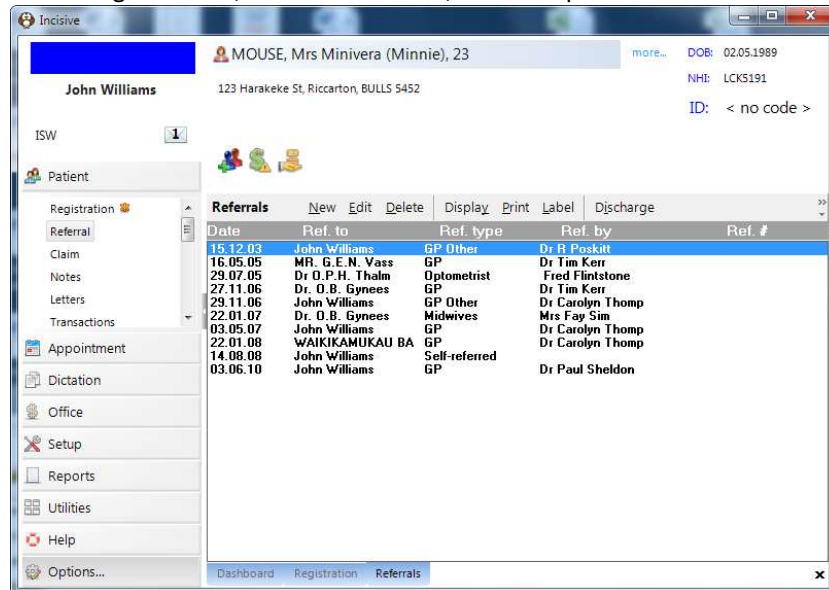


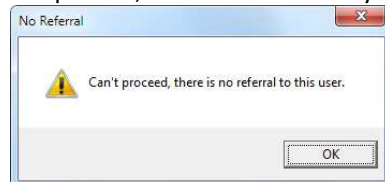
## Patient Referrals

New patients and new referrals can be entered from both Patient and Appointment book modules. They can also be automatically created when lab reports and referral letters are received in the HL7 format, and also when sub-contractors (using SPM) send electronic invoices.

If the patient is already in the database, and they are seeing another User for the first time for a new problem, the patient is not entered again – instead, a new referral is created to the User that they will see for treatment. It is therefore possible for a patient to have numerous referral entries if they are seeing the same, or different Users, for new episodes of care.



It is important to understand that there is a single, common list of patients that are shared and are available to all Users. But each User is not able to enter any clinical or financial records relating to the patient, until a referral entry has been made for them.



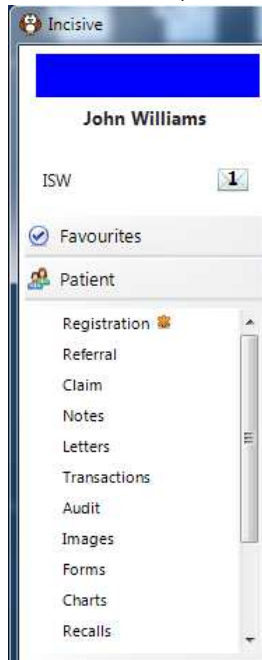
The most common method of entering new patients and referrals is when the appointment is being made.

'Quick Appointments' can be entered where the details for a new patient are known and entered, at the time of making the appointment, but no referral information is entered. This can reduce the time taken to make an appointment over the phone but does require the referral to be entered when the patient presents for their appointment.

## PATIENT

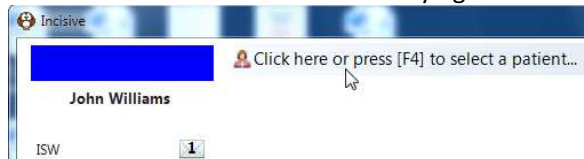
### Search for a Patient

1. From the menu, select the Patient section.



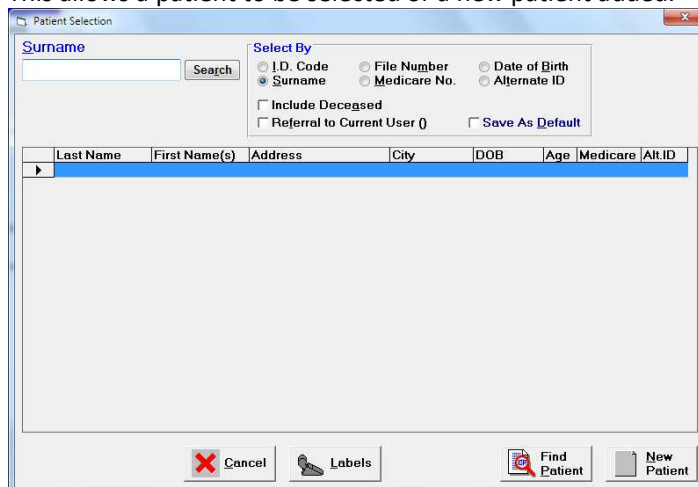
This will expand and display the options available.

2. Use the mouse to click on the text saying 'Click here or press [F4] to select a patient...',



or, press Function key F4 (or Shift + F4).

This allows a patient to be selected or a new patient added.



3. Search for the patient

Type the first few (or all) characters appropriate to your chosen method and press Enter, or select Search. The screen displays all (if any) patients who fit your selection criteria.

If the number of patients is greater than one, then entry of further characters further refines that list. Note that retrieval is faster the more characters you type before pressing enter.

### New Patient

1. On the Patient Selection form, select the 'New Patient' button.



The Patient Registration screen will appear.

2. Fill in the known details about the patient.

A screenshot of the 'Patient Registration' window. It has a title bar with 'Patient Registration' and standard window controls. Below the title bar are 'Cancel' and 'OK' buttons. The form is divided into sections: '1 Name' with fields for Title (dropdown with 'Captain' selected), First Names, Last Name, Known As, Date of Birth, Age, Salutation, Sex, NHI No., Alt ID., and Date of Death. Below this is a yellow header for '2 Contact Details' with a search icon. It contains fields for Home Phone, Work Phone, Mobile Phone, Email Address, Physical Address, Post Code, Domicile code, Town/City, Billing - Post To, Correspondence - Post To, Billing Address, and Correspondence Address. There are checkboxes for 'Opt in to SMS Messaging', 'Automatically update billing details', and 'Automatically update correspondence details'. A 'find...' button is next to the Post Code field. Below this is a yellow header for '3 Other Contacts' and another yellow header for '4 Family Doctor' with a search icon.

The minimum amount of data required to register a patient is:

- Lastname, and;
- Gender

3. Complete as much as possible of the 'Contact Details'.

A screenshot of the 'Contact Details' section of the Patient Registration form. It shows the same fields as the previous screenshot, but with the 'Automatically update billing details' and 'Automatically update correspondence details' checkboxes checked. The 'find...' button is still present next to the Post Code field.

4. Enter the patient's GP in the 'Family Doctor' section.

In the 'Family Doctor' field you can search for the doctor by their Code or Surname (depending on which method is selected in the drop down menu).

Search By:

Surname

Type either part (or all) of the code or surname.

#### 4 Family Doctor

Search For

Press Enter to start the search.

If you type more than three characters and what you type identifies a unique doctor (based on the code or surname), then the doctor's name and code will automatically appear on screen and the cursor will move to the allergies field; or if what you have typed does not result in an exact match or is less than three characters, then a pop up box will appear with a list of doctors to select from.

Code	Name	Address
FORSL	Forbes, Dr Lorraine (Lorraine)	4 Picton Street, State H'way
FORDB	Ford, Dr Beris (Beris)	Primecare Medical Services
FORDG	Ford, Dr Graeme (Graeme)	Avondale Accident & Medical
FORDR	Ford, Dr Rosemary	27 Barrington Street, Somerfield, Christchurch 8024
FORRC1	Forster, Dr Christine (Christine)	Freemans Bay Medical Centre

Name: Forbes, Dr Lorraine (Lorraine)  
Address: 4 Picton Street, State H'way  
Phone: (w) 538 0083 (h) (m)  
Fax: (w) (h)  
NZMC #: (h)

Select a doctor from the list, or if the doctor you require is not listed, Select 'New' and add the doctor.

The details for the selected doctor will appear on the Patient Registration screen.

#### 4 Family Doctor

Search For

ford

Name

Dr Rosemary Ford

Address

Barrington Medical Centre  
14-18 Athelstan Street  
Spreydon

If the patient does not have a Family Doctor, or you do not yet know who the Family Doctor is, then leave this field blank. Remember that you record the Referring Doctor elsewhere!

- Insurer or Health Fund details can be important, particularly for billing purposes.

**Patient Registration** | **MOUSE, Minivera**

**1 Name**

Title	First Names	Last Name	Known As
Mrs	Minivera	MOUSE	Minnie
Date of Birth	Age	Salutation	Sex
02.05.1989	23	Minivera	F
NHI No.	Alt. ID.	Date of Death	
LCK5191			

Left-click to open & close sections. Right-click to pin/unpin sections

**2 Status**

**6 Insurance**

Patient Insurance	Policy Name	
Australian Unity	Access Gap Cover	
Policy Number	UPI	
123423455	2	
First Name As Recorded (optional)	2nd Init	Last Name As Recorded (optional)
Employer Insurance	Insurance Note	
WorkerSolutions		

**7 Card Numbers**

**8 Allergies**

**9 Comments**

- Complete any other sections – especially Allergies.

**Patient Registration** | **PATIENT, TEST**

**1 Name**

Title	First Names	Last Name	Known As
Mr	TEST	PATIENT	
Date of Birth	Age	Salutation	Sex
01.04.1964	48	TEST	M
NHI No.	Alt. ID.	Date of Death	
	000262/06		

Left-click to open & close sections. Right-click to pin/unpin sections

**7 Card Numbers**

**8 Allergies**

Penicillin, Strapping tape adhesive

**9 Comments**

**10 Alerts**

- Click OK to save and proceed to the Referral section

**Patient Registration** | **PATIENT, TEST**

Cancel OK

## Existing Patient

- Search for the patient and select using one of the following:
  - Arrow down to another patient and press Enter; or
  - Press Enter to select the highlighted patient, or
  - Double click on a patient with the left mouse button
- Check their registration details are correct. Modify as required.
- Proceed to the Referral section.

## Referral

The referral is very important as it allows the referred User to create their own records about this patient.

Copy To	Referred To	Date Referred	Category	Name
1. <input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

A new referral should be created for any new episode of care, even if the patient has been treated by you previously for a separate problem.

1. Enter the 'Date Referred'. If it is today, you can just press the Enter key.

For Medicare (Australia), the Date Referred must be the date on the referral document. If this is unknown when making the referral, enter today's date, and adjust when you do have the referral document.

2. Select the doctor to whom the patient is being referred to.
3. Choose the category of the referrer

Select from the list the appropriate referred by category, and depending on the category chosen, someone from the address file.

The list in the referred by field comes with 3<sup>rd</sup> Party, ACC, GP, GP Locum, GP Other, Self-Referred and Specialist as standard. Other categories can be added via Setup → Selection Lists → Category.

- 3rd Party
- ACC
- GP
- GP Locum
- GP Other
- Physiotherapist
- Self-referred

4. 'Date 1<sup>st</sup> Seen' is an optional field and should not be completed until the patient presents at the practice.  
When an appointment is made for the patient, the date of the appointment will automatically be inserted into this field.
5. 'Referral Period' is optional. If enabled it will calculate the 'Expiry Date' of the referral. Default referral periods can be linked to the Address Category of the referrer. Setup → Address File → Address Category

- 'Billing Type' is important as this indicates how you are expecting to receive payment for the future services you provide, and will set the fees you will charge.

**Billing Type**  ▼

If the Billing Type selection is linked to someone other than the patient, a '3<sup>rd</sup> Party' field will appear allowing you to select the appropriate Payor.

**3<sup>rd</sup> Party**

Start typing in either the Code or Name of the 3<sup>rd</sup> Party. As you do so, a form will appear to allow you to complete the search. Click 'Search' to search through all the parties that have been entered into *Setup* → *Address File* → *3<sup>rd</sup> Party Billing/Reports*.

**Select 3rd Party**

Code or Name  Filter  Search

Found 13 records.

Code	Description	Address
@WORK	@Work Insurance Ltd	PO Box 11019, WELLINGTON
ACCDUN	Accident Compensation Co	Dunedin
ACCH	Accident Compensation Cor	Private Bag, HASTINGS
ACCOB	ACC Elective Services Unit	PO Box 408, DUNEDIN
CAREAD	Care Advantage	PO Box 91049, Auckland Mail Centre, AUCKLAND
CAREAD	Care Advantage	PO Box 91049, Auckland Mail Centre, AUCKLAND
CRM	CRM Group Ltd	PO Box 230, NAPIER
FUSION	Fusion Insurance Services	PO Box 11 763, WELLINGTON
FUSION	Fusion Insurance Services	PO Box 11 763, WELLINGTON
HIH	HIH WorkAble Ltd	PO BOX 47, NAPIER
MEDFEE	ACC Medical Fees Unit	Auckland Customer Service Centre, PO Box 90341, Auckland
PANPAC	Pan Pac Forest Products Ltd	Private Bag 6203, NAPIER
RICH	Richmonds Ltd	PO Box 940, HASTINGS

Code  Name

Contact

Phone  Fax

Address

EDI

Select the Party and click OK.

- The Presenting Problem field allows you enter free-hand text relating to the reason for the referral.
- Complete the other referral options if required. Click OK to save and exit.

**Incisive**

**PATIENT, Mr TEST, 48** more... DOB: 01.04.1964

**John Williams** 99 WHERE ST, CITYTOWNTEST NHI: < no number >

Penicillin, Strapping tape adhesive ID: 000262/06

ISW

**Referrals** New Edit Delete Display Print Label Discharge

Date	Ref. to	Ref. type	Ref. by	Ref. #
06.12.06	Dr O P H. I thalm Private	GP Other Not Applicable	Dr M B DAVIDSON	No
09.02.07	John Williams Private	Self-referred Not Applicable		No
01.04.09	Mr. E. N. Tee Private	Physiotherapist Not Applicable	Dean Thompson	No
07.08.09	John Williams Workcover	GP Not Applicable	Dr Paul Sheldon	No
11.03.10	WAIKIKAMUKAU BA Private	Miscellaneous Not Applicable	Dr MICHAEL ACC A	No

Dashboard Referrals

- If the 3<sup>rd</sup> Party, that is linked to the Billing Type, requires a Claim number to be included with the invoice, you will be forwarded to the Claims section so that you can enter information relevant to the claim.

## Appointment

Quick Appointments are turned on/off in *Setup* → *Appointments* → *Provider*.

**Edit Appointment Settings**

- Use Quick Appointments:**
- Add Appointment Type 'Details' text to Referral
- Skip Referrals and ACC entry
- Use **B**ooks Only
- Display '**U**nconfirmed' Status
- Don't print Allergies on Operation List Report
- Print '**D**RRAFT' on reports for unfinalised Sessions

Cancel OK

### Initial Consultation 'Quick' appointment

1. In the Appointment Book module, go to the date for the appointment and either double-click on the time, or select *New* → *Appointment* from the Toolbar

Thursday 13.09.2012			
8:00 am	Rooms		Finish at 12:00 pm
8:00 am	(20)	New patient	Free time
8:20 am	(10)	Follow-up	Free time
8:30 am	(10)	Follow-up	Free time
8:40 am	(10)	Follow-up	Free time

2. Search for the patient
3. If patient is not found use the New Patient button.

An abridged version of the Patient Registration screen is presented, to allow you to collect the minimal amount of information needed.

**New Appointment - Patient Registration**

**1. Name**

Title: Mr      Sex: M

First Names: \_\_\_\_\_

Last Name: \_\_\_\_\_

D.O.B: \_\_\_\_\_

**2. Contact Details**

Home Ph: \_\_\_\_\_      Work Ph: \_\_\_\_\_

Mobile Ph: \_\_\_\_\_       Opt in to SMS Messaging

Physical Address: \_\_\_\_\_

Town/City: \_\_\_\_\_

PostCode: \_\_\_\_\_      PostCode: \_\_\_\_\_

Email: \_\_\_\_\_

Search GP By: Surname

GP: \_\_\_\_\_

NHI No.: \_\_\_\_\_      Refresh

**Alerts:** \_\_\_\_\_

Help      Cancel      More      Forward >



If additional information is to be added to the patient's registration you can select the 'More' button to be taken to the usual Patient Registration form.



4. Select 'Forward' to proceed to enter the appointment details.

5. Click OK to finish the appointment.

Appointments				
Thursday 13.09.2012				
8:00 am	Rooms			Finish at 12:00 pm
8:00 am	(20)	GREAT, Mr Eric	NP	sU Initial Consultation
8:20 am	(10)	Follow-up	Free time	

### Initial Consultation 'Standard' appointment

1. In the Appointment Book, make the appointment as usual.

Appointments				
Thursday 13.09.2012				
8:00 am	Rooms			Finish at 12:00 pm
8:00 am	(20)	New patient	Free time	
8:20 am	(10)	Follow-up	Free time	
8:30 am	(10)	Follow-up	Free time	
8:40 am	(10)	Follow-up	Free time	

2. Search for the patient
3. If patient is not found use the New Patient button.  
An abridged version of the Patient Registration screen is presented, to allow you to collect the minimal amount of information needed.

New Appointment - Patient Registration

**1. Name**

Title: Mr [v] Sex: M

First Names: [ ]

Last Name: [ ]

D.O.B: [ ] [ ]

**2. Contact Details**

Home Ph: [ ] Work Ph: [ ]

Mobile Ph: [ ]  Opt in to SMS Messgging

Physical Address: [ ]

Town/City: [v]

PostCode: [ ] PostCode: [ ]

Email: [ ]

Search GP By: Surname [v]

GP: [ ]

NHI No.: [ ] Refresh [ ]

Alerts: [ ]

Help [ ] Cancel [ ] More [ ] Forward > [ ]

If additional information is to be added to the patient's registration you can select the 'More' button to be taken to the usual Patient Registration form.

More [ ]

4. Select 'Forward' to proceed
5. Enter the appointment details.

[Thu 13.09.12] GREAT, Mr Eric

**1. Appointment**

Appt Time: 8:00 am  Notify if earlier appt?

Appt Type: NP [v] Initial Consultation

How Long: 20

Details: Sore left shoulder

Budget: [ ]

Alerts: [ ]

Cancel [ ] < Back [ ] Forward > [ ]

6. Enter a new referral.

**New Referral**

Referral Date: 11.09.2012      Date 1st Seen: 13.09.2012

Referred By: GP      Expiry Date:

Ref. Period: 12 mths      Dr Siri Nana Yak HARRISON

Referral Dr: HARNSN       To Group

Locum Name:

Billing Type: Workcover

3rd Party: WC      Work Cover, 123 King St, Canberra ?

Patient Type:

Description: Sore left shoulder

Buttons: Help, Cancel, < Back, Forward >

Select 'Forward' to proceed.

7. Enter claim information if required by the Billing Type / 3<sup>rd</sup> Party

**New Claim Number**

Date of Injury: 04.05.2012

Claim Number: 532466B

Description: Sore left shoulder

Referred By: Dr Siri Nana Yak HARRISON

Branch: FUSION      Fusion Insurance Services, PO Box 11 763. ?

Case Manager:

Phone:

Party of Billing: CAREAD      Care Advantage, PO Box 91049, Auckland Mail ?

Purchase No:

Buttons: Help, Cancel, < Back, Forward >

Select 'Forward' to proceed.

8. Confirm the booking with the patient and click OK to finish

**Make Appointment** ✖

<b>Patient</b>	GREAT, Mr Eric 884 Isle Valley
<b>Appointment</b>	Thursday 13 September 2012, 8:00 am
<b>Referral</b>	11.09.2012 GP Dr Siri Nana Yak HARRISON
<b>ACC Number</b>	04.05.2012 532466B Sore left shoulder
<b>Resources</b>	
<b>Mobile</b>	0443 438 9920
	<input checked="" type="checkbox"/> <b>Send SMS Appointment Reminder</b>
	<input type="checkbox"/> Use Reporting Time in reminder instead of Appointment Time
<b>SMS Preview</b>	Appt reminder for Eric on Thu 13 Sep at 8:00 am with Dr. John Williams. Call 03 343 6882 to confirm.

Cancel    < Back    Label & OK    OK

The appointment is made.

Appointments					
New Edit Delete Label Jump Today Search Print Status					
<b>Thursday 13.09.2012</b>					
8:00 am	Rooms			Finish at 12:00 pm	
8:00am	(20) GREAT, Mr Eric	NP	sU	Initial Consultation	
8:20 am	(10) Follow-up			Free time	

Patient added and Referral created

<p> GREAT, Mr Eric, 68 <span style="float: right;">more...</span></p> <p>884 Isle Valley, AUCKLAND</p>	<p>DOB: 03.04.1944</p> <p>NHI: &lt; no number &gt;</p> <p>ID: 000277/06</p>
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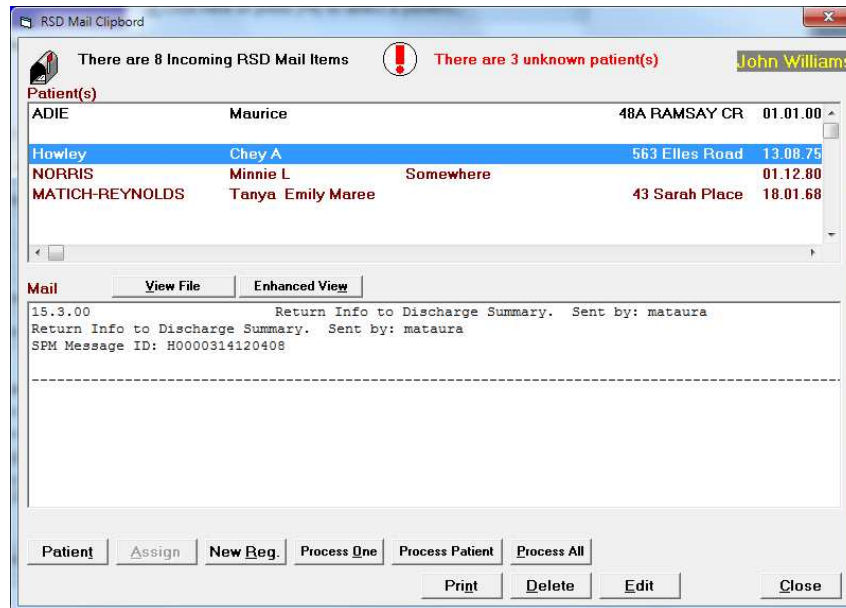
  

Referrals					
New Edit Delete Display Print Label Discharge Change Referral Number >>					
Date	Ref. to	Ref. type	Ref. by	Ref. #	
11.09.12	John Williams	GP	Dr Siri Nana Yak		

## Advanced

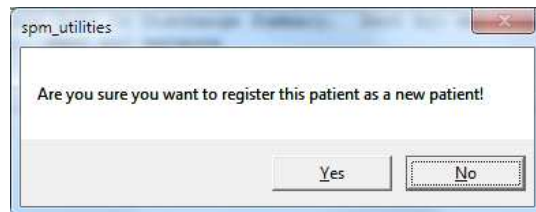
### Incoming Lab & RSD Mail

Unknown patients are shown in a red font colour.



Highlight the patient and click on the 'New Reg' button.

Choose 'Yes' to register the patient.



The patient is added to the database with the information provided in the file, but no referral has been made.

