



RMS LITE VERSION 1.5.0

ADMINISTRATOR GUIDE

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2.0	27/11/2012	Edwina Cooper	<p>Reviewed entire document.</p> <p>Updated and made corrections in the following areas:</p> <ul style="list-style-type: none"> • Removed instructions on creating a new transition screen as this is not available in the current application • Removed instructions on updating an existing transition screen as this is not available in the current application • Specified the roles that have access to the workflow functionality • Added section on how priorities function in RMS Lite

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CONTENTS

Icons used in this guide.....	1-5
1 Introduction	1-6
1.1 RMS Lite Overview	1-6
1.2 Product Features	1-6
1.2.1 Current Features	1-6
1.2.2 New Features	1-6
1.3 Administration within RMS Lite	1-7
2 Message Maintenance	2-9
2.1 List messages	2-9
2.2 Filtering the message list	2-10
2.2.1 Resend message	2-10
2.2.2 Cancel message.....	2-10
2.2.3 Revive Cancelled messages.....	2-11
2.2.4 View message	2-11
3 Users	3-12
4 Service Selection	4-13
4.1 accessing service type console	4-13
4.2 the service selection Console	4-13
4.3 creating a new service	4-14
4.4 updating an existing service	4-16
4.5 merging service with another service.....	4-17
5 Status Selection.....	5-19
5.1 accessing the status type console.....	5-19
5.2 the status selection Console	5-19
5.3 creating a new Status Type	5-20
5.4 updating an existing status	5-21
5.5 merging status with another status.....	5-23
6 Priority Selection.....	6-25
6.1 PRIORITIES IN RMS LITE	6-25
6.2 the priority selection Console	6-26
6.3 updating an existing priority	6-27
6.4 merging priority with another priority	6-28
7 New Administrator Menu Options	7-29
7.1 Identifying your Transition Workflow.....	7-29
7.2 Transition Workflows in RMS Lite.....	7-30
7.2.1 REFERRAL RECEIPT	7-30
7.2.2 CLINICAL ASSESSMENT	7-31
7.2.3 BOOKING.....	7-31
8 Transition Screen Maintenance.....	8-32
8.1 accessing the transition screen console	8-32

8.2	the transition screen Console	8-32
8.3	updating an existing Transition screen	8-33
9	Workflow Maintenance	9-35
9.1	accessing the workflow console	9-35
9.2	the workflow Console	9-35
9.3	creating a new workflow	9-37
9.4	updating an existing workflow.....	9-38
10	Role Maintenance	10-40
10.1	accessing the role maintenance console	10-40
10.2	the role maintenance Console.....	10-40
10.3	updating an existing role to add/change workflow	10-41
11	Referral Outcome Maintenance	11-44
11.1	accessing the referral outcome maintenance console	11-44
11.2	the referral outcome Console.....	11-44
11.3	creating a new referral outcome	11-45
11.4	updating an existing referral outcome	11-46
12	Clinic Location Maintenance.....	12-48
12.1	accessing the clinic location maintenance console	12-48
12.2	the clinic location Console	12-48
12.3	creating a new clinic location	12-49
12.4	updating an existing clinic location.....	12-50
13	Getting Help	13-52
13.1	User Guide	13-52
13.2	HealthLink Support	13-52
13.2.1	Phone.....	13-52
13.2.2	Fax.....	13-52
13.2.3	Email	13-52
13.2.4	Website.....	13-52

ICONS USED IN THIS GUIDE

You will see helpful icons used in this guide to draw attention to a subject, action or information.



The light bulb icon indicates information that assists the process being described.



The exclamation icon highlights a warning or an action you need to take. When you see this icon, pay attention and proceed with caution.



The 'i' for information icon indicates an area that assists in a decision.



This icon highlights new features that have been included in this RMS Lite version.

1 Introduction

1.1 RMS LITE OVERVIEW

RMS Lite is a web-based application that allows healthcare service providers the ability to manage the referral process within their organisation using a simplified interface.

The system is configurable to allow referrals to be segregated by user role groups or departments involved in processing the referral. RMS Lite can also be configured for specific transition workflow steps, which user role performs those steps and what information is captured when that step occurs. Updates to the audit records and updates back to the referrer customise the application to more accurately reflect the organisation's referral management process.

RMS Lite can be securely accessed using a computer with an internet browser, a pre-configured network access and a user account. The referral printing capability allows it to integrate with or support an existing paper-based workflow or it can be used to replace a paper based system.

1.2 Product Features

1.2.1 Current Features

- RMS Lite facilitates the real time submission of electronic referrals via HealthLink. This means the referrals are available in RMS Lite as soon as they are submitted from the practice
- Referrals are searchable on a number of criteria such as date range, service, status, priority etc.
- Referral lists can be sorted, making it easier to locate a particular referral
- Referral workflow is supported through status and service assignments (or re-assignments) and inclusion of administrative and triage notes against the referrals
- User definable referral workflow stages such as service, status and priority
- Printing of a referral and any associated attachments
- Audit log of user access and actions (e.g. viewed referral)
- Printing of referral changes history and notes
- A 'status update' message that can be sent to the referrer as desired or on demand
- A 'test referral' message that can be sent from the practice to RMS Lite. These test referral messages will use test NHI numbers are useful in testing and troubleshooting
- Ability to monitor status messages sent and the acknowledgement received, including the ability to resend a status update message

1.2.2 New Features

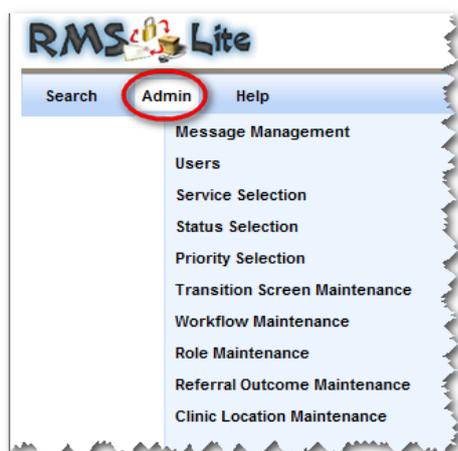


- Ability to configure specific referral management pathways
- Specific pathway steps and referral statuses can be associated with specific user

roles

- When a referral transitions through the configured pathway, additional forms or Y/N confirmation screens can be triggered
- Ability to view and triage eReferrals onscreen
- All progress notes and triage notes dynamically incorporated into the referral

1.3 ADMINISTRATION WITHIN RMS LITE



Administration Options are displayed under the RMS Lite 'Admin' Menu.



Note: Only Administrators have access to the Admin section of RMS Lite, if there is no admin menu option shown, then you don't have administrator access for RMS Lite.

There are a number of useful activities that can be completed by administrators with RMS Lite. These activities are primarily broken down into specific areas:

Message Maintenance	To support RMS Lite administrators with monitoring messages and to assist with any required remedial action for message delivery problems.
Users	Create and maintain users and their roles in RMS Lite.
Service Selection	Create and maintain the services or departments a referral can be assigned to in RMS Lite.
Status Selection	Create and maintain the status a referral can be assigned to in RMS Lite.
Priority Selection	Create and maintain the priority a referral can be assigned to in RMS Lite.
 Transition Screen Maintenance	Used to define screens available during the referral transition steps.

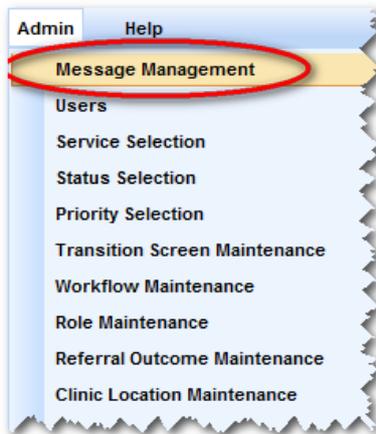
 Workflow Maintenance	Used to define transition workflow steps.
 Role Maintenance	Used to specify which user roles have access to the transition workflow steps.
 Referral Outcome Maintenance	Used to define the referral outcome field values on the triage screen.
 Clinic Location Maintenance	Used to define the clinic location field values on the triage screen.



It is recommended that RMS Lite sites wishing to utilise the new transition configuration options consult with their HealthLink representative for advice first before accessing these new Administrator menu options.

The following sections will guide you through the different administrator features available within RMS Lite.

2 MESSAGE MAINTENANCE



RMS Lite supports the creation of status update messages by users as an additional activity when recording progress against a referral. These status update messages are sent via RMS Lite's HealthLink EDI account to the EDI account associated to the referrer recorded within the original referral.

Upon successful delivery of the status update message to the referrer's HealthLink EDI account the message will be processed by the practice's EMR software with the message being allocated to both the Referrer's and Patient's inbox.

Messages are sent via the HealthLink store and forward infrastructure. With a store and forward mechanism messages are not sent and acknowledged in real-time, but rather go through a number of message queues where they are retained until the recipient connects to the relevant queue and retrieves the message.

While this approach provides a robust and easy to implement process to manage message delivery, **it does come with the need to monitor the delivery status of each message sent so that the sender can verify that the message has been delivered successfully.**

To support RMS Lite administrators with monitoring messages and to assist with any required remedial action for message delivery problems, RMS Lite includes a message management module. The following activities can be completed within the message management module:

2.1 LIST MESSAGES

When users access the message management module they are initially presented with a list of messages sent and received by RMS Lite, refer to the example screen below:

The screenshot shows the 'Message Management Search Filter' and 'Message Management Search Results' interface. The search filter includes fields for Sender, Recipient, Date Time From (03-Jan-2011 00:00), and Date Time To. There are checkboxes for 'Show problem messages only' and 'Include cancelled correspondence'. Below the filter are 'Search', 'Reset', and 'Clear' buttons. The search results are displayed in a table with columns for Creation Date, Last Sent Date, Message ID, Type, Referral ID, Author, Sender, Recipient, State, and Action.

Creation Date	Last Sent Date	Message ID	Type	Referral ID	Author	Sender	Recipient	State	Action
15-Jan-2011 18:12	15-Jan-2011 18:29	NLER-26610:11011518124300	Update (out) (T)	NLER-26610	hknet	gingming	ma6Stest	Send Error	View Resend Cancel
14-Jan-2011 19:13		NLER-26610:110114191314	eReferral (in) (T)	NLER-26610		ma6Stest	ndhberef	Received	View
14-Jan-2011 19:07		NLER-26609:110114190733	eReferral (in) (T)	NLER-26609		ma6Stest	ndhberef	Received	View
14-Jan-2011 16:08		NLER-26608:110114160822	eReferral (in) (T)	NLER-26608		ma6Stest	ndhberef	Received	View
14-Jan-2011 16:07		NLER-26607:110114160721	eReferral (in) (T)	NLER-26607		ma6Stest	ndhberef	Received	View
14-Jan-2011 15:40		NLER-26606:110114154001	eReferral (in) (T)	NLER-26606		ma6Stest	ndhberef	Received	View
14-Jan-2011 14:40		NLER-26605:110114144006	eReferral (in) (T)	NLER-26605		ma6Stest	ndhberef	Received	View
14-Jan-2011 14:33		NLER-26604:110114143348	eReferral (in) (T)	NLER-26604		ma6Stest	ndhberef	Received	View

[Next Page >](#) [Last Page >>](#)

By default the search is configured to return a list of all messages sent and received in the last two weeks, there are a number of search options that can be used to restrict the list of messages to those relevant for current review.

The following status can be associated with a message:

- Received – the message has been successfully received and acknowledged by the recipient
- Sent – the message was sent successfully but a successful delivery acknowledgement hasn't been received yet.
- Sent (Overdue) – the message was sent successfully but a successful delivery acknowledgement hasn't been received yet and has been marked as overdue as no response was received within 48 hours of sending the message.
- Send Error – There was a problem sending this message, the error can be seen by viewing the message

2.2 FILTERING THE MESSAGE LIST

The following items can be specified to limit the messages that will be displayed for review:

- Sender (The EDI account of the message sender, useful when looking for referrals from a particular practice)
- Recipient (The EDI account of the message recipient, useful when reviewing messages sent to a particular practice)
- Date Time from (filters based on when the message was either sent or received – using the date/time supplied as a starting point)
- Date Time to (filters based on when the message was either sent or received – using the date supplied as an end point)
Note: If left blank, this indicates that all messages up to the current date / time should be returned
- Show problem messages only (Limits the view to messages that haven't been delivered successfully)
- Include cancelled correspondence (Use this option to review messages that have previously been marked as cancelled)
Note: Cancelled messages are those that have been cancelled by an administrator after they failed delivery)

Administrators will generally be interested in monitoring messages that haven't been successfully delivered to GP's. These messages can be easily reviewed by selecting the 'Show problem messages only'. This option will then filter to only those messages that couldn't be delivered successfully.

2.2.1 RESEND MESSAGE

Use this option if you wish to re-send a message that hasn't received a successful delivery acknowledgement from the recipient. This option is useful where a message has been lost in transmission and should only be used after allowing an appropriate delivery time.

2.2.2 CANCEL MESSAGE

The Cancel message action has been included to allow administrators the ability to cancel a message if re-send attempts fail to deliver the message correctly, this option should only be used after the administrator has confirmed an alternative approach has been used to convey the information within the status message to the impacted recipient, e.g. either via a call to the GPs practice

manager or by sending a copy via fax. Note: Cancelled messages can be “revives” if they were marked as cancelled in error.

2.2.3 REVIVE CANCELLED MESSAGES

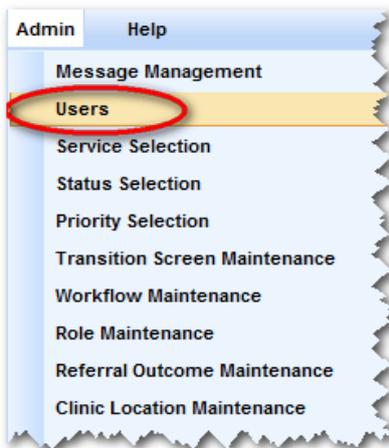
If a message has been marked as cancelled it can be re-instated by using the ‘Revive’ action from within the message management console. Note: To view previously cancelled messages click the ‘Include cancelled correspondence’ within the filter options. Below is an example filter screen with a cancelled message that can be revived:

2.2.4 VIEW MESSAGE

The administrator can view the original message by using the “view” message action within the message list. Where an error has occurred during the delivery of the message the error will also be displayed for their review. If you have any questions about the nature of the message presented please contact the HealthLink support desk and provide a copy of the error for their comment.

Below is an example of the of the message view screen:

3 USERS



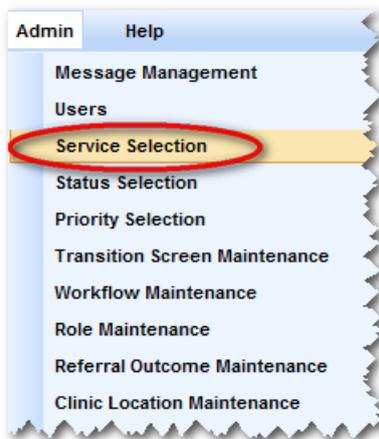
The Users menu option allows new users to be setup in RMS Lite and the maintenance of existing users to be facilitated. Specific functions include:

- Search for an existing user
 - Create a new user
 - Assigning roles
 - Viewing user activity in RMS Lite
 - Changing a user's password
 - Disabling an active user
 - Activating a disabled user
 - Unlocking a user's account
- Updating user details
 - Reviewing changes made on referrals
 - Adding/Deleting users
 - Viewing activity Logs

There are a number of role types that can apply to users in RMS Lite:

Standard User:	This role should be used for all general administration and clinical staff
Administrator:	This role should be reserved for staff that will be responsible managing user accounts and monitoring user activities
Read Only:	This role should be used for staff that can view and search referrals but who cannot record progress on a referral.
 Central Referrals Office:	This role should be used for staff that only accept receipt of the referral, check patient demographics and assess the patient's funding eligibility.
 Clinical Assessor:	This role should be used for staff that only review and make decisions regarding the clinical aspects of the patient's referral. The triage of the referral is recorded in RMS Lite only by users that have been assigned this clinical role.
 Booking Clerk:	This role should be used for staff that process and manage the outcomes of the referral's review .
 Support Level 1:	This role is used by HealthLink support staff only.
 Support Level 2:	This role is used by HealthLink support staff only.
 Configuration Access:	This role is used by HealthLink support staff only.

4 SERVICE SELECTION

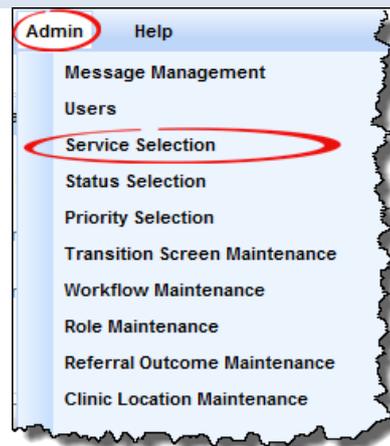


Use the 'Service Selection' option under the Admin menu to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

4.1 ACCESSING SERVICE TYPE CONSOLE

The service selection feature can be accessed by clicking **Service Selection** from **Admin** menu on the RMS menu toolbar.

All subsequent service type maintenance activities can be completed directly from the service selection console



4.2 THE SERVICE SELECTION CONSOLE

The Service Selection Console allows you to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

1	Use the Service Type Search Filter to locate a specific service
2	Add a new service to RMSLite

3	Check to see if a service is active or not. (true means active, false means inactive)
4	View service type details.
5	Edit Service type's details.
6	Merge the services that a referral can be sent to.

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite interface with the following elements:

- 1**: Search button in the Service Type Search Filter section.
- 2**: Create Service Type button at the bottom of the results page.
- 3**: Is active (# refs) column header in the Service Type Search Results table.
- 4**: View button in the Action column of the results table.
- 5**: Edit button in the Action column of the results table.
- 6**: Merge button in the Action column of the results table.

Short code	Code	Full name	Is active (# refs)	Sort order	Action
ACUTE-WHA	ACUTE-WHA	Acute - Whangarei	true (0)	8	View Edit Merge
310004004	310004004	Audiology	true (38)	10	View Edit Merge
H24	H24	Medical Alarm	true (126)	10	View Edit Merge
M13	M13	Cardiology	true (3)	20	View Edit Merge
CAPU.DGC	WAIA_CARDIOPUL	Cardiopulmonary - Diagnostic	true (3)	25	View Edit Merge
310026003	310026003	Counselling	true (0)	30	View Edit Merge
310090003	310090003	Dietetics	true (0)	70	View Edit Merge
ECO	WAIA_ECHOCARD	Echocardiogram	true (0)	73	View Edit Merge
310045007	310045007	Endocrinology	true (1)	75	View Edit Merge
EN	WAIA_ENDOSCOPY	Endoscopy	true (2)	77	View Edit Merge
310149003	310149003	ENT (Ear Nose and Throat)	true (1)	80	View Edit Merge
310046008	310046008	Gastroenterology	true (0)	90	View Edit Merge

4.3 CREATING A NEW SERVICE

You can add a new service to RMS Lite by completing the following steps:

Steps

1	Click on the Create Service Type button at the bottom of the Service Selection page
2	Complete the details under ' Add Service Type ' screen. Each Service Type entry created has: <ol style="list-style-type: none"> 1) A Short code (for internal development use), 2) A Code (for database identification),

	<p>3) A Full name (for the display shown on screen),</p> <p>4) An Active status (to show if it is currently in use) and</p> <p>5) A Sort order (to show what sequence the description shows in any drop down lists) assigned to it.</p>
3	Once you've completed setting up the service type click on the Save button. If you wish to abort service creation click on the Cancel button

Screen Reference





Note: For creation of new service you need to know the right code of that service. This code should match the code of the eReferral form. Please contact HealthLink for access to these service codes and advice on the considerations of creating/updating them.

4.4 UPDATING AN EXISTING SERVICE

Use this feature if you wish to change service type information.

Fields for editing the service type can be accessed by clicking on the **Edit** link against each service details under the **'Service Type Search Results'**.

To change the service type, follow the steps below:

Steps

1	Locate the service type within the service selection console search results list and click on Edit
2	If required change information in the details section.
3	Once you've completed use the Update button to save the changes and return to the previous screen. If you wish to abort service creation click on the Done button

Screen Reference

Short code	Code	Full name	Is active (# refs)	Sort order	Action
M13	M13	Cardiology	true (3)	20	View Edit Merge
CAPU.DGC	WAIA_CARDIOPUL	Cardiopulmonary - Diagnostic	true (3)	25	View Edit Merge
310026003	310026003	Counselling	true (0)	30	View Edit Merge

RMS Lite

Search Admin Help

Edit Service Type

Id*

Short code* **Change information here**

Full name*

Is active*

Sort order

Code*

*required fields

4.5 MERGING SERVICE WITH ANOTHER SERVICE

Use this feature if you wish to merge the service into another service.



Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging service type.



Note: Merging to another service will make the current service inactive. Please contact your Healthlink representative before merging service codes.

Fields for merging the service type can be accessed by clicking on the **Merge** link against each service details under the **'Service Type Search Results'**.

To merge the service type, follow the steps below:

Steps

	Locate the service type within the service selection console search results list and click on Merge
	Select the name of the service you want the current service to merge into from the dropdown list.
	Once you've selected the service name use the OK button to save the changes and return to the previous screen. If you wish to abort merging of service click on the Close button

Screen References

The screenshot shows a table titled "Service Type Search Results" with the following data:

Short code	Code	Full name	Is active (# refs)	Sort order	Action
M13	M13	Cardiology	true (3)	20	View Edit Merge
CAPU.DGC	WAIA_CARDIOPUL	Cardiopulmonary - Diagnostic	true (3)	25	View Edit Merge
310026003	310026003	Counselling	true (0)	30	View Edit Merge

A red circle with the number "1" is placed over the "Merge" link in the first row. A callout bubble with the word "Merge" in a blue box points to this link.

Merge Service Type [X]

This service type can be merged into one of the following services

Please note: this operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging service type

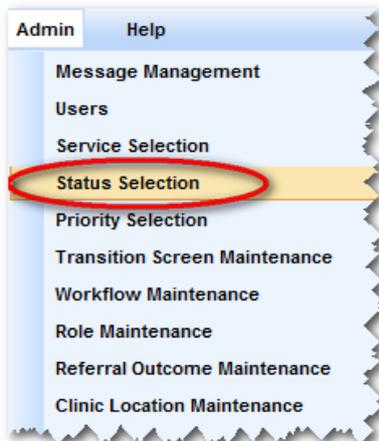
3 Click OK to save

2 Select Service

-select-
-select-
Audiology
Medical Alarm
Cardiology
Cardiopulmonary Diagnostic
Counselling
Dental
Dermatology
Dermatology
Diabetes - General
Diabetes - Pregnancy
Diabetes - Retinal

OK Close

5 STATUS SELECTION

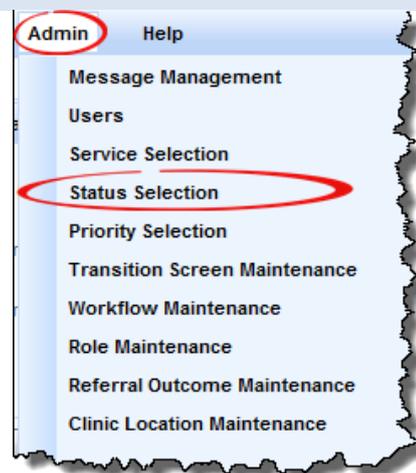


Use the 'Status Selection' option under the Admin menu to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

5.1 ACCESSING THE STATUS TYPE CONSOLE

The status selection feature can be accessed by clicking **Status Selection** from **Admin** menu on the RMS menu toolbar.

All subsequent status selection activities can be completed directly from the Status Selection console.



5.2 THE STATUS SELECTION CONSOLE

The status Selection Console allows you to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

1	Use the Status Type Search Filter to locate a specific status
2	Add a new status to RMSLite
3	Check to see if a status is active or not. (true means active, false means inactive)

4	View Status type details.
5	Edit Status type's details.
6	Merge the status with another status type

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite interface with the following elements highlighted:

- 1**: Search button in the Status Type Search Filter.
- 2**: Create Status Type button at the bottom of the page.
- 3**: Status Type Search Results header.
- 4**: Is active (# refs) column header in the search results table.
- 5**: View, Edit, Merge action links for the 'Assigned' and 'Admitted' rows.
- 6**: Merge action link for the 'Acute' row.

Short code	Full name	Is close	Is active (# refs)	Sort order	Action
Assigned	Assigned	false	true (5)	20	View Edit Merge
Admitted	Admitted	false	true (1)	80	View Edit Merge
Acute	Acute Referral Printed	true	true (1)	140	View Edit Merge

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5.3 CREATING A NEW STATUS TYPE

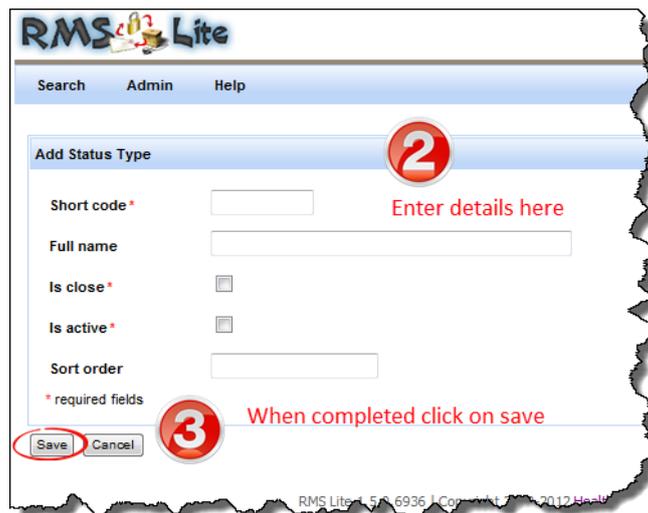
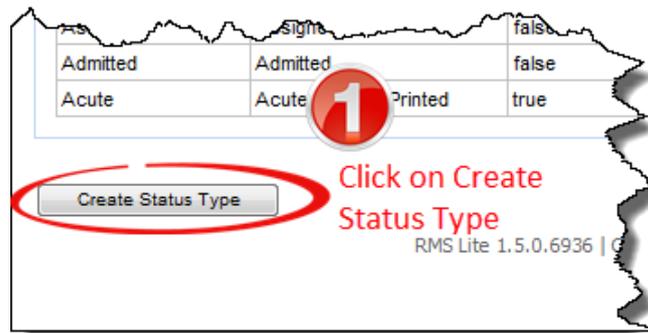
You can add a new status to RMSLite by completing the following steps:

Steps

1	Click on the  button at the bottom of the Status Selection page
2	<p>Complete the details under 'Add Status Type' screen. Each Status Type entry created has:</p> <ol style="list-style-type: none"> 1) A Short code (for internal development use), 2) A Code (for database identification), 3) A Full name (for the display shown on screen), 4) An Active status (to show if it is currently in use) and 5) A Sort order (to show what sequence the description shows in any drop down lists) assigned to it.

	<p>Once you've completed setting up the status type click on the Save button. If you wish to abort status creation click on the Cancel button</p>

Screen Reference



5.4 UPDATING AN EXISTING STATUS

Use this feature if you wish to change status type information.

Fields for editing the status type can be accessed by clicking on the **Edit** link against each service details under the **'Service Type Search Results'**.



Warning: Do not update the shortCode of 'Received' status ever. This shortCode is used to set Received status as an entry point when a referral is first received in RMSLite.



Warning: If the Received status shortCode is changed. The following functionalities will not work as expected below:

- 1) Referral entry point in RMSLite is set using Received status.
- 2) When a service is changed from one to another, the status is reset to Received.

To change the service type, follow the steps below:

Steps

1	Locate the status type within the status selection console search results list and click on Edit
2	If required change information in the details section.
3	Once you've completed use the Update button to save the changes and return to the previous screen. If you wish to abort service creation click on the Done button

Screen Reference

Short code	Full name	Is close	Is active (# refs)	Sort order	Action
Assigned	Assigned	false	true (5)	20	View Edit Merge
Admitted	Admitted	false	true (1)	80	View Edit Merge
Acute	Acute Referral Printed	true	true (1)	140	View Edit Merge

RMS Lite

Search Admin Help

Edit Status Type

Id* **Enter details here**

Short code*

Full name

Is close*

Is active*

Sort order

* required fields

Click on Update to save

5.5 MERGING STATUS WITH ANOTHER STATUS

Use this feature if you wish to merge the status into another status.



Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging status type.



Note: Merging to another status will make the current status inactive

Fields for merging the status type can be accessed by clicking on the **Merge** link against each status details under the 'Status Type Search Results'.

To merge the status type follow the steps below:

Steps

	Locate the status type within the status selection console search results list and click on Merge
	Select the name of the status into which you want the current status to merge from the dropdown list.
	Once you've selected the status name use the OK button to save the changes and return to the previous screen. If you wish to abort merging of status click on the Close button

Screen References

Short code	Full name	Is close	Is active (# refs)	Sort order	Action
Assigned	Assigned	false	true (5)	20	Merge
Admitted	Admitted	false	true (1)	80	View Edit Merge
Acute	Acute Referral Printed	true	true (1)	140	View Edit Merge

Merge

Merge Status Type [X]

This status type can be merged into one of the following status

Please note: this operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging status type

3 Click on OK to save

OK Close

-select-

-select-

Received

Assigned

2 Prioritised

Pre-work

F&A Scheduled

Patient Seen and Assessed

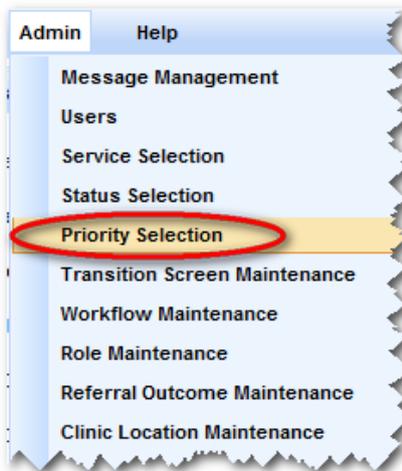
Booked for Procedure

Scheduled

Admitted

Select Status

6 PRIORITY SELECTION



Use the 'Priority Selection' option under the Admin menu to view, edit or merge the different priority status descriptions a referral can be assigned once received into the facility. Each Priority Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

6.1 PRIORITIES IN RMS LITE

All referrals received into RMS Lite have a default priority of 'unspecified' **regardless of the priority specified by the referrer in the referral itself**. Referral management staff must use the RMS Lite screens to specify the priority at the appropriate stage in that site's workflow and consideration of the clinical content of the referral. Referrals that have had a priority specified in RMS Lite will show a corresponding 'traffic light' colour when the referral is displayed in the referral search summary:

	17-Jun-2011 13:42	CCER-13079	Entwistle, Sam	JDR1234 (T)
	09-Jun-2011 15:19	CCER-12872	Entwistle, Sam	JDR1234 (T)
	09-Jun-2011 15:02	CCER-12669	Entwistle, Sam	JDR1234 (T)
	09-Jun-2011 11:58	CCER-12565	Entwistle, Sam	JDR1234 (T)
	08-Jun-2011 13:51	CCER-11447	Entwistle, Sam	JDR1234 (T)

ICON	SHORT CODE VALUE	DEFAULT LABEL
	Unknown	Unspecified
	Low	Routine
	Medium	Semi-Urgent
	High	Urgent



Note: RMS Lite priority labels can be updated and priorities can be merged by the RMS Lite administrator, but the number of priorities available are currently restricted to those listed above.

6.2 THE PRIORITY SELECTION CONSOLE

The Priority Selection Console allows you to view, edit or merge the different priority a referral can be assigned once received into the facility.

Each Priority Type entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

1	Use the Priority Type Search Filter to locate a specific priority
2	Check to see if a Priority is active or not. (true means active, false means inactive)
3	View Priority type details.
4	Edit Priority type details.
5	Merge the Priority that a referral can be assigned once received into the facility.

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite web application interface. At the top left is the 'RMS Lite' logo, and at the top right is the 'healthLINK' logo with the tagline 'BETTER PRACTICE - BETTER CARE'. Below the logos is a navigation bar with 'Search', 'Admin', and 'Help' links, and a 'signed in as: hiknet Logout' indicator. The main content area is divided into two sections:

- Priority Type Search Filter:** This section contains two input fields for 'Short code' and 'Full name'. Below these fields are 'Search' and 'Reset' buttons. A red circle with the number '1' is placed over the 'Search' button.
- Priority Type Search Results:** This section displays a table of priority types. The table has columns for 'Short code', 'Full name', 'Is active (# refs)', 'Sort order', and 'Action'. The 'Is active (# refs)' column header is circled in red with a '2'. The 'Action' column contains links for 'View', 'Edit', and 'Merge'. The 'View' link for the 'High' priority type is circled in red with a '3'. The 'Edit' link for the 'High' priority type is circled in red with a '4'. The 'Merge' link for the 'unknown' priority type is circled in red with a '5'.

At the bottom of the page, the text 'RMS Lite 1.5.0.6936 | Copyright 2008-2012 HealthLink Limited' is displayed.

6.3 UPDATING AN EXISTING PRIORITY

Use this feature if you wish to change priority type information.

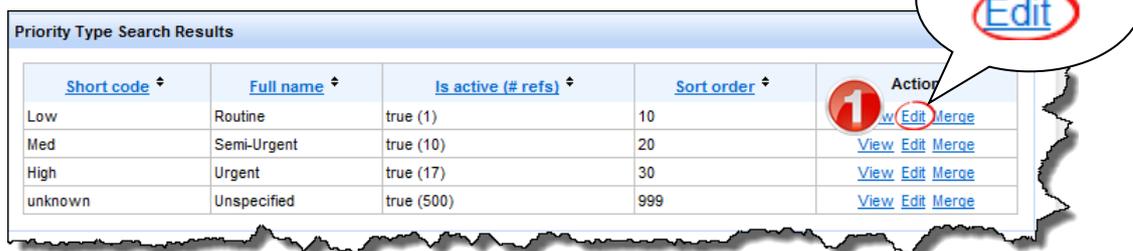
Fields for editing the priority type can be accessed by clicking on the **Edit** link against each priority details under the 'Priority Type Search Results'.

To change the priority type, follow the steps below:

Steps

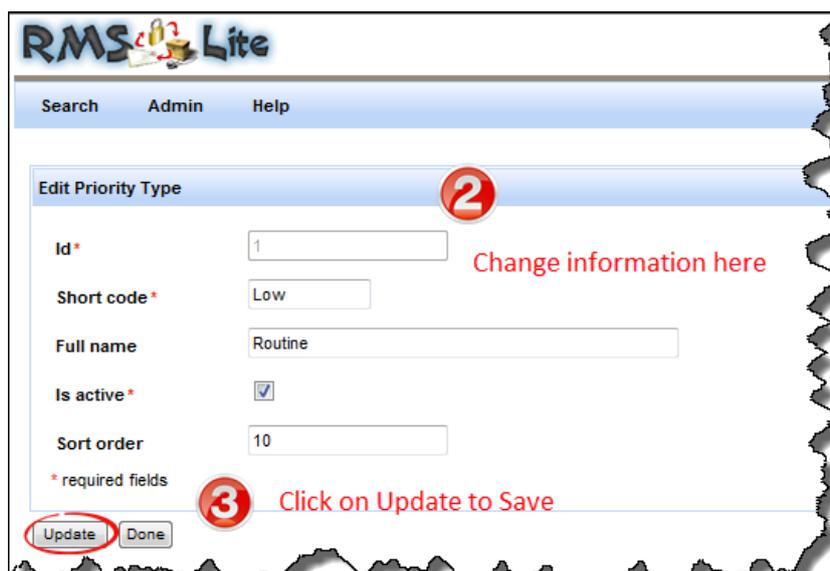
1	Locate the Priority type within the priority selection console search results list and click on Edit
2	If required change information in the details section.
3	Once you've completed use the Update button to save the changes and return to the previous screen. If you wish to abort service creation click on the Done button

Screen Reference



Priority Type Search Results

Short code	Full name	Is active (# refs)	Sort order	Action
Low	Routine	true (1)	10	1 View Edit Merge
Med	Semi-Urgent	true (10)	20	View Edit Merge
High	Urgent	true (17)	30	View Edit Merge
unknown	Unspecified	true (500)	999	View Edit Merge



RMS Lite

Search Admin Help

Edit Priority Type

2 Change information here

Id*

Short code*

Full name

Is active*

Sort order

* required fields

3 Click on Update to Save

6.4 MERGING PRIORITY WITH ANOTHER PRIORITY

Use this feature if you wish to merge one priority into another priority.



Warning: This operation cannot be undone and will overwrite the corresponding data of referrals. Also, the default search (if exists) may be reset if it contains the merging priority type.



Note: Merging to another priority will make the current priority inactive

Fields for merging the priority type can be accessed by clicking on the **Merge** link against each priority details under the 'Priority Type Search Results'.

To merge the priority type, follow the steps below:

Steps

1	Locate the priority type within the priority selection console search results list and click on Merge
2	Select the name of the priority you want the current priority to merge into from the dropdown list.
3	Once you've selected the priority name use the OK button to save the changes and return to the previous screen. If you wish to abort merging of priority click on the Close button

Screen References



Short code	Full name	Is active (# refs)	Sort order	Action
Low	Routine	true (1)	10	View Edit Merge
Med	Semi-Urgent	true (10)	20	View Edit Merge
High	Urgent	true (17)	30	View Edit Merge
unknown	Unspecified	true (500)	999	View Edit Merge

Merge

7 NEW ADMINISTRATOR MENU OPTIONS

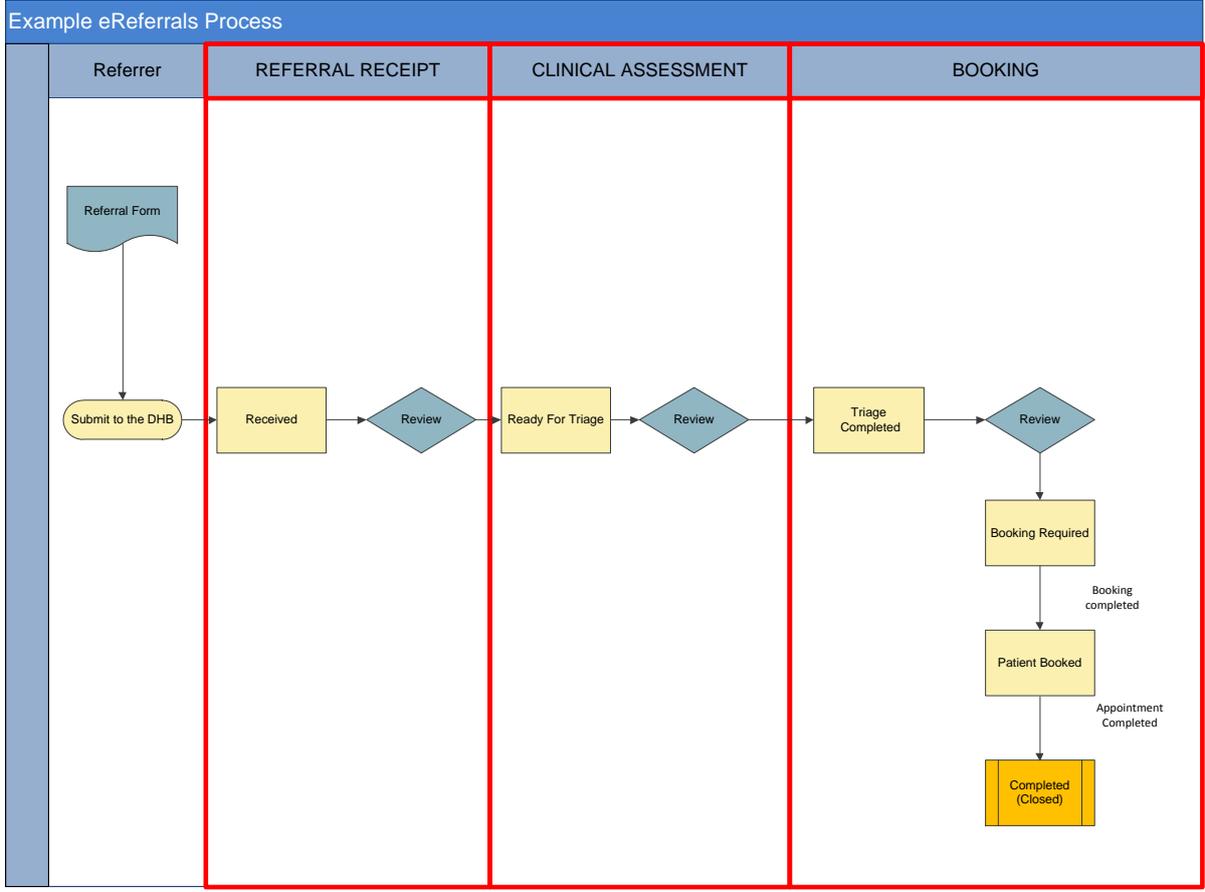
As part of an ePrioritisation upgrade in RMS Lite, sites can now configure their own eReferral management workflows, the user roles that access those workflows and the confirmations screen that appear when a transition step is confirmed. RMS Lite administrators can configure workflows by using the following sections in this guide:

 Transition Screen Maintenance	Used to define screens available during the referral transition steps.
 Workflow Maintenance	Used to define transition workflow steps.
 Role Maintenance	Used to specify which user roles have access to the transition workflow steps.
 Referral Outcome Maintenance	Used to define the referral outcome field values on the triage screen.
 Clinic Location Maintenance	Used to define the clinic location field values on the triage screen.

7.1 IDENTIFYING YOUR TRANSITION WORKFLOW

RMS Lite sites can map the way eReferrals are managed and triaged within their organisation as a first step to preparing the data to be entered in these new configuration screens. Here is an example of a standard process flow a site might utilise and the different roles referral staff at that site may play in that pathway. The referral transitions through different steps by referral receipt staff checking details, making a clinical assessment on the content of the referral and scheduling staff reviewing referral outcomes and progress notes. Sites map out what referral management steps they use and what staff roles are responsible for each step.

Please note: This 'standard' scenario does not display variations to the workflow (i.e.: decline eReferral, acute referral printed, change of service etc....)



7.2 TRANSITION WORKFLOWS IN RMS LITE

Once the transition workflow has been identified, the workflow steps for each user role are configured in RMS Lite. If you use the example workflow diagram shown above, here are the screens in RMS Lite that allow each role to perform those transition steps:

7.2.1 REFERRAL RECEIPT

Staff member has a central referrals management role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
19-Apr-2012 14:02	NLER-29604	Entwistle, Sam	JDR1234	M			Received	Record Progress
07-Jul-2011 16:30	NLER-27420	Entwistle, Sam	AAA0985	M			Received	Record Progress
07-Jul-2011 16:29	CCER-10117	Entwistle, Sam	AAA0985	M			Received	Record Progress

7.2.2 CLINICAL ASSESSMENT

Staff member has a Clinical Assessor role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
20-Apr-2012 10:02	NLER-28611	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Audiology	Ready for Triage	Record Progress Triage
18-Apr-2012 10:23	NLER-22592	Entwistle, S'am	AAA0985	MOUSE, MICKEY	13-Apr-2000	Cardiopulmonary - Diagnostic	Ready for Triage	
08-Jul-2011 12:08	NLER-27422	Entwistle, Sam	AAA0985	MOUSE, MICKEY	13-Apr-2000	Medical Alarm	Ready for Triage	
08-Jul-2011 11:45	NLER-27421	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Ready for Triage	
06-Jul-2011 14:21	NLER-27412	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Ready for Triage	
06-Jul-2011 12:40	CCER-10116	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Ready for Triage	
06-Jul-2011 12:38	NLER-27417	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Ready for Triage	

7.2.3 BOOKING

Staff member has a Booking role

Current referral status

The next transition steps available to this staff member. Options are also determined by the current status of this referral

Received	Referral ID	Referrer	Patient NHI	Patient	Patient DOB	Service	Status	Action
19-Apr-2012 14:02	NLER-28605	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	Record Progress Booking Required
19-Apr-2012 12:14	NLER-28603	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Skin cancer	Triage Completed	
19-Apr-2012 12:13	NLER-28601	Entwistle, Sam	JDR1234	MOUSE, MICKEY	29-Apr-1999	Dental	Triage Completed	
19-Apr-2012 12:12	NLER-28600	Entwistle, Sam	JDR1234	MOUSE, MICKEY			Triage Completed	
12-Oct-2011 10:34	NLER-28578	Entwistle, S'am	AAA0985	MOUSE, MICKEY			Triage Completed	
11-Oct-2011 14:43	NLER-28576	Entwistle, S'am	AAA0985	MOUSE, MICKEY			Triage Completed	
25-Aug-2011 10:44	CCER-10219	Entwistle, S'am	AAA0985	MOUSE, MICKEY			Triage Completed	
08-Jul-2011 15:35	NLER-27423	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Triage Completed	
06-Jul-2011 14:21	NLER-27416	Entwistle, Sam	AAA0985	MOUSE, MICKEY			Triage Completed	

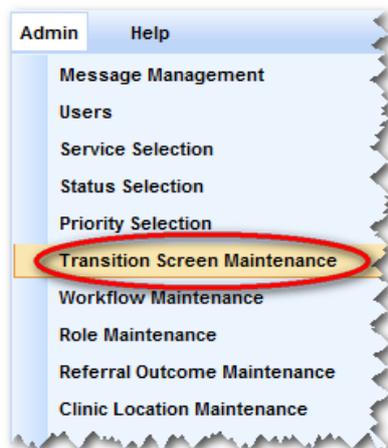


It is recommended that RMS Lite sites wishing to utilise the new transition configuration options consult with their HealthLink representative for advice first before accessing these new Administrator menu options.

8 TRANSITION SCREEN MAINTENANCE



NOTE: This maintenance screen is newly added and is available from RMSLite 1.5 version



Use the 'Transition Screen Maintenance' option under the Admin menu to views which screens are available in the application when confirming an action taken in the referral management pathway. Transition screens are associated with the specific referral management steps you define in the next menu option 'Workflow Maintenance'.



There are only four types of transition screens currently available in version 1.5 of RMS Lite. Further screens would require additional development in the application.

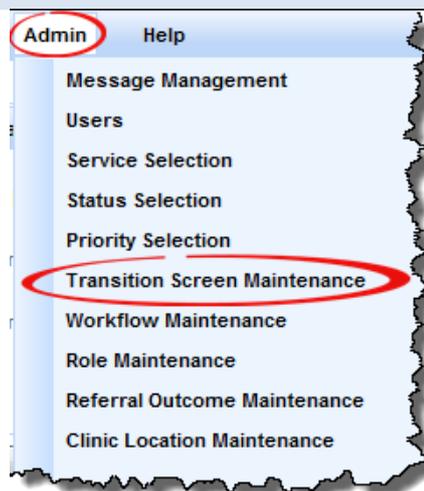
The current screen types currently available are:

1. Add Notes – A screen that allows notes to be added when a referral is processed
2. Confirmation – A simple Y/N confirmation screen
3. Triage – A screen specifically for clinical assessors to record the triage outcomes of a referral
4. Change Service – A screen that allows the service a referral has been sent to be altered.

8.1 ACCESSING THE TRANSITION SCREEN CONSOLE

The transition screen selection feature can be accessed by clicking **Transition Screen Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent transition screen maintenance activities can be completed directly from the service selection console



8.2 THE TRANSITION SCREEN CONSOLE

The transition screen console allows you to view the different transition screen descriptions. Each transition screen entry created has a short code (for database identification), Full name (for the display shown on screen) and a sort order (to show what sequence the full name shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

1	Search for a specific screen by using the Transition Screen search filter
2	View all the Transition Screens available in a summarised list or a single search result
3	View Transition Screen details for a single selection .
4	Update limited Transition Screen details for a single selection .

Screen Reference

The screenshot displays the RMS Lite web application interface. At the top, there is a navigation bar with 'Search', 'Admin', and 'Help' links, and a user status indicator 'signed in as: admin Logout'. Below this is the 'Transition Screen Search Filter' section, which contains two input fields: 'Short code' and 'Full name'. A red circle with the number '1' is placed over the 'Short code' field. Below the input fields are 'Search' and 'Reset' buttons. The 'Transition Screen Search Results' section is highlighted with a red circle and the number '2'. It contains a table with the following data:

Short code	Full name	Sort order	Action
addNotes	Add Notes	10	View Edit
service	Change Service	20	View Edit
confirm	Confirmation Screen	30	View Edit
triage	Triage	40	View Edit

Red circles with numbers '3' and '4' are placed over the 'View' and 'Edit' links in the first row of the table, respectively. At the bottom of the page, there is a 'Create Transition Screen' button and a footer with the text 'RMS Lite 1.5.1.12694 | Copyright 2008-2012 HealthLink Limited'.

8.3 UPDATING AN EXISTING TRANSITION SCREEN

Use this feature if you wish to alter some of the Transition Screen properties.

Fields for editing the transition screen can be accessed by clicking on the **Edit** link against each Transition Screen details under the **'Transition Screen Search Results'**.



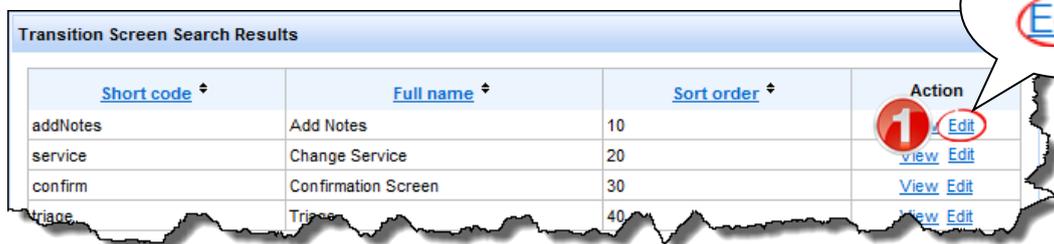
As the Transition Screens are 'hardcoded' into the RMS Lite application (i.e. can only be changed by a developer), existing screens can not be deleted and new screens can not be created by the RMS Lite administrator. Consequently some fields will be unavailable for editing or 'greyed out' on the screen when the 'Edit' link is selected. For further information about the Transition Screens your site requires, please contact HealthLink.

To alter the Transition Screen properties follow the steps below:

Steps

1	Locate the transition screen within the 'Transition Screen Search Results' list and click on Edit
2	If desired, the 'Full name' or 'Sort Order' in the Transition Screen Search Results list can be changed in the Edit Transition Screen.
3	Once you've completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button

Screen Reference



Short code	Full name	Sort order	Action
addNotes	Add Notes	10	1 Edit
service	Change Service	20	view Edit
confirm	Confirmation Screen	30	View Edit
triage	Triage	40	view Edit



2 Alter the 'Full Name' or the 'Sort Order' here

Short code: service

Full name:

Sort order:

* required fields

Save Cancel

3 'Save' your changes or 'Cancel' to exit



NOTE: This maintenance screen is newly added and is available from RMSLite 1.5 version



Use the 'Workflow Maintenance' option under the Admin menu to create and maintain referral workflow pathway steps.

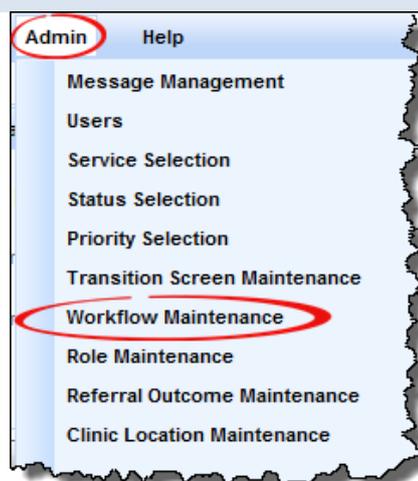
A workflow will configure:

1. the transition step name (e.g. 'Triage')
2. what order this step is in the overall referral management pathway
3. the status before this step can be taken and the status after the transition is confirmed (e.g. Ready for Triage to Triage Complete)
4. the transition screen that will be displayed when the step is selected (e.g. 'Add Notes')
5. whether an update is sent back to the referrer automatically and whether or not this can be deselected

9.1 ACCESSING THE WORKFLOW CONSOLE

The status selection feature can be accessed by clicking **Workflow Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent service type maintenance activities can be completed directly from the service selection console



9.2 THE WORKFLOW CONSOLE

The Workflow Console allows you to create, view or edit different workflow descriptions a referral status can be assigned once received into the facility.

Each Workflow entry created has a name (for database identification/internal development use), Transition label (for the display shown on action buttons), start status (to indicate the start status of workflow for a referral), end status (to indicate the end status of referral after the action has been performed), Transition screen type (Screens created to help progress the workflow when an action has been performed on a referral. Currently to choose from Confirmation screen, Add Notes screen, triage screen and change service screen), Is status update displayed (to indicate if the status update checkbox need to be displayed on the transition screens), Is status update selected (to indicate if the

status update checkbox need to be selected on the transition screens), Is status update read only (to indicate if the status update checkbox need to be read only/grayed on the transition screens) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

1	Use the Workflow Search Filter to locate a specific workflow
2	Add a new workflow to RMSLite
3	Check to see what is transition label of the workflow (This value is set as the label of the action buttons)
4	View Start Status type of the workflow.
5	View End Status type of the workflow.
6	View Transition screen type of the workflow. (currently there are four of them namely Confirmation screen, Add Notes screen, triage screen and change service screen),
7	Check to see if status update checkbox is displayed (true means displayed, false means not displayed)
8	Check to see if status update checkbox is selected (true means selected, false means not selected)
9	Check to see if status update checkbox is read only (true means read only, false means not read only)
10	View the workflow details
11	Edit the workflow details

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite interface with the following elements highlighted:

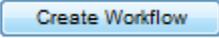
- 1**: Search button in the Workflow Search Filter.
- 2**: Create Workflow button at the bottom left.
- 3**: Transition label column header in the Workflow Search Results table.
- 4**: Start status column header in the Workflow Search Results table.
- 5**: End status column header in the Workflow Search Results table.
- 6**: Transition screen type column header in the Workflow Search Results table.
- 7**: Is status update displayed column header in the Workflow Search Results table.
- 8**: Is status update selected column header in the Workflow Search Results table.
- 9**: Is status update read only column header in the Workflow Search Results table.
- 10**: Sort order column header in the Workflow Search Results table.
- 11**: Edit link in the Action column of the Workflow Search Results table.

Name	Transition label	Start status	End status	Transition screen type	Is status update displayed	Is status update selected	Is status update read only	Sort order	Action
Received To Ready for Triage	Demographics Updated	Received	Ready for Triage	Confirmation Screen	false	false	false	10	View Edit
Received To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	View Edit
Received To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	View Edit
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	View Edit
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	View Edit
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	View Edit
Add Note Only Ready for Triage	Add Note Only	Ready for Triage	Ready for Triage	Add Notes	true	false	false	70	View Edit
On Hold To Ready for Triage	Remove from Hold	On Hold	Ready for Triage	Add Notes	true	false	false	80	View Edit
Triage Complete To Printed by Service	Printed by Service	Triage Completed	Printed by Service	Confirmation Screen	false	false	false		View Edit
Printed by Service To Booking Required	Booking Required	Printed by Service	Booking Required	Confirmation Screen	false	false	false		View Edit
Printed by Service To Filed	Filed	Printed by Service	Filed	Confirmation Screen	false	false	false		View Edit
Add Note Only Printed by Service	Add Note Only	Printed by Service	Printed by Service	Add Notes	true	true	false		View Edit
Booking Required To Patient Booked	Patient Booked	Booking Required	Patient Booked	Confirmation Screen	false	false	false		View Edit
Booking Required To Cancel	Cancel	Booking Required	Cancelled	Add Notes	true	true	true		View Edit
Patient Booked To Completed	Completed	Patient Booked	Completed	Confirmation Screen	false	false	false		View Edit
Patient Booked To Canceled	Cancel	Patient Booked	Cancelled	Add Notes	true	true	true		View Edit
Ready for Triage To Printed by Service	Printed by Service	Ready for Triage	Printed by Service	Confirmation Screen	false	false	false	170	View Edit

9.3 CREATING A NEW WORKFLOW

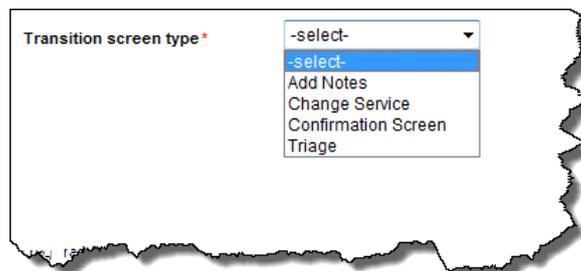
You can add a new workflow in RMSLite by completing the following steps:

Steps

1	Click on the  button at the bottom of the workflow Maintenance page
2	Complete the details under ' Add Workflow ' screen. Each Workflow entry created has: <ol style="list-style-type: none">1) A Name (for database identification/ for internal development use),2) A Transition label (for the display label shown on action buttons),3) A Start status (to indicate the start status of workflow for a referral),4) An End status (to indicate the end status of referral after the action has been performed),5) A Transition screen type (Screens created to help progress the workflow when an action has been performed on a referral. Currently to choose from Confirmation screen, Add Notes screen, triage screen and change service screen),6) Is status update displayed (to indicate if the status update checkbox needs to be displayed on the transition screens),7) Is status update selected (to indicate if the status update checkbox need to be selected on the transition screens),8) Is status update read only (to indicate if the status update checkbox need to be read only/grayed on the transition screens)9) A sort order (to show what sequence the description shows in any drop down lists) assigned to it.
3	Once you've completed setting up the transition screen click on the Save button. If you wish to abort Transition Screen creation click on the Cancel button



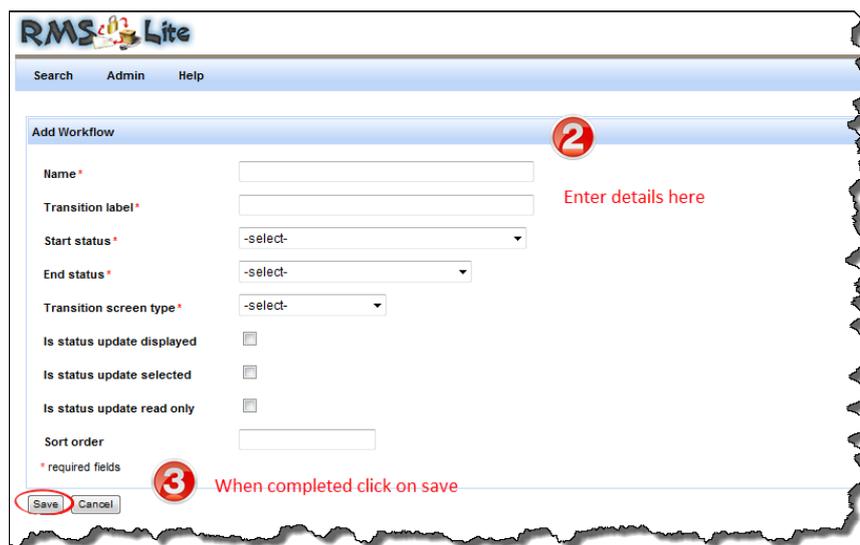
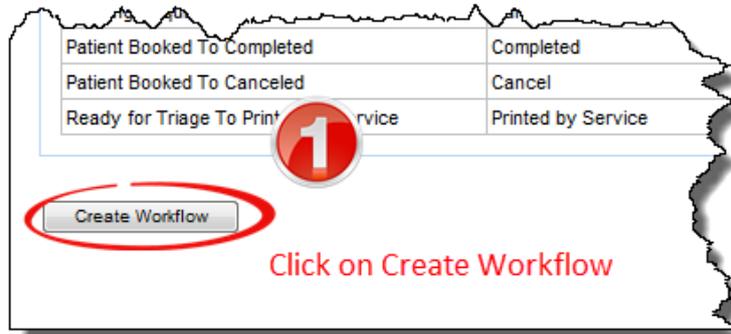
Note: Currently there are just four Transition screens developed to support the progress of workflow. They are Confirmation screen, Add Notes screen, triage screen and Change Service screen.





Note: If you select Confirmation screen as the Transition screen type you cannot have the send status update feature, as confirmation screen is intended to just change the status without any updates being sent back to Referrer.

Screen Reference



9.4 UPDATING AN EXISTING WORKFLOW

Use this feature if you wish to change workflow information. Fields for editing the workflow can be accessed by clicking on the **Edit** link against each workflow details under the **'Workflow Search Results'**.

To change the workflow, follow the steps below:

Steps



1 **Locate** the workflow within the 'Workflow maintenance console search results list and click on **Edit**

2	If required change information in the details section.
3	Once you've completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button
4	If you wish to delete the workflow click on the Delete button



Name	Transition label	Start status	End status	Transition screen type	Is status update displayed	Is status update selected	Is status update read only	Sort order	Action
Received To Ready for Triage	Demographics Updated	Received	Ready for Triage	Confirmation Screen	false	false	false	10	View Edit
Received To Declined	Decline	Received	Declined	Add Notes	true	true	true	20	View Edit
Received To Acute Referral Printed	Acute Referral Printed	Received	Acute Referral Printed	Confirmation Screen	false	false	false	30	View Edit
Ready for Triage To Triage Complete	Triage	Ready for Triage	Triage Completed	Triage	true	true	true	40	View Edit
Change Service Ready for Triage	Change Service	Ready for Triage	Ready for Triage	Change Service	true	true	true	50	View Edit
Ready for Triage To On Hold	Place on Hold	Ready for Triage	On Hold	Add Notes	true	true	false	60	View Edit
Light Hold Only Ready for Triage	Light Hold Only	Ready for Triage	Ready for Triage	Add Notes	true	true	false	70	View Edit

RMS Lite

Search Admin Help

Edit Workflow

Name* **2**

Transition label* **Edit details here**

Start status*

End status*

Transition screen type*

Is status update displayed

Is status update selected

Is status update read only

Sort order

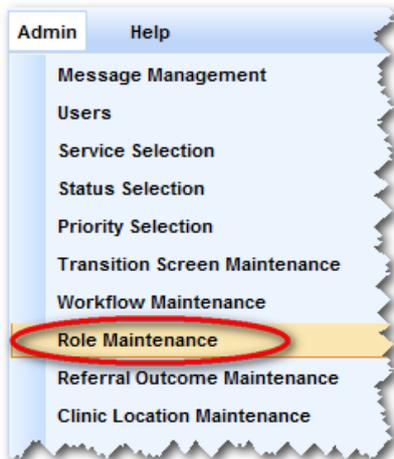
3 or 4

When completed click on Save or click on Delete to delete the workflow

10 ROLE MAINTENANCE



NOTE: This maintenance screen is newly added and is available from RMSLite 1.5 version

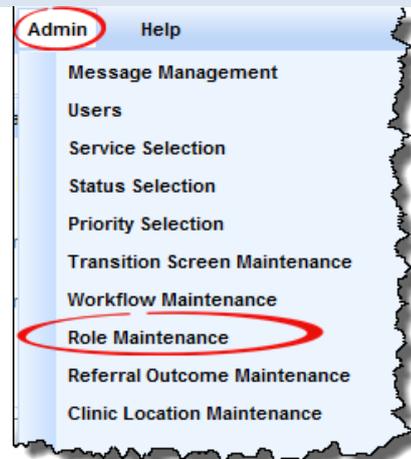


Use the 'Role Maintenance' option under the Admin menu to view, edit what workflow steps (specified in the previous section) are available to the roles assigned to RMS Lite users.

10.1 ACCESSING THE ROLE MAINTENANCE CONSOLE

The Role maintenance feature can be accessed by clicking **Role Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent role maintenance activities can be completed directly from the Role Maintenance console.



10.2 THE ROLE MAINTENANCE CONSOLE

The Role maintenance Console allows you to view or edit the different workflows associated with a Role.

A Role can have one, many or no workflows associated with it. Each Role created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the status selection console are:

1	Use the Role Search Filter to locate a specific role
2	Check to see if a role is active or not. (true means active, false means inactive)
3	View Role details.
4	Edit workflow(s) associated with the Role (if any).

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite web application interface. At the top, there are navigation links for Search, Admin, and Help, and a user status indicator 'signed in as: hlknet Logout'. Below this is the 'Role Search Filter' section with input fields for 'Short code' and 'Full name', and buttons for 'Search' and 'Reset'. A red circle with the number '1' highlights the 'Search' button. Below the filter is the 'Role Search Results' section, which contains a table of roles. A red circle with the number '2' highlights the 'Role Search Results' header. The table has columns for 'Short code', 'Full name', 'Is active', 'Sort order', and 'Action'. A red circle with the number '3' highlights the 'Is active' column. The 'Action' column contains 'View' and 'Edit' links for each role. A red circle with the number '4' highlights the 'View' and 'Edit' links for the 'Clinical' role. At the bottom of the page, there is a 'Create Role' button and a footer with the text 'RMS Lite 1.5.0.6936 | Copyright 2008-2012 HealthLink Limited'.

10.3 UPDATING AN EXISTING ROLE TO ADD/CHANGE WORKFLOW

Use this feature if you wish to add/change workflow associated with a Role.

To **Edit a Role**, click on the **Edit** link against each role details under the 'Role Search Results'.

In version 1.5 of RMS Lite, the only roles that can utilise the workflow functionality are:

- 1. Clinical Assessor**
- 2. Booking Clerk**
- 3. Central Referrals Office**

To change the workflow associated with the role follow the steps below:

Steps

1	<p>Locate the role within the 'Role maintenance console' search results list and click on Edit</p>
2	<p>If required add/change workflow information in the Edit Role screen.</p> <p>To specify the workflow</p> <ul style="list-style-type: none"> • Select the appropriate workflow(s) within the available workflows list. To select a single workflow click on the workflow(s) you wish to associate with the Role • Use the list action items highlighted to transfer these workflow(s) to the Role workflow list <p>Note: list action items can be used to add all workflows, single workflow, remove all allocated workflow or a workflow associated with a Role</p>
3	<p>Once you've completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button</p>

The screenshot shows a table titled 'Role Search Results' with the following columns: Short code, Full name, Is active, Sort order, and Action. The 'Action' column contains 'View' and 'Edit' links for each role. A red circle with the number '1' is placed over the 'Edit' link for the 'User' role. A callout bubble with the word 'Edit' inside points to this link.

Short code	Full name	Is active	Sort order	Action
User	Standard User	true	10	View Edit
Admin	Administrator	true	20	View Edit
ReadOnly	Read Only Access	true	30	View Edit
Config	Configuration Access	true	40	View Edit
Clinical	Clinical Assessor	true	50	View Edit
CRO	Central Referrals Office	true	60	View Edit
BClerk	Booking Clerk	true	70	View Edit

Edit Role

Short code CRO

Full name Central Referrals Office

Is active true

Sort order 60

Workflow

Ready for Triage To Triage Complete	Select All	Received To Declined
Change Service Ready for Triage	Select	Received To Acute Referral Printed
Ready for Triage To On Hold	Remove	Received To Ready for Triage
Add Note Only Ready for Triage	Remove All	
On Hold To Ready for Triage		

Workflow
Received To Declined
Received To Acute Referral Printed
Received To Ready for Triage

* required fields

2 Select Role workflow(s)



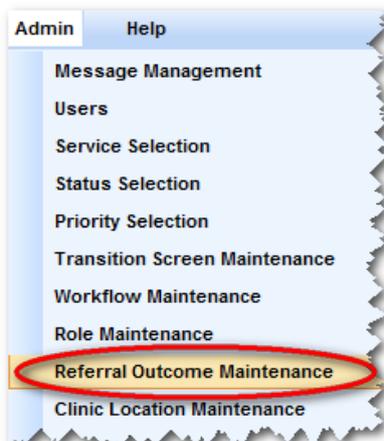
Save Delete Cancel

3 When completed click on Save

11 REFERRAL OUTCOME MAINTENANCE



NOTE: This maintenance screen is newly added and is available from RMSLite 1.5 version

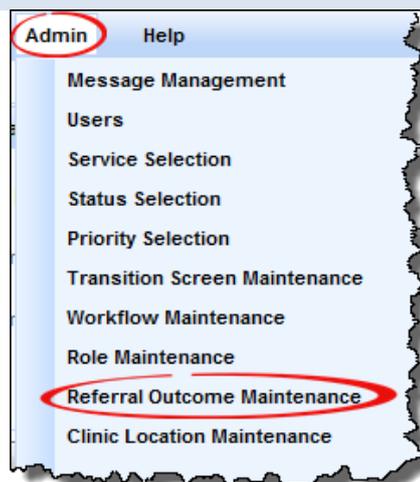


Use the 'Referral Outcome Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

11.1 ACCESSING THE REFERRAL OUTCOME MAINTENANCE CONSOLE

The Referral outcome maintenance feature can be accessed by clicking **Referral Outcome Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent referral outcome activities can be completed directly from the Referral Outcome Maintenance console.



11.2 THE REFERRAL OUTCOME CONSOLE

The Referral Outcome Console allows you to create, view or edit referral outcomes which is been used by the Triage screen to help triage a referral.

All referral outcome entered can be viewed in a drop down list in the Triage screen.

Each Referral Outcome entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

1	Use the Referral Outcome Search Filter to locate a specific 'referral outcome'
2	Add a new Referral Outcome to RMSLite
3	Check to see if a Referral Outcome is active or not. (true means active, false means inactive)
4	View Referral Outcome details.
5	Edit Referral Outcome details.

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite interface with the following elements highlighted:

- 1**: Search button in the Referral Outcome Search Filter section.
- 2**: Create Referral Outcome button at the bottom of the page.
- 3**: Referral Outcome Search Results table.
- 4**: View and Edit links in the Action column of the results table.
- 5**: Edit link in the Action column of the results table.

Short code	Full name	Is active	Sort order	Action
FSA	FSA/Clinic Appointment	true	10	View Edit
SBL	SBL/placed on surgical waiting list	true	20	View Edit
VFSA	Virtual FSA / full management plan	true	30	View Edit
Advice	Simple advice	true	40	View
Consult	Show to another clinician	true	50	View Edit
Declined	Declined	true	60	View Edit
Other	Other	true	70	View Edit

11.3 CREATING A NEW REFERRAL OUTCOME

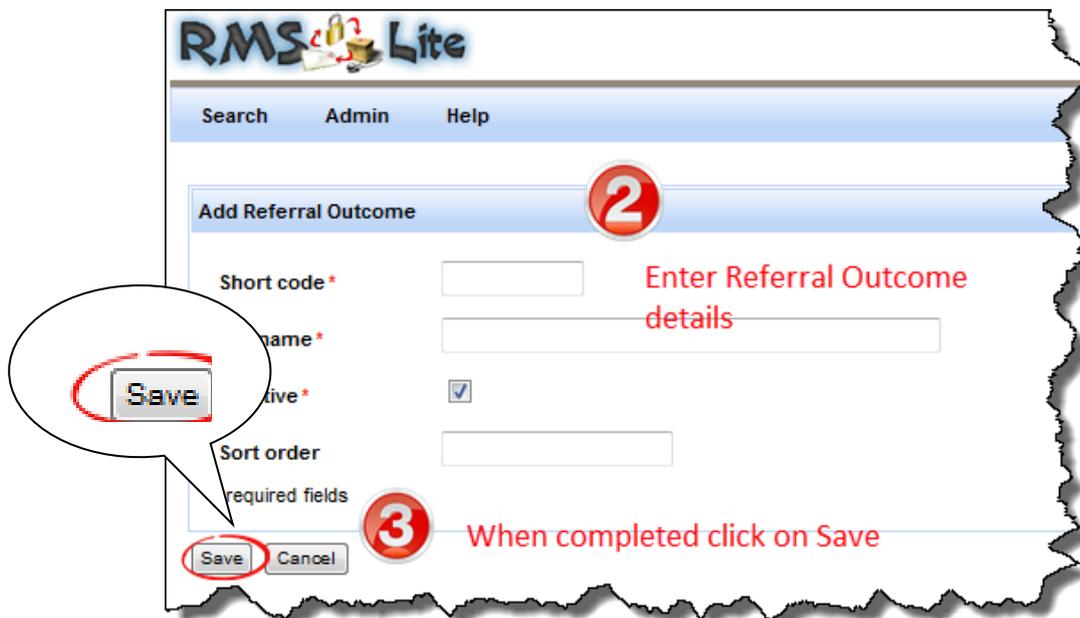
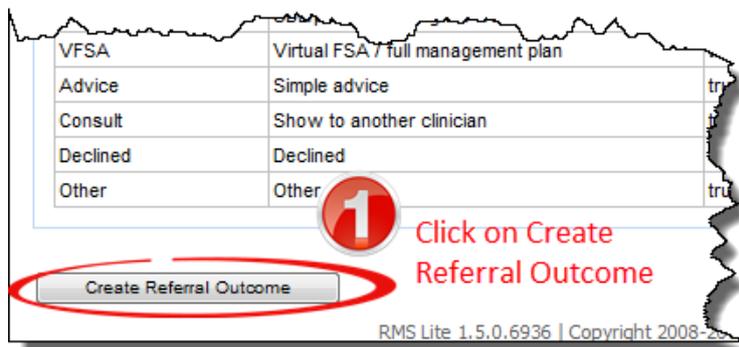
You can add a new Referral Outcome to RMSLite by completing the following steps:

Steps

1	Click on the Create Referral Outcome button at the bottom of the Referral Outcome Maintenance page
2	Complete the details under ' Add Referral Outcome ' screen. Each Referral Outcome entry created has: <ol style="list-style-type: none"> 1) A Short code (for database identification /for internal development use), 2) A Full name (for the display shown on screen),

	<p>3) An Active status (to show if it is currently in use) and</p> <p>4) A Sort order (to show what sequence the description shows in any drop down lists) assigned to it.</p>
3	Once you've completed setting up the service type click on the Save button. If you wish to abort service creation click on the Cancel button

Screen Reference



11.4 UPDATING AN EXISTING REFERRAL OUTCOME

Use this feature if you wish to change Referral Outcome information.

Fields for editing the Referral Outcome can be accessed by clicking on the **Edit** link against each 'referral outcome' details under the '**Referral Outcome Search Results**'.

To change the referral outcome, follow the steps below:

Steps

1	Locate the 'Referral Outcome' within the Referral Outcome Maintenance console search results list and click on Edit
2	If required change information in the details section.
3	Once you've completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button
4	Click on Delete button to delete a referral outcome.

Screen Reference

Referral Outcome Search Results

Short code	Full name	Is active	Sort order	Action
FSA	FSA/Clinic Appointment	true	10	View Edit
SBL	SBL/placed on surgical waiting list	true	20	View Edit
VFSA	Virtual FSA / full management plan	true	30	View Edit
Advice	Simple advice	true	40	View Edit
Consult	Show to another clinician	true	50	View Edit
Declined	Declined	true	60	View Edit
Other	Other	true	70	View Edit

RMS Lite

Search Admin Help

Edit Referral Outcome **2** Edit details here

Short code *

Full name *

Is active *

Sort order *

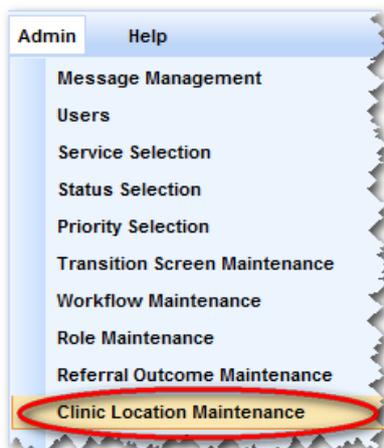
3 **4**

When completed click on Save or to delete click on Delete

12 CLINIC LOCATION MAINTENANCE



NOTE: This maintenance screen is newly added and is available from RMSLite 1.5 version

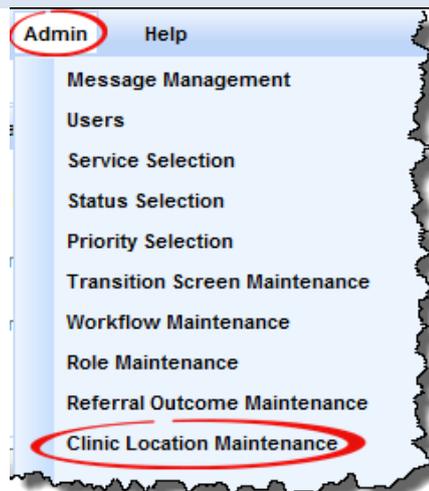


Use the 'Clinic Location Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

12.1 ACCESSING THE CLINIC LOCATION MAINTENANCE CONSOLE

The Clinic Location maintenance feature can be accessed by clicking Clinic Location **Maintenance** from **Admin** menu on the RMS menu toolbar.

All subsequent clinic location maintenance activities can be completed directly from the clinic location maintenance console.



12.2 THE CLINIC LOCATION CONSOLE

The Clinic Location Console allows you to create, view or edit clinic location's which is been used by the Triage screen to help triage a referral.

All clinic location entered can be viewed in a drop down list in the Triage screen.

Each Clinic location entry created has a Short code (for database identification), Full name (for the display shown on screen), active status (to show if it is currently in use) and a sort order (to show what sequence the description shows in any drop down lists) assigned to it.

The activities that can be initiated from the service selection console are:

1	Use the Clinic Location Search Filter to locate a specific 'referral outcome'
2	Add a new Clinic Location to RMSLite
3	Check to see if a Clinic Location is active or not. (true means active, false means inactive)
4	View Clinic Location details.
5	Edit Clinic Location details.

Below is a reference of where to look for these activities:

The screenshot shows the RMS Lite web application interface. At the top, there are navigation links for Search, Admin, and Help, and a user status bar indicating 'signed in as: hlknet' with a Logout link. The main content area is divided into two sections: 'Clinic Location Search Filter' and 'Clinic Location Search Results'. The 'Clinic Location Search Filter' section contains two input fields for 'Short code' and 'Full name', and a 'Search' button (circled in red with a '1' next to it) and a 'Reset' button. The 'Clinic Location Search Results' section displays a table with columns for 'Short code', 'Full name', 'Is active', 'Sort order', and 'Action'. The 'Is active' column has a dropdown arrow (circled in red with a '3' next to it). The 'Action' column contains 'View' and 'Edit' links for each row. The 'View' link for the first row is circled in red with a '4' next to it, and the 'Edit' link for the last row is circled in red with a '5' next to it. Below the table is a 'Create Clinic Location' button (circled in red with a '2' next to it). At the bottom, there is a footer with the text 'RMS Lite 1.5.0.6936 | Copyright 2008-2012 HealthLink Limited'.

12.3 CREATING A NEW CLINIC LOCATION

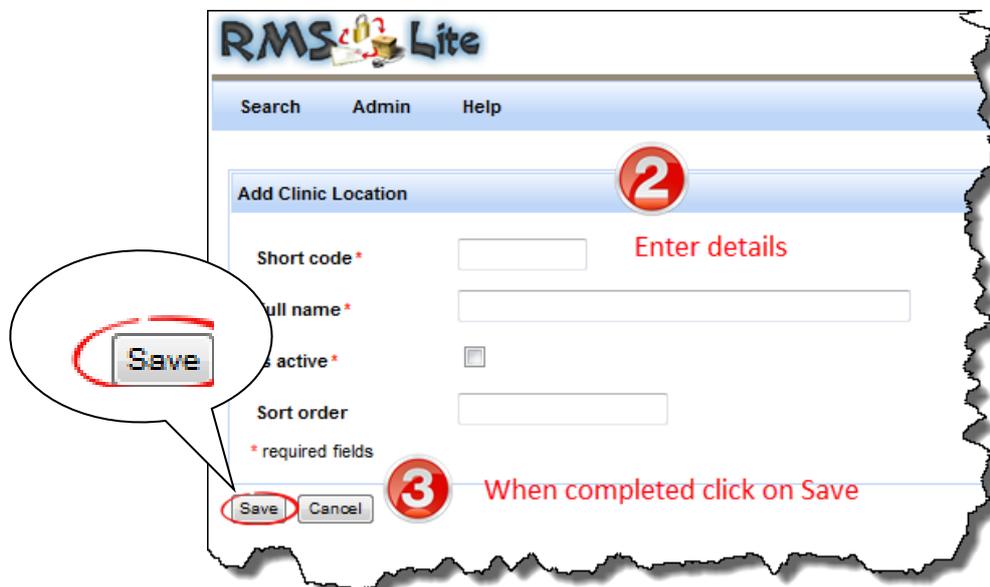
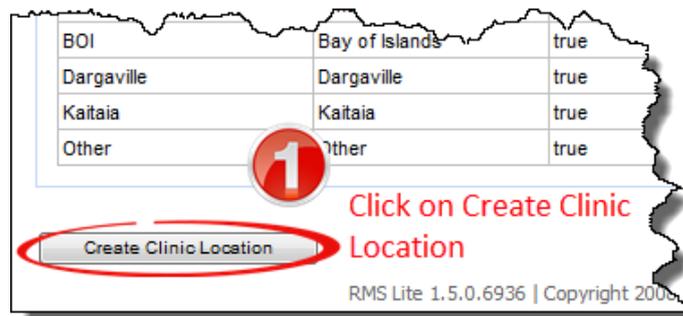
You can add a new Clinic Location to RMSLite by completing the following steps:

Steps

1	Click on the  button at the bottom of the Clinic Location Maintenance page
2	Complete the details under ' Add Clinic Location ' screen. Each Clinic Location entry created has:

	<ol style="list-style-type: none"> 1) A Short code (for database identification /for internal development use), 2) A Full name (for the display shown on screen), 3) An Active status (to show if it is currently in use) and 4) A Sort order (to show what sequence the description shows in any drop down lists) <p>assigned to it.</p>
3	Once you've completed setting up the service type click on the Save button. If you wish to abort service creation click on the Cancel button

Screen Reference



12.4 UPDATING AN EXISTING CLINIC LOCATION

Use this feature if you wish to change Clinic Location information.

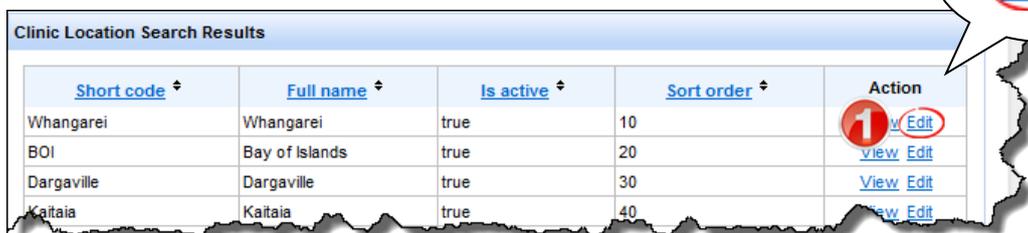
Fields for editing the Clinic Location can be accessed by clicking on the **Edit** link against each 'clinic location' details under the '**Clinic Location Search Results**'.

To change the clinic location, follow the steps below:

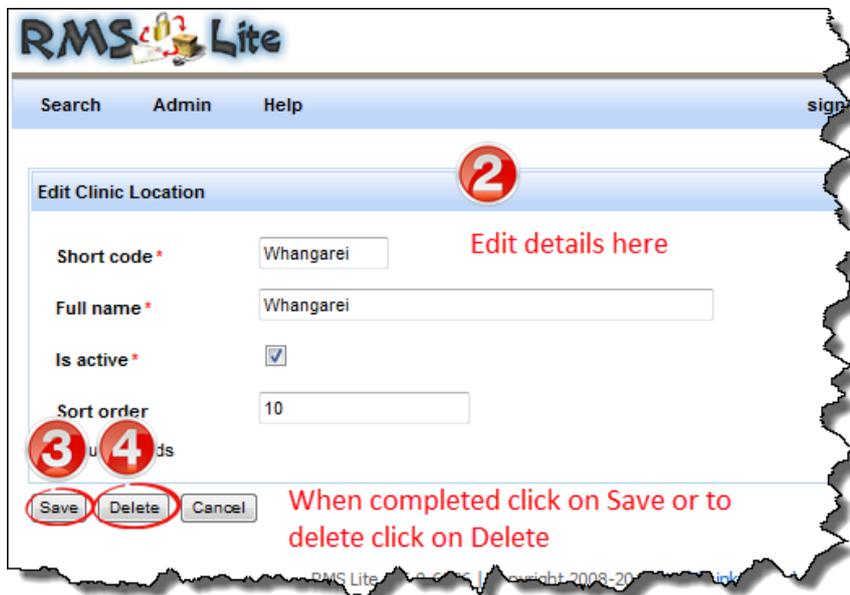
Steps

1	Locate the 'Clinic Location' within the Clinic Location Maintenance console search results list and click on Edit
2	If required change information in the details section.
3	Once you've completed use the Save button to save the changes and return to the previous screen. If you wish to abort service creation click on the Cancel button
4	Click on Delete button to delete a clinic location.

Screen Reference



Short code	Full name	Is active	Sort order	Action
Whangarei	Whangarei	true	10	1 View Edit
BOI	Bay of Islands	true	20	View Edit
Dargaville	Dargaville	true	30	View Edit
Kaitaia	Kaitaia	true	40	View Edit



RMS Lite

Search Admin Help sign

Edit Clinic Location **2**

Short code* Whangarei **Edit details here**

Full name* Whangarei

Is active*

Sort order 10

3 **4** Save Delete Cancel

When completed click on Save or to delete click on Delete

13 GETTING HELP

13.1 USER GUIDE

You can access the RMS Lite User Guide by clicking on Help from the Menu bar in the Main screen.

13.2 HEALTHLINK SUPPORT

You can contact HealthLink for RMS Lite assistance and support through the following:

13.2.1 PHONE

New Zealand Toll Free Phone on 0800 288 887

8am to 6pm, Monday to Friday, New Zealand Standard Time

13.2.2 FAX

New Zealand Toll Free Fax on 0800 288 885

13.2.3 EMAIL

helpdesk@healthlink.net

13.2.4 WEBSITE

www.healthlink.net