RMS
ADMINISTRATOR GUIDE

Version 1.10.0

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1. Icons used in this Guide

You will see helpful icons used in this guide to draw attention to a subject, action or information.

The light bulb icon indicates information that assists the process being described.

The exclamation icon highlights a warning or an action you need to take. When you see this icon, pay attention and proceed with caution.

The ‘i’ for information icon indicates an area that assists in a decision.

2. Introduction

2.1 RMS Overview

The RMS web portal provides a simple and secure way to immediately receive and manage HealthLink's electronic referrals from Primary and Specialist care providers. Once received, referrals can be printed, reviewed, responded to, prioritised, and triaged. Progress can be tracked and audited, in a customisable system to meet your referral-handling needs.

Customise RMS

RMS easily fits in with, and optimises, your referral management processes, taking into account services, statuses and priorities. User roles can be associated with a specific referral management step and a referral can be transitioned using site-configured pathways. When referrals transition through the configured pathway, additional prompts or confirmation screens can be triggered.

Receive referrals in Real Time

Referrals are available in RMS as soon as they are submitted from the practice and instant acknowledgment is sent back to the referrer on initial receipt. Images and related documents can come through with referrals and be downloaded. Individual referrals can be sorted and searched on a number of criteria, making it easier to locate a particular referral or segregate referrals by groups or departments involved in processing the referral.

Manage referrals efficiently

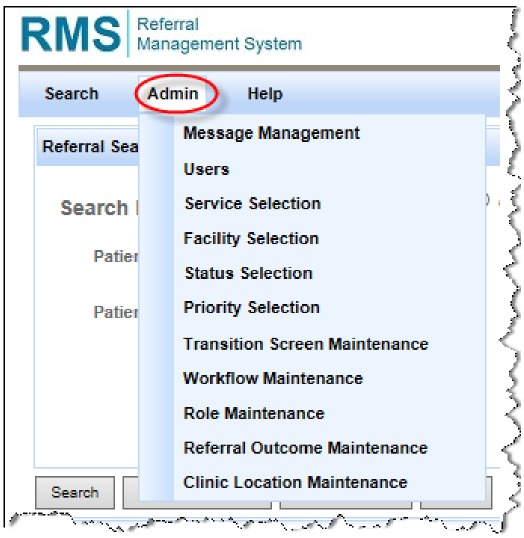
Referrals can be efficiently triaged using your own site-configured pathways. All actions taken or notes made regarding referrals are available using shared progress and triage notes incorporated into the referral view. Status Update Messages can be sent to the referrer as desired or on demand.

Audit and track

Status Update Messages sent, the acknowledgement received, user access and actions can be fully audited and tracked in RMS.

2.2 Administration within RMS

Administration Options are displayed under the RMS 'Admin' Menu.



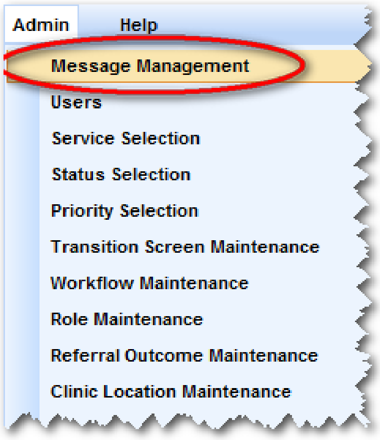
Note: Only Administrators have access to the Admin section of RMS. If there is no admin menu option shown, then you don't have administrator access for RMS.

There are a number of useful activities that can be completed by administrators with RMS. These activities are primarily broken down into specific areas:

Area	Explanation
Message Maintenance	To support RMS administrators with monitoring messages and to assist with any required remedial action for message delivery problems.
Users	Create and maintain users and their roles in RMS.
Service Selection	Create and maintain the services or departments a referral can be assigned to in RMS.
Facility Selection	Create and maintain the facilities or locations a referral in a service can be assigned to in RMS.
Status Selection	Create and maintain the status a referral can be assigned to in RMS.
Priority Selection	Create and maintain the priority a referral can be assigned to in RMS.
Transition Screen Maintenance	Used to define screens available during the referral transition steps.
Workflow Maintenance	Create and maintain the transition workflow steps.
Role Maintenance	Used to define available user roles and to specify which user roles have access to the transition workflow steps.
Referral Outcome Maintenance	Create and maintain the referral outcome field values on the triage screen.
Clinic Location Maintenance	Create and maintain the clinic location field values on the triage screen.

The following sections will guide you through the different administrator features available within RMS.

3. Message Maintenance



RMS supports the creation of status update messages by users as an additional activity when recording progress against a referral. These status update messages are sent via RMS's HealthLink EDI account to the EDI account associated to the referrer recorded within the original referral.
Upon successful delivery of the status update message to the referrer's HealthLink EDI account the message will be processed by the practice's EMR software with the message being allocated to both the Referrer's and Patient's inbox.

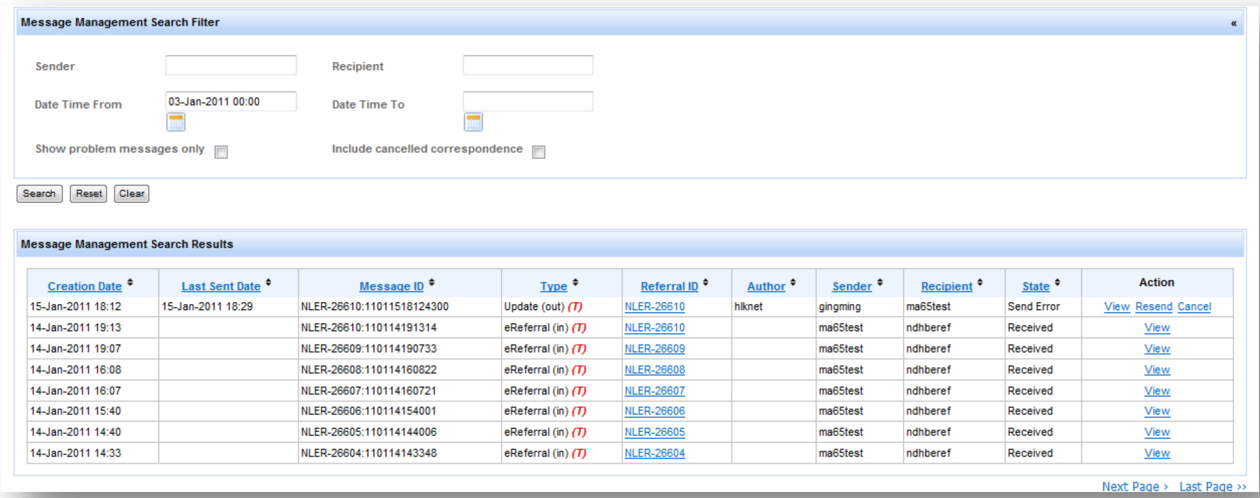
Messages are sent via the HealthLink store and forward infrastructure. With a store and forward mechanism messages are not sent and acknowledged in real-time, but rather go through a number of message queues where they are retained until the recipient connects to the relevant queue and retrieves the message.

While this approach provides a robust and easy to implement process to manage message delivery, it does come with the need to monitor the delivery status of each message sent so that the sender can verify that the message has been delivered successfully.

To support RMS administrators with monitoring messages and to assist with any required remedial action for message delivery problems, RMS includes a message management module. The following activities can be completed within the message management module:

3.1 List messages

When users access the message management module they are initially presented with a list of messages sent and received by RMS, refer to the example screen below:



Creation Date	Last Sent Date	Message ID	Type	Referral ID	Author	Sender	Recipient	State	Action
15-Jan-2011 18:12	15-Jan-2011 18:29	NLER-26610:11011518124300	Update (out) *(T)*	NLER-26610	hlknet	gingming	ma65test	Send Error	View Resend Cancel
14-Jan-2011 19:13		NLER-26610:110114191314	eReferral (in) *(T)*	NLER-26610		ma65test	ndhberef	Received	View
14-Jan-2011 19:07		NLER-26609:110114190733	eReferral (in) *(T)*	NLER-26609		ma65test	ndhberef	Received	View
14-Jan-2011 16:08		NLER-26608:110114160822	eReferral (in) *(T)*	NLER-26608		ma65test	ndhberef	Received	View
14-Jan-2011 16:07		NLER-26607:110114160721	eReferral (in) *(T)*	NLER-26607		ma65test	ndhberef	Received	View
14-Jan-2011 15:40		NLER-26606:110114154001	eReferral (in) *(T)*	NLER-26606		ma65test	ndhberef	Received	View
14-Jan-2011 14:40		NLER-26605:110114144006	eReferral (in) *(T)*	NLER-26605		ma65test	ndhberef	Received	View
14-Jan-2011 14:33		NLER-26604:110114143348	eReferral (in) *(T)*	NLER-26604		ma65test	ndhberef	Received	View

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By default, the search is configured to return a list of all messages sent and received in the last two weeks, there are a number of search options that can be used to restrict the list of messages to those relevant for current review.

The following status can be associated with a message:

- Received – the message has been successfully received and acknowledged by the recipient
- Sent – the message was sent successfully but a successful delivery acknowledgement hasn't been received yet.
- Sent (Overdue) – the message was sent successfully but a successful delivery acknowledgement hasn't been received yet and has been marked as overdue as no response was received within 48 hours of sending the message.
- Send Error – The was a problem sending this message, the error can be seen by viewing the message

3.2 Filtering the message list

The following items can be specified to limit the messages that will be displayed for review:

- Sender (The EDI account of the message sender, useful when looking for referrals from a particular practice)
- Recipient (The EDI account of the message recipient, useful when reviewing messages sent to a particular practice)
- Date Time from (filters based on when the message was either sent or received – using the date/time supplied as a starting point)
- Date Time to (filters based on when the message was either sent or received – using the date supplied as an end point)
- Note: If left blank, this indicates that all messages up to the current date / time should be returned
- Show problem messages only (Limits the view to messages that haven't been delivered successfully)
- Include cancelled correspondence (Use this option to review messages that have previously been marked as cancelled)
- Note: Cancelled messages are those that have been cancelled by an administrator after they failed delivery)

Administrators will generally be interested in monitoring messages that haven't been successfully delivered to GP's. These messages can be easily reviewed by selecting the 'Show problem messages only'. This option will then filter to only those messages that couldn't be delivered successfully.

3.2.1 Resend message

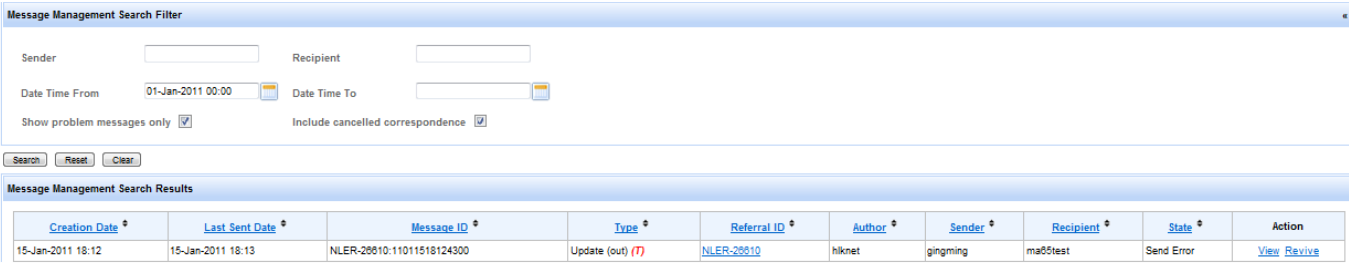
Use this option if you wish to re-send a message that hasn't received a successful delivery acknowledgement from the recipient. This option is useful where a message has been lost in transmission and should only be used after allowing an appropriate delivery time.

3.2.2 Cancel message

The Cancel message action has been included to allow administrators the ability to cancel a message if re-send attempts fail to deliver the message correctly, this option should only be used after the administrator has confirmed an alternative approach has been used to convey the information within the status message to the impacted recipient, e.g. either via a call to the GPs practice manager or by sending a copy via fax. Note: Cancelled messages can be "revived" if they were marked as cancelled in error.

3.2.3 Revive Cancelled messages

If a message has been marked as cancelled it can be re-instated by using the 'Revive' action from within the message management console. Note: To view previously cancelled messages click the 'Include cancelled correspondence' within the filter options. Below is an example filter screen with a cancelled message that can be revived:

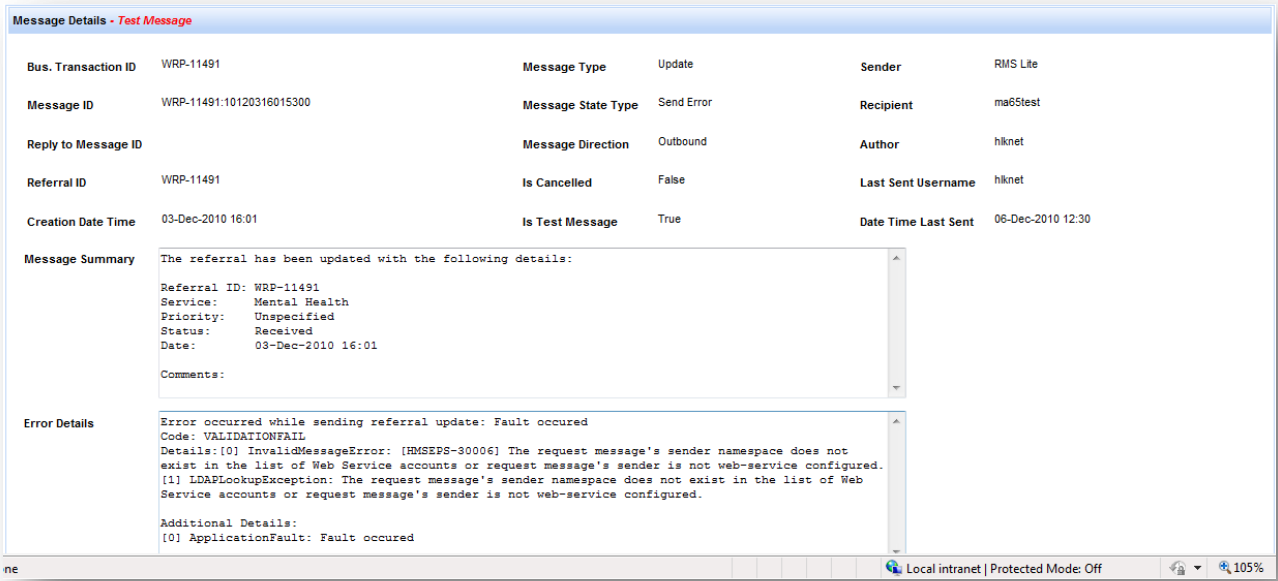


Creation Date	Last Sent Date	Message ID	Type	Referral ID	Author	Sender	Recipient	State	Action
15-Jan-2011 18:12	15-Jan-2011 18:13	NLER-26610:11011518124300	Update (out) (T)	NLER-26610	hlknet	gingming	ma65test	Send Error	View Revive

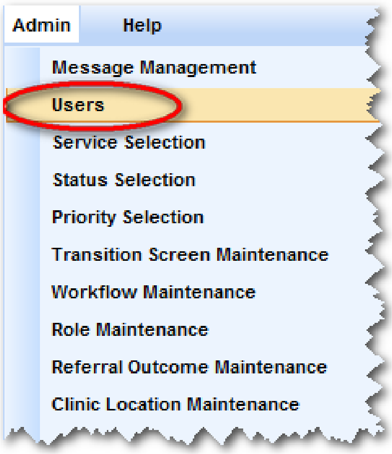
3.2.4 View message

The administrator can view the original message by using the "view" message action within the message list. Where an error has occurred during the delivery of the message the error will also be displayed for their review. If you have any questions about the nature of the message presented please contact the HealthLink support desk and provide a copy of the error for their comment.

Below is an example of the of the message view screen:



4. Users



The Users menu option allows new users to be setup in RMS and the maintenance of existing users to be facilitated. Specific functions include:

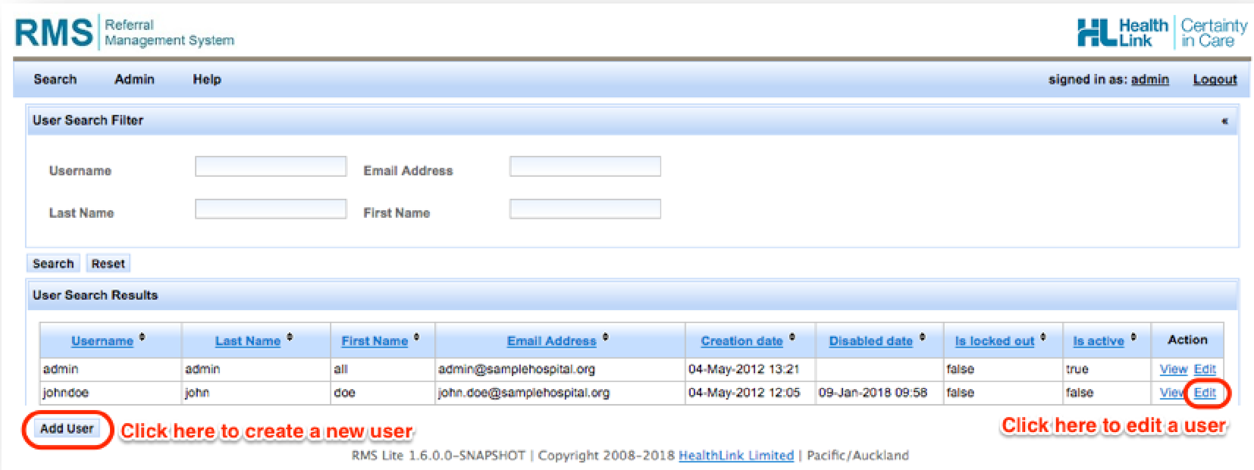
- Search for an existing user
- Create a new user
- Assigning roles
- Assigning facilities \ services
- Viewing user activity in RMS
- Changing a user's password
- Disabling an active user
- Activating a disabled user
- Unlocking a user's account
- Updating user details
- Reviewing changes made on referrals
- Adding/Deleting users
- Viewing activity Logs

There are a number of role types that can apply to users in RMS:

User	Description
Standard User:	This role should be used for all general administration and clinical staff
Administrator:	This role should be reserved for staff that will be responsible managing user accounts and monitoring user activities
Read Only:	This role should be used for staff that can view and search referrals but who cannot record progress on a referral.
Central Referrals Office:	This role should be used for staff that only accept receipt of the referral, check patient demographics and assess the patient's funding eligibility.
Clinical Assessor:	This role should be used for staff that only review and make decisions regarding the clinical aspects of the patient's referral.
Booking Clerk:	This role should be used for staff that process and manage the outcomes of the referral's review.
Support Level 1:	This role is used by HealthLink support staff only.
Support Level 2:	This role is used by HealthLink support staff only.
Configuration Access:	This role is used by HealthLink support staff only.

Users

You can see all current users in your system in a table as shown below.



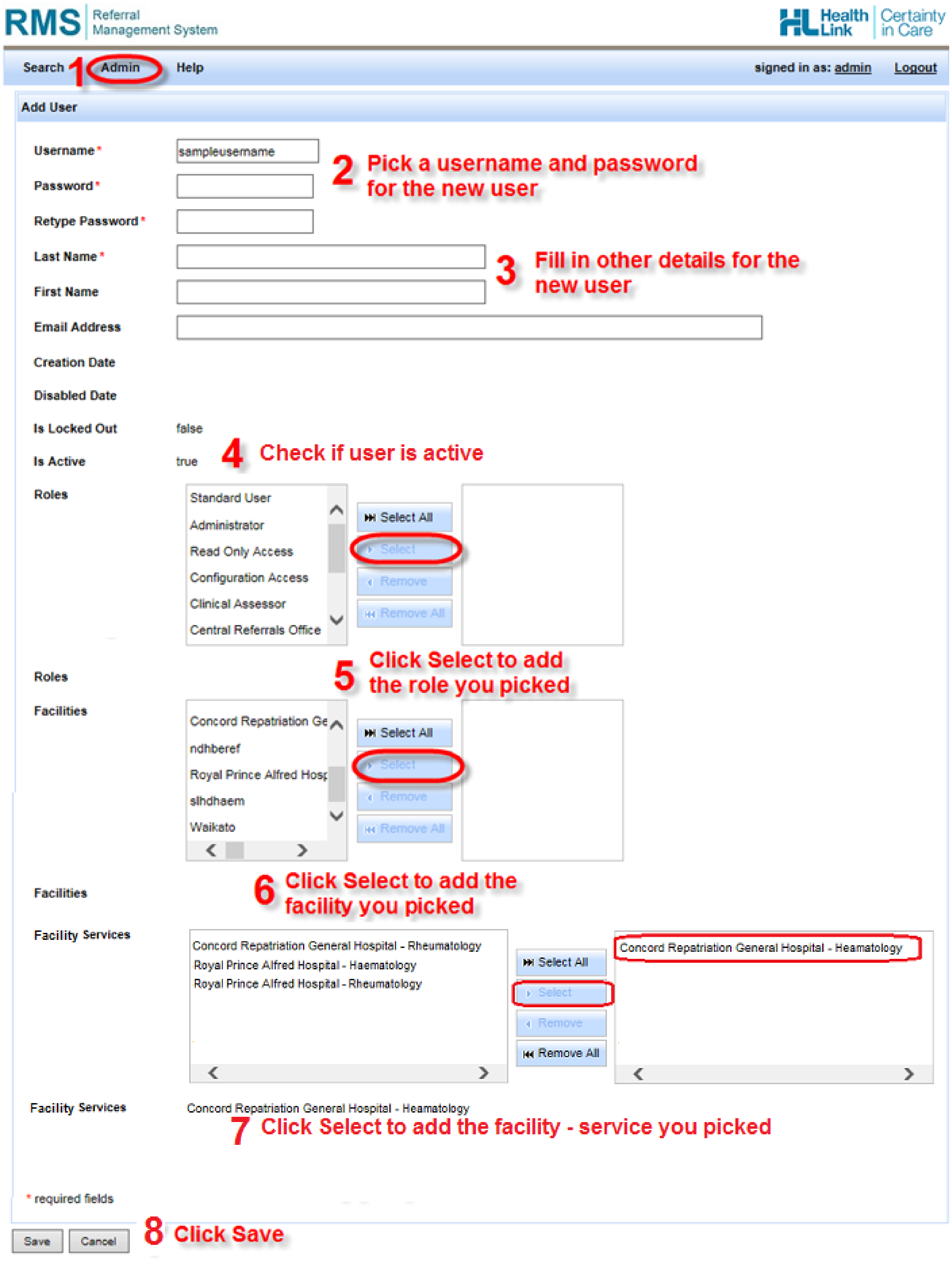
To add a new user, follow these steps:

Action	Description
1	Click on the **Admin** menu at the top, and then click **Users.** Then click **Add User** as shown in the screenshot above.
2	Pick a username and password for the new user
3	Fill other details for the new user
4 & 5	Pick role(s) for the new user. Click **Select** to add a role, and **Remove** to remove a role
6 & 7	Pick facility for the new user. Click **Select** to add a facility, and **Remove** to remove a facility
8 & 9	Pick facility - service for the new user. Click **Select** to add a facility - service, and **Remove** to remove a facility - service
10	Click **Save** to save the new user you have created

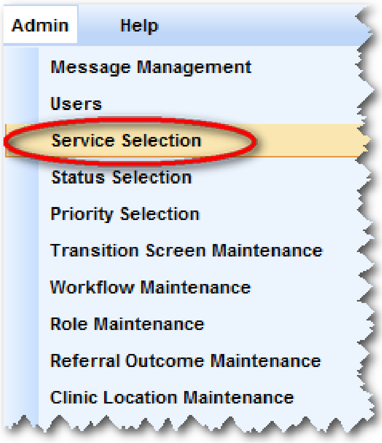
You can edit an existing user by clicking on **Edit** link on the same row as the user you want to edit.

Warning: Do not change the name of the user 'system' as it is used for some system actions. You can change other details like password and roles.

Screen references:



5. Service Selection

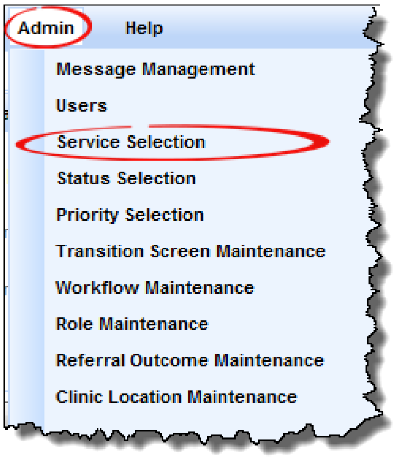


Use the ‘Service Selection’ option under the Admin menu to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

5.1 Accessing service type console

The service selection feature can be accessed by clicking Service Selection from Admin menu on the RMS menu toolbar.

All subsequent service type maintenance activities can be completed directly from the service selection console



5.2 The service selection Console

The Service Selection Console allows you to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

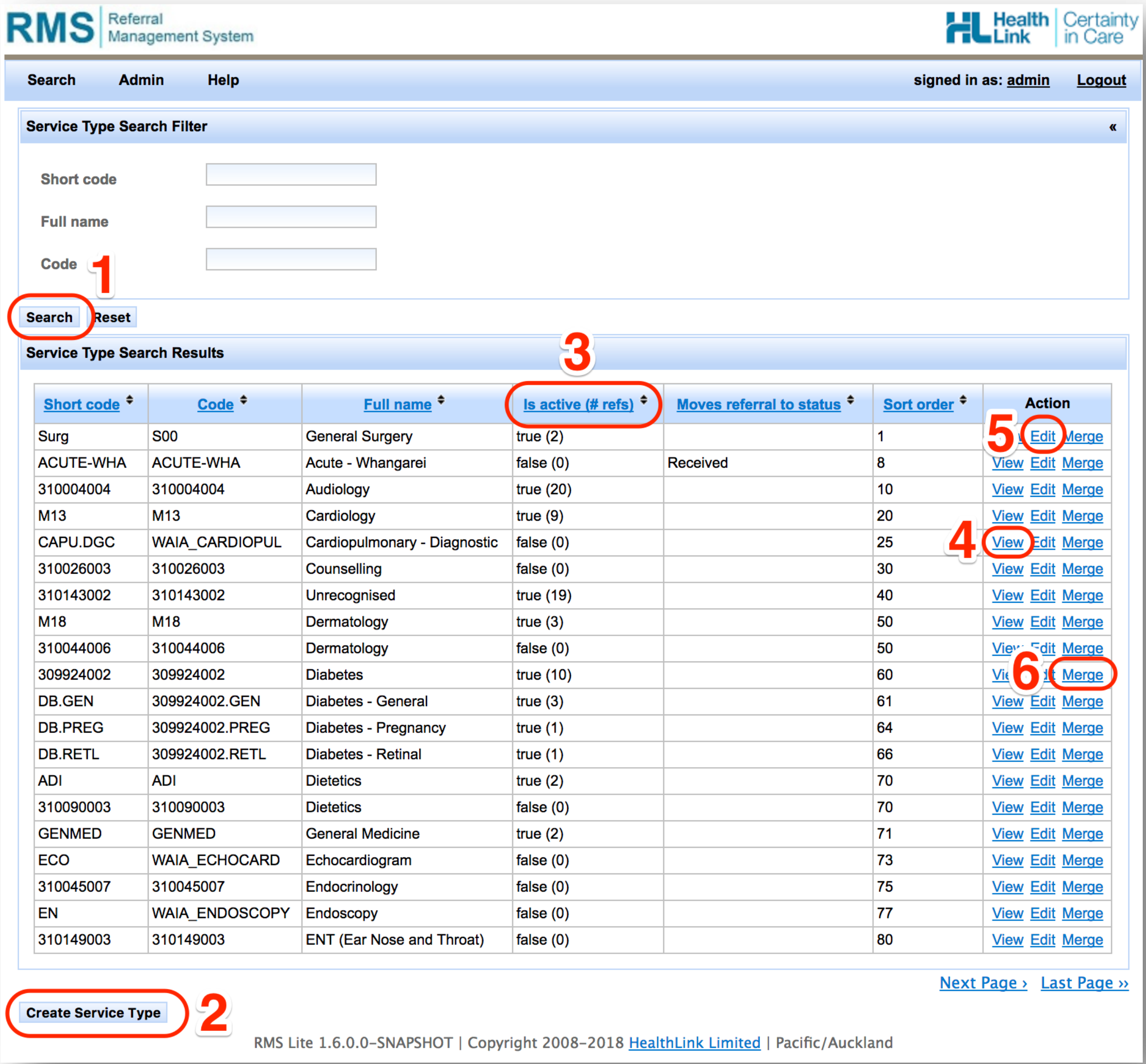
The activities that can be initiated from the service selection console are:

Action	Description
1	Use the **Service Type Search Filter** to locate a specific service
2	**Add** a new service to RMS
3	Check to see if a service is **active** or not. (true means active, false means inactive)

4	**View** service type details.
5	**Edit** Service type's details.
6	**Merge*** the services that a referral can be sent to.

***Important note about retiring services:** You cannot delete services, but you can merge them into existing services. This is to avoid referrals belonging to a deleted service from being lost. See section 5.5 on how to merge services.

Below is the reference of where to look for these activities:



RMS Referral Management System | Health Link Certainty in Care

Search Admin Help signed in as: admin Logout

Service Type Search Filter «

Short code

Full name

Code 1

Search Reset

Service Type Search Results 3

Short code	Code	Full name	Is active (# refs)	Moves referral to status	Sort order	Action
Surg	S00	General Surgery	true (2)		1	5 Edit Merge
ACUTE-WHA	ACUTE-WHA	Acute - Whangarei	false (0)	Received	8	View Edit Merge
310004004	310004004	Audiology	true (20)		10	View Edit Merge
M13	M13	Cardiology	true (9)		20	View Edit Merge
CAPU.DGC	WAIA_CARDIOPUL	Cardiopulmonary - Diagnostic	false (0)		25	4 View Edit Merge
310026003	310026003	Counselling	false (0)		30	View Edit Merge
310143002	310143002	Unrecognised	true (19)		40	View Edit Merge
M18	M18	Dermatology	true (3)		50	View Edit Merge
310044006	310044006	Dermatology	false (0)		50	View Edit Merge
309924002	309924002	Diabetes	true (10)		60	6 Merge
DB.GEN	309924002.GEN	Diabetes - General	true (3)		61	View Edit Merge
DB.PREG	309924002.PREG	Diabetes - Pregnancy	true (1)		64	View Edit Merge
DB.RETL	309924002.RETL	Diabetes - Retinal	true (1)		66	View Edit Merge
ADI	ADI	Dietetics	true (2)		70	View Edit Merge
310090003	310090003	Dietetics	false (0)		70	View Edit Merge
GENMED	GENMED	General Medicine	true (2)		71	View Edit Merge
ECO	WAIA_ECHOCARD	Echocardiogram	false (0)		73	View Edit Merge
310045007	310045007	Endocrinology	false (0)		75	View Edit Merge
EN	WAIA_ENDOSCOPY	Endoscopy	false (0)		77	View Edit Merge
310149003	310149003	ENT (Ear Nose and Throat)	false (0)		80	View Edit Merge

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Create Service Type 2

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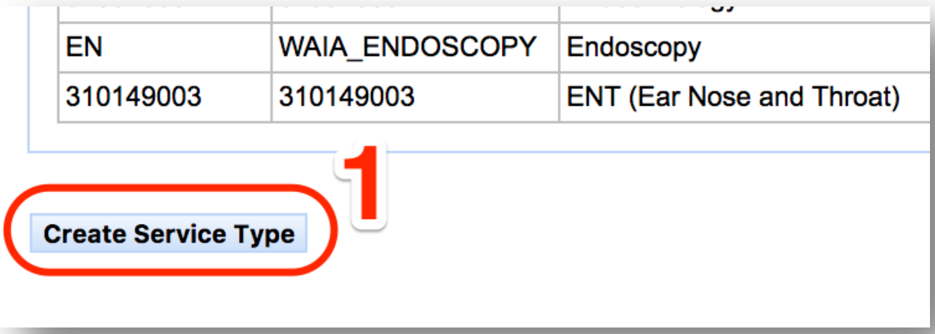
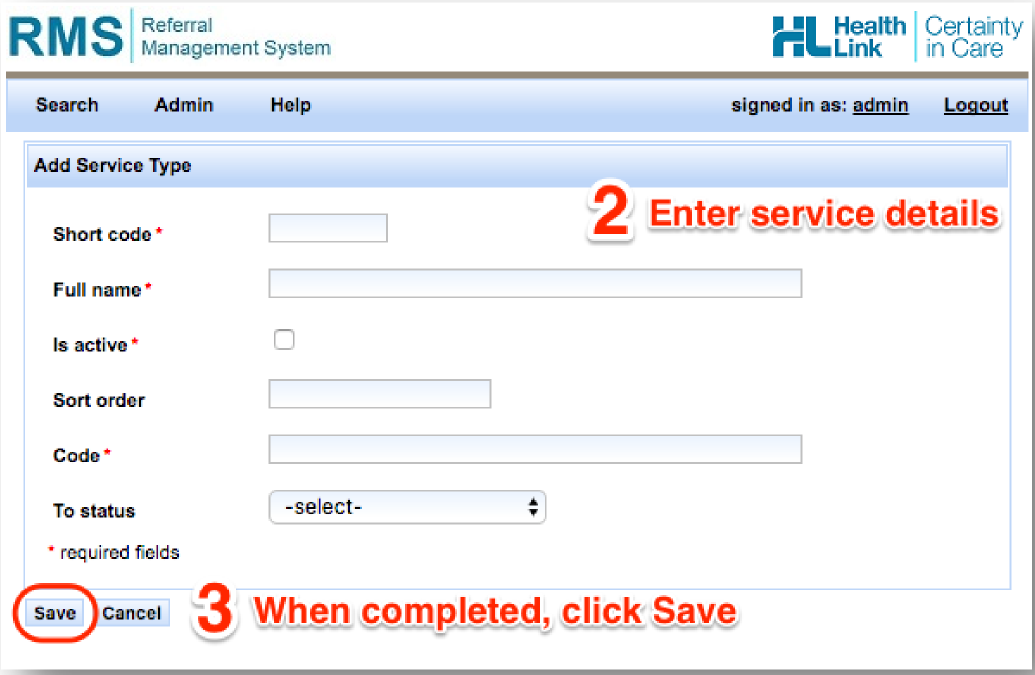
5.3 Creating a new service

You can add a new service to RMS by completing the following steps:

Action	Description
1	Click on the Create Service Type button at the bottom of the **Service Selection** page
2	Complete the details under ‘**Add Service Type’** screen. Each Service Type entry created has: 1) A **Short code** (for internal development use), 2) A **Code** (for database identification), 3) A **Full name** (for the display shown on screen), 4) An **Active status** (to show if it is currently in use) and 5) A **Sort order** (to show what sequence the description shows in any drop down lists) assigned to it. 6) A **To Status**. Starting with release 1.7.0, it is possible to configure RMS so that if an incoming referral goes to a certain **service** its **status** can automatically be determined. This field allows you to create this service-to-status mapping.
3	Once you’ve completed setting up the service type click on the **Save** button. If you wish to abort service creation click on the **Cancel** button

Screen Reference:





Note: For creation of new service you need to know the right code of that service. This code should match the code of the eReferral form. Please contact HealthLink for access to these service codes and advice on the considerations of creating/updating them.

5.4 Updating an existing service

Use this feature if you wish to change service type information.

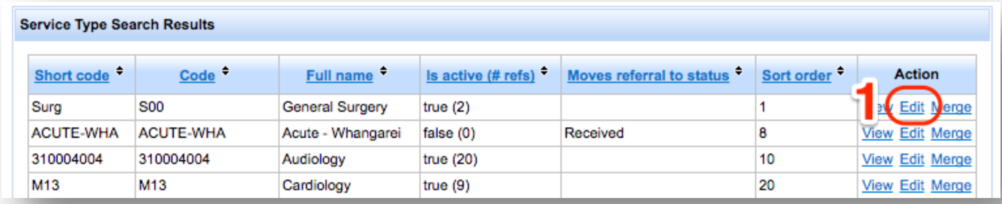
Fields for editing the service type can be accessed by clicking on the Edit link against each service details under the ‘Service Type Search Results’.

To change the service type, follow the steps below:

Action	Description
1	Locate the service type within the service selection console search results list and click on **Edit**
2	If required change information in the **details section**
3	Once you’ve completed use the **Update** button to save the changes and return to the previous screen. If you wish to abort service creation click on the Done button

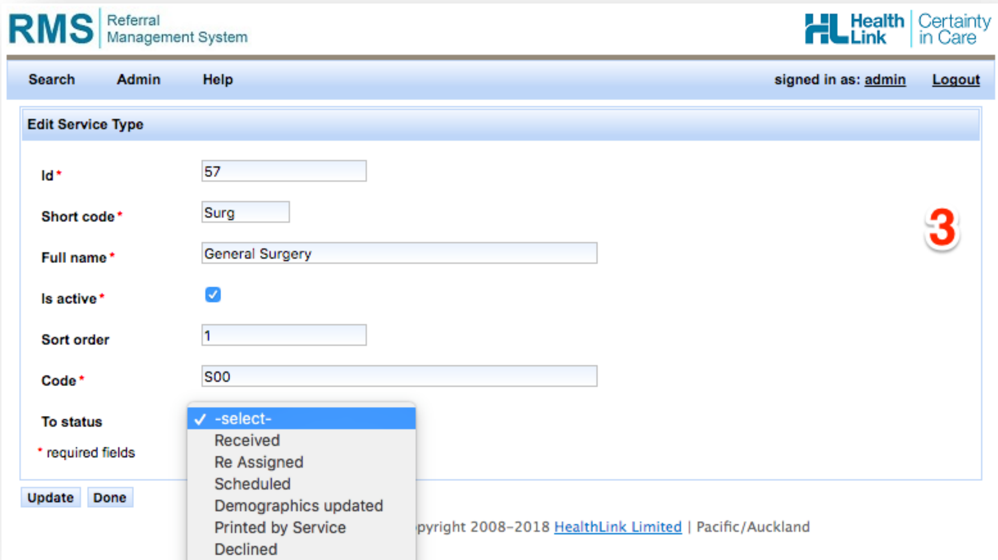
Warning: Do not change or merge the service called ‘Unspecified’. This is the reserved service used by RMS Lite when it cannot find the matching service for received referrals.

Screen Reference:



Service Type Search Results

Short code	Code	Full name	Is active (# refs)	Moves referral to status	Sort order	Action
Surg	S00	General Surgery	true (2)		1	View Edit Merge
ACUTE-WHA	ACUTE-WHA	Acute - Whangarei	false (0)	Received	8	View Edit Merge
310004004	310004004	Audiology	true (20)		10	View Edit Merge
M13	M13	Cardiology	true (9)		20	View Edit Merge



5.5 Merging service with another service

Use this feature if you wish to merge the service into another service.

Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging service type.

Warning: Do not change or merge the service called 'Unspecified'. This is the reserved service used by RMS Lite when it cannot find the matching service for received referrals.

Note: Merging to another service will make the current service inactive

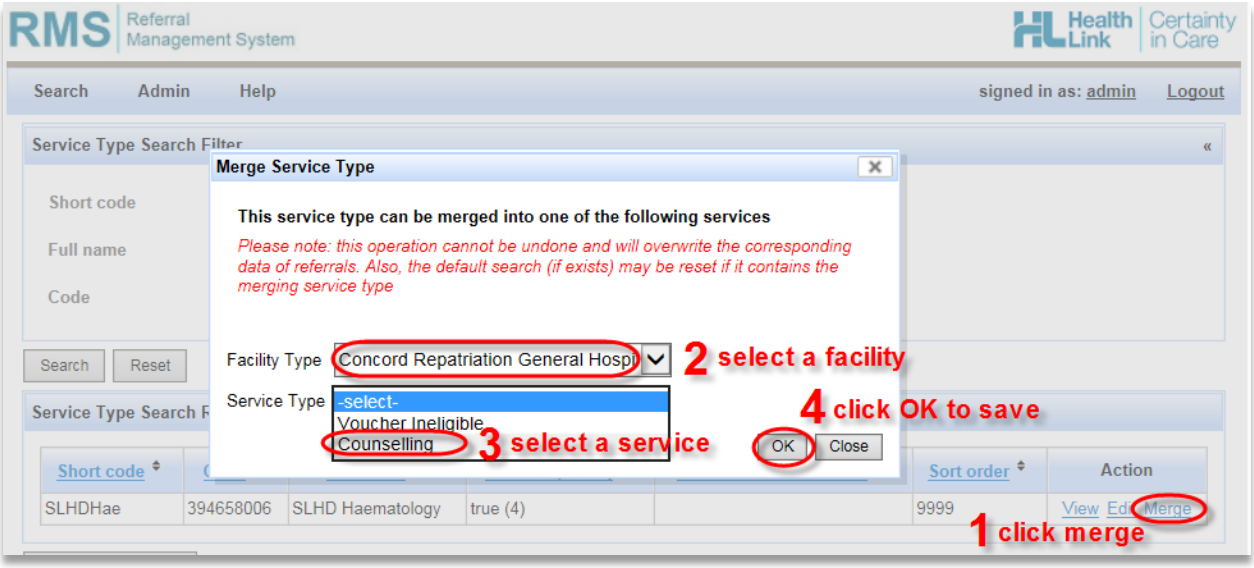
Important note about retiring services: You cannot delete services, but you can merge them into existing services. This is to avoid referrals belonging to a deleted service from being lost.

Fields for merging the service type can be accessed by clicking on the Merge link against each service details under the 'Service Type Search Results'.

To merge the service type, follow the steps below:

Action	Description
1	**Locate** the service type within the service selection console search results list and click on **Merge**
2	Select the name of the facility from the **dropdown list**
3	Next select the name of the service you want the current service to merge into from the **dropdown list. You can only merge current service into another service of the same facility.**
4	Once you've selected the service name use the **OK** button to save the changes and return to the previous screen. If you wish to abort merging of service click on the **Close** button

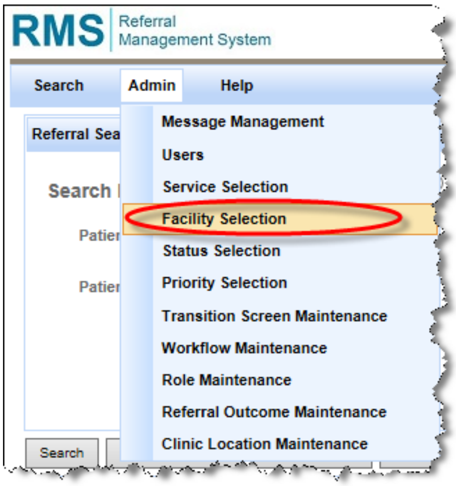
Screen References:



5.6 Deleting a service

You cannot delete services, but you can merge them into existing services. This is to avoid referrals belonging to a deleted service from being lost. See section 5.5 on how to merge services.

6. Facility Selection

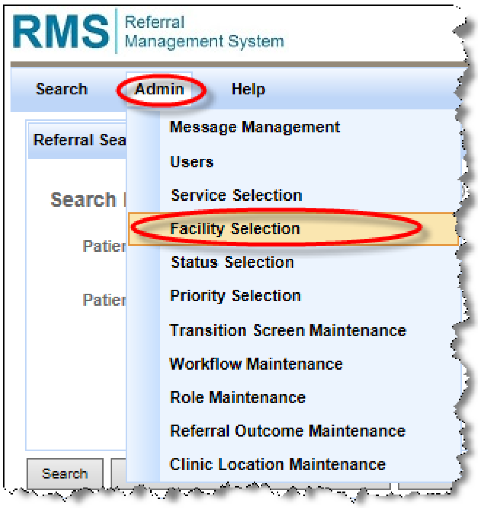


Use the ‘Facility Selection’ option under the Admin menu to create, view, edit or merge the facilities that a service can be assigned to when a referral is received. Each Facility Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

6.1 Accessing facility type console

The facility selection feature can be accessed by clicking Facility Selection from Admin menu on the RMS menu toolbar.

All subsequent facility type maintenance activities can be completed directly from the facility selection console



6.2 The facility selection Console

The Facility Selection Console allows you to create, view, edit or merge the facilities that that a service can be assigned to when a referral is received. Each Facility Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

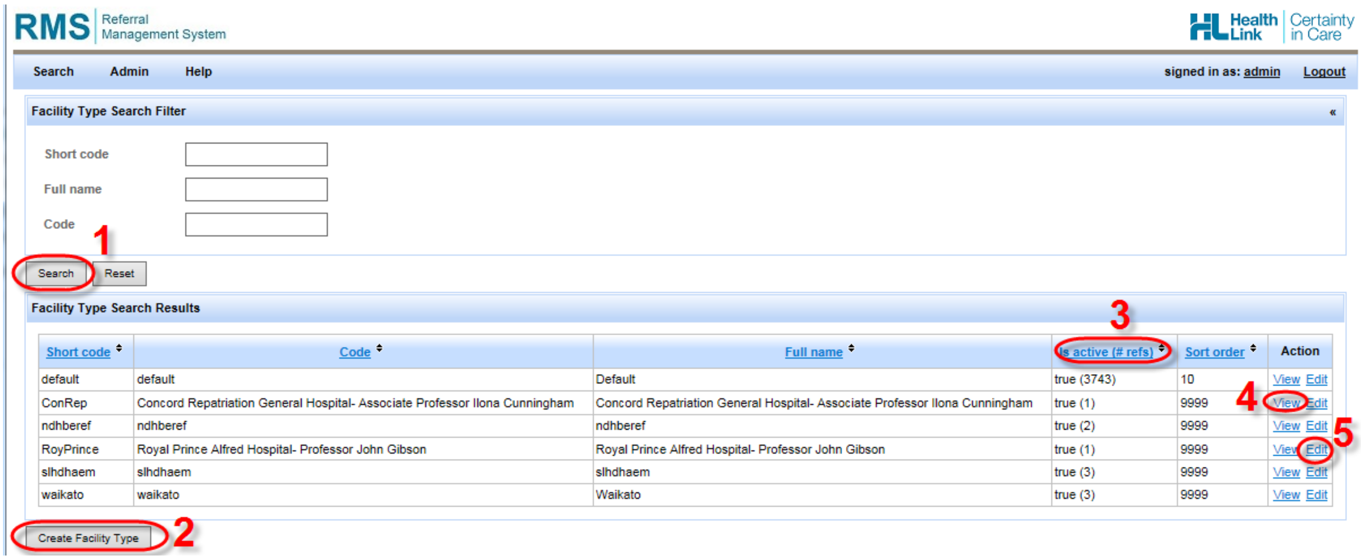
The activities that can be initiated from the facility selection console are:

Action	Description
1	Use the **Facility Type Search Filter** to locate a specific facility
2	**Add** a new facility to RMS
3	Check to see if a facility is **active** or not. (true means active, false means inactive)

4	**View** facility type details.
5	**Edit** Facility type's details.

***Important note about retiring facilities:** You cannot delete facilities, but you can merge them into existing facilities. This is to avoid referrals belonging to a deleted facility from being lost. See section 5.5 on how to merge facilities.

Below is the reference of where to look for these activities:

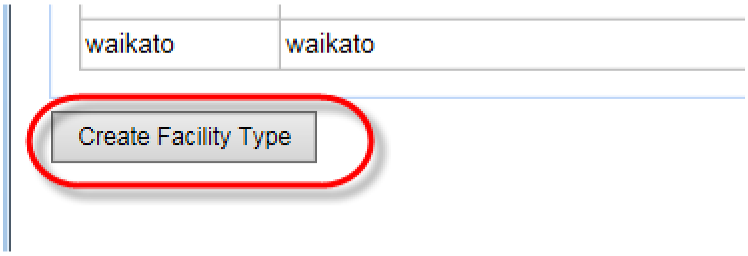


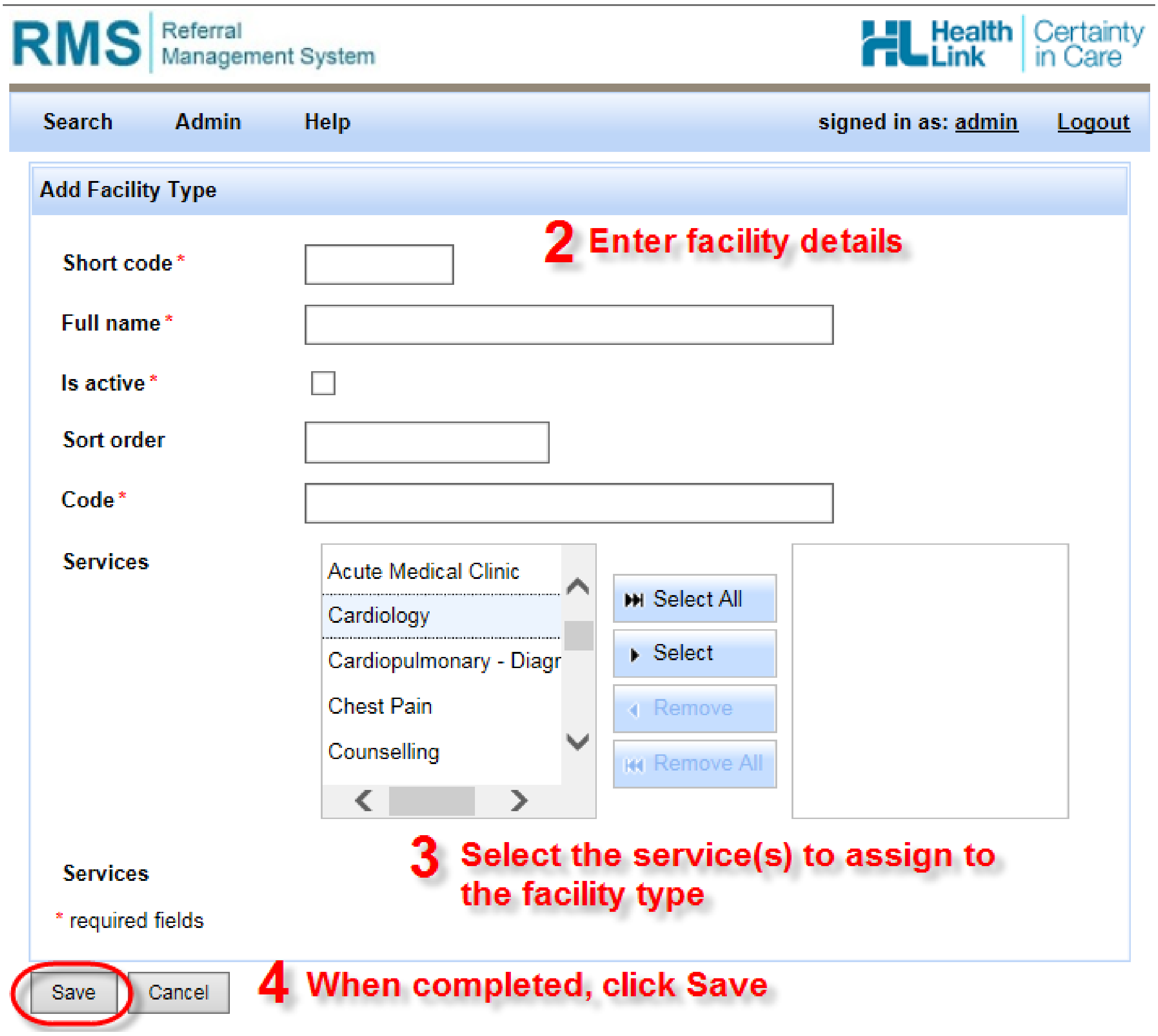
6.3 Creating a new facility

You can add a new facility to RMS by completing the following steps:

Action	Description
1	Click on the [Create Facility Type] button at the bottom of the **Facility Selection** page
2	Complete the details under '**Add Facility Type'** screen. Each Facility Type entry created has: 1) A **Short code** (for internal development use), 2) A **Code** (for database identification), 3) A **Full name** (for the display shown on screen), 4) An **Active status** (to show if it is currently in use) and 5) A **Sort order** (to show what sequence the description shows in any drop down lists) assigned to it. .
3	Select the service(s) to assign to the facility type.
4	Once you've completed setting up the facility type click on the **Save** button. If you wish to abort service creation click on the **Cancel** button

Screen Reference:





Note: For creation of new facility you need to know the right code of that facility. This code should match the code of the eReferral form. Please contact HealthLink for access to these facility codes and advice on the considerations of creating/updating them.

6.4 Updating an existing facility

Use this feature if you wish to change facility type information.

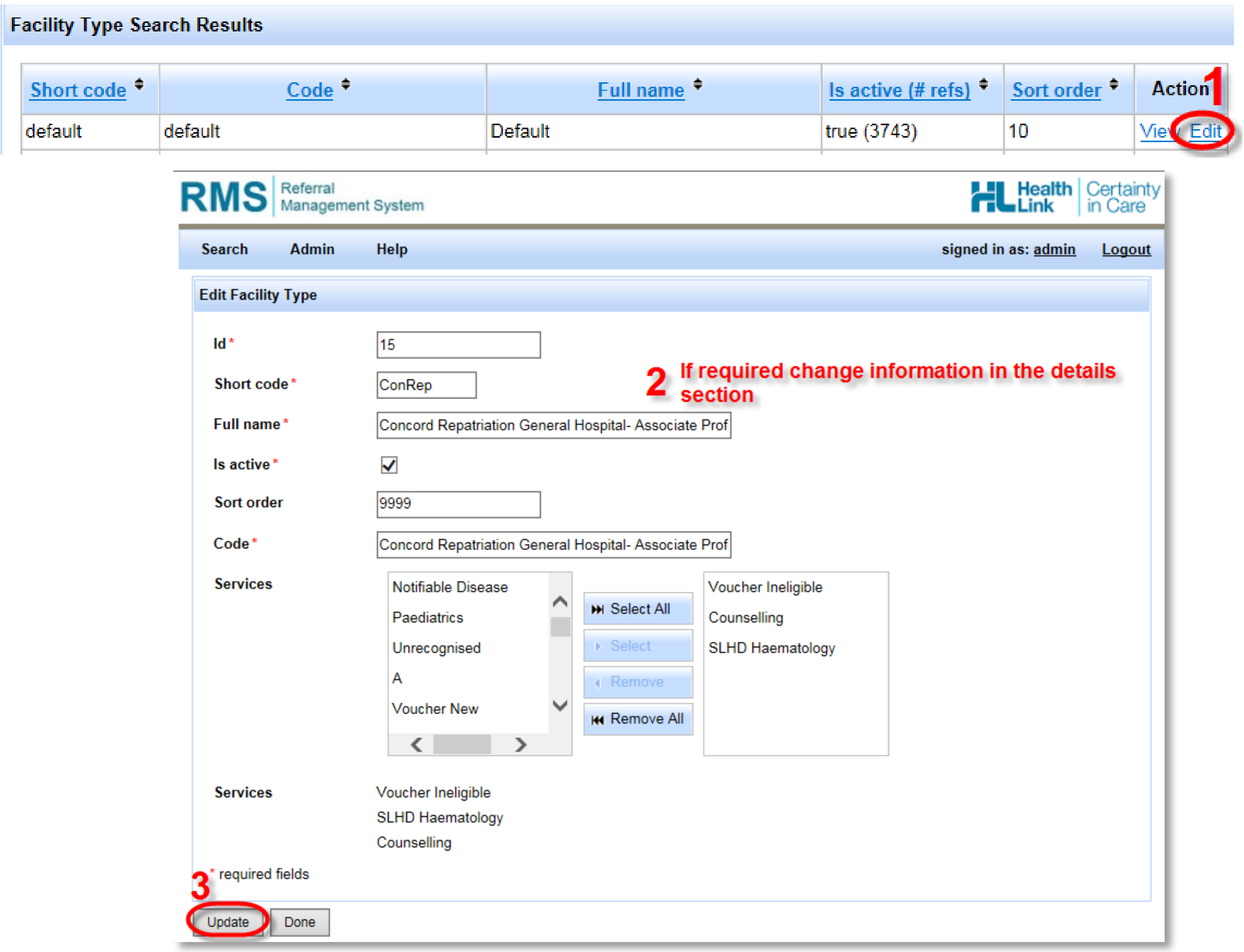
Fields for editing the facility type can be accessed by clicking on the Edit link against each facility details under the 'Facility Type Search Results'.

To change the facility type, follow the steps below:

Action	Description
1	Locate the facility type within the facility selection console search results list and click on **Edit**
2	If required change information in the **details section**
3	Once you've completed use the **Update** button to save the changes and return to the previous screen. If you wish to abort facility creation click on the Done button

Warning: Do not change or merge the facility called 'Unrecognized'. This is the reserved facility used by RMS Lite when it cannot find the matching service for received referrals.

Screen Reference:



6.5 Merging a referral's facility type with another facility

Use this feature if you wish to merge a referral's facility into another facility.

Warning: Do not change or merge the facility called 'Unrecognized'. This is the reserved facility used by RMS Lite when it cannot find the matching facility for received referrals.

Note: Only Administrator is allowed to merge a referral's facility to another facility.

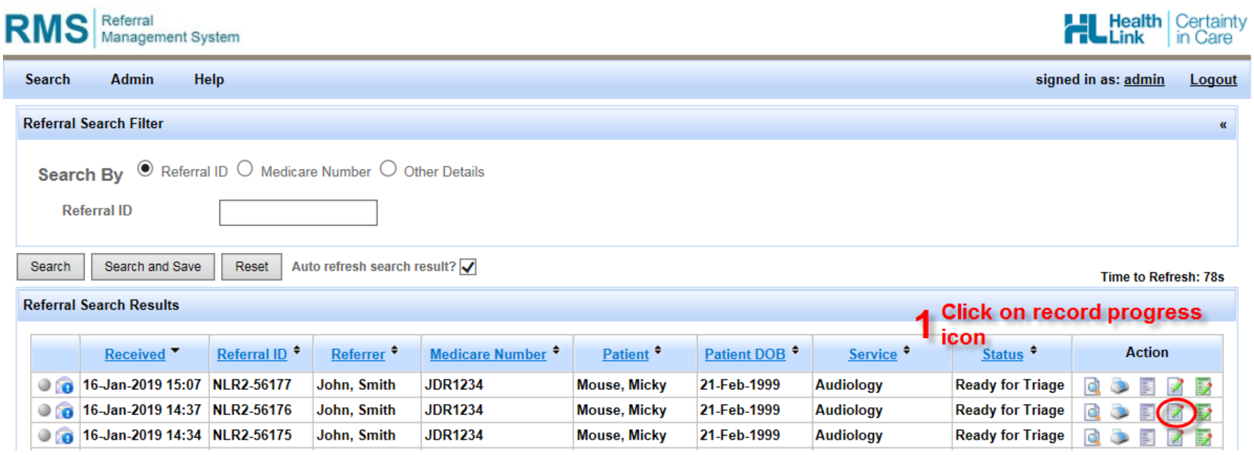
Important note about retiring facilities: You cannot delete facilities, but you can merge them into existing facilities for a referral. This is to avoid referrals belonging to a deleted facility from being lost.

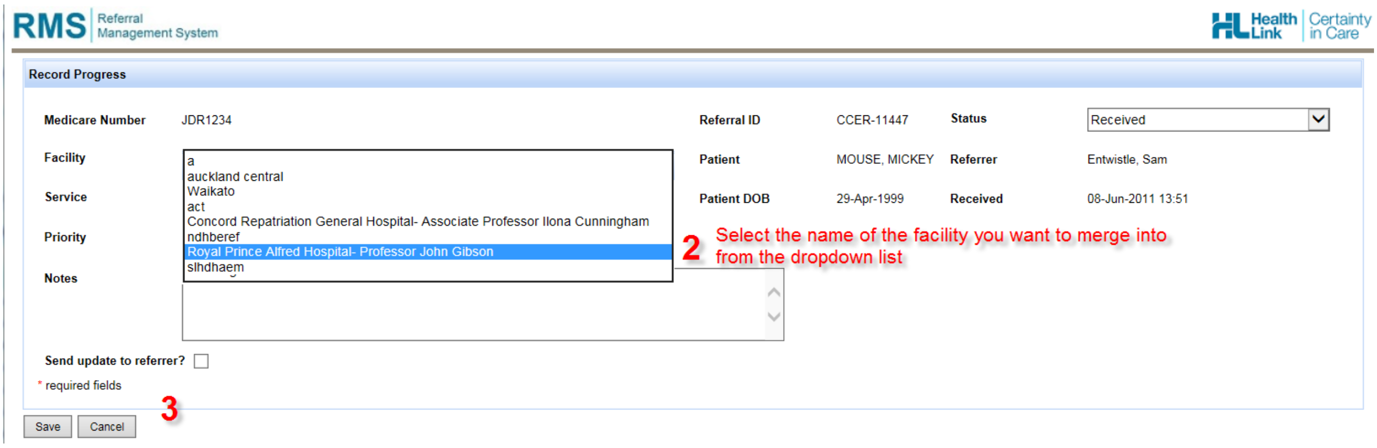
Merging of a referral facility type can be done using the record progress screen.

To merge the facility type, follow the steps below:

Action	Description
1	**Locate** the referral you want the facility to be changed\ merged. Click on the Record Progress icon for that referral to open up record progress screen.
2	Select the name of the facility you want the current referral facility to merge into from the **dropdown list**
3	Once you've selected the facility name use the **Save** button to save the changes and return to the previous screen. If you wish to abort merging of service click on the **Cancel** button

Screen References:

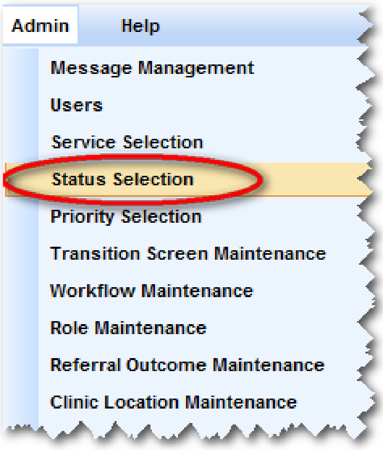




6.6 Deleting a facility

You cannot delete facilities, but you can merge referrals from one facility to another existing facility. This is to avoid referrals belonging to a deleted facility from being lost. See section 5.5 on how to merge facilities.

7. Status Selection

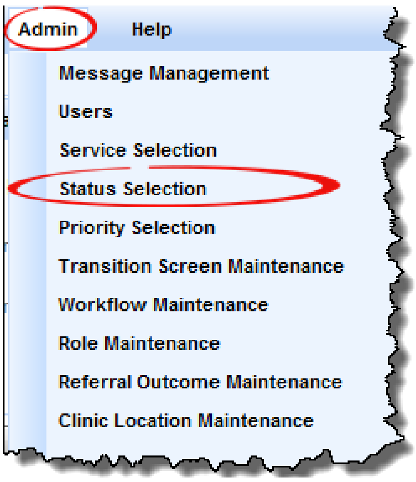


Use the **'Status Selection'** option under the Admin menu to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

7.1 Accessing the status type console

The status selection feature can be accessed by clicking **Status Selection** from Admin menu on the RMS menu toolbar.

All subsequent status selection activities can be completed directly from the **Status Selection** console.



7.2 The Status Selection console

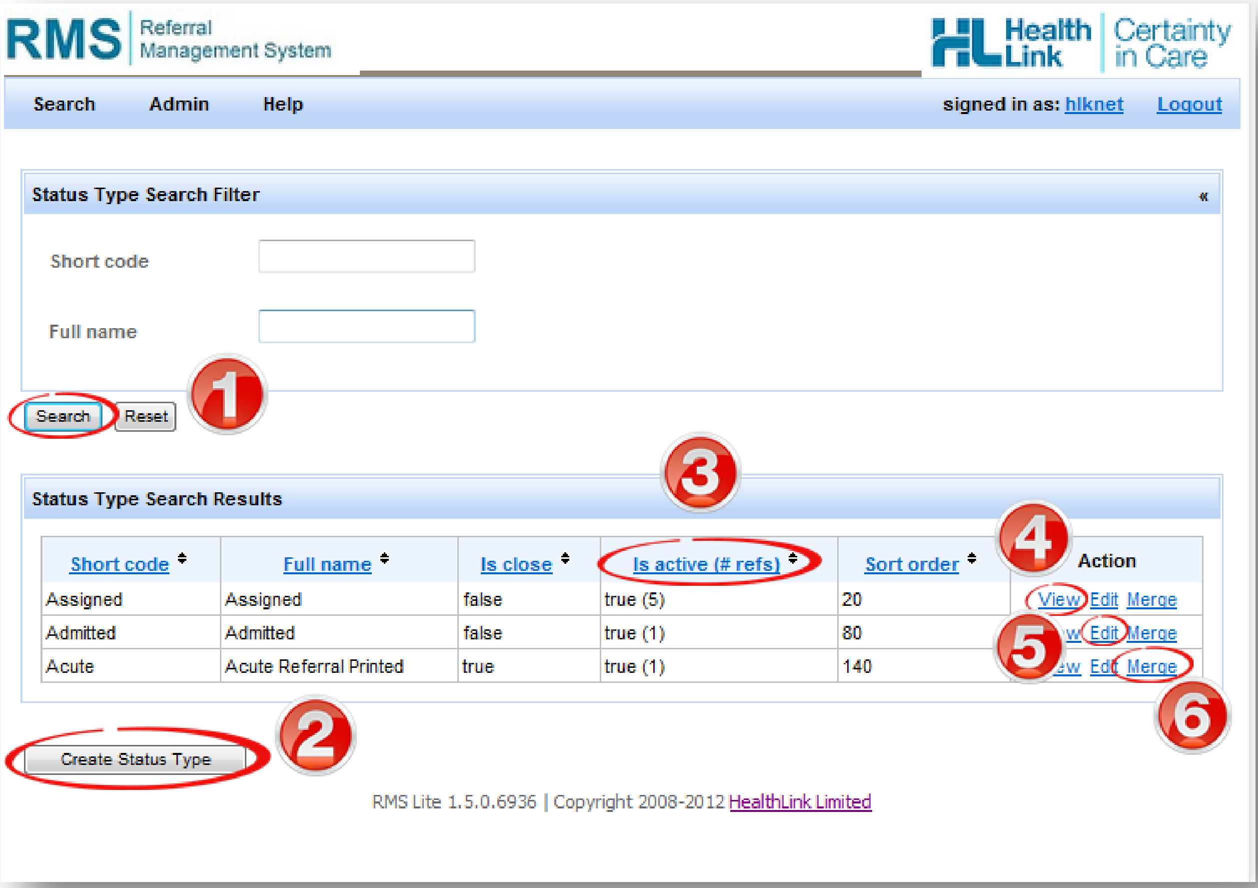
The Status Selection console allows you to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

Action	Description
1	Use the **Status Type Search** Filter to locate a specific status
2	**Add** a new status to RMS
3	**Check** to see if a status is active or not. (true means active, false means inactive)
4	**View** Status type details.
5	**Edit** Status type's details.
6	**Merge** the status with another status type

Note*: you cannot delete a status, but you can merge it with an existing status to effectively retire that status.*

Below is a reference of where to look for these activities:

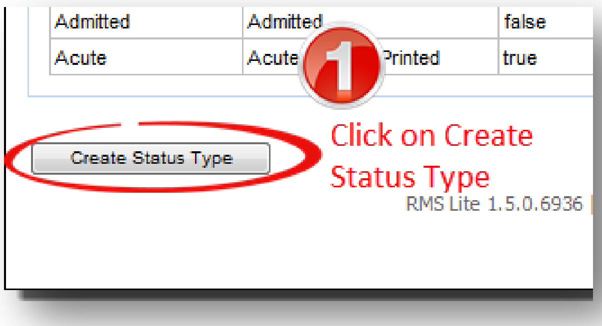


7.3 Creating a new Status Type

You can add a new status to RMS by completing the following steps:

Action	Description
1	Click on the [Create Status Type] button at the bottom of the Status Selection page
2	Complete the details under 'Add Status Type' screen. Each Status Type entry created has: 1) A Short code (for internal use), 2) A Full name (for the display shown on screen), 3) An Active status (to show if it is currently in use) and 4) A Sort order (to show what sequence the description shows in any drop down lists) assigned to it.
3	Once you've completed setting up the status type click on the Save button. If you wish to abort status creation click on the Cancel button

Screen Reference:



7.4 Updating an existing status

Use this feature if you wish to change status type information.

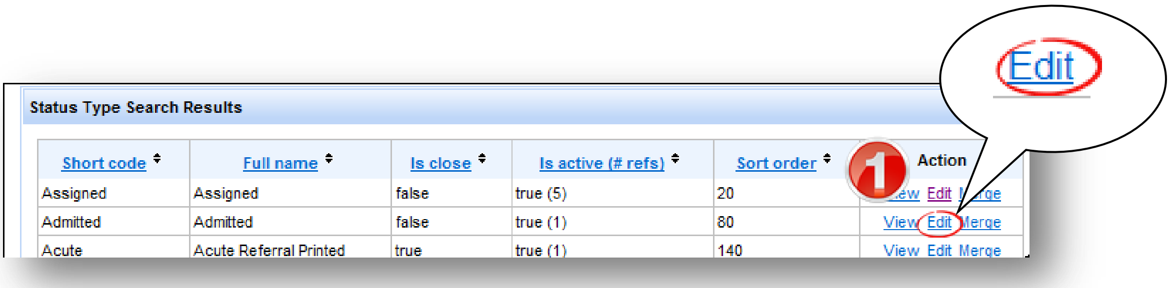
Fields for editing the status type can be accessed by clicking on the Edit link against each status details under the ‘Status Type Search Results’.

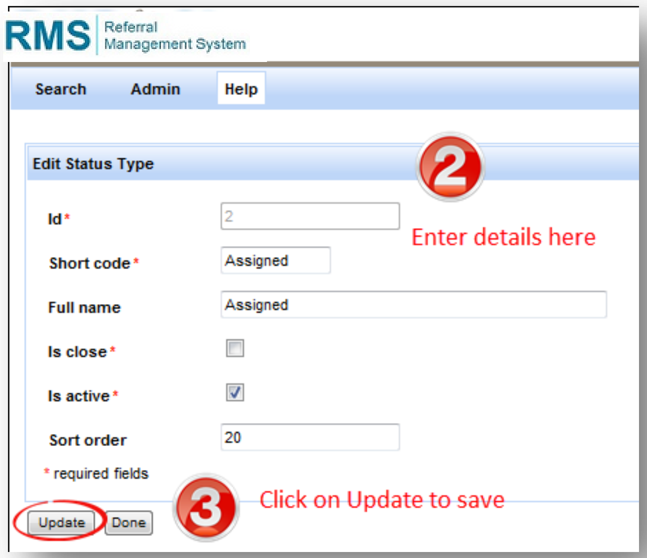
Note: *The* ***short code*** *for the default status cannot be changed.*

To change the status type, follow the steps below:

Action	Description
1	**Locate** the status type within the status selection console search results list and click on **Edit**
2	If required **change** information in the details section.
3	Once you’ve completed use the **Update** button to save the changes and return to the previous screen. If you wish to abort service creation click on the **Done** button

Screen Reference:





7.5 Merging status with another status

Use this feature if you wish to merge the status into another status.

Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging status type.

Warning: Before merging the status, you should update all workflows that are using this status. Otherwise, users will still be able to assign referrals to this status.

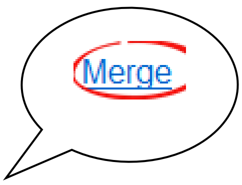
Note: Merging to another status will make the current status inactive

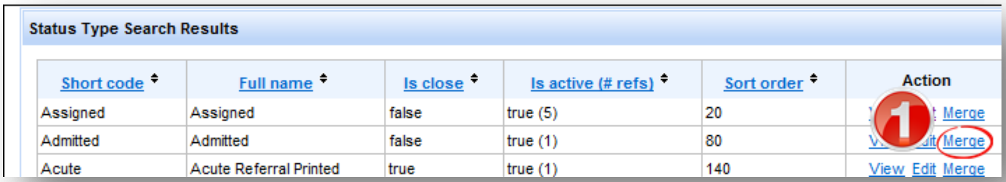
Fields for merging the status type can be accessed by clicking on the **Merge** link against each status details under the '**Status Type Search Results'**.

To merge the status type follow the steps below:

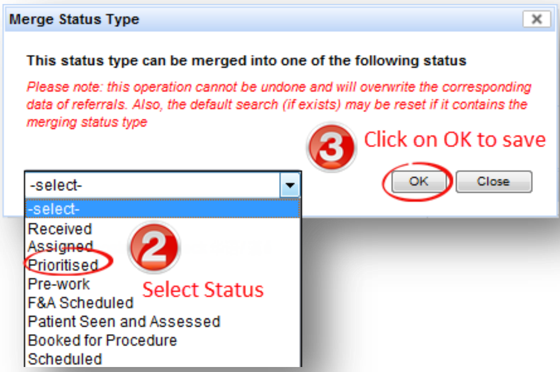
Action	Description
1	**Locate** the status type within the status selection console search results list and click on **Merge**
2	Select the name of the status into which you want the current status to merge from the **dropdown list**.
3	Once you've selected the status name use the **OK** button to save the changes and return to the previous screen. If you wish to abort merging of status click on the **Close** button

Screen References:



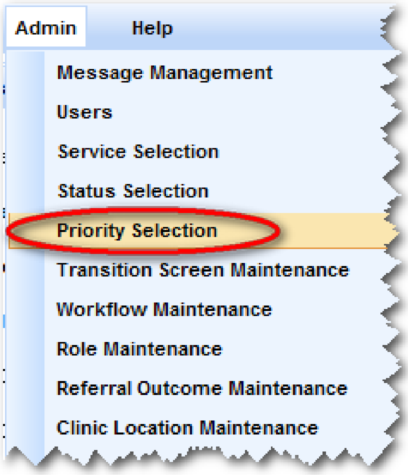


Status Type Search Results
Short code
Full name
Is close
Is active (# refs)
Sort order
Action
Assigned
Assigned
false
true (5)
20
Merge
Admitted
Admitted
false
true (1)
80
Merge
Acute
Acute Referral Printed
true
true (1)
140
View Edit Merge
1



Merge Status Type
This status type can be merged into one of the following status
Please note: this operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging status type
3
Click on OK to save
OK
Close
-select-
-select-
Received
Assigned
Prioritised
Pre-work
F&A Scheduled
Patient Seen and Assessed
Booked for Procedure
Scheduled
2
Select Status

8. Priority Selection



Use the ‘Priority Selection’ option under the Admin menu to view, edit or merge the different priority status descriptions a referral can be assigned once received into the facility. Each Priority Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

8.1 The priority selection Console

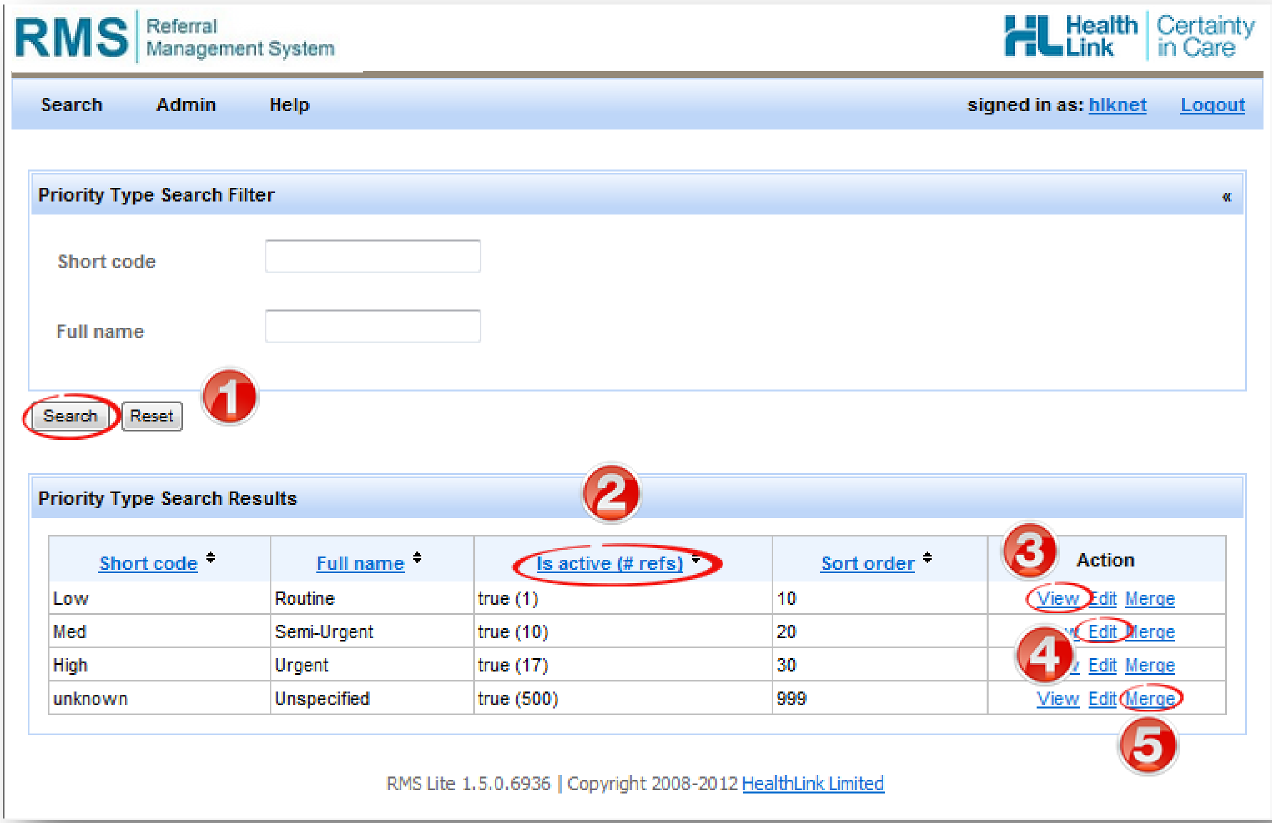
The Priority Selection Console allows you to view, edit or merge the different priority a referral can be assigned once received into the facility.

Each Priority Type entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

Action	Description
1	Use the **Priority Type Search Filter** to locate a specific priority
2	Check to see if a Priority is **active** or not. (true means active, false means inactive)
3	**View** Priority type details.
4	**Edit** Priority type details.
5	**Merge** the Priority that a referral can be assigned once received into the facility.

Below is a reference of where to look for these activities:



8.2 Updating an existing priority

Use this feature if you wish to change priority type information.

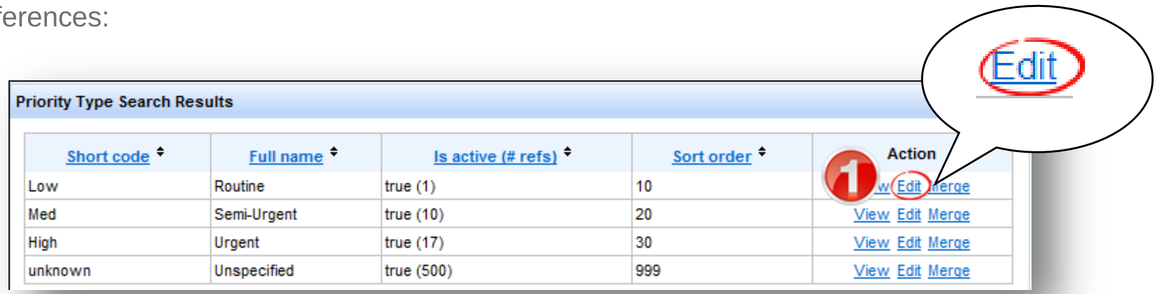
Fields for editing the priority type can be accessed by clicking on the **Edit** link against each priority details under the '**Priority Type Search Results'**.

To change the priority type, follow the steps below:

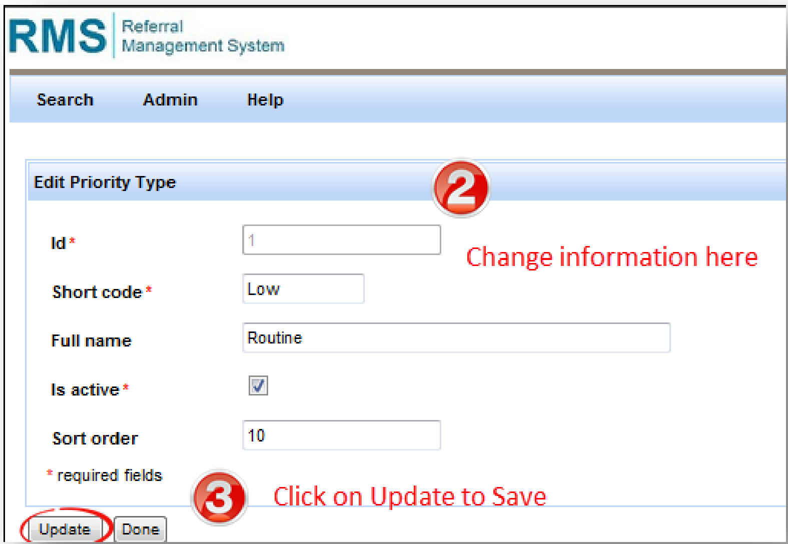
Action	Description
1	**Locate** the Priority type within the priority selection console search results list and click on **Edit**
2	If required **change** information in the details section.
3	Once you've completed use the **Update** button to save the changes and return to the previous screen. If you wish to abort service creation click on the **Done** button

WARNING: Never update the **Short Code** of ‘unknown’ priority.
This **Short Code** is used to set unknown priority as an entry point when a referral is first received in RMS. Updating this short code could prevent you from receiving incoming referrals.

Screen References:



Short code	Full name	Is active (# refs)	Sort order	Action
Low	Routine	true (1)	10	View Edit Merge
Med	Semi-Urgent	true (10)	20	View Edit Merge
High	Urgent	true (17)	30	View Edit Merge
unknown	Unspecified	true (500)	999	View Edit Merge



8.3 Merging priority with another priority

Use this feature if you wish to merge one priority into another priority.

Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging priority type.

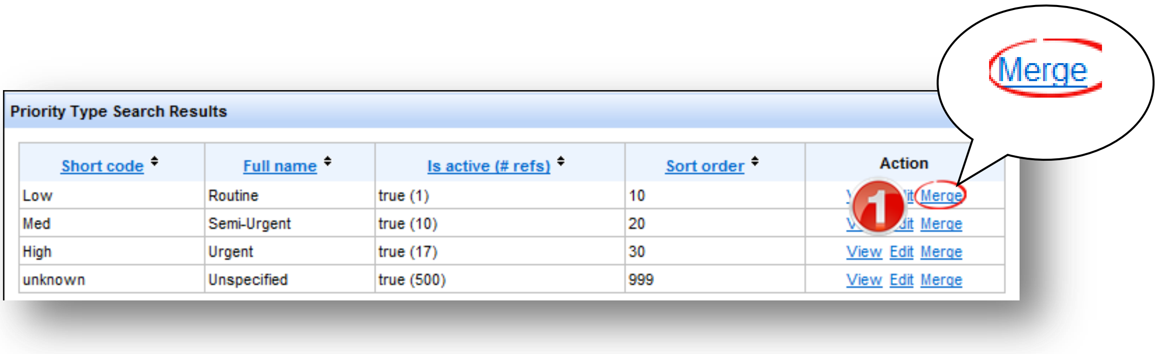
Note: Merging to another priority will make the current priority inactive

Fields for merging the priority type can be accessed by clicking on the **Merge** link against each priority details under the ‘**Priority Type Search Results’**.

To merge the priority type, follow the steps below:

Action	Description
1	**Locate** the priority type within the priority selection console search results list and click on **Merge**
2	Select the name of the priority you want the current priority to merge into from the **dropdown list**.
3	Once you’ve selected the priority name use the **OK** button to save the changes and return to the previous screen. If you wish to abort merging of priority click on the **Close** button

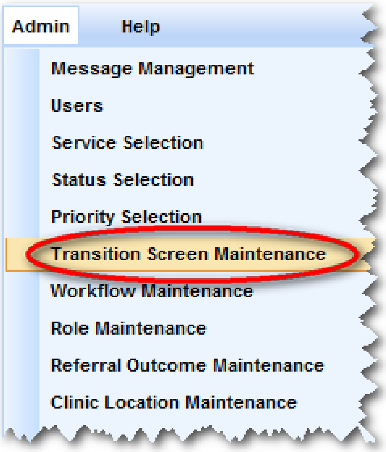
Screen References



Priority Type Search Results

Short code	Full name	Is active (# refs)	Sort order	Action
Low	Routine	true (1)	10	Merge
Med	Semi-Urgent	true (10)	20	Merge
High	Urgent	true (17)	30	View Edit Merge
unknown	Unspecified	true (500)	999	View Edit Merge

9. Transition Screen Maintenance



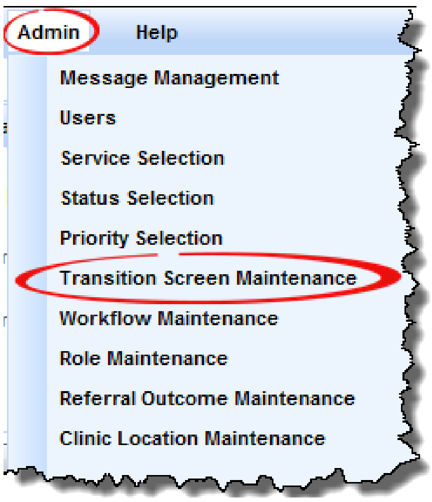
Use the ‘Transition Screen Maintenance’ option under the Admin menu to learn which screens are available in the application when confirming an action taken in the referral management pathway.

The screen types available are:

1. **Add Notes** – A screen that allows notes to be added when a referral is processed
2. **Confirmation** – A simple Y/N confirmation screen
3. **Triage** – A screen specifically for clinical assessors to record the triage outcomes of a referral
4. **Change Service** – A screen that allows the service a referral has been sent to be altered.

9.1 Accessing the transition screen console

The transition screen selection feature can be accessed by clicking **Transition Screen Maintenance** from Admin menu on the RMS menu toolbar.



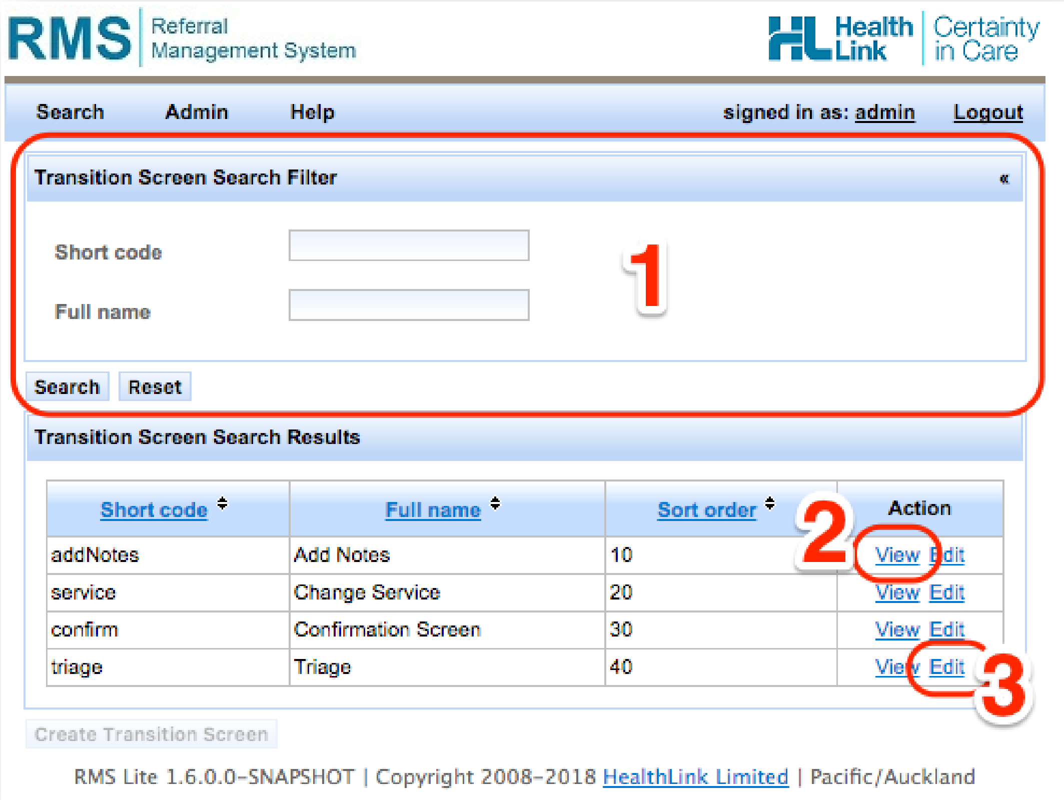
9.2 The transition screen Console

The transition screen Console allows you to view available transition screens. Each transition screen entry created has a short code (for database identification), Full name (for the display shown on screen) and a sort order (to show what sequence the full name shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

Action	Description
1	Use the **Transition Screen Search Filter** to locate a specific screen
2	**View** Transition Screen details.
3	**Edit** Transition Screen details NOTE: despite this feature is available on the screen, it is not active. You shouldn’t use it.

Below is a reference of where to look for these activities:

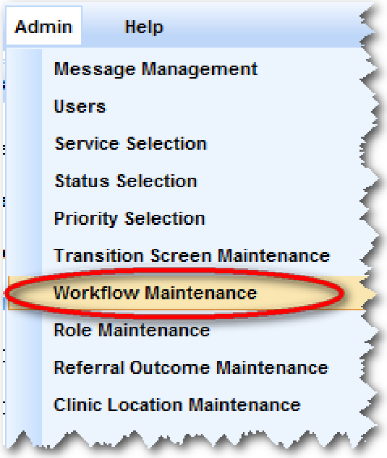


Note: Transition screen cannot be deleted if it has been assigned to any of the workflow. In that case, no Delete button will be displayed on the screen.

9.3 Updating an existing Transition screen

NOTE: despite this feature is available on the screen, it is not active. You shouldn't use it.

10. Workflow Maintenance



Use the ‘Workflow Maintenance’ option under the Admin menu to create and maintain referral workflow pathway steps.

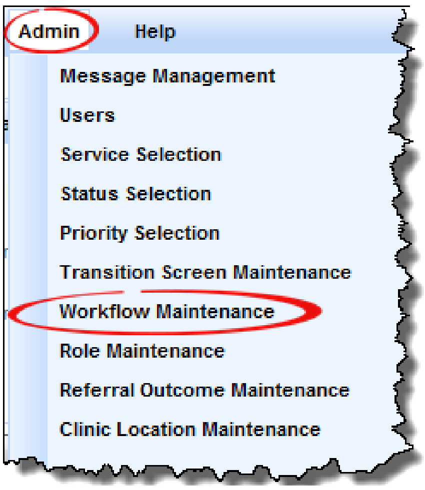
A workflow will configure:

1. the transition step name (e.g. ‘Triage’)
2. what order this step is in the overall referral management pathway
3. the status before this step can be taken and the status after the transition is confirmed (e.g. Ready for Triage to Triage Complete)
4. the screen that will be displayed when the step is selected (e.g. ‘Add Notes’)
5. whether an update is sent back to the referrer automatically and whether or not this can be deselected

10.1 Accessing the workflow console

The status selection feature can be accessed by clicking **Workflow Maintenance** from Admin menu on the RMS menu toolbar.

All subsequent service type maintenance activities can be completed directly from the service selection console



10.2 The workflow Console

The Workflow Console allows you to create, view or edit different workflow descriptions a referral status can be assigned once received into the facility.

Each Workflow entry created has the following:

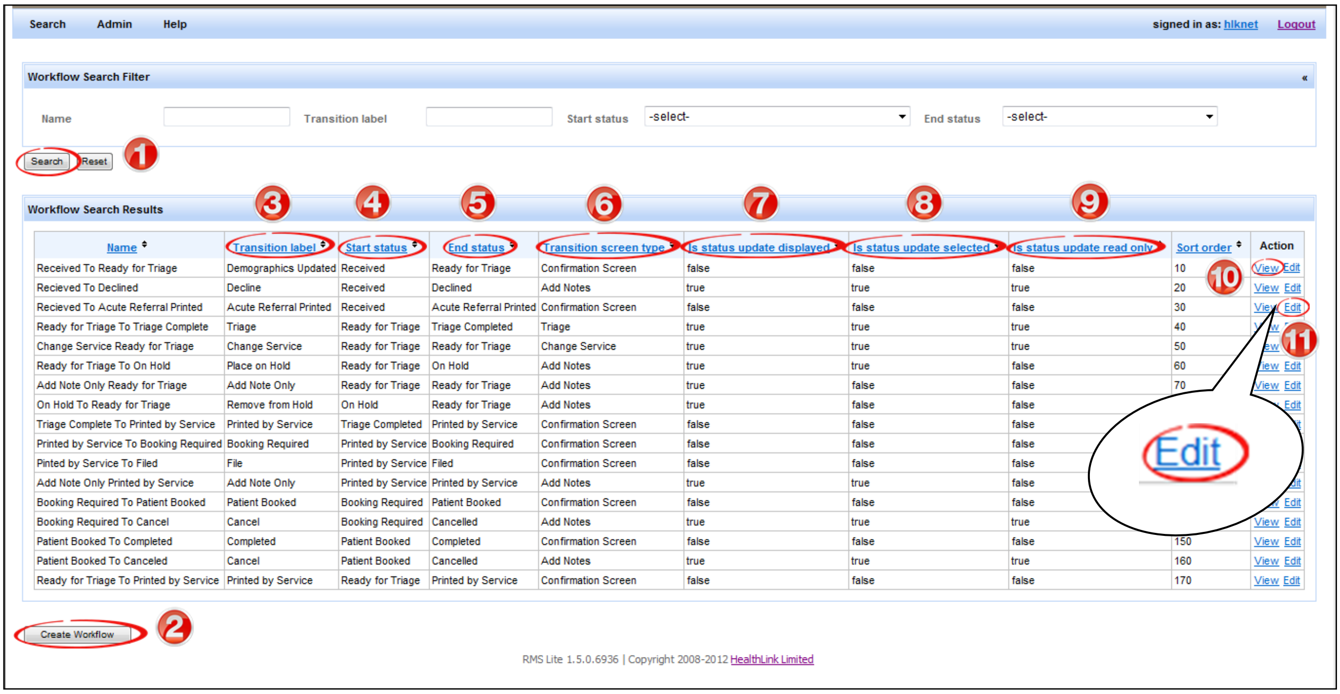
- **Name** (for database identification/internal development use);
- **Transition label** (for the display shown on action buttons);
- **Start status** (to indicate the start status of workflow for a referral);
- **End status** (to indicate the end status of referral after the action has been performed);
  - *Note: From release 1.6 onwards, **end status** can be automatically overridden by **service** or **referral outcome**.*
- **Transition screen type** (Screens created to help progress the workflow when an action has been performed on a referral. Currently to choose from Confirmation screen, Add Notes screen, triage screen and change service screen);

- **Is status update displayed** (to indicate if the status update checkbox need to be displayed on the transition screens);
- **Is status update selected** (to indicate if the status update checkbox need to be selected on the transition screens);
- **Is status update read only** (to indicate if the status update checkbox need to be read only/grayed on the transition screens); and,
- **Sort order** (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

Action	Description
1	Use the **Workflow Search Filter** to locate a specific workflow
2	**Add** a new workflow to RMS
3	**Check** to see what is transition label of the workflow (This value is set as the label of the action buttons)
4	View **Start Status** type of the workflow.
5	View **End Status** type of the workflow.
6	View **Transition screen type** of the workflow. (currently there are four of them namely Confirmation screen, Add Notes screen, triage screen and change service screen),
7	Check to see if **status update checkbox is displayed** (true means displayed, false means not displayed)
8	Check to see if **status update checkbox is selected** (true means selected, false means not selected)
9	Check to see if **status update checkbox is read only** (true means read only, false means not read only)
10	**View** the workflow details
11	**Edit** the workflow details

Below is a reference of where to look for these activities:



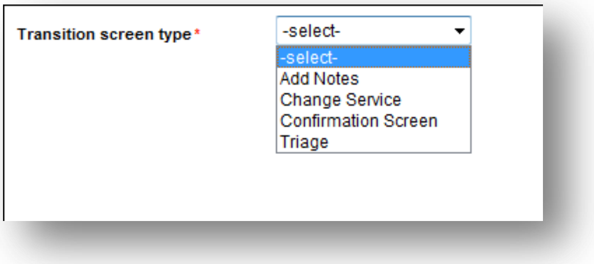
Name	Transition label	Start status	End status	Transition screen type	Is status update displayed	Is status update selected	Is status update read only	Sort order	Action
Received To Ready for Triage	Demographics Updated	Received	Ready for Triage	Confirmation Screen	false	false	false	10	View Edit
Recieved To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	View Edit
Recieved To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	View Edit
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	
Add Note Only Ready for Triage	Add Note Only	Ready for Triage	Ready for Triage	Add Notes	true	false	false	70	
On Hold To Ready for Triage	Remove from Hold	On Hold	Ready for Triage	Add Notes	true	false	false		
Triage Complete To Printed by Service	Printed by Service	Triage Completed	Printed by Service	Confirmation Screen	false	false	false		
Printed by Service To Booking Required	Booking Required	Printed by Service	Booking Required	Confirmation Screen	false	false	false		
Pinted by Service To Filed	File	Printed by Service	Filed	Confirmation Screen	false	false	false		
Add Note Only Printed by Service	Add Note Only	Printed by Service	Printed by Service	Add Notes	true	true	false		
Booking Required To Patient Booked	Patient Booked	Booking Required	Patient Booked	Confirmation Screen	false	false	false		
Booking Required To Cancel	Cancel	Booking Required	Cancelled	Add Notes	true	true	true		View Edit
Patient Booked To Completed	Completed	Patient Booked	Completed	Confirmation Screen	false	false	false	150	View Edit
Patient Booked To Canceled	Cancel	Patient Booked	Cancelled	Add Notes	true	true	true	160	View Edit
Ready for Triage To Printed by Service	Printed by Service	Ready for Triage	Printed by Service	Confirmation Screen	false	false	false	170	View Edit

10.3 Creating a new workflow

You can add a new workflow in RMS by completing the following steps:

Action	Description
1	Click on the **Create Workflow** button at the bottom of the workflow Maintenance page
2	Complete the details under '**Add Workflow**' screen. Each Workflow entry created has: 1. A **Name** (for database identification/ for internal development use), 2. A **Transition label** (for the display label shown on action buttons), 3. A **Start status** (to indicate the start status of workflow for a referral), 4. An **End status** (to indicate the end status of referral after the action has been performed). *Note: From release 1.7.0 onwards, **end status** can be automatically determined by **service** or **referral outcome**.* 5. A **Transition screen type** (Screens created to help progress the workflow when an action has been performed on a referral. Currently to choose from Confirmation screen, Add Notes screen, triage screen and change service screen), 6. Is **status update displayed** (to indicate if the status update checkbox needs to be displayed on the transition screens), 7. Is **status update selected** (to indicate if the status update checkbox need to be selected on the transition screens), 8. Is **status update read only** (to indicate if the status update checkbox need to be read only/grayed on the transition screens) 9. A **sort order** (to show what sequence the description shows in any drop down lists) assigned to it.
3	Once you've completed setting up the transition screen click on the **Save** button. If you wish to abort Transition Screen creation click on the **Cancel** button

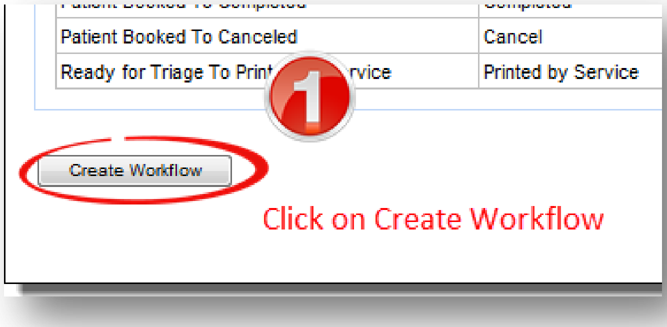
Note: Currently there are four Transition screens developed to support the progress of workflow. They are Confirmation screen, Add Notes screen, triage screen and Change Service screen.

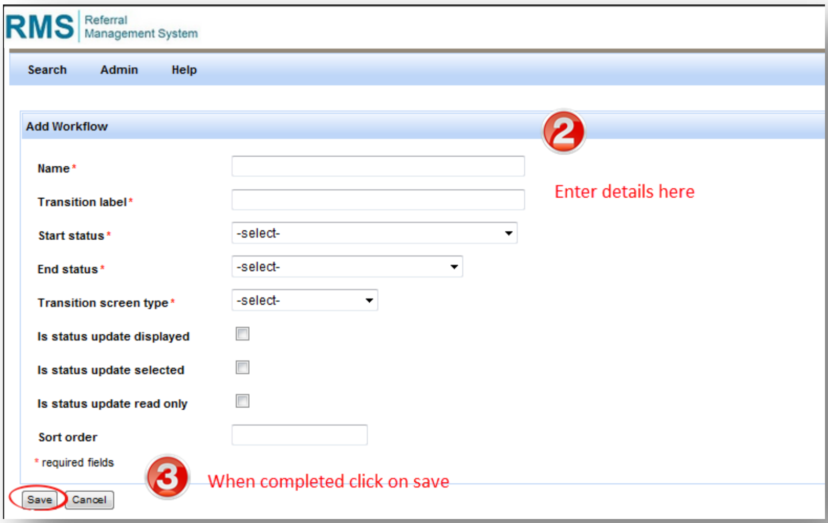


Note: If you select Confirmation screen as the Transition screen type you cannot have the send status update feature, as confirmation screen is intended to just change the status without any updates being sent back to Referrer.

Warning: If you select Triage screen as the Transition screen type you should name it as **'Ready for Triage To Triage Complete'**, as only this name will enable saving the entered triage information in the specific triage area on the referral view screen.

Screen Reference:





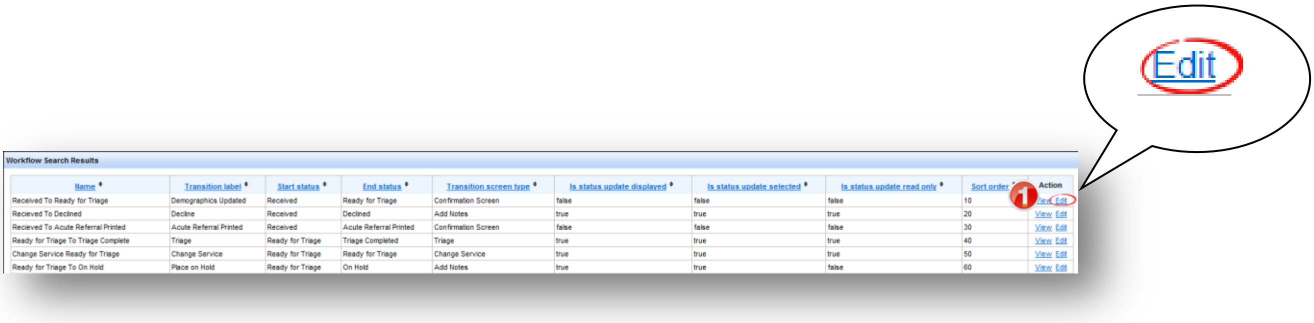
10.4 Updating an existing workflow

Use this feature if you wish to change workflow information. Fields for editing the workflow can be accessed by clicking on the Edit link against each workflow details under the '**Workflow Search Results**'.

To change the workflow, follow the steps below:

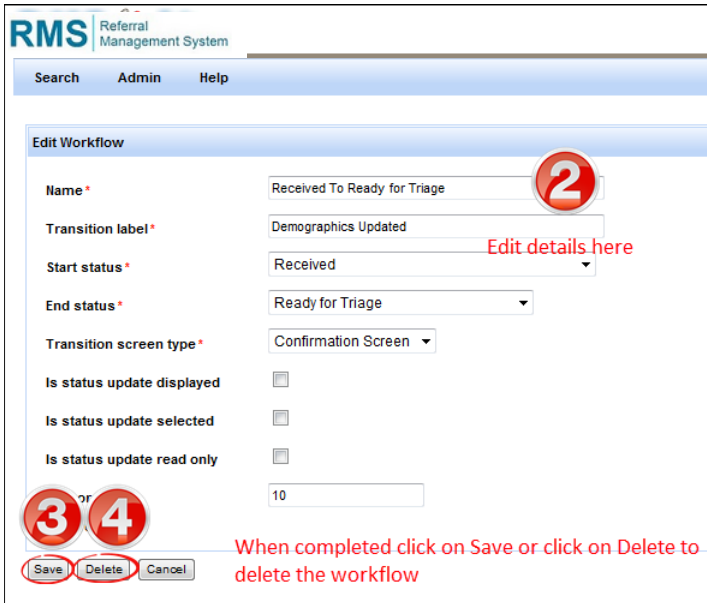
Action	Description
1	**Locate** the workflow within the 'Workflow maintenance console search results list and click on **Edit**
2	If required change information in the details section.
3	Once you've completed use the **Save** button to save the changes and return to the previous screen. If you wish to abort service creation click on the **Cancel** button
4	If you wish to delete the workflow click on the **Delete** button

Workflow Maintenance

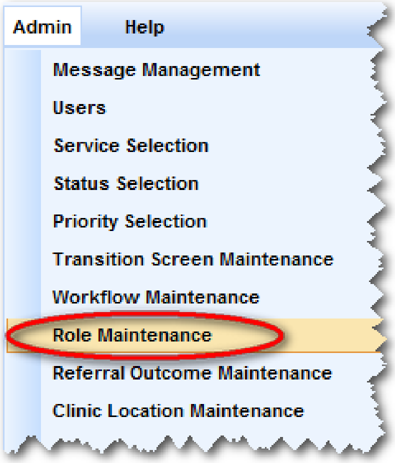


Workflow Search Results

Name	Transition label	Start status	End status	Transition screen type	Is status update displayed	Is status update selected	Is status update read only	Sort order	Action
Received To Ready for Triage	Demographics Updated	Received	Ready for Triage	Confirmation Screen	false	false	false	10	View Edit
Recieved To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	View Edit
Recieved To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	View Edit
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	View Edit
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	View Edit
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	View Edit



11. Role Maintenance

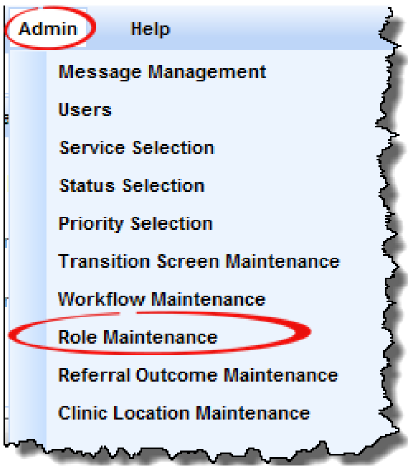


Use the 'Role Maintenance' option under the Admin menu to view, edit what workflow steps (specified in the previous section) are available to the roles assigned to RMS users.

11.1 Accessing the role maintenance console

The Role maintenance feature can be accessed by clicking **Role Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent role maintenance activities can be completed directly from the Role Maintenance console.



11.2 The Role Maintenance Console

The Role Maintenance console allows you to view or edit different workflow associated with a Role.

A Role can have one, many or no workflows associated with it.

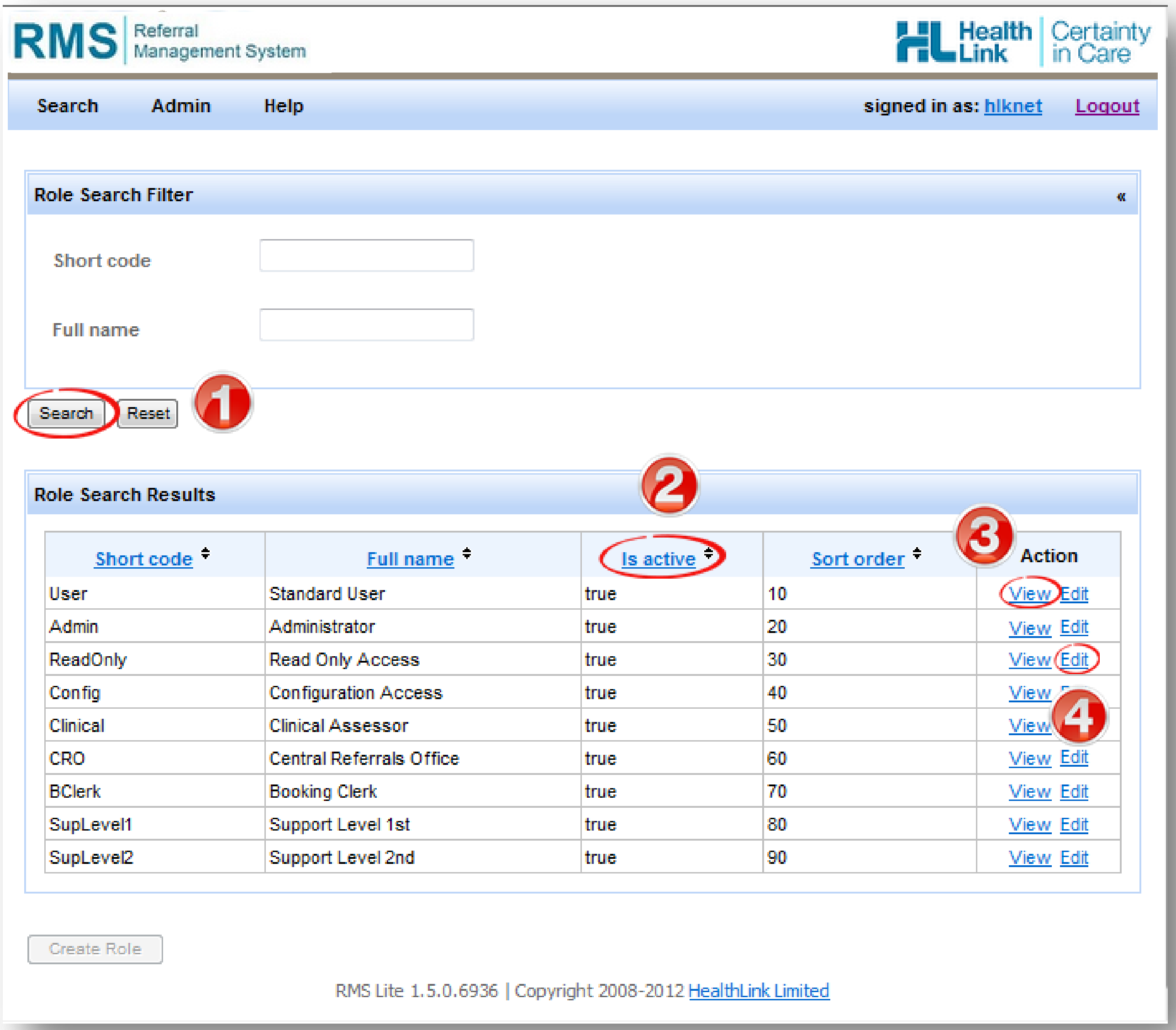
Each Role created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

Action	Description
1	Use the **Role Search Filter** to locate a specific role
2	Check to see if a **role** is active or not (true means active, false means inactive)

3	**View** Role details.
4	**Edit** workflow(s) associated with the Role (if any).

Below is a reference of where to look for these activities:

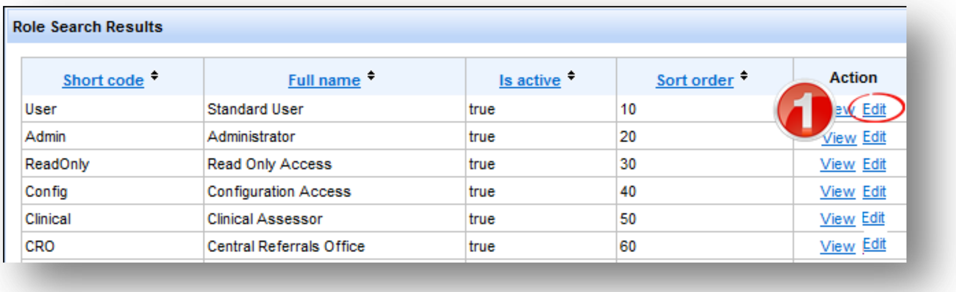


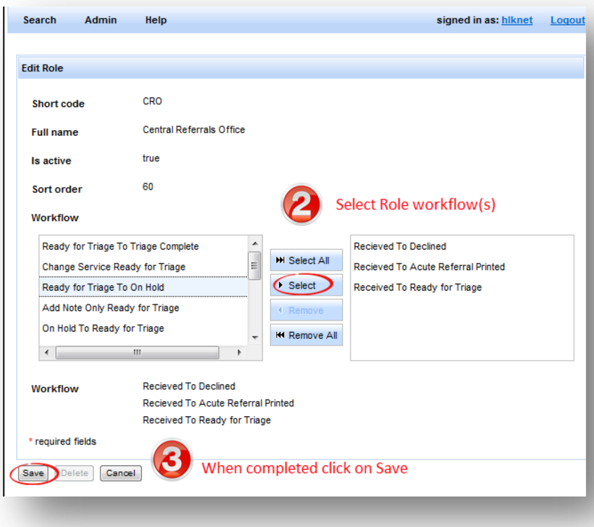
11.3 Updating an existing role to add/change workflow

Use this feature if you wish to add/change workflow associated with a Role. To **Edit** a Role, click on the Edit link against each role details under the ‘Role Search Results’.

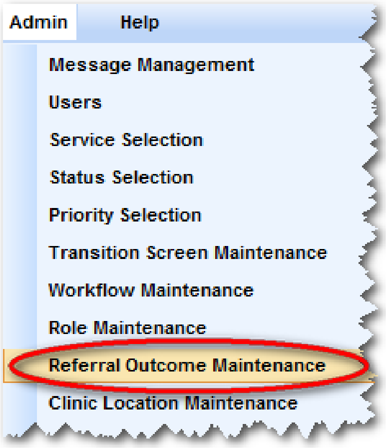
To change the workflow associated with the role follow the steps below:

Action	Description
1	**Locate** the role within the ‘Role maintenance console’ search results list and click on **Edit**
2	If required add/change workflow information in the **Edit Role** screen. To specify the workflow: • Select the appropriate workflow(s) within the available workflows list. To select a single workflow **click** on the workflow(s) you wish to associate with the Role • **Use** the list action items highlighted to transfer these workflow(s) to the Role workflow list **Note**: list action items can be used to add all workflows, single workflow, remove all allocated workflow or a workflow associated with a Role
3	Once you’ve completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button





12. Referral Outcome Maintenance

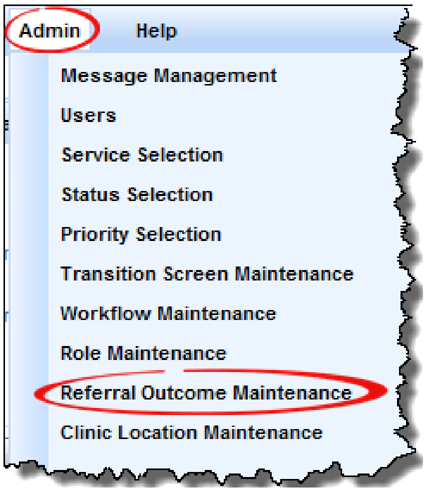


Use the ‘Referral Outcome Maintenance’ option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

12.1 Accessing the referral outcome maintenance console

The Referral outcome maintenance feature can be accessed by clicking **Referral Outcome Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent referral outcome activities can be completed directly from the Referral Outcome Maintenance console.



12.2 The Referral Outcome console

The Referral Outcome console allows you to create, view or edit referral outcomes which is been used by the Triage screen to help triage a referral.

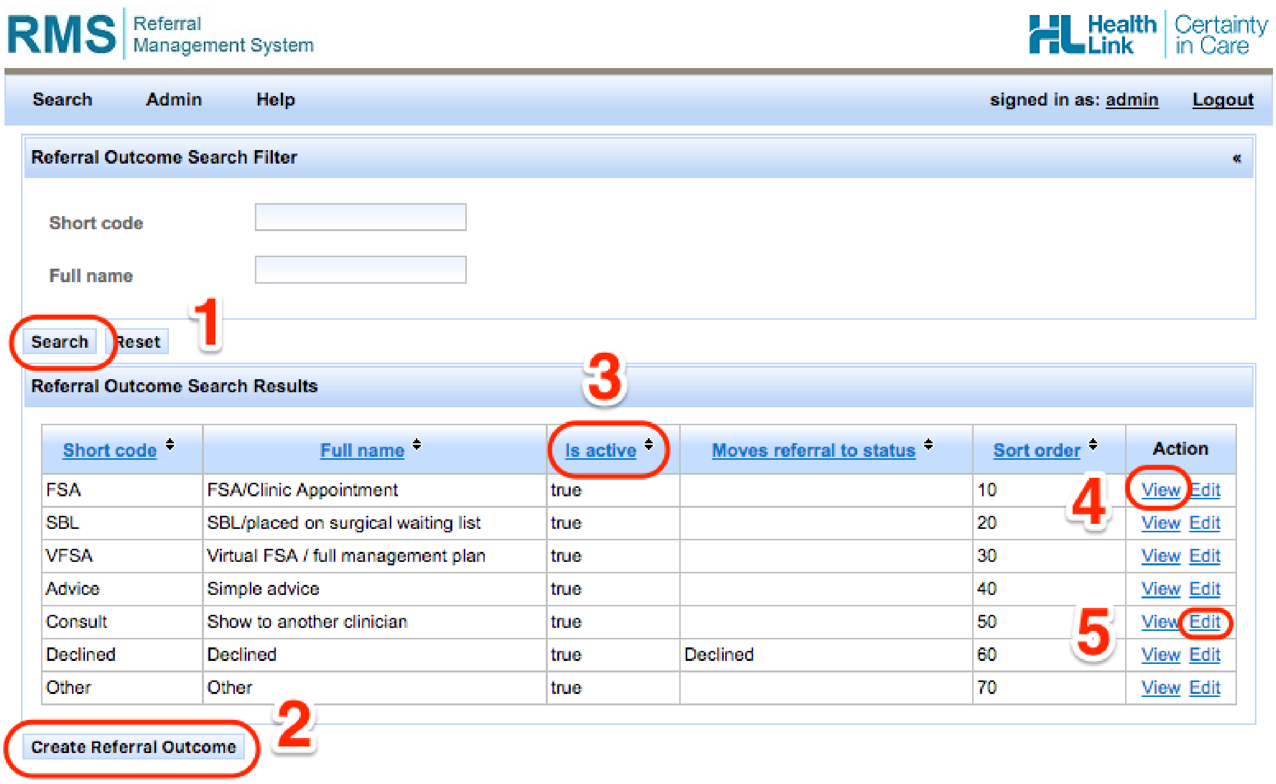
All referral outcome entered can be viewed in a drop down list in the Triage screen.

Each Referral Outcome entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use), a sort order (to show what sequence the description shows in any drop down lists), and a ‘to status’ (the status that should be set for any referral if that referral is assigned this referral outcome).

The activities that can be initiated from the service selection console are:

Action	Description
1	Use the **Referral Outcome Search Filter** to locate a specific 'referral outcome'
2	**Add** a new Referral Outcome to RMS
3	Check to see if a Referral Outcome is **active** or not (true means active, false means inactive)
4	**View** Referral Outcome details.
5	**Edit** Referral Outcome details.

Below is a reference of where to look for these activities:



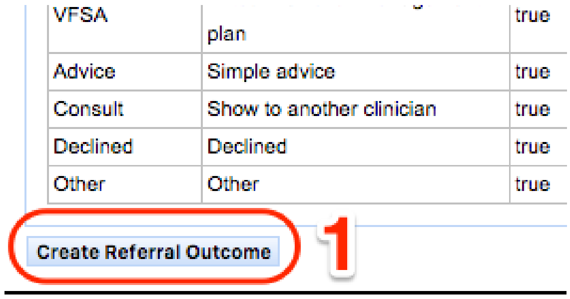
12.3 Creating a new referral outcome

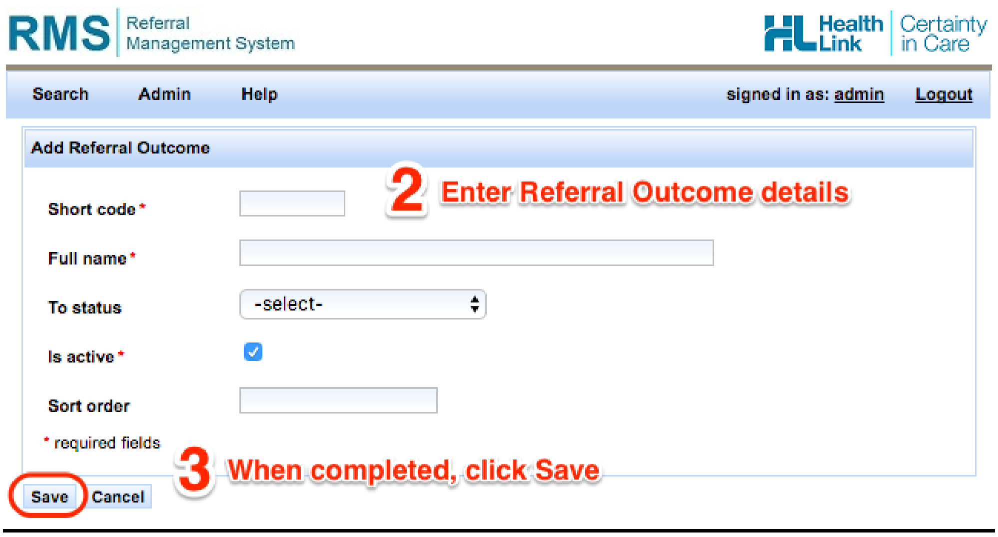
You can add a new Referral Outcome to RMS by completing the following steps:

Action	Description
1	Click on the [Create Referral Outcome] button at the bottom of the **Referral Outcome Maintenance** page
2	Complete the details under '**Add Referral Outcome**' screen. Each Referral Outcome entry created has: • **A Short code** (for database identification /for internal development use), • **A Full name** (for the display shown on screen),

	• **An Active status** (to show if it is currently in use) and • **A Sort order** (to show what sequence the description shows in any drop down lists) assigned to it. • **To Status** (the status that should be set for any referral if that referral is assigned this referral outcome) • **Triage screen configuration** settings defaulted to display all fields on the triage screen and don't mandate any of them.
3	Once you've completed setting up the service type click on the **Save** button. If you wish to abort service creation click on the **Cancel** button

Screen Reference





12.4 Updating an existing referral outcome

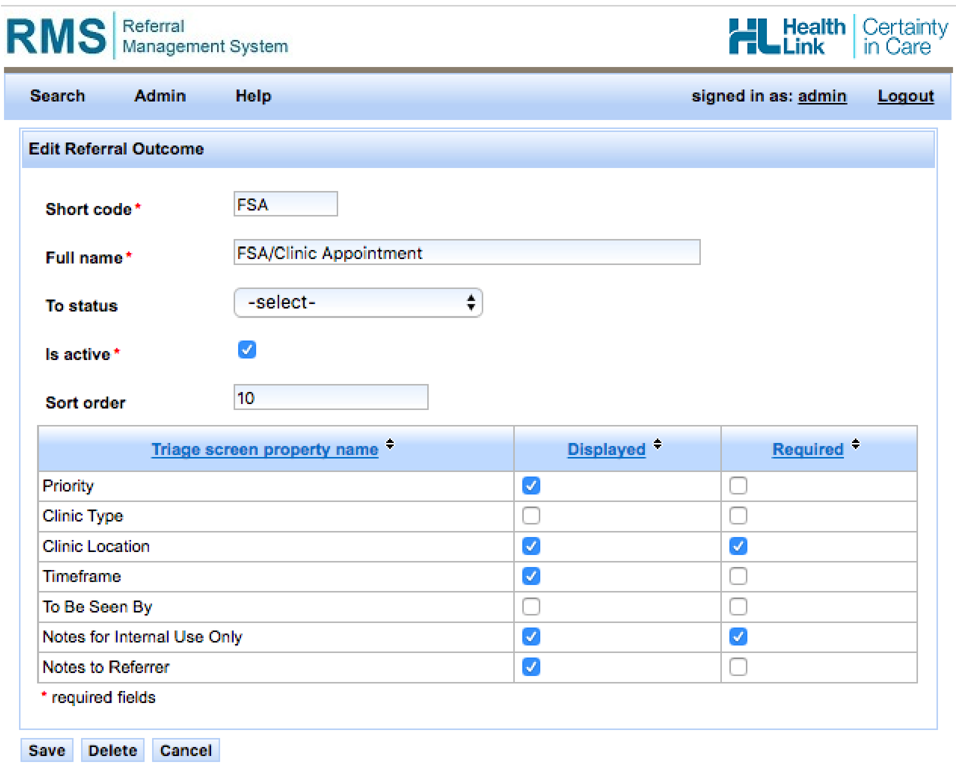
Use this feature if you wish to change Referral Outcome information.

Fields for editing the Referral Outcome can be accessed by clicking on the **Edit** link against each 'referral outcome' details under the '**Referral Outcome Search Results'**.

To change the referral outcome, follow the steps below:

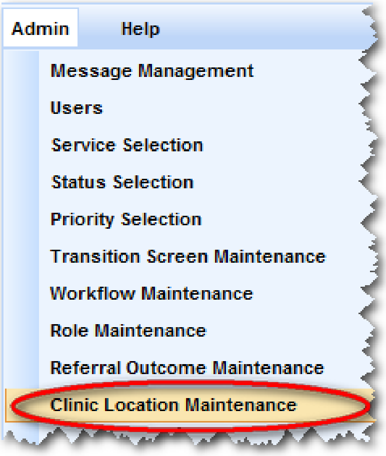
Action	Description
1	**Locate** the 'Referral Outcome' within the Referral Outcome Maintenance console search results list and click on **Edit**
2	If required **change** information in the details section. Starting with release 1.7.0, you will be able to automate aspects of the triaging screen to reduce redundant effort and save time. You now have the ability to control which input fields on the **Triage** screen should be mandatory and/or hidden based on the referral outcome that is selected. You will see a new table of triage screen fields, each with a **Displayed** and **Required** true/false property. Fields with **Displayed** value of false will be hidden from the triage screen if this referral outcome is chosen on the triage screen. A hidden field cannot be required. Fields with **Required** value of true will be required to be filled in the triage screen if this referral outcome is chosen on the triage screen. A required field cannot be hidden. An example referral outcome with Triage screen fields configuration is shown below.
3	Save your changes by clicking on the **Save** button. If you wish to abort service creation click on the **Cancel** button. Click on **Delete** button to delete a referral outcome.

Screen Reference



__Example__: On the triage screen, should FSA/Clinic Appointment referral outcome be chosen, the fields Clinic Type and To Be Seen By will be hidden, and Clinic Location and Notes For Internal Use Only will be required to be filled by the user.

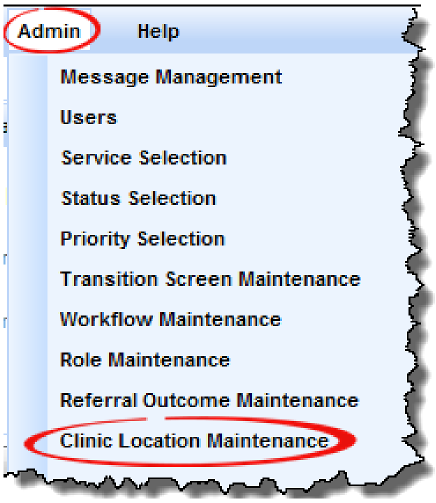
13. Clinic Location Maintenance



Use the 'Clinic Location Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

13.1 Accessing the clinic location maintenance console

The Clinic Location maintenance feature can be accessed by clicking Clinic Location **Maintenance** from **Admin** menu on the RMS menu toolbar.



All subsequent clinic location maintenance activities can be completed directly from the clinic location maintenance console.

13.2 The clinic location Console

The Clinic Location Console allows you to create, view or edit clinic location's which is been used by the Triage screen to help triage a referral.

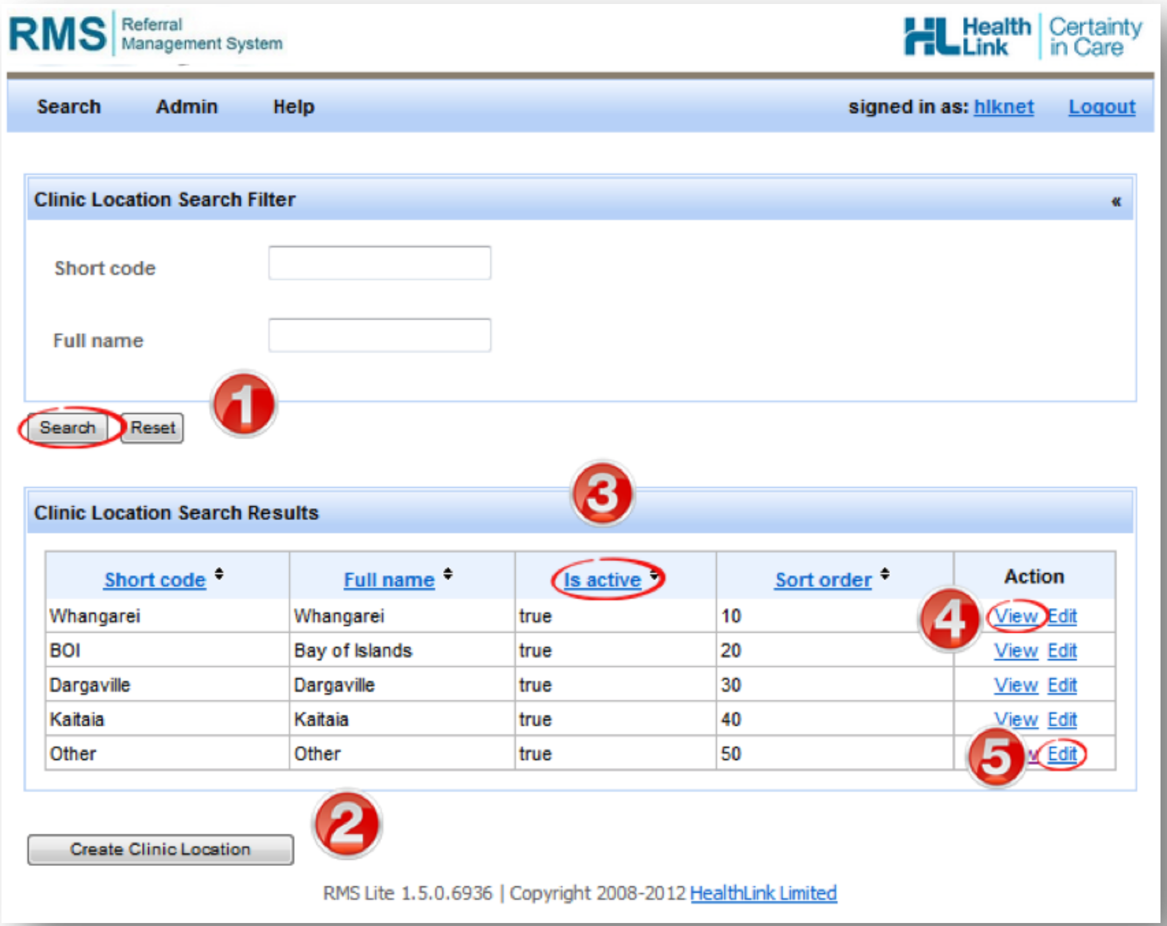
All clinic location entered can be viewed in a drop down list in the Triage screen.

Each Clinic location entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

Action	Description
1	Use the **Clinic Location Search Filter** to locate a specific 'referral outcome'
2	**Add** a new Clinic Location to RMS
3	**Check** to see if a Clinic Location is active or not (true means active, false means inactive)
4	**View** Clinic Location details.
5	**Edit** Clinic Location details.

Below is a reference of where to look for these activities:

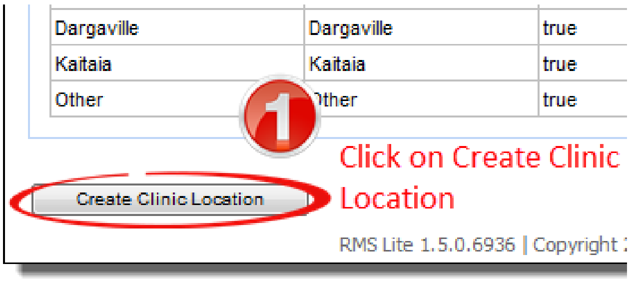


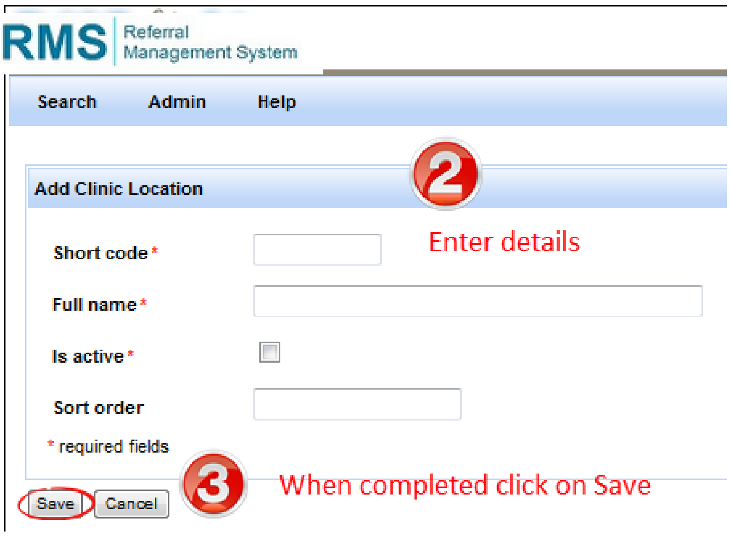
13.3 Creating a new clinic location

You can add a new Clinic Location to RMS by completing the following steps:

Action	Description
1	Click on the Create Clinic Location button at the bottom of the Clinic Location Maintenance page
2	Complete the details under '**Add Clinic Location**' screen. Each Clinic Location entry created has: 1) A **Short code** (for database identification /for internal development use), 2) A **Full name** (for the display shown on screen), 3) An **Active status** (to show if it is currently in use) and 4) A **Sort order** (to show what sequence the description shows in any drop down lists) assigned to it.
3	Once you've completed setting up the service type click on the **Save** button. If you wish to abort service creation click on the **Cancel** button

Screen Reference





13.4 Updating an existing clinic location

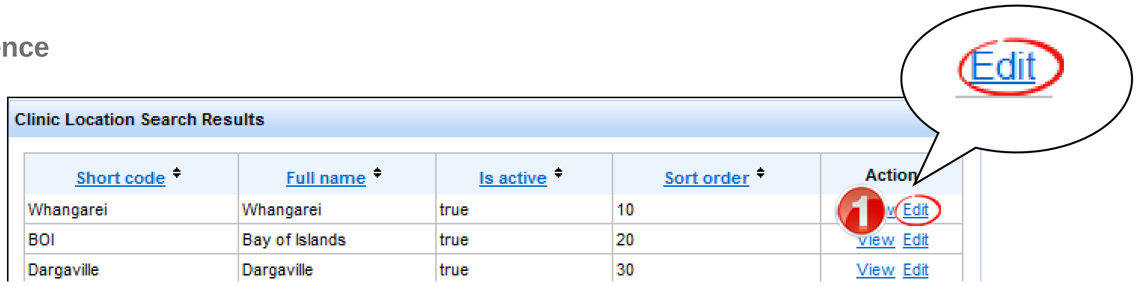
Use this feature if you wish to change Clinic Location information.

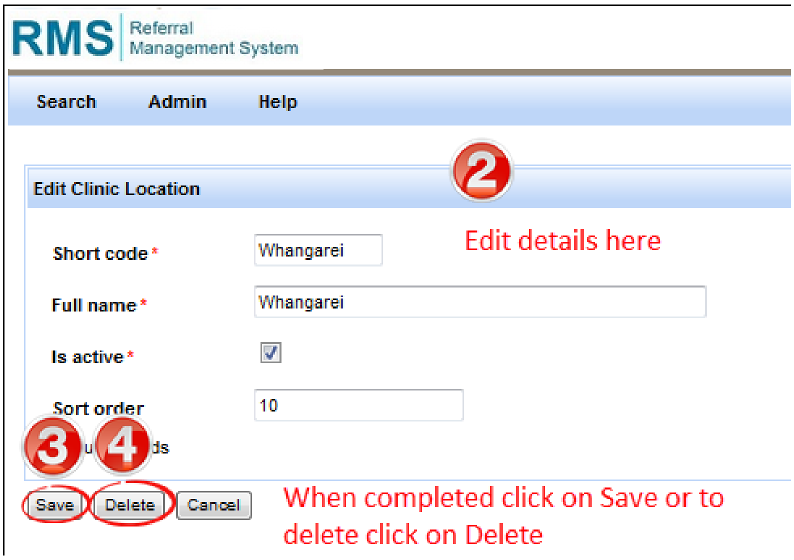
Fields for editing the Clinic Location can be accessed by clicking on the **Edit** link against each 'clinic location' details under the '**Clinic Location Search Results**'.

To change the clinic location, follow the steps below:

Action	Description
1	**Locate** the 'Clinic Location' within the Clinic Location Maintenance console search results list and click on **Edit**
2	If required change information in the details section.
3	Once you've completed use the **Save** button to save the changes and return to the previous screen. If you wish to abort service creation click on the **Cancel** button
4	Click on **Delete** button to delete a clinic location.

Screen Reference





14. Help

You can access the RMS User Guide by clicking on Help from the Menu bar in the Main screen.

14.1 HealthLink Support Details

You can contact HealthLink for RMS assistance and support through the following:

14.1.1 Phone

Toll Free Phone: **1800 125 036**

Monday to Friday: 8am to 6pm

14.1.2 Fax

Toll Free Fax: **1800 151 146**

14.1.3 Email

helpdesk@healthlink.net

14.1.4 Website

www.healthlink.net