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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

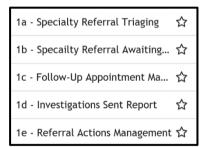
Click 1a – Specialty Referral Triaging

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

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 <u>Client Document View</u>
- Click Referral document
- (Click Open)

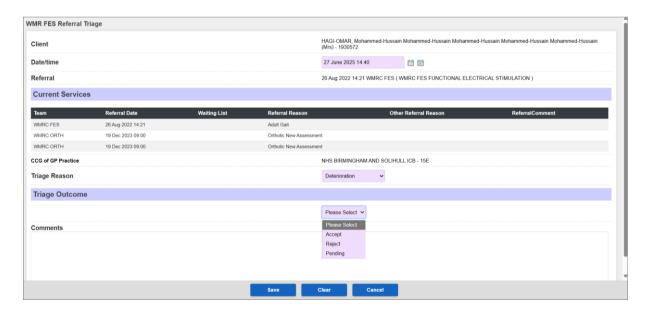
View the contents of the document and triage

• 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

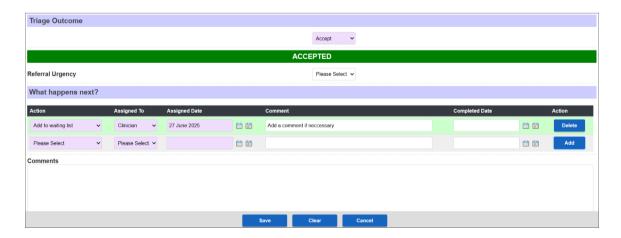
The options selected from the Patient Pathway list will display different fields and options which will need to be completed

- 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

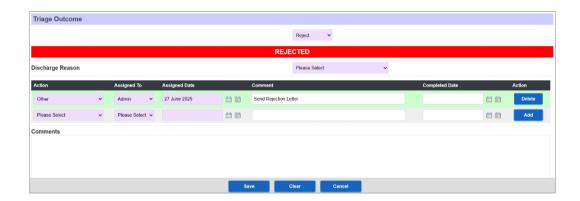
• Click Reject

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**.



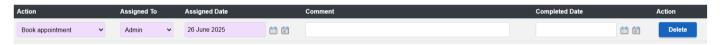
Viewing BCHC Specialty Triaged Referral Awaiting Appointment (1b) Report

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 Edit Record located in the Triaged Record column of the report



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.