Intake referral management

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Referral received via email or paper

Intake

1. Save received **Referral** to temporary location on local **Shared Directory**.
2. Open **Clinical**
3. Use **My Files (Cloud menu)** to upload referral to your **Temporary Files.**
4. In Clinical > select **Open Patient** icon > Search Patient.
5. Select **New** to add patient with minimal demographic information.
6. Select **Other Clinicians** tab on top right.
7. Use the Magnifying Glass to add referring GP from the Zedmed Address Book.
8. Select **OK** to save patient.
9. In patient **Summary Views** > select **Incoming Documents** > paperclip icon.
10. Document description to start with REFERRAL.
11. **Do not link** with Doctor.
12. Select **Incoming Document** radio button > select **Mark as Complete**.
13. Batch referrals and send an email to Dr/s for review.
14. Follow current referral management process.
15. Use **Notepad** in Office to capture actions.

Referral received in Results Inbox

Intake

1. Referral received via **Results Inbox**.
2. Change **Type** filter to **Documents.**
3. Change **Role** drop down to <**All Roles**>.
4. Check the documents for Orphan results.
5. Right-click result > select **Link to Possible Patient Matches....**
6. Select **Find Another Patient** > Search patient > **New.**
7. Enter minimal demographic information.
8. Select **Other Clinicians** tab on top right.
9. Use the Magnifying Glass to add referring Practitioner from the Zedmed Address Book.
10. Select **OK** to save patient.
11. Right-click **Rename Referral.**
12. Right-click **Mark Result Complete.**
13. Batch referrals and email to Dr/s for review.
14. Follow current referral management process.
15. Use **Notepad** in Office to capture actions.

Doctor

1. Review referral email.
2. Indicate accept, reject or recirculate via email back to Intake.

Intake

Accepted Referral

1. Update spreadsheet for Reception.
2. Record actions in Notepad.

Rejected Referrals and Requests to Recirculate Referral

1. Follow current process for recirculation and/or use Zedmed to send a letter to referrer:
    a. Open **Clinical**, search and **Open** patient.
    b. **Quick Documents** > **New Letter** > template.
    c. Write letter > Distribute

Reception

1. **Accepted referral –** follow current process - reach out to patient, send patient details form and information. All attempts to contact and actions recorded through **Notepad**.
2. When Patient Details received, record additional patient information in Office.
3. In Office add **referral details** to patient **when they attend**.
