

T- PATIENT DISPOSITION - COMPLEX CONSULTATION REQUEST

Today's office appointments are visible on the secretary's "Manage Requests" screen with "Consult Today" status. They also appear on her Calendar screen.

The HCP sorts today's patient visits using the "Consult Today" tab. After examining the patient, he enters his findings into his EMR or paper record. He updates the Portal thread to instruct the secretary that he requires lab tests, a prescription to be phoned in to the pharmacy, and a referral to be made to a specialist.

The secretary leaves the "For Secretary's Attention" box checked until she can complete all of the tasks requested by the HCP. At present, she can only complete two of the three.

Next, she requests the consult with the specialist. She does so by either faxing the specialist or logging into his Consult*STAT*-Refer Portal. She unchecks "For Secretary's Attention" box because she has completed all 3 tasks. She checks the "Refer to Specialist" box and Saves. The status changes from "Consult Pending Tests" to "Referral Pending Approval".

When she receives confirmation that the referral has been booked, she opens the patient's Request, updates with all relevant details about the appointment, checks "Referral Approved" and Saves.

The change in status to "Referral Approved" triggers an email notification to the patient. The patient opens the email, clicks through the post, and reads the appointment information. The time of the consult appoint is inconvenient, so he dialogues with the secretary by updating the thread, asking to change the date of his referral appointment.

The secretary will find this request for referral rebooking during a routine task in her workflow: checking dropdown submenus in "Waiting for My Reply". Clicking through the submenus will reveal all patient responses for each listed status. In this case, the reply is found under "Referral Approved." She opens the thread and reads the patient's rebooking request. By logging into the specialist's Portal and dialoguing with his office staff, the secretary was able to change the patient's referral appointment within minutes. She then reopens the patient's Request in her own portal and updates the patient's thread with the new appointment information.

Here is the email notification for the patient, and clicking through to the post reveals the rebooked date and time of his specialist appointment.

Satisfied with the rebooking, the patient clicks "Yes, I have noted the information" and closes the Request.

The secretary now creates a PDF of the entire thread, saves it to the patient's EMR or paper record, and then deletes the Request.