

## **T- PATIENT DISPOSITION – REFERRAL TO SPECIALIST REQUIRED**

In this patient disposition, a referral to a specialist is required following the office visit. In this case, it's an urgent visit.

It's time for the office visit. The HCP opens Ann's Request just prior to entering the examining room and reads the problem description on the "Manage Request" screen. At the end of the appointment, the HCP makes a separate note to Ann's EMR or paper file. He then returns to the "Manage Request" screen and enters instructions to the secretary.

He updates, instructing that she make an urgent referral to a specialist. He checks "Consult Pending Tests" and Saves.

On her "Manage Requests" screen, the secretary's uncompleted tasks are pink banded. She can click the "For Secretary's Attention" tab to display all the pink-banded tasks on one screen.

Ann has just left the examining room. The secretary opens her newly pink-banded Request, and sees that an urgent consult with a specialist is required. However, in order to make this referral, she first needs a referral request letter from the HCP. He has to dictate it and have it transcribed.

While awaiting the referral request letter, the secretary clicks back to "Manage Requests" and works on other pink-banded Requests until the letter is ready.

Once she has the referral request letter, she will request the referral by logging in to the specialist's "ConsultSTAT-Refer" portal. If that specialist does not yet have a ConsultSTAT-Refer Portal, the secretary must transmit the request by fax. Now she can reopen Ann's Request and update that she has made the referral. After updating, she unchecks the "For Secretary's Attention" box, checks the "Refer to Specialist" box and Saves. This changes the status to "Referral Pending Approval".

When the sec receives a booking confirmation from the specialist's office, she reopens Ann's Request. She enter the consultation appointment info into the Update Request field, checks "Referral Approved" and Saves.

This sends Ann an email notification regarding her booking to see the specialist. In Ann's Gmail inbox, we see her previous "Consult Today" email, as well as a most recent email, the "Referral Approved" notification.

When Anne clicks through to the post in the thread, she can see the details of her referral appointment.

Ann checks the box indicating that she has made note of her appointment info and clicks "Close".

On her “Manage Requests” screen, the secretary sees the red Copy and Close status on Ann’s Request. She opens it, creates a PDF of the entire thread, either saves it to the patient’s EMR or prints it to the patient's paper record. She confirms that she has printed the information. She then clicks “Delete” to remove Ann’s Request completely from database. Ann’s Request, which was ID number 67, can no longer be found on anyone’s “Manage Requests” screen.