E-Triage

Contents

Overview

The E-Triage suite of reports allows staff to triage Client referrals effectively. Tasks can be allocated to other members of the team e.g. Administrators. The reports and forms can be located via the main Rio Menu.

Locating the E-Triage Reports

- Click **Menu**

- Click   Clinical Services >

A list of E-Triage reports displays

- Click **1a – Specialty Referral Triaging**

A new window will open

- Click **Select Specialty Group** drop down & select your **Division**

- Click **OK**

- Click **Select Specialty** drop down & select your **Service**

- (If applicable, click **Select District or Group** & select required district/group)

- Click **OK**

1a - Specialty Referral Triaging	☆
1b - Specailty Referral Awaiting...	☆
1c - Follow-Up Appointment Ma...	☆
1d - Investigations Sent Report	☆
1e - Referral Actions Management	☆

The **Referral Triaging Management (1a)** Report displays, showing new/pending referrals awaiting triage

NHS/Client No	Client Name	DoB	Referred To Team	Referral Received Date	Referral Reason	Referral Comment	Hold Reason	Days Waiting	Waiting List	View Document	Triage Form	Refresh
1041989	Miss Patient One TEST	17 Feb 2018	WMR FES	15 Aug 2022 09:00				2	Waiting List	Client Document View	Record New	Refresh
1041989	Miss Patient One TEST	17 Feb 2018	WMR FES	16 Aug 2022 09:00				1	Waiting List	Client Document View	Record New	Refresh

Check CCG & Referral Document from Triaging Management (1a) Report

- Locate your Client and click **NHS/Client No**

The **Clinical Portal – Client's View** displays in a new window

- Click the **Summary** tab

- Locate **Demographics** pane (left)

- Click the **Full Name** link

The Client's **Demographic Details** screen will display

- Scroll down to view the **CCG of Client Address**

- Click **X** to **close window** and return to the **Referral Triaging Management (1a)** Report

- Click **Client Document View**

- Click **Referral document**

- (Click **Open**)

View the contents of the document and triage

- Click **X**

Complete the Triage form

- Click **Record New**

The Triage form displays in a new window

The mandatory date & time field completes automatically

- Select a Triage Reason
- Navigate to Triage Outcome section

Here you can select the Triage Outcome of either **Accept, Reject or Pending**

Decision to Accept

- Click **Accept**

Note the green 'Accepted' banner

- Select **Referral Urgency/Patient Pathway**

Some services may at this point see an additional **Patient Pathway** picklist

The options selected from the Patient Pathway list will display different fields and options which will need to be completed

- Select the relevant options depending on the needs of your client
- Select **Actions**
- Select **Assigned To**
- Select **Assigned Date & Time**
- Enter **Comments** (if required)
- Click **Add**

The entry changes to green to indicate it has been added

- Click **Save**

Once saved the client is removed from **Referral Triaging Management (1a) Report** and the **Actions** display on the **BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report.**

Decision to Reject

- Click **Reject**

Note the red 'Rejected' banner

- Select **Discharge Reason**
- Select **Actions**
- Select **Assigned To**
- Select **Assigned Date & Time**
- Enter **Comments** (if required)
- Click **Add**

The entry changes to green to indicate it has been added

- Click **Save**

When the Rejection outcome has been saved, the client remains on the **BCHC Referral Triaging Management (1a) Report**. However, all actions are displayed on **BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report.**

Decision of Pending

The decision of 'Pending' allows actions and comments to be recorded against the referral but keeps the referral on the **Referral Triaging Management (1a) Report.**

All Pending referrals will remain on the **Referral Triaging Management (1a) Report** until an outcome of either Accepted or Rejected is recorded.

Please note: **Pending** referrals are **not fully triaged** and the correct triage outcome **must be recorded as soon as possible**.

Viewing BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report

This report displays **all Actions** recorded on the **Triage** forms that <u>do not</u> yet have a **Completed Date**

- Click **Menu**

- Click [Clinical Services >]

- Click **1b – Specialty Referral Awaiting Appointment**

- Select a **Specialty Group**

- Click **OK**

- Select a **Specialty**

- Click **OK**

BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report displays

- Click <u>Edit Record</u> located in the **Triaged Record** column of the report

Action	Assigned To	Assigned Date		Comment	Completed Date		Action
Book appointment ▾	Admin ▾	26 June 2025	📅 📅			📅 📅	Delete

All actions must be addressed promptly, and the Completed Date added

This then removes the action from **BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report.**

Refreshing the Report

- Click **Refresh**

- Click **Specialty Group**

- Click **OK**

- Click **Specialty**

- Click **OK**

The report will reload to the most up to date view.