



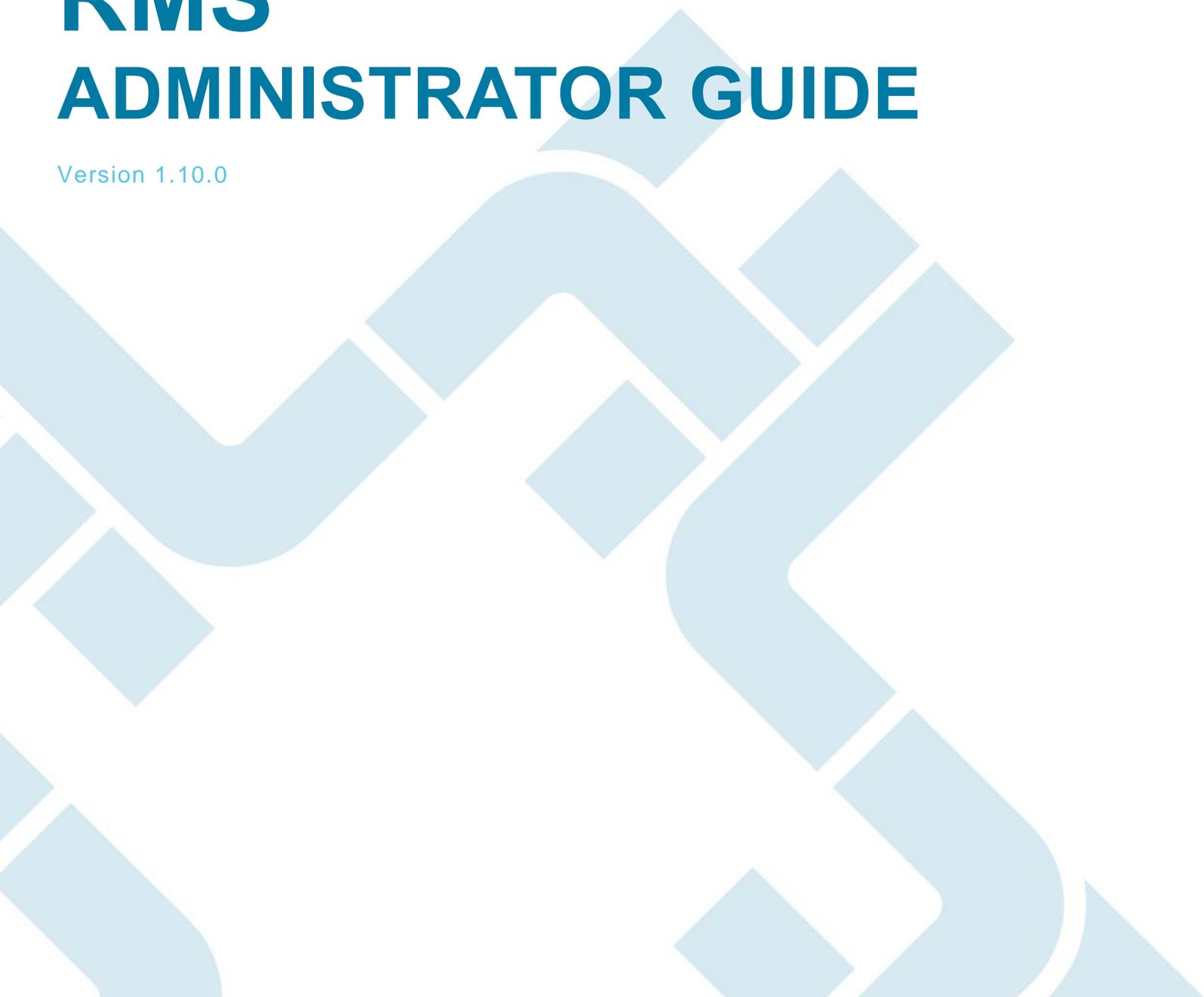
Certainty  
in Care

**RMS**

Referral  
Management System

# RMS ADMINISTRATOR GUIDE

Version 1.10.0





## Document History

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# Contents

<b>1.</b>	<b>Icons used in this Guide</b>	<b>5</b>
<b>2.</b>	<b>Introduction</b>	<b>6</b>
2.1	RMS Overview	6
2.2	Administration within RMS	6
<b>3.</b>	<b>Message Maintenance</b>	<b>8</b>
3.1	List messages	8
3.2	Filtering the message list	9
3.2.1	Resend message	9
3.2.2	Cancel message	9
3.2.3	Revive Cancelled messages	9
3.2.4	View message	10
<b>4.</b>	<b>Users</b>	<b>11</b>
<b>5.</b>	<b>Service Selection</b>	<b>14</b>
5.1	Accessing service type console	14
5.2	The service selection Console	14
5.3	Creating a new service	16
5.4	Updating an existing service	17
5.5	Merging service with another service	18
5.6	Deleting a service	19
<b>6.</b>	<b>Facility Selection</b>	<b>20</b>
6.1	Accessing facility type console	20
6.2	The facility selection Console	20
6.3	Creating a new facility	21
6.4	Updating an existing facility	23
6.5	Merging a referral's facility type with another facility	24
6.6	Deleting a facility	25
<b>7.</b>	<b>Status Selection</b>	<b>26</b>
7.1	Accessing the status type console	26
7.2	The Status Selection console	26
7.3	Creating a new Status Type	28
7.4	Updating an existing status	29
7.5	Merging status with another status	30
<b>8.</b>	<b>Priority Selection</b>	<b>32</b>
8.1	The priority selection Console	32
8.2	Updating an existing priority	33
8.3	Merging priority with another priority	35
<b>9.</b>	<b>Transition Screen Maintenance</b>	<b>36</b>



## Contents

---

9.1	Accessing the transition screen console .....	36
9.2	The transition screen Console.....	36
9.3	Updating an existing Transition screen .....	37
<b>10.</b>	<b>Workflow Maintenance.....</b>	<b>38</b>
10.1	Accessing the workflow console.....	38
10.2	The workflow Console .....	38
10.3	Creating a new workflow .....	40
10.4	Updating an existing workflow .....	42
<b>11.</b>	<b>Role Maintenance .....</b>	<b>44</b>
11.1	Accessing the role maintenance console .....	44
11.2	The Role Maintenance Console .....	44
11.3	Updating an existing role to add/change workflow.....	46
<b>12.</b>	<b>Referral Outcome Maintenance .....</b>	<b>47</b>
12.1	Accessing the referral outcome maintenance console .....	47
12.2	The Referral Outcome console.....	47
12.3	Creating a new referral outcome .....	48
12.4	Updating an existing referral outcome.....	49
<b>13.</b>	<b>Clinic Location Maintenance.....</b>	<b>51</b>
13.1	Accessing the clinic location maintenance console .....	51
13.2	The clinic location Console.....	51
13.3	Creating a new clinic location .....	53
13.4	Updating an existing clinic location .....	53
<b>14.</b>	<b>Help.....</b>	<b>55</b>
14.1	HealthLink Support Details .....	55
14.1.1	Phone .....	55
14.1.2	Fax.....	55
14.1.3	Email .....	55
14.1.4	Website .....	55

## Icons used in this Guide

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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

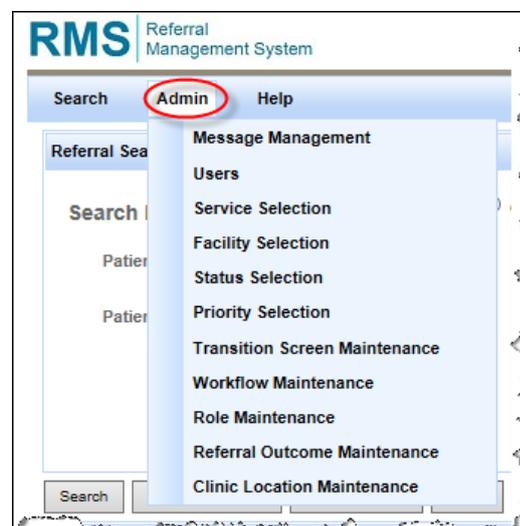
Status Update Messages sent, the acknowledgement received, user access and actions can be fully audited and tracked in RMS.

### 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.

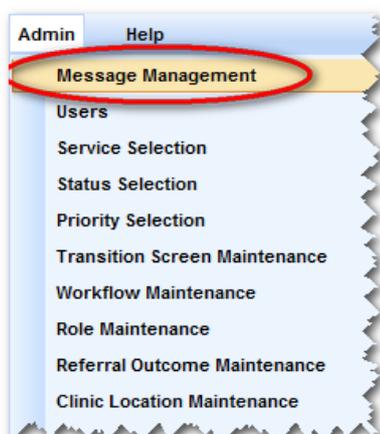


There are a number of useful activities that can be completed by administrators with RMS. These activities are primarily broken down into specific areas:

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:

**Message Management Search Filter**

Sender:  Recipient:

Date Time From: 03-Jan-2011 00:00 Date Time To:

Show problem messages only  Include cancelled correspondence

---

**Message Management Search Results**

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)	<a href="#">NLER-26610</a>	hiknet	gingming	ma65test	Send Error	<a href="#">View</a> <a href="#">Resend</a> <a href="#">Cancel</a>
14-Jan-2011 19:13		NLER-26610:110114191314	eReferral (in) (T)	<a href="#">NLER-26610</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 19:07		NLER-26609:110114190733	eReferral (in) (T)	<a href="#">NLER-26609</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 16:08		NLER-26608:110114160822	eReferral (in) (T)	<a href="#">NLER-26608</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 16:07		NLER-26607:110114160721	eReferral (in) (T)	<a href="#">NLER-26607</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 15:40		NLER-26606:110114154001	eReferral (in) (T)	<a href="#">NLER-26606</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 14:40		NLER-26605:110114144006	eReferral (in) (T)	<a href="#">NLER-26605</a>		ma65test	ndhberef	Received	<a href="#">View</a>
14-Jan-2011 14:33		NLER-26604:110114143348	eReferral (in) (T)	<a href="#">NLER-26604</a>		ma65test	ndhberef	Received	<a href="#">View</a>

[Next Page >](#) [Last Page >>](#)

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.

## Message Maintenance

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 – There 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

## Message Maintenance

correspondence' within the filter options. Below is an example filter screen with a cancelled message that can be revived:

**Message Management Search Filter**

Sender:  Recipient:

Date Time From: 01-Jan-2011 00:00 Date Time To:

Show problem messages only  Include cancelled correspondence

---

**Message Management Search Results**

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-20010:11011518124300	Update (out) (7)	NLER-20010	hknet	gingming	ma65test	Send Error	<a href="#">View</a> <a href="#">Revive</a>

### 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.

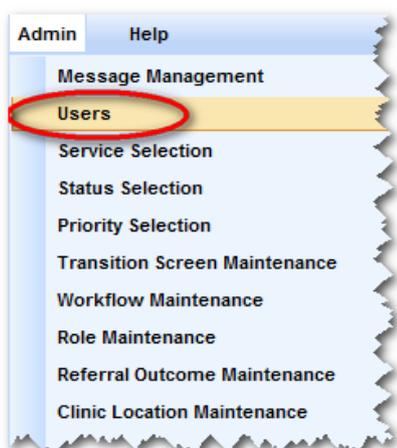
Below is an example of the of the message view screen:

**Message Details - Test Message**

Bus. Transaction ID	WRP-11491	Message Type	Update	Sender	RMS Lite
Message ID	WRP-11491:10120316015300	Message State Type	Send Error	Recipient	ma65test
Reply to Message ID		Message Direction	Outbound	Author	hknet
Referral ID	WRP-11491	Is Cancelled	False	Last Sent Username	hknet
Creation Date Time	03-Dec-2010 16:01	Is Test Message	True	Date Time Last Sent	06-Dec-2010 12:30
Message Summary	<p>The referral has been updated with the following details:</p> <p>Referral ID: WRP-11491            Service: Mental Health            Priority: Unspecified            Status: Received            Date: 03-Dec-2010 16:01</p> <p>Comments:</p>				
Error Details	<p>Error occurred while sending referral update: Fault occurred</p> <p>Code: VALIDATIONFAIL</p> <p>Details: [0] InvalidMessageError: (HMSEPS-30006) The request message's sender namespace does not exist in the list of Web Service accounts or request message's sender is not web-service configured.            [1] LDAPLookupException: The request message's sender namespace does not exist in the list of Web Service accounts or request message's sender is not web-service configured.</p> <p>Additional Details:            [0] ApplicationFault: Fault occurred</p>				

Local intranet | Protected Mode: Off | 105%

## 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.

**RMS** Referral Management System HL HealthLink Certainty in Care

Search Admin Help signed in as: admin Logout

**User Search Filter**

Username  Email Address   
 Last Name  First Name

Search Reset

**User Search Results**

Username	Last Name	First Name	Email Address	Creation date	Disabled date	Is locked out	Is active	Action
admin	admin	all	admin@samplehospital.org	04-May-2012 13:21		false	true	<a href="#">View</a> <a href="#">Edit</a>
johndoe	john	doe	john.doe@samplehospital.org	04-May-2012 12:05	09-Jan-2018 09:58	false	false	<a href="#">View</a> <a href="#">Edit</a>

[Add User](#) [Click here to create a new user](#) [Click here to edit a user](#)

RMS Lite 1.6.0.0-SNAPSHOT | Copyright 2008-2018 HealthLink Limited | Pacific/Auckland

To add a new user, follow these steps:

Action	Description
1	Click on the <b>Admin</b> menu at the top, and then click <b>Users</b> . Then click <b>Add User</b> 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 <b>Select</b> to add a role, and <b>Remove</b> to remove a role
6 & 7	Pick facility for the new user. Click <b>Select</b> to add a facility, and <b>Remove</b> to remove a facility
8 & 9	Pick facility - service for the new user. Click <b>Select</b> to add a facility - service, and <b>Remove</b> to remove a facility - service
10	Click <b>Save</b> 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:

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search **Admin** Help signed in as: admin Logout

### Add User

**1** Username\*  Password\*  Retype Password\*

**2** Pick a username and password for the new user

Last Name\*  First Name  Email Address

**3** Fill in other details for the new user

Creation Date  Disabled Date

Is Locked Out false

Is Active true **4** Check if user is active

**Roles**

- Standard User
- Administrator
- Read Only Access
- Configuration Access
- Clinical Assessor
- Central Referrals Office

**5** Click Select to add the role you picked

**Facilities**

- Concord Repatriation Ge...
- ndhberef
- Royal Prince Alfred Hosp...
- silhdaem
- Waikato

**6** Click Select to add the facility you picked

**Facility Services**

- Concord Repatriation General Hospital - Rheumatology
- Royal Prince Alfred Hospital - Haematology
- Royal Prince Alfred Hospital - Rheumatology

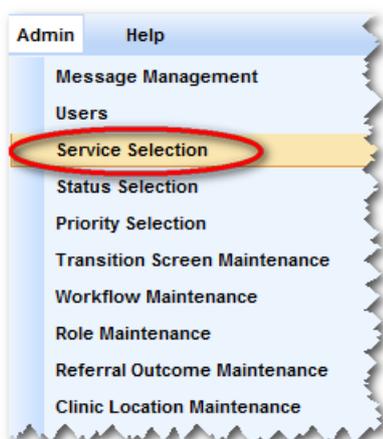
**7** Click Select to add the facility - service you picked

**8** Click Save

\* required fields

Save Cancel

## 5. Service Selection

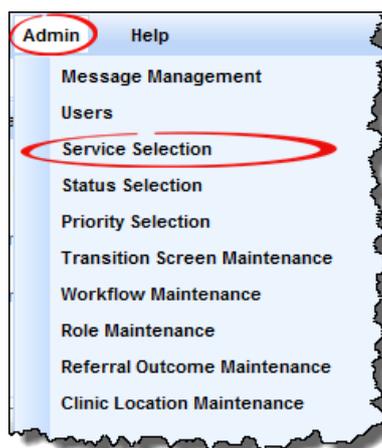


Use the 'Service Selection' option under the Admin menu to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) 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 <b>Service Type Search Filter</b> to locate a specific service
2	<b>Add</b> a new service to RMS
3	Check to see if a service is <b>active</b> or not. (true means active, false means inactive)

## Service Selection

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 **HL HealthLink** 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	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a> <b>5</b>
ACUTE-WHA	ACUTE-WHA	Acute - Whangarei	false (0)	Received	8	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310004004	310004004	Audiology	true (20)		10	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
M13	M13	Cardiology	true (9)		20	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
CAPU.DGC	WAIA_CARDIOPUL	Cardiopulmonary - Diagnostic	false (0)		25	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a> <b>4</b>
310026003	310026003	Counselling	false (0)		30	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310143002	310143002	Unrecognised	true (19)		40	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
M18	M18	Dermatology	true (3)		50	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310044006	310044006	Dermatology	false (0)		50	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
309924002	309924002	Diabetes	true (10)		60	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a> <b>6</b>
DB.GEN	309924002.GEN	Diabetes - General	true (3)		61	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
DB.PREG	309924002.PREG	Diabetes - Pregnancy	true (1)		64	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
DB.RETL	309924002.RETL	Diabetes - Retinal	true (1)		66	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
ADI	ADI	Dietetics	true (2)		70	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310090003	310090003	Dietetics	false (0)		70	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
GENMED	GENMED	General Medicine	true (2)		71	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
ECO	WAIA_ECHOCARD	Echocardiogram	false (0)		73	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310045007	310045007	Endocrinology	false (0)		75	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
EN	WAIA_ENDOSCOPY	Endoscopy	false (0)		77	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
310149003	310149003	ENT (Ear Nose and Throat)	false (0)		80	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>

[Next Page >](#) [Last Page >>](#)

[Create Service Type](#) **2**

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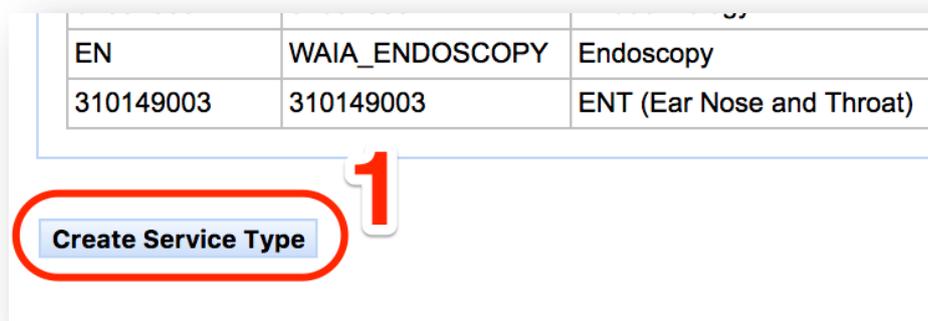
## Service Selection

### 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  button at the bottom of the <b>Service Selection</b> page
2	Complete the details under ' <b>Add Service Type</b> ' screen. Each Service Type entry created has: <ol style="list-style-type: none"> <li>1) A <b>Short code</b> (for internal development use),</li> <li>2) A <b>Code</b> (for database identification),</li> <li>3) A <b>Full name</b> (for the display shown on screen),</li> <li>4) An <b>Active status</b> (to show if it is currently in use) and</li> <li>5) A <b>Sort order</b> (to show what sequence the description shows in any drop down lists) assigned to it.</li> <li>6) A <b>To Status</b>. Starting with release 1.7.0, it is possible to configure RMS so that if an incoming referral goes to a certain <b>service</b> its <b>status</b> can automatically be determined. This field allows you to create this service-to-status mapping.</li> </ol>
3	Once you've completed setting up the service type click on the <b>Save</b> button. If you wish to abort service creation click on the <b>Cancel</b> button

Screen Reference:



**RMS** Referral Management System | **HL HealthLink** Certainty in Care

Search Admin Help signed in as: admin Logout

**Add Service Type**

Short code\*

Full name\*

Is active\*

Sort order

Code\*

To status

\* required fields

**2 Enter service details**

**3 When completed, click Save**



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 <b>Edit</b>
2	If required change information in the <b>details section</b>
3	Once you’ve completed use the <b>Update</b> 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.

## Service Selection

Screen Reference:

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

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search Admin Help signed in as: admin Logout

---

**Edit Service Type**

Id \*

Short code \*

Full name \*

Is active \*

Sort order

Code \*

To status   
 -select-  
 Received  
 Re Assigned  
 Scheduled  
 Demographics updated  
 Printed by Service  
 Declined

\* required fields

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### 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.

## Service Selection

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

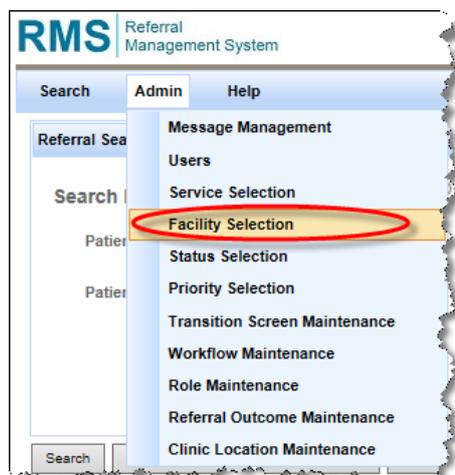
Screen References:

The screenshot shows the RMS Referral Management System interface. A 'Merge Service Type' dialog box is open, displaying a warning: "This service type can be merged into one of the following services. 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 service type". The 'Facility Type' dropdown is set to 'Concord Repatriation General Hosp' (labeled '2 select a facility'). The 'Service Type' dropdown is set to 'Counselling' (labeled '3 select a service'). The 'OK' button is highlighted (labeled '4 click OK to save'). In the background, a table of service types is visible, with the 'Merge' link in the 'Action' column of the first row circled and labeled '1 click merge'.

### 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

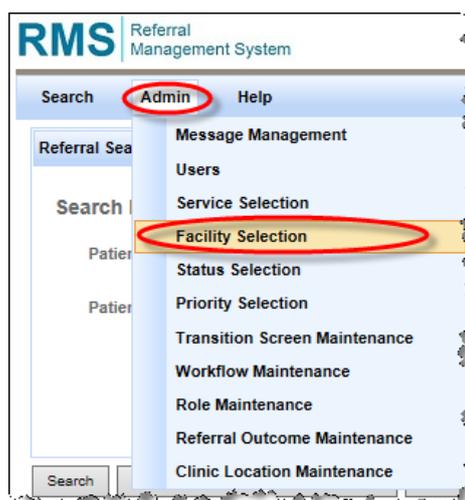


Use the 'Facility Selection' option under the Admin menu to create, view, edit or merge the facilities that a service can be assigned to when a referral is received. Each Facility Type entry created has a code (for database identification), description (for the display shown on screen), active status (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 <b>Facility Type Search Filter</b> to locate a specific facility
2	<b>Add</b> a new facility to RMS
3	Check to see if a facility is <b>active</b> or not. (true means active, false means inactive)

## Facility Selection

4	<b>View</b> facility type details.
5	<b>Edit</b> 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:

The screenshot shows the RMS Referral Management System interface. At the top right, it says 'signed in as: admin' and 'Logout'. Below the navigation bar, there is a 'Facility Type Search Filter' section with input fields for 'Short code', 'Full name', and 'Code'. A red circle with the number '1' highlights the 'Search' button. Below the filter is a 'Facility Type Search Results' table. A red circle with the number '2' highlights the 'Create Facility Type' button at the bottom left. The table has columns: 'Short code', 'Code', 'Full name', 'Is active (# refs)', 'Sort order', and 'Action'. A red circle with the number '3' highlights the 'Is active (# refs)' column. A red circle with the number '4' highlights the 'View' link in the 'Action' column for the 'ConRep' row. A red circle with the number '5' highlights the 'Edit' link in the 'Action' column for the 'ConRep' row.

Short code	Code	Full name	Is active (# refs)	Sort order	Action
default	default	Default	true (3743)	10	<a href="#">View</a> <a href="#">Edit</a>
ConRep	Concord Repatriation General Hospital- Associate Professor Ilona Cunningham	Concord Repatriation General Hospital- Associate Professor Ilona Cunningham	true (1)	9999	<a href="#">View</a> <a href="#">Edit</a>
ndhberref	ndhberref	ndhberref	true (2)	9999	<a href="#">View</a> <a href="#">Edit</a>
RoyPrince	Royal Prince Alfred Hospital- Professor John Gibson	Royal Prince Alfred Hospital- Professor John Gibson	true (1)	9999	<a href="#">View</a> <a href="#">Edit</a>
slhdhaem	slhdhaem	slhdhaem	true (3)	9999	<a href="#">View</a> <a href="#">Edit</a>
waikato	waikato	Waikato	true (3)	9999	<a href="#">View</a> <a href="#">Edit</a>

### 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 <b>Create Facility Type</b> button at the bottom of the <b>Facility Selection</b> page
2	Complete the details under ' <b>Add Facility Type</b> ' screen. Each Facility Type entry created has: <ul style="list-style-type: none"> <li>1) A <b>Short code</b> (for internal development use),</li> <li>2) A <b>Code</b> (for database identification),</li> <li>3) A <b>Full name</b> (for the display shown on screen),</li> <li>4) An <b>Active status</b> (to show if it is currently in use) and</li> <li>5) A <b>Sort order</b> (to show what sequence the description shows in any drop down lists) assigned to it.</li> </ul>
3	Select the service(s) to assign to the facility type.
4	Once you've completed setting up the facility type click on the <b>Save</b> button. If you wish to abort service creation click on the <b>Cancel</b> button

## Facility Selection

Screen Reference:

A screenshot of a web form. It features two input fields, both containing the text 'waikato'. Below these fields is a button labeled 'Create Facility Type', which is circled in red.

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search Admin Help signed in as: admin [Logout](#)

### Add Facility Type

**1** Enter facility details

Short code \*

Full name \*

Is active \*

Sort order

Code \*

Services

- Acute Medical Clinic
- Cardiology
- Cardiopulmonary - Diagn
- Chest Pain
- Counselling

Services

\* required fields

**2** Select the service(s) to assign to the facility type

**3** When completed, click Save



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.

## Facility Selection

### 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 <b>Edit</b>
2	If required change information in the <b>details section</b>
3	Once you've completed use the <b>Update</b> 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:

**Facility Type Search Results**

Short code	Code	Full name	Is active (# refs)	Sort order	Action
default	default	Default	true (3743)	10	View <b>Edit</b>

**RMS** Referral Management System

Search Admin Help

HL HealthLink | Certainty in Care

signed in as: admin Logout

**Edit Facility Type**

**Id\***

**Short code\***

**Full name\***

**Is active\***

**Sort order**

**Code\***

Notifiable Disease

Paediatrics

Unrecognised

A

Voucher New

Select All

Select

Remove

Remove All

Voucher Ineligible

Counselling

SLHD Haematology

**Services**

Voucher Ineligible

SLHD Haematology

Counselling

**3\*** required fields

**Update** Done

## Facility Selection

### 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	<b>Locate</b> 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 <b>dropdown list</b>
3	Once you've selected the facility name use the <b>Save</b> button to save the changes and return to the previous screen. If you wish to abort merging of service click on the <b>Cancel</b> button

Screen References:

**RMS** Referral Management System **HL HealthLink** | Certainty in Care

Search Admin Help signed in as: admin Logout

**Referral Search Filter**

Search By  Referral ID  Medicare Number  Other Details

Referral ID

Search Search and Save Reset Auto refresh search result?  Time to Refresh: 78s

**Referral Search Results**

Received	Referral ID	Referrer	Medicare Number	Patient	Patient DOB	Service	Status	Action
16-Jan-2019 15:07	NLR2-56177	John, Smith	JDR1234	Mouse, Micky	21-Feb-1999	Audiology	Ready for Triage	
16-Jan-2019 14:37	NLR2-56176	John, Smith	JDR1234	Mouse, Micky	21-Feb-1999	Audiology	Ready for Triage	
16-Jan-2019 14:34	NLR2-56175	John, Smith	JDR1234	Mouse, Micky	21-Feb-1999	Audiology	Ready for Triage	

**RMS** Referral Management System
**HL HealthLink** Certainty in Care

**Record Progress**

Medicare Number	JDR1234	Referral ID	CCER-11447	Status	Received <input type="button" value="v"/>
Facility	<ul style="list-style-type: none"> <li>auckland central</li> <li>Waikato</li> <li>act</li> <li>Concord Repatriation General Hospital- Associate Professor Iona Cunningham</li> <li>ndhberef</li> <li style="background-color: #e0e0e0;">Royal Prince Alfred Hospital- Professor John Gibson</li> <li>slhdhaem</li> </ul>	Patient	MOUSE, MICKEY	Referrer	Entwistle, Sam
Service		Patient DOB	29-Apr-1999	Received	08-Jun-2011 13:51
Priority					
Notes					

2 Select the name of the facility you want to merge into from the dropdown list

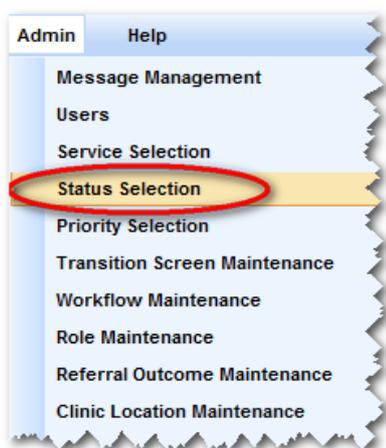
Send update to referrer?

\* required fields

## 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

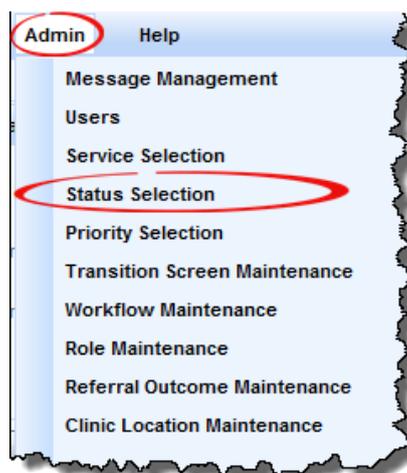


Use the 'Status Selection' option under the Admin menu to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), 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.

## Status Selection

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

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

**RMS** Referral Management System | **HL HealthLink** Certainty in Care

Search Admin Help | signed in as: [hlknet](#) [Logout](#)

**Status Type Search Filter**

Short code

Full name

**1** Search

**3** **Status Type Search Results**

Short code	Full name	Is close	Is active (# refs)	Sort order	Action
Assigned	Assigned	false	true (5)	20	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
Admitted	Admitted	false	true (1)	80	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
Acute	Acute Referral Printed	true	true (1)	140	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>

**2**

**4** [View](#) [Edit](#) [Merge](#)

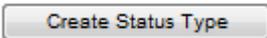
**5** [View](#) [Edit](#) [Merge](#)

**6** [Merge](#)

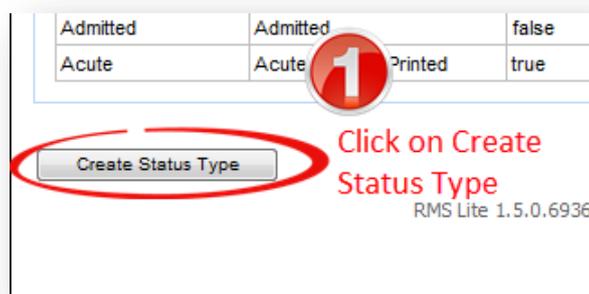
RMS Lite 1.5.0.6936 | Copyright 2008-2012 [HealthLink Limited](#)

## 7.3 Creating a new Status Type

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

Action	Description
<b>1</b>	Click on the  button at the bottom of the Status Selection page
<b>2</b>	Complete the details under 'Add Status Type' screen. Each Status Type entry created has: <ol style="list-style-type: none"> <li>1) A Short code (for internal use),</li> <li>2) A Full name (for the display shown on screen),</li> <li>3) An Active status (to show if it is currently in use) and</li> <li>4) A Sort order (to show what sequence the description shows in any drop down lists) assigned to it.</li> </ol>
<b>3</b>	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:



## Status Selection

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

Screen Reference:



**RMS** Referral Management System

Search Admin Help

**Edit Status Type**

**2** Enter details here

Id \*

Short code \*

Full name

Is close \*

Is active \*

Sort order

\* required fields

**3** Click on Update to save

## Status Selection

### 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
	<b>Locate</b> the status type within the status selection console search results list and click on <b>Merge</b>
	Select the name of the status into which you want the current status to merge from the <b>dropdown list</b> .
	Once you've selected the status name use the <b>OK</b> button to save the changes and return to the previous screen. If you wish to abort merging of status click on the <b>Close</b> 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	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
Admitted	Admitted	false	true (1)	80	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
Acute	Acute Referral Printed	true	true (1)	140	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>

**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*

-select-

-select-

Received

Assigned

**Prioritised**

Pre-work

F&A Scheduled

Patient Seen and Assessed

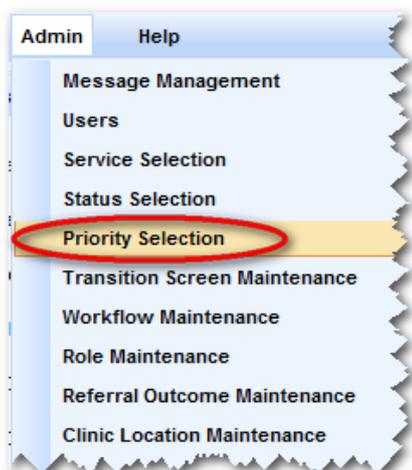
Booked for Procedure

Scheduled

**2** Select Status

**3** Click on OK to save

## 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
	Use the <b>Priority Type Search Filter</b> to locate a specific priority
	Check to see if a Priority is <b>active</b> or not. (true means active, false means inactive)
	<b>View</b> Priority type details.
	<b>Edit</b> Priority type details.
	<b>Merge</b> the Priority that a referral can be assigned once received into the facility.

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

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search Admin Help signed in as: [hlknet](#) [Logout](#)

**Priority Type Search Filter**

Short code

Full name

**1** Search Reset

**2** Priority Type Search Results

Short code	Full name	Is active (# refs)	Sort order	3 Action
Low	Routine	true (1)	10	View Edit Merge
Med	Semi-Urgent	true (10)	20	View Edit Merge
High	Urgent	true (17)	30	4 View Edit Merge
unknown	Unspecified	true (500)	999	View Edit Merge 5

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

## Priority Selection



**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:

Priority Type Search Results

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



RMS Referral Management System

Search Admin Help

Edit Priority Type

Id\*  **2** Change information here

Short code\*

Full name

Is active\*

Sort order

\* required fields

**3** Click on Update to Save

## Priority Selection

### 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:

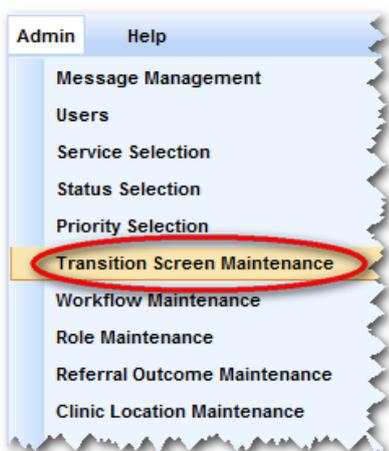
Action	Description
	<b>Locate</b> the priority type within the priority selection console search results list and click on <b>Merge</b>
	Select the name of the priority you want the current priority to merge into from the <b>dropdown list</b> .
	Once you've selected the priority name use the <b>OK</b>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

#### Screen References

Priority Type Search Results				
<a href="#">Short code</a> ↓	<a href="#">Full name</a> ↓	<a href="#">Is active (# refs)</a> ↓	<a href="#">Sort order</a> ↓	Action
Low	Routine	true (1)	10	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
Med	Semi-Urgent	true (10)	20	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
High	Urgent	true (17)	30	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>
unknown	Unspecified	true (500)	999	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Merge</a>

Merge

## 9. Transition Screen Maintenance



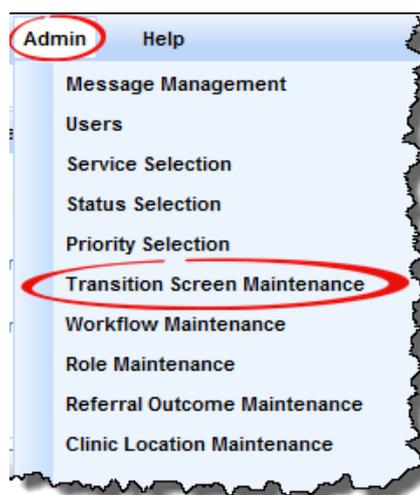
Use the 'Transition Screen Maintenance' option under the Admin menu to learn which screens are available in the application when confirming an action taken in the referral management pathway.

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 <b>Transition Screen Search Filter</b> to locate a specific screen
2	<b>View</b> Transition Screen details.
3	<b>Edit</b> Transition Screen details <b>NOTE: despite this feature is available on the screen, it is not active. You shouldn't use it.</b>

## Transition Screen Maintenance

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

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search Admin Help signed in as: admin [Logout](#)

**Transition Screen Search Filter** «

Short code

Full name

**1**

Search Reset

**Transition Screen Search Results**

Short code ↕	Full name ↕	Sort order ↕	Action
addNotes	Add Notes	10	<a href="#">View</a> <a href="#">Edit</a> <b>2</b>
service	Change Service	20	<a href="#">View</a> <a href="#">Edit</a>
confirm	Confirmation Screen	30	<a href="#">View</a> <a href="#">Edit</a>
triage	Triage	40	<a href="#">View</a> <a href="#">Edit</a> <b>3</b>

Create Transition Screen

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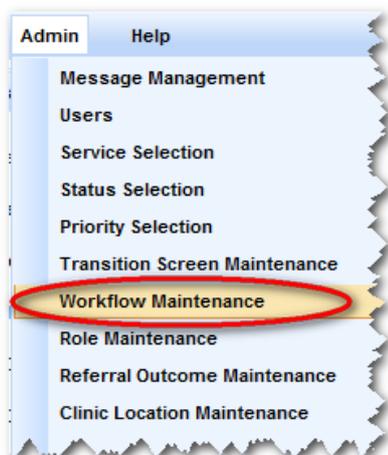


**Note:** Transition screen cannot be deleted if it has been assigned to any of the workflow. In that case, no Delete button will be displayed on the screen.

### 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.

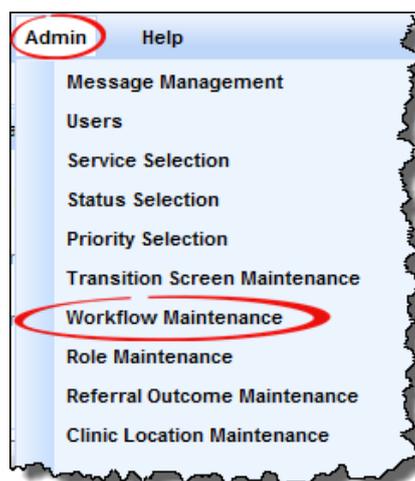
A workflow will configure:

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);

## Workflow Maintenance

- **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
	Use the <b>Workflow Search Filter</b> to locate a specific workflow
	<b>Add</b> a new workflow to RMS
	<b>Check</b> to see what is transition label of the workflow (This value is set as the label of the action buttons)
	View <b>Start Status</b> type of the workflow.
	View <b>End Status</b> type of the workflow.
	View <b>Transition screen type</b> of the workflow. (currently there are four of them namely Confirmation screen, Add Notes screen, triage screen and change service screen),
	Check to see if <b>status update checkbox is displayed</b> (true means displayed, false means not displayed)
	Check to see if <b>status update checkbox is selected</b> (true means selected, false means not selected)
	Check to see if <b>status update checkbox is read only</b> (true means read only, false means not read only)
	<b>View</b> the workflow details
	<b>Edit</b> the workflow details

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

Search Admin Help signed in as: hlnet Logout

**Workflow Search Filter**

Name  Transition label  Start status  End status

**1**

**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	<a href="#">View</a> <a href="#">Edit</a>
Received To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	<a href="#">View</a> <a href="#">Edit</a> <b>10</b>
Received To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	<a href="#">View</a> <a href="#">Edit</a>
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	<a href="#">View</a> <a href="#">Edit</a>
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	<a href="#">View</a> <a href="#">Edit</a>
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	<a href="#">View</a> <a href="#">Edit</a>
Add Note Only Ready for Triage	Add Note Only	Ready for Triage	Ready for Triage	Add Notes	true	false	false	70	<a href="#">View</a> <a href="#">Edit</a>
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		
Printed 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		<a href="#">View</a> <a href="#">Edit</a>
Patient Booked To Completed	Completed	Patient Booked	Completed	Confirmation Screen	false	false	false	150	<a href="#">View</a> <a href="#">Edit</a>
Patient Booked To Cancelled	Cancel	Patient Booked	Cancelled	Add Notes	true	true	true	160	<a href="#">View</a> <a href="#">Edit</a>
Ready for Triage To Printed by Service	Printed by Service	Ready for Triage	Printed by Service	Confirmation Screen	false	false	false	170	<a href="#">View</a> <a href="#">Edit</a>

**2**

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### 10.3 Creating a new workflow

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

Action	Description
<b>1</b>	Click on the <input type="button" value="Create Workflow"/> button at the bottom of the workflow Maintenance page
<b>2</b>	<p>Complete the details under 'Add Workflow' screen.</p> <p>Each Workflow entry created has:</p> <ol style="list-style-type: none"> <li>1. A <b>Name</b> ( for database identification/ for internal development use),</li> <li>2. A <b>Transition label</b> (for the display label shown on action buttons),</li> <li>3. A <b>Start status</b> (to indicate the start status of workflow for a referral),</li> <li>4. An <b>End status</b> (to indicate the end status of referral after the action has been performed). <i>Note: From release 1.7.0 onwards, end status can be automatically determined by service or referral outcome.</i></li> <li>5. A <b>Transition screen type</b> (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),</li> <li>6. Is <b>status update displayed</b> (to indicate if the status update checkbox needs to be displayed on the transition screens),</li> <li>7. Is <b>status update selected</b> (to indicate if the status update checkbox need to be selected on the transition screens),</li> <li>8. Is <b>status update read only</b> (to indicate if the status update checkbox need to be read only/grayed on the transition screens)</li> <li>9. A <b>sort order</b> (to show what sequence the description shows in any drop down lists) assigned to it.</li> </ol>
<b>3</b>	Once you've completed setting up the transition screen click on the <b>Save</b> button. If you wish to abort Transition Screen creation click on the <b>Cancel</b> button

## Workflow Maintenance



**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.

Transition screen type \*

- select-
- select-
- Add Notes
- Change Service
- Confirmation Screen
- Triage



**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:

Patient Booked To Canceled	Completed
Patient Booked To Canceled	Cancel
Ready for Triage To Print	Printed by Service

**1**

Click on Create Workflow

## 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
	<b>Locate</b> the workflow within the ‘Workflow maintenance console search results list and click on <b>Edit</b>
	If required change information in the details section.
	Once you’ve completed use the <b>Save</b> button to save the changes and return to the previous screen. If you wish to abort service creation click on the <b>Cancel</b> button
	If you wish to delete the workflow click on the <b>Delete</b> button



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	<a href="#">View</a> <a href="#">Edit</a>
Received To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	<a href="#">View</a> <a href="#">Edit</a>
Received To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	<a href="#">View</a> <a href="#">Edit</a>
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	<a href="#">View</a> <a href="#">Edit</a>
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	<a href="#">View</a> <a href="#">Edit</a>
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	<a href="#">View</a> <a href="#">Edit</a>

RMS Referral Management System

Search Admin Help

**Edit Workflow**

Name \*  **2**

Transition label \*  **Edit details here**

Start status \*

End status \*

Transition screen type \*

Is status update displayed

Is status update selected

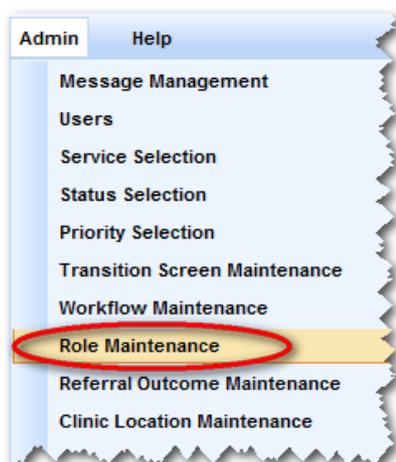
Is status update read only

Sort order

**3** **4**

**When completed click on Save or click on Delete to delete the workflow**

## 11. Role Maintenance

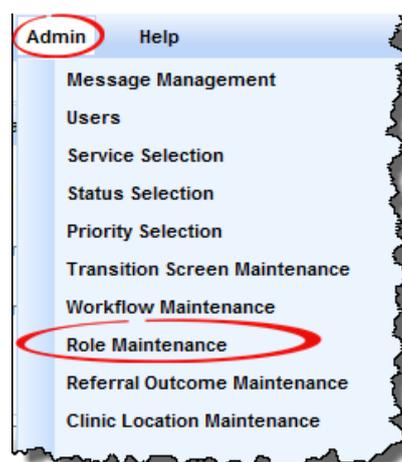


Use the 'Role Maintenance' option under the Admin menu to view, edit what workflow steps (specified in the previous section) are available to the roles assigned to RMS users.

### 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 <b>Role Search Filter</b> to locate a specific role
2	Check to see if a <b>role</b> is active or not (true means active, false means inactive)

## Role Maintenance

<b>3</b>	<b>View</b> Role details.
<b>4</b>	<b>Edit</b> workflow(s) associated with the Role (if any).

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

**RMS** Referral Management System **HL HealthLink** | Certainty in Care

Search Admin Help signed in as: [hlknet](#) [Logout](#)

**Role Search Filter**

Short code

Full name

**1** Search Reset

**2** **Role Search Results**

<a href="#">Short code</a>	<a href="#">Full name</a>	<a href="#">Is active</a>	<a href="#">Sort order</a>	<b>3</b> <a href="#">Action</a>
User	Standard User	true	10	<a href="#">View</a> <a href="#">Edit</a>
Admin	Administrator	true	20	<a href="#">View</a> <a href="#">Edit</a>
ReadOnly	Read Only Access	true	30	<a href="#">View</a> <a href="#">Edit</a>
Config	Configuration Access	true	40	<a href="#">View</a> <a href="#">Edit</a>
Clinical	Clinical Assessor	true	50	<a href="#">View</a> <a href="#">Edit</a> <b>4</b>
CRO	Central Referrals Office	true	60	<a href="#">View</a> <a href="#">Edit</a>
BClerk	Booking Clerk	true	70	<a href="#">View</a> <a href="#">Edit</a>
SupLevel1	Support Level 1st	true	80	<a href="#">View</a> <a href="#">Edit</a>
SupLevel2	Support Level 2nd	true	90	<a href="#">View</a> <a href="#">Edit</a>

Create Role

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## Role Maintenance

### 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
<b>1</b>	<b>Locate</b> the role within the 'Role maintenance console' search results list and click on <b>Edit</b>
<b>2</b>	<p>If required add/change workflow information in the <b>Edit Role</b> screen.</p> <p>To specify the workflow:</p> <ul style="list-style-type: none"> <li>Select the appropriate workflow(s) within the available workflows list. To select a single workflow <b>click</b> on the workflow(s) you wish to associate with the Role</li> <li><b>Use</b> the list action items highlighted to transfer these workflow(s) to the Role workflow list</li> </ul> <p><b>Note:</b> list action items can be used to add all workflows, single workflow, remove all allocated workflow or a workflow associated with a Role</p>
<b>3</b>	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

Role Search Results				
Short code	Full name	Is active	Sort order	Action
User	Standard User	true	10	<a href="#">View</a> <a href="#">Edit</a>
Admin	Administrator	true	20	<a href="#">View</a> <a href="#">Edit</a>
ReadOnly	Read Only Access	true	30	<a href="#">View</a> <a href="#">Edit</a>
Config	Configuration Access	true	40	<a href="#">View</a> <a href="#">Edit</a>
Clinical	Clinical Assessor	true	50	<a href="#">View</a> <a href="#">Edit</a>
CRO	Central Referrals Office	true	60	<a href="#">View</a> <a href="#">Edit</a>

Search Admin Help signed in as: hiknet Logout

**Edit Role**

Short code: CRO  
 Full name: Central Referrals Office  
 Is active: true  
 Sort order: 60

Workflow

Ready for Triage To Triage Complete

Change Service Ready for Triage

Ready for Triage To On Hold

Add Note Only Ready for Triage

On Hold To Ready for Triage

⌘ Select All

⌘ Select

⌘ Remove

⌘ Remove All

Received To Declined

Received To Acute Referral Printed

Received To Ready for Triage

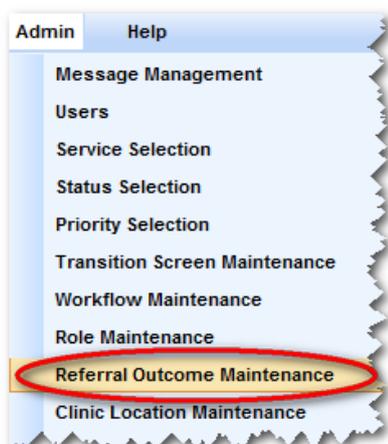
Workflow

Received To Declined  
 Received To Acute Referral Printed  
 Received To Ready for Triage

\* required fields

[Save](#) [Delete](#) [Cancel](#)

## 12. Referral Outcome Maintenance

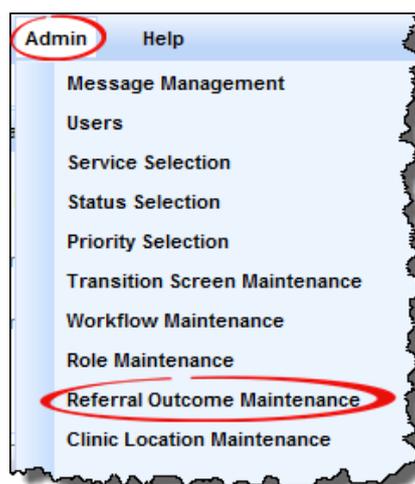


Use the 'Referral Outcome Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

### 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:

## Referral Outcome Maintenance

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

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

The screenshot shows the RMS Referral Management System interface. At the top, there are navigation links for Search, Admin, and Help, and a user status bar indicating 'signed in as: admin' with a Logout link. The main content area is divided into two sections: 'Referral Outcome Search Filter' and 'Referral Outcome Search Results'.

**Referral Outcome Search Filter:** This section contains two input fields: 'Short code' and 'Full name'. Below these fields are two buttons: 'Search' (circled in red with a '1' callout) and 'Reset'.

**Referral Outcome Search Results:** This section displays a table of results. The table has the following columns: Short code, Full name, Is active, Moves referral to status, Sort order, and Action. The 'Is active' column is circled in red with a '3' callout. The 'Action' column contains 'View' and 'Edit' links. The 'View' link for the 'FSA' row is circled in red with a '4' callout, and the 'Edit' link for the 'Consult' row is circled in red with a '5' callout.

At the bottom of the results section, there is a button labeled 'Create Referral Outcome' (circled in red with a '2' callout).

### 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  button at the bottom of the <b>Referral Outcome Maintenance</b> page
2	Complete the details under ' <b>Add Referral Outcome</b> ' screen. Each Referral Outcome entry created has: <ul style="list-style-type: none"> <li>• <b>A Short code</b> (for database identification /for internal development use),</li> <li>• <b>A Full name</b> (for the display shown on screen),</li> </ul>

## Referral Outcome Maintenance

	<ul style="list-style-type: none"> <li>• <b>An Active status</b> (to show if it is currently in use) and</li> <li>• <b>A Sort order</b> (to show what sequence the description shows in any drop down lists) assigned to it.</li> <li>• <b>To Status</b> (the status that should be set for any referral if that referral is assigned this referral outcome)</li> <li>• <b>Triage screen configuration</b> settings defaulted to display all fields on the triage screen and don't mandate any of them.</li> </ul>
3	Once you've completed setting up the service type click on the <b>Save</b> button. If you wish to abort service creation click on the <b>Cancel</b> button

### Screen Reference

VFSA	plan	true
Advice	Simple advice	true
Consult	Show to another clinician	true
Declined	Declined	true
Other	Other	true

**Create Referral Outcome** 1

**RMS** Referral Management System **HL HealthLink** Certainty in Care

Search Admin Help signed in as: admin [Logout](#)

**Add Referral Outcome**

**2 Enter Referral Outcome details**

Short code\*

Full name\*

To status

Is active\*

Sort order

\* required fields

**3 When completed, click Save**

### 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**'.

## Referral Outcome Maintenance

To change the referral outcome, follow the steps below:

Action	Description
1	<b>Locate</b> the 'Referral Outcome' within the Referral Outcome Maintenance console search results list and click on <b>Edit</b>
2	<p>If required <b>change</b> information in the details section.</p> <p>Starting with release 1.7.0, you will be able to automate aspects of the triaging screen to reduce redundant effort and save time.</p> <p>You now have the ability to control which input fields on the <b>Triage</b> screen should be mandatory and/or hidden based on the referral outcome that is selected.</p> <p>You will see a new table of triage screen fields, each with a <b>Displayed</b> and <b>Required</b> true/false property.</p> <p>Fields with <b>Displayed</b> 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.</p> <p>Fields with <b>Required</b> 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.</p> <p>An example referral outcome with Triage screen fields configuration is shown below.</p>
3	Save your changes by clicking on the <b>Save</b> button. If you wish to abort service creation click on the <b>Cancel</b> button. Click on <b>Delete</b> button to delete a referral outcome.

### Screen Reference

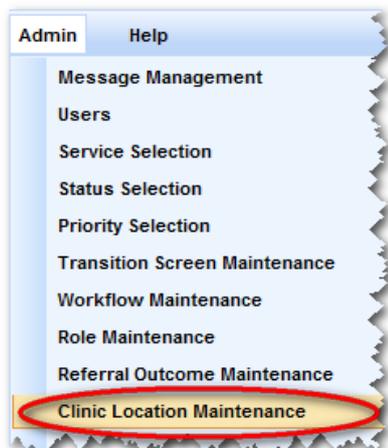
Triage screen property name	Displayed	Required
Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinic Type	<input type="checkbox"/>	<input type="checkbox"/>
Clinic Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Timeframe	<input checked="" type="checkbox"/>	<input type="checkbox"/>
To Be Seen By	<input type="checkbox"/>	<input type="checkbox"/>
Notes for Internal Use Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes to Referrer	<input checked="" type="checkbox"/>	<input type="checkbox"/>

\* required fields

Save Delete Cancel

**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

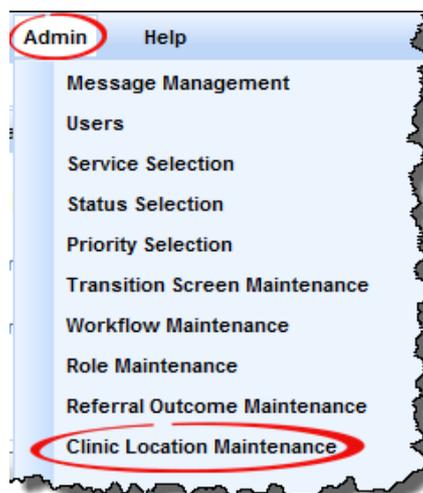


Use the 'Clinic Location Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

### 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.

## Clinic Location Maintenance

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

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

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

The screenshot shows the RMS Referral Management System interface. At the top, there are navigation tabs for Search, Admin, and Help, and a user status indicator 'signed in as: hlknet' with a Logout link. The main content area is divided into two sections:

- Clinic Location Search Filter:** This section contains two input fields for 'Short code' and 'Full name'. Below these fields are 'Search' and 'Reset' buttons. A red circle with the number '1' is placed over the Search button.
- Clinic Location Search Results:** This section displays a table of search results. The table has columns for 'Short code', 'Full name', 'Is active', 'Sort order', and 'Action'. The 'Is active' column is circled in red with a red circle containing the number '3'. The 'Action' column contains 'View' and 'Edit' links. A red circle with the number '4' is placed over the 'View' link for the 'Whangarei' entry, and a red circle with the number '5' is placed over the 'Edit' link for the 'Other' entry. Below the table is a 'Create Clinic Location' button with a red circle and the number '2' next to it.

At the bottom of the page, there is a footer: 'RMS Lite 1.5.0.6936 | Copyright 2008-2012 HealthLink Limited'.

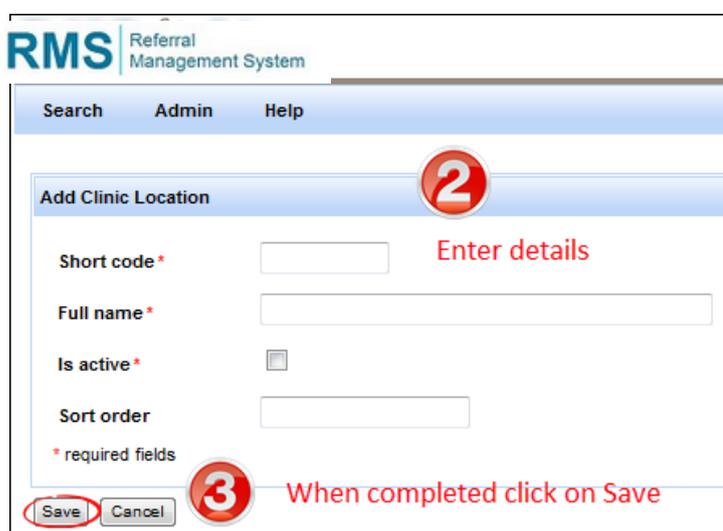
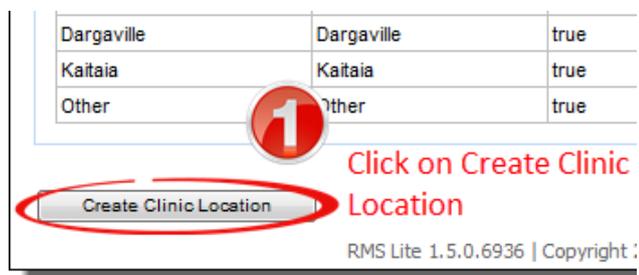
## Clinic Location Maintenance

### 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  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: <ol style="list-style-type: none"> <li>1) A <b>Short code</b> (for database identification /for internal development use),</li> <li>2) A <b>Full name</b> (for the display shown on screen),</li> <li>3) An <b>Active status</b> (to show if it is currently in use) and</li> <li>4) A <b>Sort order</b> (to show what sequence the description shows in any drop down lists) assigned to it.</li> </ol>
3	Once you've completed setting up the service type click on the <b>Save</b> button. If you wish to abort service creation click on the <b>Cancel</b> 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'.

## Clinic Location Maintenance

To change the clinic location, follow the steps below:

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

### Screen Reference

Clinic Location Search Results				
Short code	Full name	Is active	Sort order	Action
Whangarei	Whangarei	true	10	<b>1</b> <a href="#">View</a> <a href="#">Edit</a>
BOI	Bay of Islands	true	20	<a href="#">View</a> <a href="#">Edit</a>
Dargaville	Dargaville	true	30	<a href="#">View</a> <a href="#">Edit</a>

**RMS** Referral Management System

Search Admin Help

**2** Edit Clinic Location

Short code \* Whangarei **Edit details here**

Full name \* Whangarei

Is active \*

Sort order 10

**3** **4** Save Delete Cancel

**When completed click on Save or to delete click on Delete**

## 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](mailto:helpdesk@healthlink.net)

#### 14.1.4 Website

[www.healthlink.net](http://www.healthlink.net)