## R- TRIAGE OF BOOKING REQUESTS

Here's how the consultant's staff triage referral requests.

Each Portal's New Request screen displays its own unique instructions for the composition of referral request letters. These requirements are customized by the consultant and are practice-specific. The referring HCP fills out all required fields, attaches a referral request letter and sends.

The consultant's secretary sees a new Booking Request displayed in red on her Manage Requests screen. She opens it, reads the referral request post and the attached referral request letter. She then either creates and posts an appointment booking, declines the consult request, or refers it to the consultant for further disposition.

### Part 1: Declining a Request

If the referral is unsuitable or cannot be accommodated, the secretary declines the request by selecting "Booking Declined" and adding her reply in the “Update this Request” field. She can select a response from the “canned response” dropdown menu and then modify or add to it. She then saves. The Request status changes to from “Booking Request” to “Booking Declined” and an email notification is automatically generated and sent the referring HCP's office.

The referring HCP's office opens the notification and clicks through to the post. The referring HCP's staff has the opportunity to reply and try to renegotiate or accept the refusal. In the latter case, she would then copy the entire thread to the patient's EMR or print it for the paper record, click "Yes, I have printed the Request" and “Close the Request”.

The Request status changes from “Booking Declined” to "Copy and Close", which is displayed in red, on the consultant secretary's Manage Requests screen. She opens the Request, copies the entire thread to the patient's EMR or prints it for their paper medical record, clicks "Yes, I have printed the Request" and clicks "Delete this Request", which deletes the ticket from the Portal’s database. As a result, it will not longer appear on her Manage Requests screen.

### Part 2: How the secretary refers a request to the consultant

If the consultant’s secretary is uncertain about a Booking Request and requires the consultant to review the referral request before proceeding, she simply updates with a "?", checks "Pre-Consult for Approval" and Saves.

The Consultant’s Manage Requests screen will now display this request in green (to indicate that it is for immediate action). The status has changed from “Booking Request” to "Pre-Consult for Approval". All “Pre-Consult for Approval requests are consolidated in the Pre-Consult for Approval tab, located at the bottom of the consultant’s screen. Clicking on this tab will display only the "Pre-Consult for Approval" requests that must be attended to.

The consultant opens the request, reads it and reviews the attached referral letter. He /she will now either click "Booking Declined" and add a comment and Save, or click on "Specialist Approved" (below the “Update this Request” field) and save. In this scenario, he updates, selects "Specialist Approved" and Saves.

The request status changes to from “Pre-Consult for Approval” to “Specialist Approved”. It is automatically brought to the consultant secretary’s attention because it is displayed in red on the Manage Requests page.

It is also consolidated with all other requests of the same status in the secretary’s "Specialist Approved" tab. She opens the request, knowing by the status that it has been approved by the consultant, and proceeds to book the appointment. She selects a response from the dropdown, schedules the date and time using the calendar, copies and pastes it into the Update field, and Saves. This generates an automatic email notification to the referring HCP’s office.

The request status changes to from “Specialist Approved” to “Pre-Consult Approved”, with the appointment time and date and clearly indicated.

The referring HCP's office opens the email notification named "Pre-Consult Approved" in their inbox and clicks through to the post. The date and time is displayed in the Consultation Session box at the top of the thread, as well as appearing in the most recent post made by the consultant’s staff.

Both the referring HCP and consultant's offices can now notify the patient of the appt.