R - INTERNAL INTERCOM

Here is how the consultant and staff communicate with each other.

How the secretary intercoms the consultant

Part 1: Using the “Pre-Consult for Approval” checkbox
[Note: this part of the video erroneously displays and describes the process in CS-Triage rather than in CS-Refer. Follow the written rather than the voice transcript]
The consultant is automatically flagged when the secretary checks the “Pre-Consult for Approval” box. This changes the status to “Pre-Consult for Approval”. The ticket now appears in the consultant’s “Pre-Consult for Approval” tab.

Part 2: Using Flag Specialist from the "Change Status" dropdown menu
Near the top right of the “Manage Request” screen, the secretary selects the blue “Show Options” button. Then she selects from the “Change Status” dropdown menu. The secretary selects "Flag Specialist" and Saves. This changes the Request status to “Booking Request”. She adds her remarks to the Update field, checks "Pre-Consult for Approval" and Saves. The Request status is now “Pre-Consult for Approval”. The consultant is alerted because the Request now appears in the consultant's “Pre-Consult for Approval” tab. He’ll come across this Request within the course of his daily workflow.

How the consultant intercoms the secretary

Part 1: Using the “For Secretary's Attention” checkbox
In any Manage Request screen containing the “For Secretary's Attention” box, the Consultant can check the box, update and Save to bring the Request to the secretary’s attention. The Request will now be pink-banded and appear in the “For Secretary’s Attention” tab.

Part 2: Automatic Intercomming for ticket status updates
When the Request status changes from “Consult Today” to either “Consult Conducted” or “Consult Pending Tests”, the Portal’s logic assures that the Request will automatically be brought to the secretary's attention—despite the fact that there is no “For Secretary’s Attention” box on the “Consult Today” status “Manage Request” screen. Here’s an example:
After the consult is complete, the consultant checks “Consult Pending Tests” on the “Consult Today” screen and Saves. The status changes to “Consult Pending Tests”, the Request is automatically pink-banded and appears in the “For Secretary’s Attention” tab. When the secretary opens the Request, she sees that the “For Secretary’s Attention” box is checked.
Similarly, if instead, the consultant checks “Consult Conducted” on the “Consult Today” screen and Saves, the Request is automatically pink-banded and appears in the “For Secretary’s Attention” tab. When the secretary opens the Request, she sees that the “For Secretary’s Attention” box is checked.

Part 3: Using “Flag Secretary” from the "Change Status" dropdown menu
Near the top right of the “Manage Request” screen, the consultant selects the blue “Show Options” button. Then he selects from the “Change Status” dropdown menu. The consultant selects "Flag Secretary" and Saves. This changes the Request status to “Post Consult Discussion”. The Consultant adds his instructions to the Update field, checks the For Secretary’s Attention” box and Saves. On the Secretary’s “Manage Requests” screen, the Request is automatically pink-banded and appears in the “For Secretary’s Attention” tab. When the secretary opens the Request, she sees that the “For Secretary’s Attention” box is checked.