute inpatient admission (ward follow-up)									
	ID	Follow-up after acute inpatient admission (ward follow-up)									
	Follow Lin - Other	Follow-ups that do not fit the other dron-down criteria									
		Tonow ups that do not it the other drop down enteria.									
	Investigation /	Requires an Investigation/Test (this includes investigation/tests									
	Test	required to inform referral triage outcome)									
		MUST Enter in Procedure 1									
	Other	A non FSA appointment for an assessment. May include non-									
	Assessment	specialist assessments such as nurse assessment, anaesthetic pre-									
		admission assessment, or allied health									
	Procedure/	Includes all intended elective admissions for a procedure or									
	Treatment	treatment. Some procedures include a diagnostic component,									



1									
	such as a bio	osy or angiography.							
	MOST Enter I	n Procedure 1							
Referrer Suspicion of	A code indicating the suspicion of c	ancer for the patient as determined by the <u>Referrer</u>							
Cancer	If this is not provided on the referra	al, select - "Not Stated"							
Problem 1-3	Generic presenting problem as dete	ermined by referrer.							
	State whether accident related or r	not.							
Claim Type	If accident is selected a screen will	appear once you finish entering information to enter							
	details.								
Health Purchaser	Where funding for visits is coming f	rom.							
Casara	Select a relevant option (most com								
Score	Currently not in use.								
Contract	Currently not in use.								
	Provide (search for and select) if re	ferral was generated from another webPAS							
	visit/referral e.g. Emergency Attend	dance:							
Link to Visit	pery Referral Department Code General Surgery								
	Link to Visit								
Prev Related Referral	Currently not in use								
ID									
Prev Related Ref	Currently not in use.								
Date									
	Use if clinician not available in search for referring HCP								
Referral Originator	Type in Name and Practice/Facility of Referrer e.g. Dr John Smith, Rust Ave Medical								
	Centre								
Retain as Usual GP	Only tick if patient or referrer requi	oste							
Primary	Leave as ticked								
r mindi y	Full problem description e.g. Left A	nkle Dain							
Reason for Referral	You can also add another importan	t information in here for booking e.g. requires FCG							
	A code indicating whether the appr	pintment is to be managed within MoH standard time							
	frames or there is a clinical reason why time frames may be extended								
	Planned is only used for "FSA's" under MoH time-frames:								
	Option	Description and Use							
	Normal	Use where patient is not Planned.							
	Acute	Only used by Ophthalmology Department							
	Planned (must also provide	Where the timing of the service is intentionally							
Normal or Dispaged	"Must be Seen by Date")	delayed for <u>clinical reasons</u> , but the timeframe is							
Normal or Planned		known							
		e.g.							
		- Patient is pregnant and will have FSA after delivery							
		- Patient needs to reach a certain age to have their							
		FSA and this is outside the MoH time-frames.							
		- The assessment is an FSA that is a referral for							
		follow up care from private or another Submitting							
		Organisation and is required in 12 months.							



Diagnosis 1.2	Enter If Triage Suspicion of Cancer is "confirmed" and the diagnosis code/s have been provided by the clinician
Diagnosis 1-3	Diagnosis 1 SKIN Malignant melanoma of skin, un
Procedure 1-3	Enter if Referral Type is "Investigation/Test" (example 1) or "Procedure Treatment" (example 2) 1 CT CT Scan 2 SLEEP Sleep Study NEVER enter this for any other Referral Type.
Preferred Hospital	Used to specify the preferred hospital for the appointment to take place. Will place patient on that hospitals waiting list.
Preferred Site	Leave as defaulted
Clinic Type	Type of clinic patient will be booked into.
Clinic ID	Select if patient has been allocated to a specific clinician, otherwise leave blank.
Slot Type	Leave blank
Responsible HCP	Head of Department or Clinician assigned to the patient during triage. Add further clinicians in "Additional HCP" field if required.
Case Team	Currently not in use.
Additional HCP	Use to define further clinicians the patient can be seen by (if identified at triage): A dditional HCP A ctivate Referral A dditional HCP 1 ER400 RATAH, Erin (MR) A dditional HCP 2 Modifional HCP 3 A dditional HCP 4
Patient's DHB	This field will display if patient is outside NDHB area. Select "Accepted by Management"
Priority	Select a Priority option based on the triage by clinician.
Date of Priority	eReferral = Date of Triage; Paper referral = Date Written on Triage Stamp or Date received back from Triage
Must be Seen By Date	The clinically appropriate time frame for the intended service to occur as determined by priority or MoH waiting time for FSA's. 1 st of the month due, unless due in weeks then enter exact date.
Prioritising HCP	Clinician who triaged the referral.
Triage Outcome	Select "Accepted".
Triage Susp Cancer	A code indicating the level of suspicion of cancer for the patient as determined by the <u>Triaging Clinician.</u> If this is not clearly stated by the Triaging Clinician, select "There is NOT A HIGH suspicion of Cancer"
Suspicion Noted Date	Same as Date of Priority field.
Activate Referral	Must leave <u>un-ticked</u> (makes the referral "Active" instead of "Waiting")
Print New Referral Letter to Patient	All patients must receive acknowledgement of acceptance for an FSA within 10 working days from receipt of referral.

5. Click Add

> the Referral List will re-display, the letters selected will print;

Business Rule: If a booking is being made directly after the referral is added and there is no referral letter sent the person <u>must</u> be contacted and "confirmed" in webPAS. Please see section: Confirm Appointments.

The referral will be saved and added to this list with a status of "Waiting":

Department All	My Department Standard View	ew Primary Vie	ew Primary View 2	Statı	is All	•		Add Referral Add	
Selected : 2			ОР	/RF Referral List				Q	y, B
Date	Department	Clinic Type	Reason For Referral	Referred By	Responsible HCP	Claim Type	Priority	Type/Link	Status
💁 22 Jun 2015	Orthopaedic	Fracture	HIP PAIN R, FEB 1,2016	BRYANT Jan (DR)	COUP Rob (DR)	NA	Semi Urgent	♦ Primary	Waiting
📴 21 Dec 2015	General Surgery		INGUINAL HERNIA	BRYANT Jan (DR)	SWAN Peter (MR)	NA	Routine	🚓 Primary	Active

And on the Appointment Action List (please see section on Appointment Action List for further details)

3.5 REFERRAL WITH CLAIM TYPE OF ACCIDENT (ACC)

- 1. After clicking ______ on the referral screen, the Injury / Accident Details screen will display
- If there is an exisiting claim in webPAS, the search icon will appear next to the ACC Number field:
- 2. Use this to search for and select the relevant number if selected all the required information will auto populate;

OR enter in the mandatory details (blue fields) <u>only</u>, referencing the table below:

Field	Description and Use				
ACC Number	Enter ACC Number, this will be on the referral				
Accident Date/Time	Enter in <u>date</u> of accident <u>only</u> , this will be on the referral				
ACC Work Related	Select an option, select "To be Confirmed" if unknown				
Employer	Will be required if work-related. Type in the business name of the patients employer e.g. Northland District Health Board				
Description of Injury	Type in the full description on injury e.g. "Fell from Ladder, Left Fractured Ankle"				

3. Click **OK** > the Referral Details screen will display, the letters selected will print and the referral will be saved and added to the list.



3.6 PAPER REFERRAL PROCESS

The addition of paper referrals into the system before triage is to ensure patients are not lost.

The process is the same for adding an electronic referral except only the known or mandatory fields are entered with the rest left blank and updated after the referral has been triaged.

All paper referrals must be;

- Date stamped and entered into the system on the same day as receipt.

- Delivered (not sent in internal mail) to CRO (Central Referral Office) on the same day as entry into the system.

- Sent to the appropriate clinician for triage on the same day as picked up from CRO (need timeframes for CRO).

- If the referral is urgent, send a scanned copy to CRO.

The following details this process:

- 1. Add a new referral for the patient
- 2. Complete Mandatory (blue) fields:
- **Responsible HCP** = Head of Department
- **Priority** = Triage Req Paper Ref
- Date of Priority = Current Date
- Must be Seen by Date = 10 working days from Referral Received Date
- **Prioritising HCP** = Head of Department.
- **NPF Triage Outcome** = Enter Triage B4 Appt
- Triage Susp Cancer = Same as Referrer Susp of Cancer (if not Not Stated, select "Not high Susp of Ca")
- Suspicion Noted Date = Current Date



	Orth	10paedic I	Referral		? = ×
Date of Referral	30 Apr 2018 🛛 🝎 📖		Department Code	Orthopaedic	
Date Letter Received	30 Apr 2018 📩 🝎 📖		Link to Visit		
Referral Source	Gen. Practitioner		Prev Related Ref ID Prev Related Ref Date	Time 💆 😁	
eReferral Number	123456				
Inform GP	Yes 🗸		Referral Originator		
Referring HCP	CL400 DR Conlin LOCKE) 🍠 🔍	Retain as Usual GP?		
HCP Practice	B839 RAUMANGA MEDICAL CENTRE] 🥑 👘	Primary	✓	
Type of Referral	FSA 1st Specialist		Reason for Referral	Left Ankle Pain	
Referrer Susp Cancer	Not Stated		Normal or Planned	Normal	
Problem 1	Ankle Pain		Diagnosis 1	Q 🖉	
Problem 2	✓		Diagnosis 2		
Problem 3	✓		Diagnosis 3	Q <i>§</i>	
Claim Type	Non Accident				
Health Purchase	35 Base DHB-funded 🗸				
Score			Procedure 1	🔍 🖉	
Contract	~		Procedure 2	🔍 🖉	
			Procedure 3		
Preferred Hospital	Whangarei Hospital		Priority	Triage Req Paper Ref	
Preferred Site	NDHB Outpatients		Date of Priority	30 Apr 2018 💆 🛄	
Clinic Type	Orthopaedic		Must Be Seen By Date	30 Apr 2018 📩 📩	
Clinic ID	✓		Prioritising HCP	MP500 MS Margy POHL	
Slot Type	✓		NPF Triage Outcome	Enter Triage b4 Appt	
Responsible HOF	MP500 MS Margy POHL	3 🥒	Triage Susp Cancer	Not high susp of Ca	
Case Team		3 🥒	Suspicion Noted Date	30 Apr 2018 📑 🤠 📖	

3. Once entered send physical referral to the Clinician for prioritisation.

Once the referral has been prioritised and returned:

- If the referral is **Accepted**: Update/Add the required information (making sure all the above specific fields are updated); please refer to <u>Updating Referral Details</u>.
- If the referral is **Rejected:** Reject the referral (Please refer to <u>Reject (Declined)</u>)



4 REFERRAL MANAGEMENT

4.1 UPDATING REFERRAL DETAILS

The following details how to update the details for a referral:

- 1. Navigate to the patient's referral list
- 2. Click on the 🖾 icon for the referral you wish to update > the Referral Details screen will display.
- 3. Click the Update button > the Update Referral screen will display.
- 4. Update the required details
- 5. Click > The Referral Details screen will display and the details updated.

4.2 ACTION CODES (REFERRAL COMMENTS)

Action codes are used to capture notes/comments made for referrals e.g. patient phoned to say they can only come to appointments on a Wednesday or Friday:

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the referral you wish to make a comment on > the Referral Details screen will display:

Information	🖌 🔠 🛗 Action	ıs 🗕	- Printing	- 3						
Status Update 🔻	Outpatient Bookings	•				Orti	hopaedic Referral Details	5		
Type of Referral Claim Type Reason for Referral Created By	FSA Non Accident Sciatic Pain Noni Perkins 14 Oct	2015 16:57	Status Code Case Team Last Updated By	Closed 13 N Noni Perkins	ov 2015 13 Nov 2015 15:0	02:52	Referral Date Responsible HCP Health Purchaser Contract	14 Oct 2015 COUP Rob (DR) 35 Base DHB-funded		
		List Contacts	Add Contact	Update Referra	List Copy Re	eferral 🔻 📘	Request Appts			
				Last 5 Contac						
Date & Time		Provider		Service Input			Claim Type		Notes / Other	
				No more Encount						
Audit Letter History					Action Code		✓ Comment		Save Action	
	0.1.07			Kererral Action P	oun.					
webuser	Date & Time		Action	n code		update Type		Comment		
	<< Previous Next >>									

- 3. Select an **Action** from the Action Code drop down list (highlighted above)
- 4. And/or, enter **text** into the Comments field to further explain the action made.
- 5. Click Save Action.
- The Action Code and Comments will be saved on the Referral Details screen under Referral Audit:

Audit Letter History			Action Code	▼ Comment		
		Referra	al Action Audit			
Web User	Date & Time	Action Code	Update Type	Comment		
Noni Perkins	13 Nov 2015 at 15:26:30		Action	Patient phoned to request an earlier FSA		
<< Previous Next >>						



4.3 REFERRAL RE-TRIAGE

The following details the process if another referral is sent in to say the patient's condition has deteriorated and the referral has been reprioritised as a result e.g. routine to semi-urgent/urgent:

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the referral > the Referral Details screen will display.
- 3. Click the Update button > the Update Referral screen will display.
- 4. Select the new priority from the **Priority** drop-down
- 5. Update **Date of Priority** to date the new priority was assigned.
- 6. NPF Triage Outcome = Accepted
- 7. If patent is not being booked straight away print another letter notifying patient of new waiting time.
- 8. Click OK
- 9. Go to "Action Codes" for the referral and add an action with the following:
- Action Code = "Triage Reassessed"
- Comment = Detail why patient was re-assessed e.g. "New GP referral Condition Deterioration":

Referral Action Audit							
Web User	Date & Time	Action Code	Update Type	Comment			
Noni Perkins	21 Nov 2016 at 13:08:39	Triage ReAssesed	Action	New GP Referral - Condition Deterioration			
		<< Previous	Next >>				

4.4 TRANSFER A REFERRAL

The following option should <u>only</u> be used if you are transferring to a different Responsible HCP or if the referral was sent to the wrong department in the first place. If a patient is referred to another department this should be a new referral.

Note: Using transfer instead of updating is preferred as it is clearly captured in the referral audit history.

- 1. Navigate to the required patients' referral list
- 2. Click on the 🖾 icon for the referral you wish to transfer > the Referral Details screen will appear.
- 3. At the patient level, select "Transfer Referral" from the Action drop-down > the following screen will display:

		Ort	hopaedic Tra	nsfer Referral				? = ×
Transfer From			Т	ransfer To				
Department Code	Orthopaedic		C	Department Code	Orthopaedic	~		
Responsible HCP	KV200	MR Kelly VINCE	F	Responsible HCP	RC300	DR Rob COUP	9] 🥑
Case Team			C	Case Team			9] 🥑
			Update	Cancel				

- 4. If required select a new Department Code
- 5. If required Enter a new Responsible HCP
- 6. Click > the referral will have transferred to the new department/HCP.

4.5 REFERRAL AUDIT HISTORY

In webPAS you can view an audit history for each referral. This displays a log of every user who viewed and updated a referral:

- 1. Navigate to the patient's referral list ᄩ
- 2. Click on the 1 icon for the referral > the Referral Details screen will display.
- 3. In this screen, click on the Audit button > the Referral Audit screen will display showing the history for the referral:

		Orthopaedic Referral Audit Details	
Priority	Routine	Entered by	Noni Perkins
Referral Date	20 Feb 2018	Referral Source	Gen. Practitioner
Referred By	DR Rob COUP	Problem	Orthopaedic
Diagnosis Code		Created	20 Feb 2018 at 15:36
Status Code	Active	Case Review Date	
		Cancel	
		Referral Audit	
Web User	Date & Time	Action Code	Update Type
Noni Perkins	27 Apr 2018 at 15:39:56		View
Noni Perkins	27 Apr 2018 at 15:31:00		View
Noni Perkins	27 Apr 2018 at 10:39:56		View
Noni Perkins	20 Feb 2018 at 15:40:57		View
Noni Perkins	20 Feb 2018 at 15:38:38		View
Noni Perkins	20 Feb 2018 at 15:36:26		Add
		<< Previous Next >>	

	Next >>	
Note: this screen only displays the last 6 updates. Click		to view older updates.



4.6 CLOSING REFERRALS

The status of a referral automatically defaults to "Waiting" when the referral is added. Once a booking is made off that referral the status will change to "Active".

Closing a referral occurs by changing a referrals' status from waiting or active to one of the following status' (depending on the reason for closure):

Reject (Declined) A (pre-entered) paper referral that is declined during the prioritisation process.
 Cancel The Cancel option is used to close a "waiting" referral or a referral entered in error *e.g. patient has gone private or you accidently added a referral in error* Closed A "Closed" status is used to signify that a patient's journey has ended for that particular referral. This is most commonly used once the patient has been seen in clinic and the clinician has decided they no longer require any further appointments.

This section details the process for each.

4.6.1 REJECT (DECLINED)

Business Rule: "Reject" is not a NDHB agreed term for the decline of a referral. All communication verbal or written with a patient relating to this process must reference to "Declined" and not "Rejected".

The following details the process:

- 1. Navigate to the patient's referral list
- 2. Click on the 1 icon for the referral > the Referral Details screen will display.
- 3. Click the Update button > the Update Referral screen will display.
- 4. Update Priority to "Rejected"
- 5. NPF Triage Outcome = Select option relevant to why referral was declined.
- 6. Click **Ok** > the Referral Details screen will display:

🖉 🗃 🔡 💾 🚰 Info	ormation 🗸 🛗 Actions	 Printing 	🗠 🍝 📥		
Status Update 🗸 🕴 Dutpatie	nt Bookings 🗸	Waiting List 🗸			Orthopaedic Referral Details
Type of Referral	FSA 1st Specialist	Status Code	Waiting		Referral Date
Claim Type	Accident	Case Team			Responsible HCP
Reason for Referral	this is the reason for referral				Health Purchaser
Created By	Noni Perkins 20 Feb 2018 15:36	Last Updated By	Noni Per	kins 27 Apr 2018 16:13:22	Contract
	List Contacts Add Contact	Update Referral List	Orthopaedic	V Internal Referral V	Linked Referrals Notes
			Charopacale		
			Last 5 Cor	itacts	
Date & Time	Provider		Service Input		Claim Type
			No more Enc	ounters	
Audit Letter History				Action Code	Commont
					Connent
			Referral Acti	on Audit	
Web User	Date & Time	Action	Code	Update	Туре
			<< Previous	Next >>	

 Select Reject from the Status Update drop-down (highlighted above) > The Reject a Referral screen will display:

Reject a Referral						
Department	Orthopaedic	Entered by	Noni Perkins			
Date Rejected	27 Apr 2018 🛄 Time 15:56:44 🝎 🤇	Ð				
Reason for Rejection	Rejected on Referral					
Comment						
Print Reject Referral Letter	to Patient	Printer	Spool Report	~		
Print Reject Referral Letter	to Referrer	Printer	Spool Report	~		
Print Reject Referral Letter	to GP	Printer	WHGTOHORA-006	~		
Referral Labels 🗌 Copie	s 40 🗸	Printer	Com Diseases Label	~		
	ОК Са	ncel				

- 8. Update Date Rejected to Date Clinician Triaged
- 9. Reason for Rejection = Rejected on Referral
- 10. Enter further Comments if required
- 11. There are currently no rejected letters.
- 12. Click > The Referral Details screen will display showing a Status of "Rejected":

Status Code	Rejected 24 Aug 2016
-------------	----------------------

Note:

If at any stage you try to reject a referral with appointments (past or future) an error message will display and not allow you to continue:



If the referral has already been entered onto the waitlist and a review has resulted in an outcome of removal, the referral should be "Closed" as **Service Complete.**

4.6.1.1 VIEW REJECTED REFERRALS

The Rejected Referral view; lists patients with a referral status set to Rejected, filtered by Referral date range. The screen displays both patient and referral details.

Filters at the top of the screen at the top of the screen allow you to narrow or broaden your search as required.

- 1. At the hospital level, select **Rejected Referrals** from the Views drop-down.
- The Department and Preferred Hospital fields will default to your access settings and matching records will display:

Department	Orthopaedic	•	-	HCP				Q 🝠	Referral Date << August	2016 -	>> 17	31 ^
Clinic Type	Select Clinic Type	•		Clinic ID	Select Clinic ID	-						
Preferred Hospital	Whangarei Hospital		•	Preferred Site	NDHB Outpatient	ts 🔻						
									Add Referral	Add Ort	hopaedic	-
					Orthopaedic	Referrals - I	Rejected					
Selected : 1	Selected : 1 List Referrals											
Patient			U/R	DOB	Referral D	Date Da	te Rejected	Last Con	itact Problem	Reaso	n Preferred Site	d
ZAR8787)	Mrs Sandra (04/08/19	36,F,	ZAR8787	04 Aug 198	6 04 Aug 20	16 04	Aug 2016		Ankle Pain	Rejected Referra	on NDHB al Outpatien	nt:

- Click on the icon next to a patient to view details for the corresponding referral.

4.6.1.2 REINSTATE

The reinstate option is used to re-open referrals **rejected** in error:

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the referral > the Referral Details screen will display:

🖉 🗃 🔡 🔛 📖 🖬	ormation 🗸 🛗 Actions	- 🗸 Rinting 🔪	/ 🧕 📇
Status Update 🗸 🛛 Dutpati	ent Bookings 🗸	Waiting List 🗸	
Type of Referral Claim Type Reason for Referral	FSA 1st Specialist Non Accident bio left	Status Code Case Team	Rejected 27 Apr 2018
Created By	paulak 12 Oct 2017 09:05	Last Updated By	Noni Perkins 27 Apr 2018 16:2
	List Contacts Add Contact	Update Referral List	Copy Referral 💙 Internal Refer
			Last 5 Contacts
Date & Time	Provider	Se	rvice Input
			No more Encounters
Audit Letter History			Action Code
			Referral Action Audit
Web User	Date & Time	Action Co	de
			<< Previous Next >>

3. Select **Reinstate** from the Status Update drop-down (highlighted above) > The Reinstate Referral screen will display:

		Reinstate a Referral			×
Department	General Medicine		Entered by	Street States	
Comment	Rejected in Error				
		OK Cancel			
4. En	ter Comment				
5. Clie	ск				

4.6.2 CANCEL

- 1. Navigate to the patient's referral list
- 2. Click on the 📴 icon for the referral > the Referral Details screen will display:

	Information 🗸 🛗 Actions	✓ Printing	✓ <u>≼</u>
Status Update 🗸 💡	Dutpatient Bookings 🗸	Waiting List 🗸	
Type of Referral	FSA 1st Specialist	Status Code	Waiting
Claim Type	Accident	Case Team	
Reason for Referral	this is the reason for referral		
Created By	Noni Perkins 20 Feb 2018 15:36	Last Updated By	Noni Perkins 27 Apr 2018 16

3. Select **Cancel** from the Status Update field (highlighted above) > the Cancel a Referral screen will display:

	Cancel a Referral		? = ×
Department	Orthopaedic	Entered by	
Date Cancelled	27 Apr 2018 🔤 Time 16:22:20 💆 🕒		
Reason for Cancellation	Patient w ent Private		
Comment	Patient phoned and advised gone private		
		1	
	OK Cancel		

- 4. Enter Date Cancelled (Date notified referral needed to be Cancelled)
- 5. Select Reason
- 6. Enter **Comment** (highly recommended this is entered so there is a clear history of why)
- Click OK > The Referral Details screen will display showing a Status of "Cancelled"

Status Code

Cancelled 27 Apr 2018



4.6.2.1 VIEW CANCELLED REFERRALS

The Cancelled Referral view; lists patients with a referral status set to Cancelled, filtered by referral date range. The screen displays both patient and referral details.

Filters at the top of the screen allow you to narrow or broaden your search as required.

- 1. At the hospital level, select **Cancelled Referrals** from the Views drop-down.
- The Department and Preferred Hospital fields will default to your access settings and matching records will display:

Department	General Surgery	~		HCP				S 🖉	Referral D	ate << April 2018	✔ >>	
Clinic Type	General Surgery	~		Clinic	: ID	Select Clinic ID	~					
Preferred Hospital	Whangarei Hospital		~	Pref	erred Site	NDHB Outpatients V						
										Add I	Referral Add Gene	ral Su
						General Sur	Jery Referra	ıls - Rejected				
Selected : 1							st Referrals				Q	
Patient				U/R	DOB	Referral		Date Rejected	Last Contact	Problem	Reason	Pro Sit
TEST, Ms Autumn	(23/05/2017,F, ZBE321	16)		ZBE3216	23 May 2017	20 Apr 201	8	27 Apr 2018		General Surgery	Rejected on Referral	ND) Out
									<u></u>			

- Any of the listed referrals can be accessed by clicking on the folder icon 🛄 in the list.

4.6.3 CLOSE

A "Closed" status is used to signify that a patient's journey has ended for that particular referral. This is most commonly used once the patient has been seen in clinic and the clinician has decided they no longer require any further appointments.

Note: You cannot close a referral that has future bookings.

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the referral > the Referral Details screen will display:

	Information 💙 🛗 Action	Is Printing	✓ <u>≼</u>	
Status Update 🗸	Outpatient Bookings 🗸	Waiting List 🗸		
Type of Referral Claim Type Reason for Referral	FSA 1st Specialist Non Accident suspected beart attack	Status Code Case Team	Active 27 Apr 2	2018
Created By	Generic Clinics 20 Apr 2018 1	3:57 Last Updated By	Next Partition 2	7 May 2010 102 277 288
	List Contacts Add Contact	Update Referral List	Orthopaedic V	Internal Referral 🗸
			Last 5 Contacts	
Date & Time		Provider		Service Input
20 Apr 2018 09:30:00		DR Jonathan MANSON		Follow Up - Other
			No more Encounters	; ;
Audit Letter Hi	story			Action Code

 Select Close from the Status Update field (highlighted above) > the Close a Referral screen will display:

	Close a Referral			? = ×
				r
Department	Orthopaedic	Entered by	Generic Clinics	
Date Closed	27 Apr 2018 🔤 Time 16:39:08 💆 💮			
Reason for Closure	Service Complete			
Comment	As per clinician			
Closure Outcome	Primary Care			
Date of Next Review	🛅 💆			
	Ok Cancel			

- 4. Enter Date Closed (date notified referral needed to be closed)
- 5. Select Reason (most Commonly "Service Complete")
- 6. Enter Comment (highly recommended this is entered so there is a clear history of why)
- 7. Select Outcome (where patient is going back to)
- 8. Click Ok > The Referral Details screen will display showing a Status of "Closed"

Status Code

Closed 27 Apr 2018

4.6.3.1 WARNING: LINKED OUTPATIENT APPOINTMENTS EXIST

If there are current future bookings for this referral the following warning will display:



1. Click to view > the following screen will display:

	Linked Outpatient Visits									
Visit Date	Visit No	Presenting Complaint	Clinic Type	Clinic Id	Visit Status	Cancel				
05 Oct 2016	5094671	Left Elbow Pain ? Tennis Elbow	Orthopaedics	Gareth Laws	Booked					
	Ok									

2. Click on the icon next to the appointment > The Cancel Appointment screen will display:

	Cancel Appointment TEST Ms Autumn					
Cancellation Reason	Not Reqd - Ref to GP					
Comments	As per clinician service complete	~				
Print Cancellation Lette	er Printer WHGTOHORA-006 V					

- 3. Select a Cancellation Reason
- 4. Enter Comments (highly recommended this is entered so there is a clear history of why)
- 5. Un-tick Print Cancellation Letter (this does not currently exist)
- Click Ok > the following screen will display:

Message fi	rom webpage 🛛 🔀
?	Do you wish to continue with this cancellation? Click OK to continue, CANCEL to exit
	OK Cancel

7. Click Ok > the following screen will display:



8. Click > the following screen will re-display:

	Linked Outpatient Visits									
Visit Date	Visit No	Presenting Complaint	Clinic Type	Clinic Id	Visit Status	Cancel				
			Ok							

- 9. If there are any other outstanding appointments repeat previous steps until there are none.
- 10. Click ______ > the following screen will re-display:

	Close a Referral			? = ×
Department	Orthopaedic	Entered by	Noni Perkins	
Reason for Closure	Service Complete			
Closure Outcome	Back to GP			
210 01 101 101	Ok Cancel			
	Ok Cancel			

11. Click (as you have already closed the referral in previous steps) > the Cancelled Appointment screen will display, showing the appointment you just cancelled:

Cancelled Appointment									
Appointment	Clinic	Date Cancelled	Reason	Operator	Rescheduled	Cancellation Comments			
05 Oct 2016 14:10	925HL	24 Aug 2016	Not Reqd - Ref to GP	Noni Perkins					

12. The referral will now also be closed.

Cancel

4.6.3.2 VIEW CLOSED REFERRALS

The Closed Referral view; lists patients with a referral status set to Closed, filtered by a referral date range. The screen displays both patient and referral details.

Filters at the top of the screen allow you to narrow or broaden your search as required.

- 1. At the hospital level, select **Closed Referrals** from the Views drop-down.
- The Department and Preferred Hospital fields will default to your access settings and matching records will display.

Department Clinic Type Preferred Hospital	General Surgery WG Select Clinic Type Wellington Hospital	HCP Clinic ID Preferred Sit	Select Clinic ID General Outpatie] 🍠	Referral Date <	May 2014 💙 ≫		. 17	31 ^
			G	eneral Surgery WGTNRefe	rrals - Closed		Ad	d Referral Add Gene	eral Surgery WG 💉	-
Selected : 3				List Referrals				Q	1.8	
Patient		U/R	DOB	Date Closed	Last Contact	Problem	Healthcare Professional	Outcome	Preferred Site	
MOBILE, Miss Cellula HAN0811)	ar Vodafone Telecom (01/09/2010,F,	HAN0811	01 Sep 2010	25 Jun 2014	24 Jun 2014		Tauvae Deborah (Prof)	Moved District	General Outpatients	^

- Click on the icon next to a patient to view details for the corresponding referral.

4.7 RE-ACTIVATE CLOSED/CANCELLED REFERRAL

The following details how to re-open a closed or cancelled referral using the "Re-Activate" option. This option will re-open the referral with a status of "Active". Because of this it is really important to return the referral to "Waiting" if this was the original status before closure.

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the required referral > the Referral Details screen will display:

		Information 🗸 📸 Actions	🗸 Printing 🗸 🧕
(Status Update 🗸	Outpatient Bookings 🗸	Waiting List
	Type of Referral	FSA 1st Specialist	Status Code
	Reason for Referral	suspected heart attack	Case ream
	Created By	Generic Clinics 20 Apr 2018 13:57	Last Updated By
		List Contacts Add Contact	Update Referral List Orthopae

- 3. Select Reactivate from the Status Update drop-down (highlighted above)
- 4. Enter Date Active
- 5. Enter a comment (highly recommended for history purposes)
- 6. Click > Referral will now have a status of "Active" Status Code Active 27 Apr 2018

Business Rule: If the referral was originally "Waiting" it must be returned to this status

7. Click on the Status Update drop-down > If "Waiting" appears on the bottom of this list it means the referral was originally this status:



 Select Waiting > the screen will refresh and the referral status will now display as "Waiting" Status Code Waiting

V

Reference: MOH NPF specification 2018

5 FSA REFERRAL MANAGEMENT

Patients who require a booking of an FSA appointment (Referral Type of FSA 1st Specialist) must be managed within the current Ministry of Health Elective wait-time of 4 months.

5.1.1 PATIENT UNABLE TO ACCEPT OR COMMIT

If a patient is unable to accept or commit to a <u>reasonable</u> date within this time-frame a management process must occur.

This process must only be used for:

Referrals with a "type of referral" of FSA 1st Specialist

And

Those where a Booking has NOT been made*

And

A period of 10 – 120 days

Patient reasons

*Note: If an appointment is offered this should be booked and subsequently cancelled or rescheduled instead of using this process.

5.1.1.1 PROCESS

1. Before progressing, check with the consultant as to whether the patient should remain on the waiting list.

Where a patient is to remain on the waiting list and be offered another opportunity for an appointment:

2. **Cancel** the referral with the reason "Pt Reason (Describe)" AND enter a statement in the comments field:

	Cancel a Referral		? = ×
Department	Renal	Entered by	
Date Cancelled	17 Mar 2017 🔲 Time 12:05:55 💆 🕒		
Reason for Cancellation	R Reason (Describe) 🗸		
Comment	Patient unable to accept dates given for appt		
	OK Cancel		

3. Create a new Referral



4. Ensure the "new" referral is created using the correct dates

The new referral MUST have the date that the patient notified you they were unavailable for the "Date Letter Received" field

5. Link the new referral to the original referral you have just cancelled

Orthopaedic Referral					
Department Code	Orthopaedic				
Link to Visit	5146338				

6. Enter a comment via Action Codes to record this event:

Referral Action Audit					
Web User	Date & Time	Action Code	Update Type	Comment	
Noni Perkins	24 Aug 2016 at 15:26:44	Copied Referral	Action	Patient Unavailable - FSA Timeframe	

Where a patient is not to be offered another opportunity for an appointment:

7. Cancel the referral with the reason "Pt Reason (Describe)" AND enter a statement in the comments field that clearly indicates the Consultant has said the patient is not to be given another appointment.

		Cancel a Ref	erral		? = X
Department Date Cancelled Reason for Cancellation	Haematology 17 Mar 2017 Time R Reason (Describe)	12:22:33	ö 🕞	Entered by	
Comment	Pt will not commit - Consu	ultant Discharg	e		
		OK	Cancel		

8. The consultant will need to dictate a letter to the patients referrer in regards to this decision.

5.1.2 CLINICAL REASONS (PLANNED)

A planned status can be used to exclude an FSA patient from the MoH waiting times when a clinician specifically requests they need to be seen outside the MoH time frame due to clinical reasons.

The time-frame <u>must</u> be known at the time of giving the patient this status.

Examples:

- Patient is pregnant and will have their FSA after delivery
- Patient is currently 6 months old and must be 1 year on their FSA -
- Patient seen in another DHB, moves to Whangarei and is referred to be seen as a follow-up in 6 months in our DHB. This is an FSA to us but can be given a planned exclusion as this is required outside the time-frame.
- 1. Update the referral details with "Type of Procedure" field changed to "Planned":

Type of Procedure Planned \sim 2. Enter in a "Must be Seen By Date":

Must Be Seen By	24 Aug 2016	1 💏	
Date	24 Aug 2016	9	

3. Enter a comment via <u>Action Codes</u> to record this event:

Web User	Date & Time	Action Code	Update Type	Comment
Noni Perkins	24 Aug 2016 at 15:29:12	Planned Event	Action	Patient Pregnant - Planned

5.2 WAITING INVESTIGATIONS

This section details managing referrals that require investigations e.g. MRI. There are different processes depending on if the investigation is:

- Required <u>prior</u> to Triage (informs triage)
- Required prior to FSA but the referral has been <u>accepted</u>.

Patients should only wait in both processes for 10-120 days.

5.2.1 PRIOR TO TRIAGE (PAPER REFERRAL AND RMS OUTCOME: FOR INVESTIGATION/TEST)

The following process is applied when the clinician requires an investigation <u>before</u> the referral is triaged and accepted:

- 1. Add a <u>new referral</u> for the patient, with the following fields:
 - **Type of Referral** = FSA 1st Specialist
 - **Priority** = "Undecided tests pend"
 - **Date of Priority** = Current Date
 - **Must be seen by Date** = Date investigation likely to be completed (must be between 10-120 days).
 - **NPF Triage Outcome** = "Pending Test Results"
 - Suspicion Noted Date = Current Date

When the investigation has been completed:

 If referral is <u>Rejected</u>: Follow rejection process (please see <u>Reject (Declined)</u>) OR

If the referral is Accepted:

- 5. <u>Cancel</u> the referral with the reason "Investigation Needed"
- 6. Create a **<u>new referral</u>**, with the following fields:
 - Date of Referral = "Date of Referral" from the original referral
 - Date Letter Received = Date investigation was completed

7. Link the new referral to the original referral you have just cancelled:

Orthopaedic Referral					
Department Code	Orthopaedic				
Link to Visit	5146338				

8. Enter a comment via <u>Action Codes</u> to record this event:

Referral Action Audit						
Web User	Date & Time	Action Code		Update Type		Comment
Noni Perkins	27 Apr 2018 at 17:33:18	Investigation Needed		Action		New Referral Accepted after Investigation
			<< Previous	Next >>		

9. Book an appointment or record a virtual FSA depending on how the clinician wants to care for the patient.

5.2.2 BEFORE FSA

The following process is applied when: A patient has been triaged, <u>accepted</u> as an FSA and it is unlikely that the investigation will be completed in time for the patient to be seen within the maximum waiting time. If the test is required as part of the normal or predicted treatment pathway, this process should not be applied.

Examples:

Patient triaged and accepted to orthopaedics for back pain but requires an MRI before their FSA.

- 1. Add or Update the relevant referral, with the following fields:
 - **Type of Referral** = Investigation / Test
 - **Referral Reason** = When entering the referral reason also add comment stating patient is awaiting investigation e.g. *Back pain awaiting MRI*
 - **Must be Seen by Date** = Date investigation likely to be completed (must be between 10-120 days).
- 2. Patients can be found and managed using the NDHB First Appointment Report category of "Investigation Test" (please see NDHB First Appointment Report)

When the investigation has been completed:

- 3. <u>Cancel</u> the referral with the reason "Investigation Needed"
- 4. Create a **<u>new referral</u>**, with the following fields:
 - **Date of Referral** = "Date of Referral" from the original referral
 - Date Letter Received = Date investigation was completed
 - **Type of Referral** = FSA 1st Specialist
- 5. Link the new referral to the original referral you have just cancelled:



Orthopaedic Referral					
Department Code	Orthopaedic				
Link to Visit	5146338				

6. Enter a comment via <u>Action Codes</u> to record this event:

Referral Action Audit					
Web User	Date & Time	Action Code	Update Type	Comment	
Noni Perkins	27 Apr 2018 at 17:35:54	Investigation Needed	Action	MRI Completed Referral Re-Entered	

6 **REFERRAL TO PERIPHERAL HOSPITAL PROCESS**

The "Preferred Hospital" field on a referral is used to allocate referrals to a hospital and therefore display on the selected hospitals waiting list.

Note: Allocating a referral to a "Preferred Hospital" does not restrict the patient from being booked into a different hospitals to the one identified on the referral.

The following process is used when a patient's referral is sent from one hospital to another:

1. A referral for a patient is created, with the Preferred Hospital field as "Whangarei Hospital":

Dreferred		
Hospital	Whangarei Hospital	-

It is decided that the patient is suitable to have their assessment in a peripheral hospital i.e. Kaitaia.

- 2. Before sending the physical referral to Kaitaia, the referral details are updated with the Preferred Hospital field changed to "Kaitaia Hospital" (please see Updating Referral **Details**)
- 3. The Action Codes on the referral are used to record the referral has been sent to a regional hospital (this is important for tracking purposes) (please see <u>Action Codes</u>):
 - Action Code = "Sent to Regional Hsp"
 - **Comments** = Kaitaia (there is no need to record a date and time as this will be recorded when saving the action):

Audit Letter Hist	ory	Action Code	 Comment 	Save Action	
		Referral Action Audit			
Web User	Date & Time	Action Code	Update Ty	vpe Comment	
Noni Perkins	06 May 2016 at 10:53:35	Send to Regional Hsp	Action	Kaitaia	
< Previous Next >>					

4. When the referral is received in Kaitaia, an Action Code is added by the peripheral booking clerk to record this:

7





5. After the patient has been assessed in Kaitaia, if a follow-up is being **booked** in Whangarei there is no need to change the preferred hospital back to Whangarei If a **requested appointment** is made for the follow-up, make sure the preferred hospital is showing the correct hospital so that the patient appears on that hospitals Appointment Action List:

Hospital	Whangarei Hospita	al 🔻	Preferred Site	NDHB Outpati	ents 🔻		Preferred Date] << Fri 06	6 May 2016	▼ >>	1 7 31
Department	Orthopaedic	-	Clinic Type	 Include Waiting F 		 Include Waiting Referrals 					
Priority		-	Clinic Id	Include Suspended Appointments							
Appointment Action Status	Requested	•					Search				
Selected : 0				Appointme	nt Action List					Q	% 🔒
Patient	1	U/R	Referral Date	Action Date	Clinic Type	Clinic Id	Visit Type	Priority	List Days E	Preferred Date	Appt. Status

REFERRAL SENT TO OTHER DHB'S BUT WILL RETURN

If a referral is sent to another DHB but is likely to return at some point the process should be:

1. <u>Close</u> the referral and enter a <u>Date of Next Review</u> (when the patient is likely to return):

	Close a Referral	? = ×
Denartment	Concret Surgery	
Date Closed		
Reason for Closure	Referral (Related)	
Comment	Sent to Auckland	
Closure Outcome	Other DHB	
Date of Next Review	09 May 2019 🛅 💆	
	Ok Cancel	

2. When the patient returns: **<u>Reactivate</u>** the referral:

	Re-activate a Referral	? = ×
Department	Orthopaedic Entered by	
Date Active	09 May 2018 III Time 15:46:41	
Comment	Return from Auckland	
	OK Cancel	

MIGRATED REFERRALS 8

This section details important factors for those patients who have referrals migrated from the old patient management system to WebPAS.

8.1.1 REFERRAL NOTES

<u>Comments</u> for migrated referrals are found in a function called "Notes"; the following details how to view these:

- 1. Navigate to the required patient, the patient demographic screen will display
- 2. At the patient level, click on the Elicon > the Referral List will display:

aUTUMN Miss Leah	*			((Current IP - Wha	ingarei)		NHI No.	ZAE953
Date of Birth 07 Apr 1992(Age 24	tyrs) Sex Female			Claim Type ACC				Visit No	506061
🌌 🗃 🗎 📔 Infor	mation 👻 🛗 Actions -		Printing 🔻						
Department Al	▼ My Department Standard	View Primary \	/iew Primary View 2	Stati	IS AI	•		Add Referral Add	•
Selected : 5			OF	P/RF Referral List				Q	K B
Date	Department	Clinic Type	Reason For Referral	Referred By	Responsible HCP	Claim Type	Priority	Type/Link	Status
26 Apr 2016	Orthopaedic	Orthopaedics	Left Ankle Pain	LOCKE Conlin (DR)	COUP Rob (DR)	NA	3 - Routine	♦ Primary	Active
26 Apr 2016	Orthopaedic	Orthopaedics	Lower Back Pain T9	LOCKE Conlin (DR)	COUP Rob (DR)	ACC	3 - Routine	♦ Primary	Rejected
07 Apr 2016	Orthopaedic	Orthopaedics	Lower Back Pain T9	LOCKE Conlin (DR)	COUP Rob (DR)	NA	3 - Routine	Primary-Links	Closed
26 Apr 2016	Orthopaedic	Fracture	Left Knee Pain	COUP Rob (DR)	COUP Rob (DR)	ACC	0 - Immediate	◆ Primary	Waiting
20 Apr 2016	Orthopaedic	Fracture	Left Knee Pain	COUP Rob (DR)	COUP Rob (DR)	NA	0 - Immediate	Primary-Links	Active

- 3. Click on the Isicon next to the required referral > the Referral Details screen will display:
- Notes 4. If there are comments migrated for this patients referral, the button will appear in **RED** (if there are no notes, this button will display in black)
- 5. Click on this button > the notes screen will display:

Referral Notes - SCHLAEPFER Mr Anthony James (QRG3544)						
Date	Input By	Notes	Delete By			
26 May 2016 08:01:33	CONVREFL -	JM 10MIN XOA				
Add Exit						

6. If required; these notes can be copied, pasted and saved into the "Action Codes" please see Action Codes for more information.

8.1.2 MISSING INFORMATION FOR MIGRATED REFERRALS

There are fields that exist for webPAS referrals that did not exist or were not mandatory in the old system.

What this means is that for every migrated referral, there will be fields/information missing.

Some of these fields are mandatory so when you go into the referral and want to make changes or progress to another process you will have to enter in this data.

The following highlights the possible fields that may have missing information:

	Orthopae	edic Referral	? = ×
Date of Referral	07 May 2009	Department Code Orthopaedic	
Date Letter Received	D7 May 2009 × 🍎 💷	Link to V isit	
Referral Source	Other DHB Specialist	Prev Related Ref ID	
Transfer Source		Prev Related Ref	
eReferral Number			
InformGP	Yes 🗸	Referral Originator	
Ref erring HCP	473HD MR David LY ON	Retain as Usual	
HOP Practice	4111 WHANGAREI HOSPITAL 🔍 🍼	Primary Y es	
Type of Referral	Migrated Follow Up	Reason for Referral NOF # L_COLLES #L	
Referrer Susp Cancer		Normal or Flanned	
Problem 1		Diagnosis 1 🔍 🖉	
Problem 2	✓	Diagnosis 2 🛛 🔍 🖉	
Problem 3	✓	Diagnosis 3 🛛 🔍 🖉	
ClaimTy pe	A ccident		
Order Number			
Health Purchaser	35 Base DHB-funded 🗸		
Score		Procedure 1	
Contract	✓	Procedure 2	
		Procedure 3	
Preferred Hospital	Whannarei Hospital	Priority Sent V	
Preferred Site	NDHB Outpatients	Date of Priority 07 May 2009 10 1	
Clinic Type	Fracture	Must Be Seen By	
Clinic ID		Date	
Clarific ID		NFF Triage	
Slot Type	`	Outcome	
Responsible HCP	RC300 DR Rob COUP	Cancer	
Case Team		Suspicion Noted 📩 📩	
Additional HCP			
Patient's DHB	Northland DHB	Distr. OursiDurat	
Print Update Referr	al Letter to Patient	Printer Spool Report	
Print Update Refer		Printer WHGTOHORA-006	
Referral Labels	Copies 40 V	Printer Com Diseases Label	
	OK	Close	

N

9 ACC

9.1.1 INTRODUCTION

To ensure all funding available to the DHB is accessed; all patients who require assessment as the result of an accident (this could be after some time) <u>MUST</u> have accident details completed.

When considering whether the injury or condition could be caused as the result of an accident, look for keywords that include:

Injury, trauma, fracture, sprain, strain, dislocation, foreign body, assault, drowning, burns, poisoning, haematoma, head injury etc.

Note: If any of the mandatory information is not available on the referral sent in by the referrer, this can be obtained by either the referrer or the ACC hotline.

This section details information related to the viewing and management of ACC patients.

9.1.2 ACC ENQUIRY

The following details how to view ACC information for a patient:

- 1. Navigate to the required patient > the Patient Demographic screen will display
- 2. In the patient level, select ACC Enquiry from the Information drop down > The ACC Enquiry Summary screen will display.

This shows all the ACC numbers the patient has in the top half and below is all the visits linked to those ACC numbers:

🖾 🗂 🗎 🔛 Inform	mation	🔻 🛗 Actions	▼ 🖶 Printing	-	_				_	_		
Selected : 1 ACC Summary						76 🔒						
ACC Number		Accident Description				Accider	nt Date		Decline Date			
ABC5555		27 Apr 2016						* *				
Selected : 1				Injury / Accident Enquiry							Ŀ	
ACC Number	Descr	iption of Injury		Date of Accident	Visit Type		Visit Date	Visit Nur	nber	Decline Date		
H ABC5555				27 Apr 2016	4RF		26 Apr 2016	5060612				^ T
												1

3. Click on the 🛄 icon next to a visit to view the ACC details.

9.1.3 MODIFY ACC NUMBER

The following details how to make changes to and\ existing ACC number:

1. In the patient level, select **Modify ACC Number** from the Actions drop down > the Modify ACC Number screen will display:



🕼 🗃 📔 🖬 In formation	🗸 🔡 Actions 🗸 昌	Printing 🗸					
New ACC Number							Update
Selected : 1		Modify A	CC Number			Q	
ACC Number	Accident Date	Visit Type	Visit Date	Visit Number	Select		
ACC3333	18 Feb 2016	7RF	26 Apr 2016	5060612			

2. Click on the **Select** box next the ACC number that needs to be changed (highlighted above)

3. In the New ACC Number field, type the new number:

New ACC Number ABC2222

4. Click on the update button (top right hand corner) > the screen will display with the changes showing.

9.1.4 MODIFY ACC DETAILS

The following details how to make changes to the details of an existing ACC claim:

1. In the patient level, select **Update ACC Details** from the Actions drop down > the ACC Summary screen will display:

Selected : 1		ACC Summary											
ACC Number	Accident Description		Description			Accident Description		Accident Date			Decline Date		
ABC2222			18			016							
Selected : 1			Injury / Accident Alteration										
ACC Number	Descri	iption of Injury	Date of Accident	Visit Type		Visit Date	Visit Nun	nber	Decline Date				
ABC2222			18 Feb 2016	4RF		26 Apr 2016	5060612						

- 2. Click on the 🛅 icon next to the ACC Number that needs to have details changed.
- 3. The Injury/Accident Data screen will display > make the required changes.
- 4. Click **Ok** > you will be returned to the appropriate area for that event.

10 PRINTING REFERRAL LETTERS AND LABELS

Most processes in webPAS offer (if required) the option of printing labels and letters. This section details how to print outside of the process e.g. the patient didn't get a letter or some extra labels are required.

Important Note: for webPAS printing you must have a visit in context to be able to print e.g. to print a referral label you must be in the referral.

Referral Letter = letter sent out informing the patient that their referral has been accepted and their likely waiting time for an appointment.

<u>Referral Label</u> = label that prints out with the Responsible HCP's name and Department for the referral.

- 1. Navigate to the patient's referral list
- 2. Click on the icon for the required referral > the Referral Details screen will display
- 3. At the patient level, select Ref Letter & Labels from the Printing drop-down:

Actions Waiting List Status Code > The following	Free Format Labels Form Ref Letters & Labels screen displays:	
	Referral Management - Print Letters & Labels	? = ×
Letters I Letter Type	RF1 Referral Acknowledgement to Pt Visit No.	Printer WHGTOHORA-006
Forms 🔲 Template	O/P Visit No.	Printer 🔽
Referral Labels 🔽 Copies	40 🗸	Printer Com Diseases Label
PMI/Mailing Copies	40 🗸	Printer Com Diseases Label
	Ok Cancel	
4. Make require	ed selections	
5. Click		

10.1 **REFERRAL LETTER HISTORY**

The following details how to see the history for letters printed for a referral (this does not include outpatient appointment letters which are seen elsewhere)

- 1. Navigate to the patient's referral list
- 2. Click on the 📴 icon for the required referral > the Referral Details screen will display

3. In this screen click on the

Letter History

button > the following screen displays,

showing the history of letters printed and by whom:

		Anaesthesia / Pain Lette	er History Audit Details
Priority	Routine		Entered by
Referral Date	01 Nov 2017		Referral Source
Referred By	DR. COAST CARE A AND M CLINIC		Problem
Diagnosis Code			Created
Status Code	Waiting		Case Review Date
		Can	cel
		Letter History	Audit Details
Web User	Date & Time		Letter Printed
michellewn	16 Feb 2018 at 14:04:54		RF1 Referral Acknowledgement to Pt
		<< Previous	Next >>

11 WHO TO CONTACT

Email help-desk (NDHB) ISServiceDesk@northlanddhb.org.nz or

Contact the webPAS Support Team	
Louise Miller	
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_= <u>louise.miller@northlanddhb.org.nz</u>	HELP
Noni Perkins	ADVICE
The section NDHB Extension: 60799 Mob +64 21 529 943 #1191	GUÍDANCE
n on i.perkin s@n orth lan ddhb.org.nz	RANA
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