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RMS LITE VERSION 1.5.0

ADMINISTRATOR GUIDE

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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 reflects 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

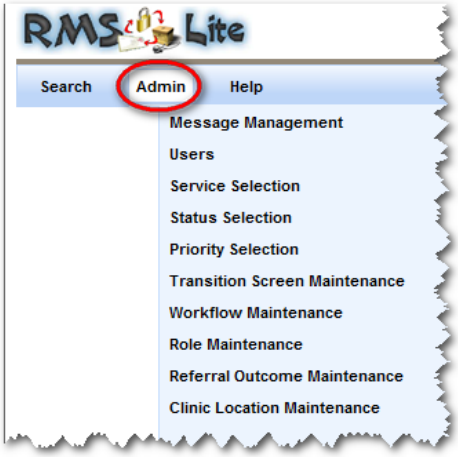
NEW

- 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:

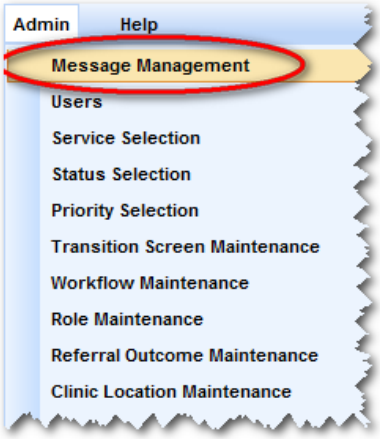
Message Maintenance	To support RMS Lite administrators with monitoring messages and to assist with any required remedial action for message delivery problems.
Users	Create and maintain users and their roles in RMS Lite.
Service Selection	Create and maintain the services or departments a referral can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

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

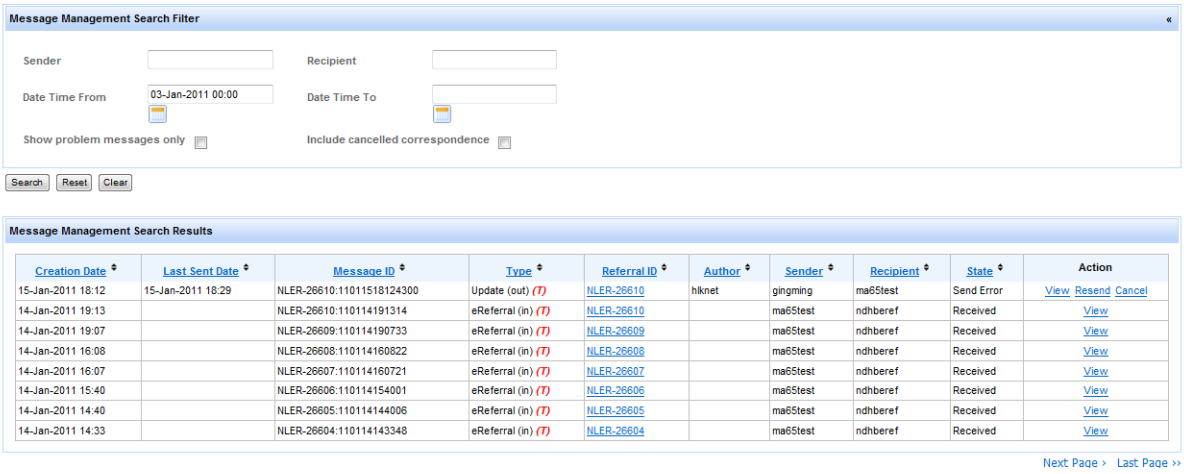
Messages are sent via the HealthLink store and forward infrastructure. With a store and forward mechanism messages are not sent and acknowledged in real-time, but rather go through a number of message queues where they are retained until the recipient connects to the relevant queue and retrieves the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



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	hlknet	gingming	ma65test	Send Error	View Resend Cancel
14-Jan-2011 19:13		NLER-26610:110114191314	eReferral (in) (T)	NLER-26610		ma65test	ndhberef	Received	View
14-Jan-2011 19:07		NLER-26609:110114190733	eReferral (in) (T)	NLER-26609		ma65test	ndhberef	Received	View
14-Jan-2011 16:08		NLER-26608:110114160822	eReferral (in) (T)	NLER-26608		ma65test	ndhberef	Received	View
14-Jan-2011 16:07		NLER-26607:110114160721	eReferral (in) (T)	NLER-26607		ma65test	ndhberef	Received	View
14-Jan-2011 15:40		NLER-26606:110114154001	eReferral (in) (T)	NLER-26606		ma65test	ndhberef	Received	View
14-Jan-2011 14:40		NLER-26605:110114144006	eReferral (in) (T)	NLER-26605		ma65test	ndhberef	Received	View
14-Jan-2011 14:33		NLER-26604:110114143348	eReferral (in) (T)	NLER-26604		ma65test	ndhberef	Received	View

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 – The 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.

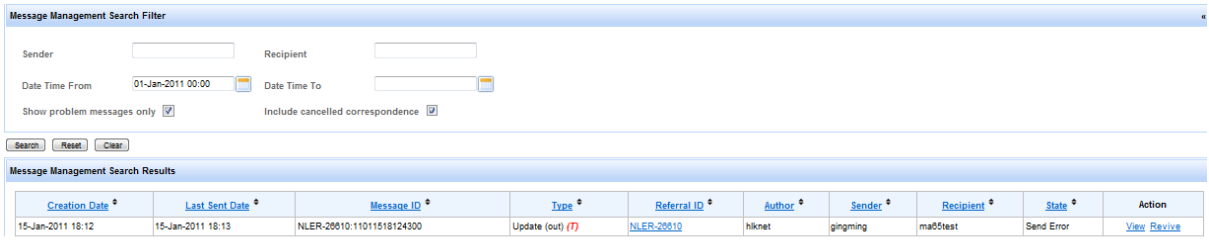
2.2.2 CANCEL MESSAGE

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

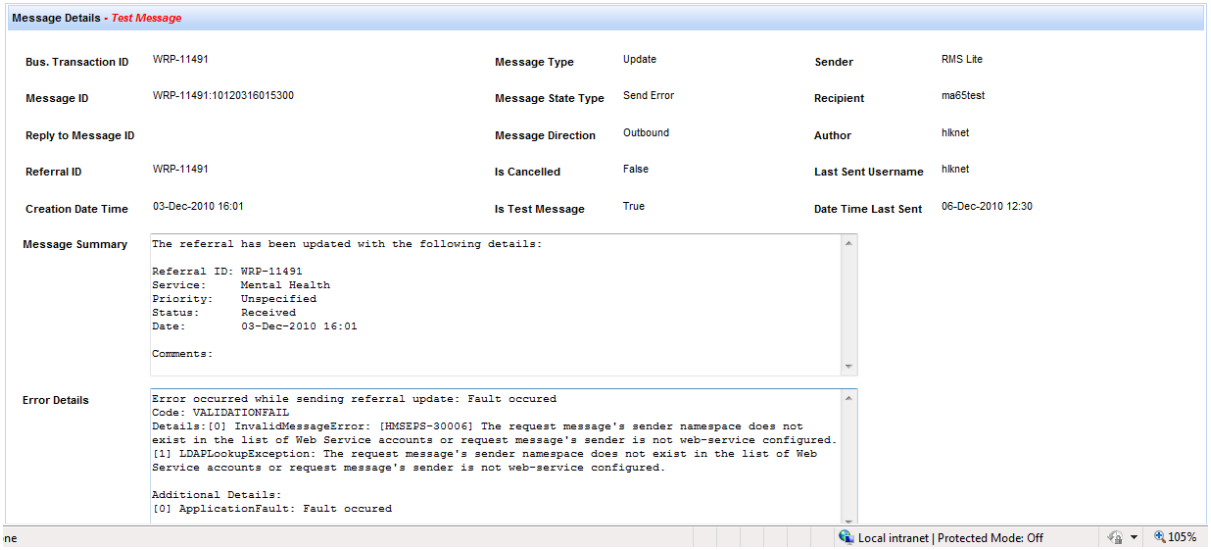
If a message has been marked as cancelled it can be re-instated by using the ‘Revive’ action from within the message management console. Note: To view previously cancelled messages click the ‘Include cancelled correspondence’ within the filter options. Below is an example filter screen with a cancelled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



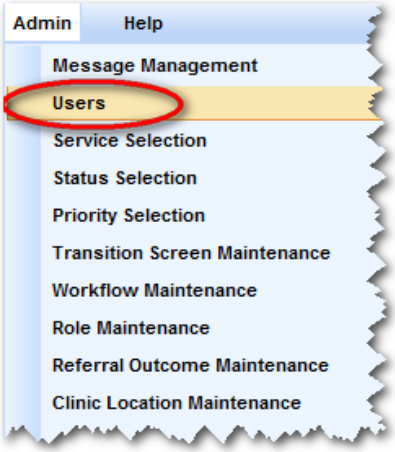
2.2.4 VIEW MESSAGE

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



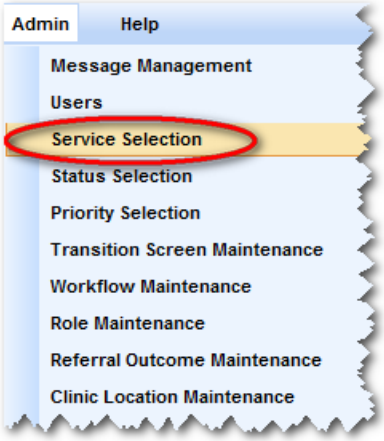
The Users menu option allows new users to be setup in RMS Lite and the maintenance of existing users to be facilitated. Specific functions include:

- 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.
NEW **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.
NEW **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.
NEW **Booking Clerk:**	This role should be used for staff that process and manage the outcomes of the referral's review .
NEW **Support Level 1:**	This role is used by HealthLink support staff only.
NEW **Support Level 2:**	This role is used by HealthLink support staff only.
NEW **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

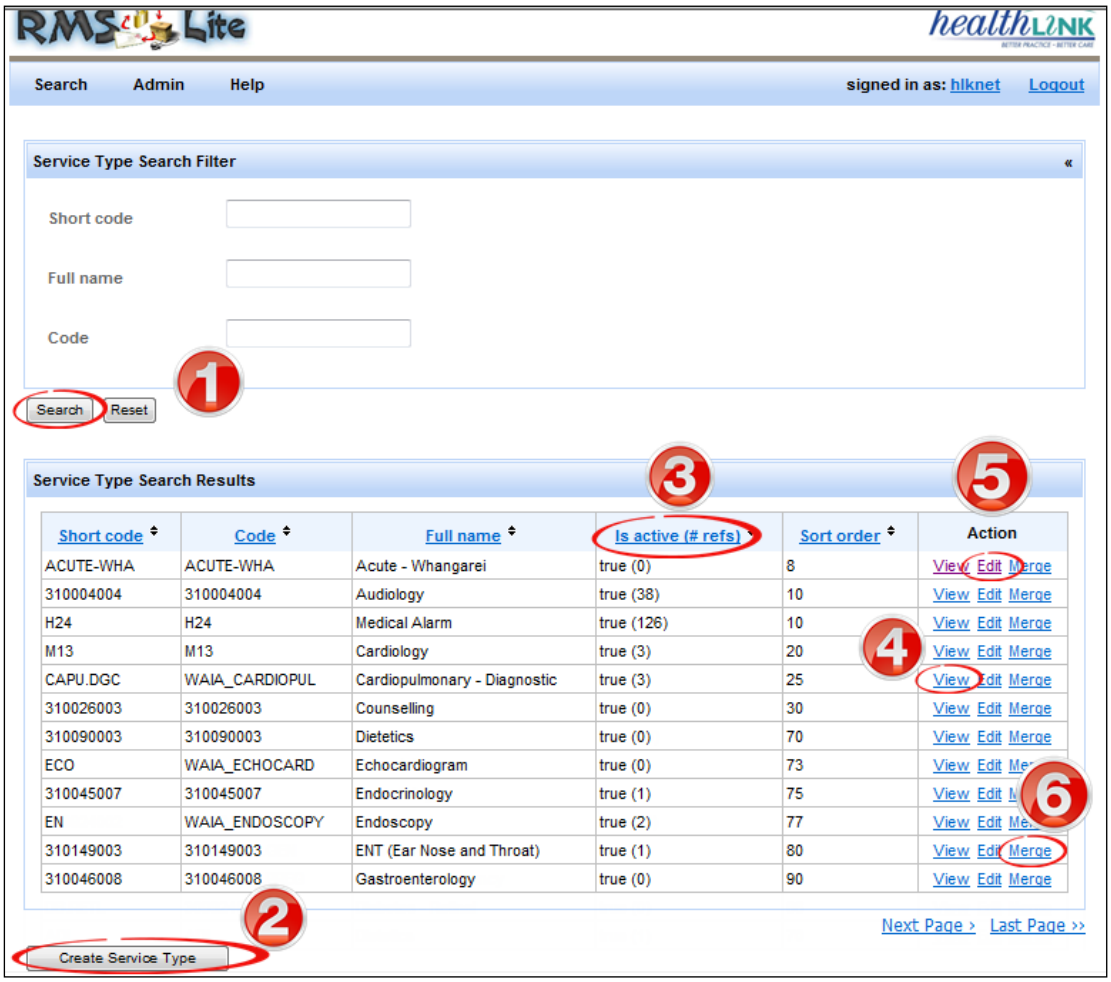
The Service Selection Console allows you to create, view, edit or merge the services that a referral can be sent to. Each Service Type entry created has a code (for database identification), description (for the display shown on screen), active status (to show if it is currently in use) and a sort order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



4.3 CREATING A NEW SERVICE

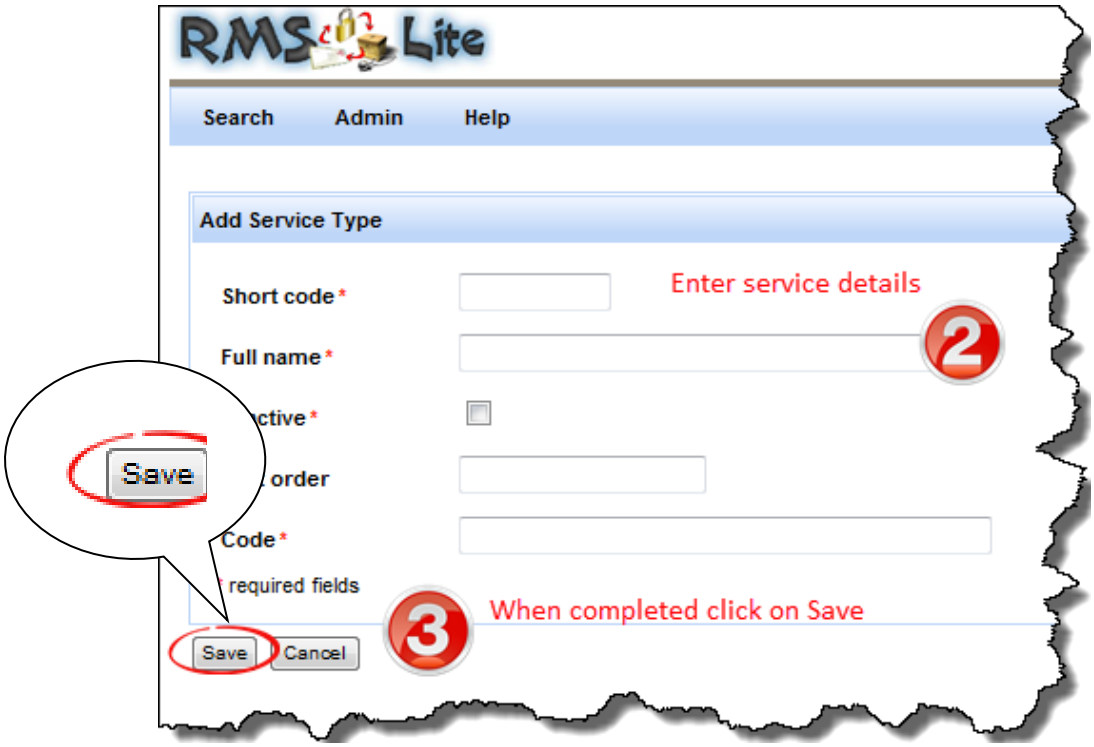
You can add a new service to RMSLite by completing the following steps:

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: 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.
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: <u>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.</u>

4.4 UPDATING AN EXISTING SERVICE

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

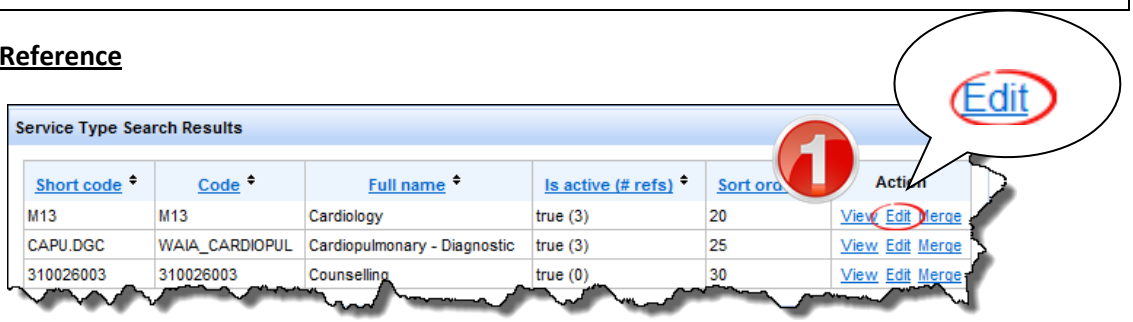
Fields for editing the service type can be accessed by clicking on the **<u>Edit</u>** link against each service details under the **'Service Type Search Results'**.

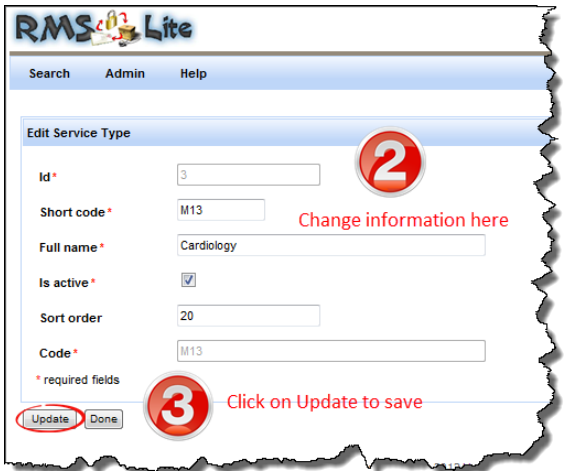
To change the service type, follow the steps below:

<u>Steps</u>

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

<u>Screen Reference</u>





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.

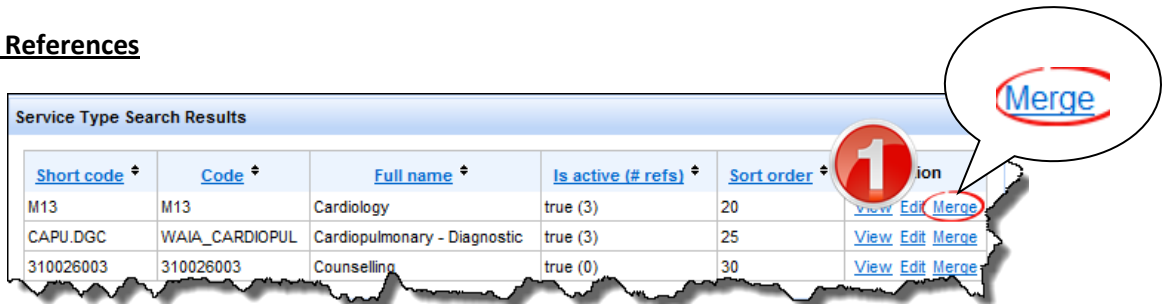
Fields for merging the service type can be accessed by clicking on the **Merge** link against each service details under the **'Service Type Search Results'**.

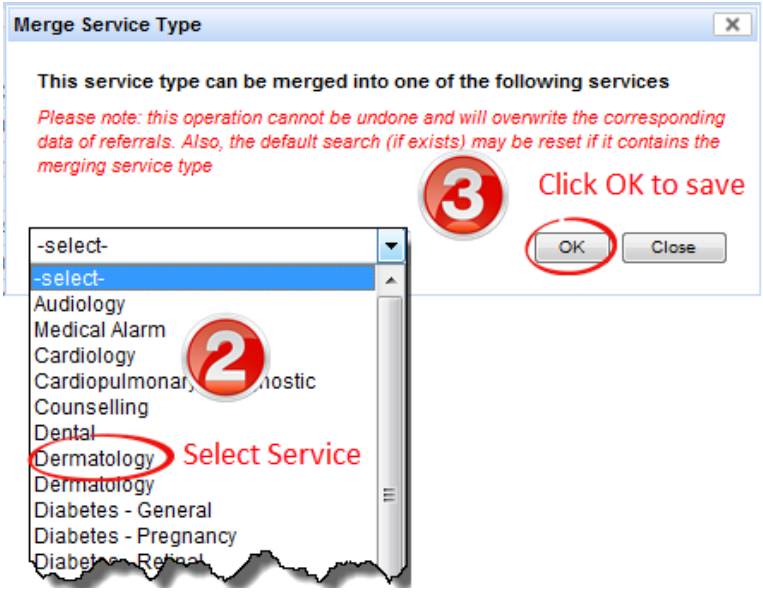
To merge the service type, follow the steps below:

Steps

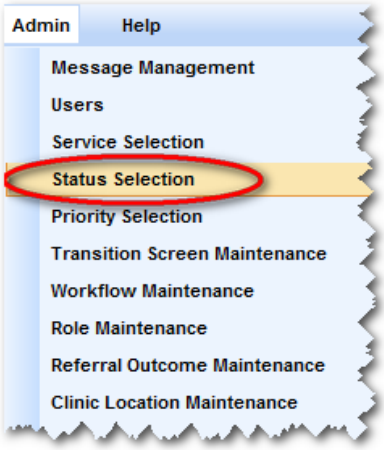
1	**Locate** the service type within the service selection console search results list and click on **Merge**
2	Select the name of the service you want the current service to merge into from the dropdown list.
3	Once you've selected the service name use the **OK** button to save the changes and return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

Screen References




Merge Service Type
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
OK
Close
-select-
-select-
Audiology
Medical Alarm
Cardiology
Counselling
Dental
Dermatology
Select Service
Dermatology
Diabetes - General
Diabetes - Pregnancy
2

5 Status Selection

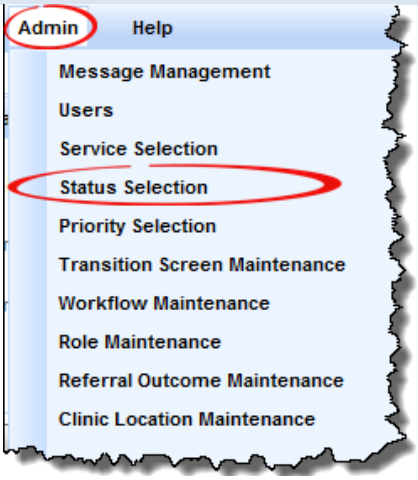


Use the 'Status Selection' option under the Admin menu to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), 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

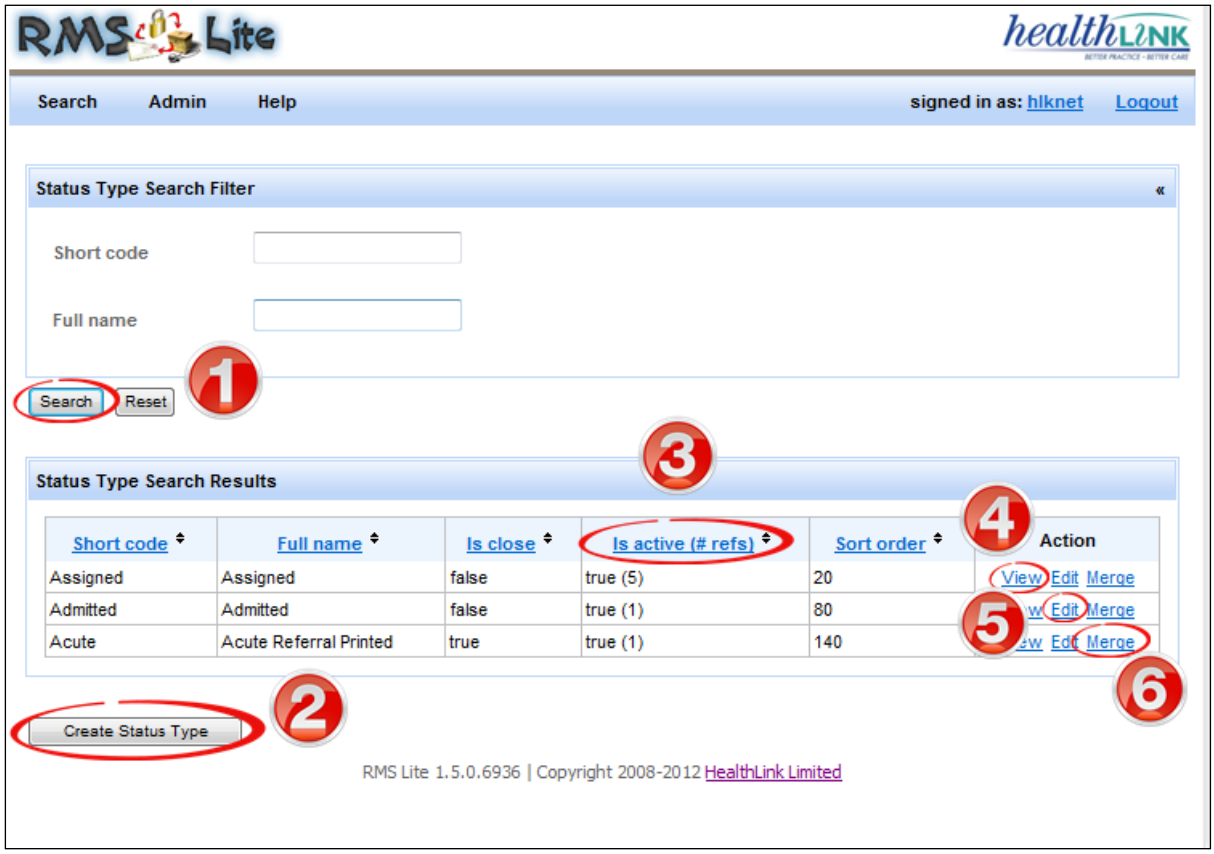
The status Selection Console allows you to create, view, edit or merge the different progress status descriptions a referral can be assigned once received into the facility. Each Status Type entry created has a code (for database identification), description (for the display shown on screen), active 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:



5.3 CREATING A NEW STATUS TYPE

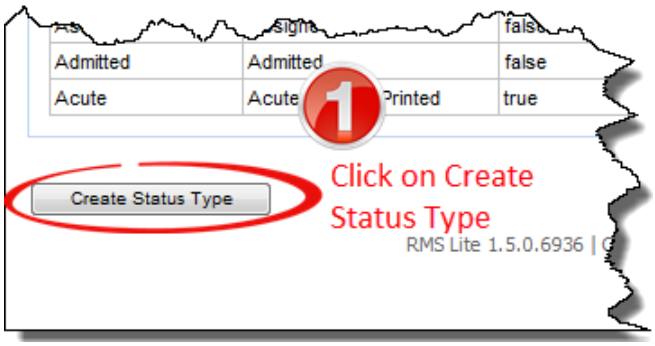
You can add a new status to RMSLite by completing the following steps:

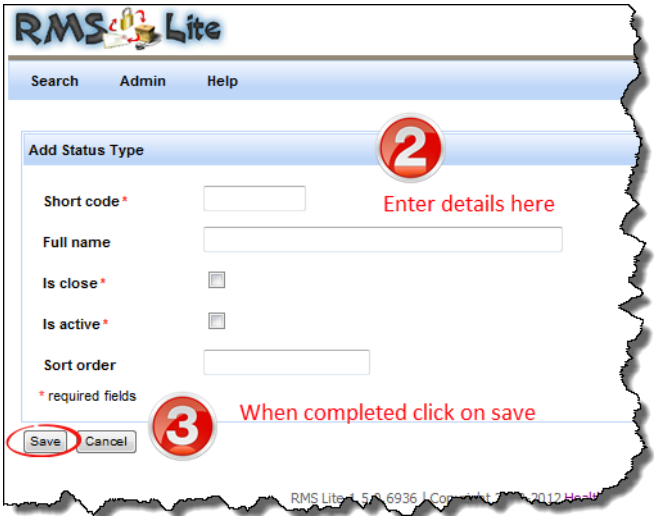
Steps

1	Click on the Create Status Type button at the bottom of the **Status Selection** page
2	Complete the details under '**Add Status Type**' screen. Each Status Type entry created has: 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.

3	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

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.

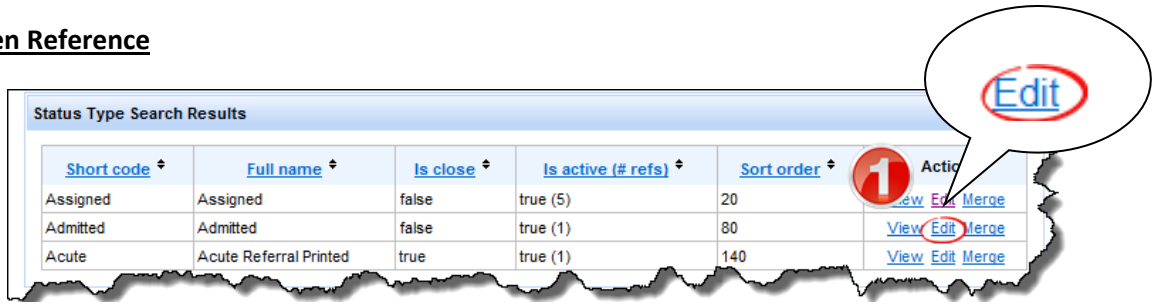
2) When a service is changed from one to another, the status is reset to Received.

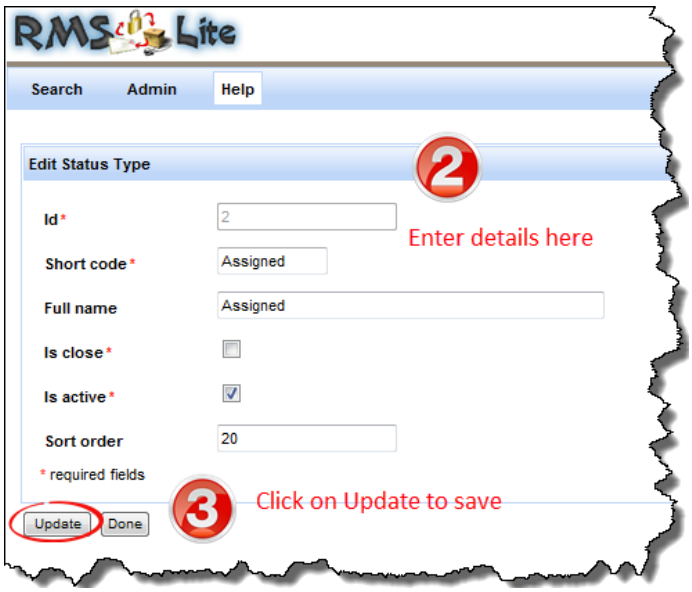
To change the service type, follow the steps below:

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





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

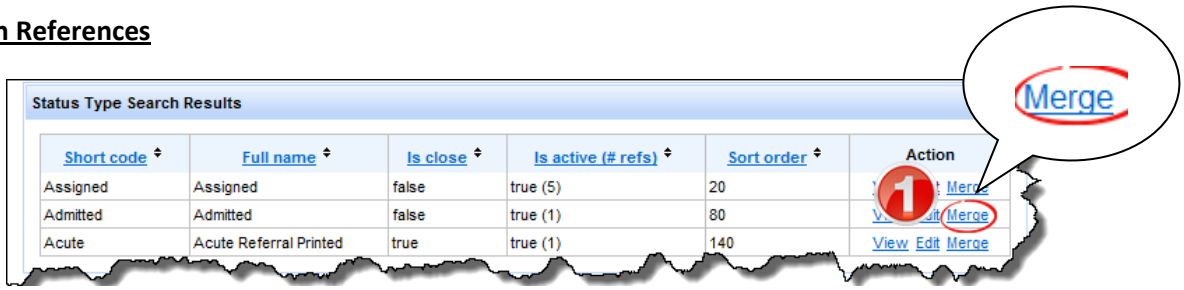
Fields for merging the status type can be accessed by clicking on the **Merge** link against each status details under the **'Status Type Search Results'**.

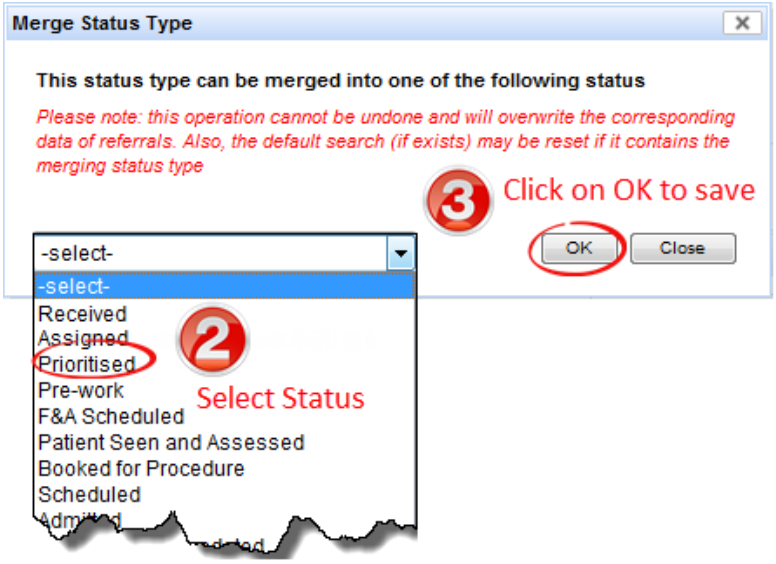
To merge the status type follow the steps below:

Steps

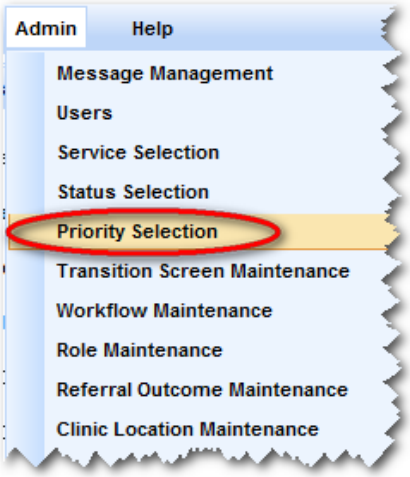
1	**Locate** the status type within the status selection console search results list and click on **Merge**
2	Select the name of the status into which you want the current status to merge from the dropdown list.
3	Once you've selected the status name use the **OK** button to save the changes and return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

Screen References




Merge Status Type
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
Prioritised
Pre-work
F&A Scheduled
Patient Seen and Assessed
Booked for Procedure
Scheduled
2
Select Status

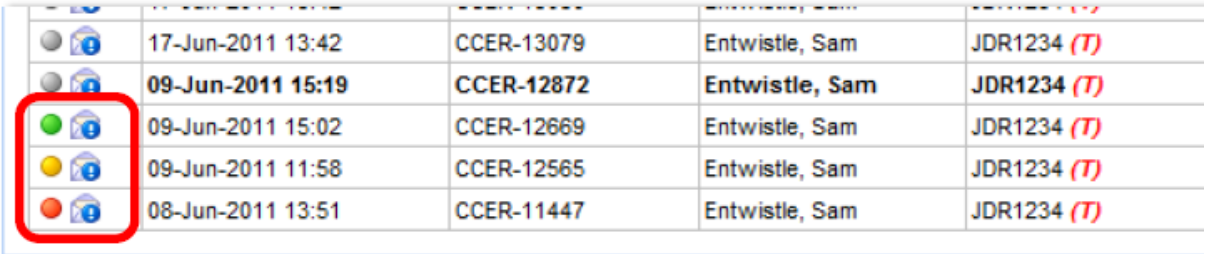
6 PRIORITY SELECTION



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:



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.

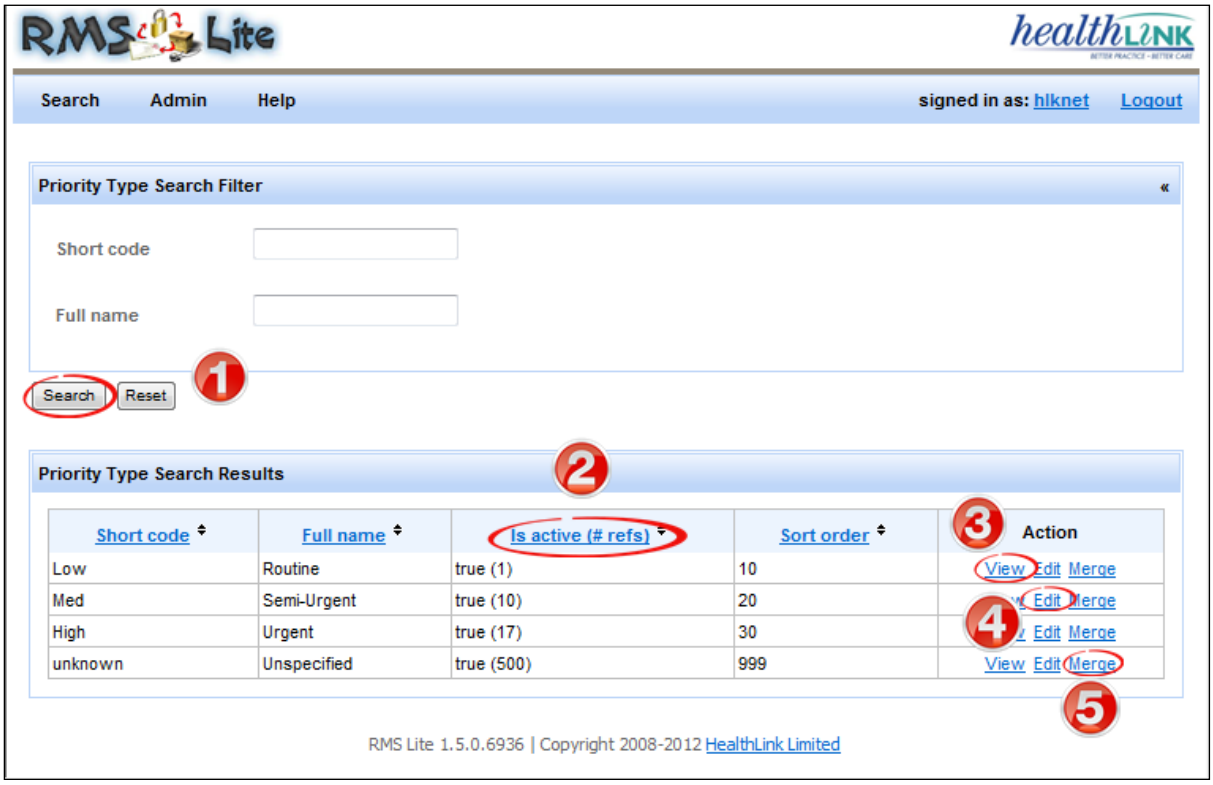
6.2 THE PRIORITY SELECTION CONSOLE

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:



6.3 UPDATING AN EXISTING PRIORITY

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

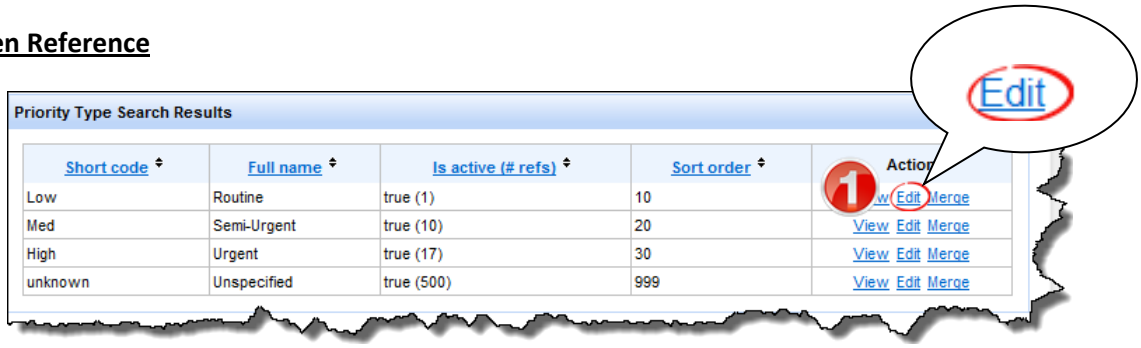
Fields for editing the priority type can be accessed by clicking on the **Edit** link against each priority details under the **'Priority Type Search Results'**.

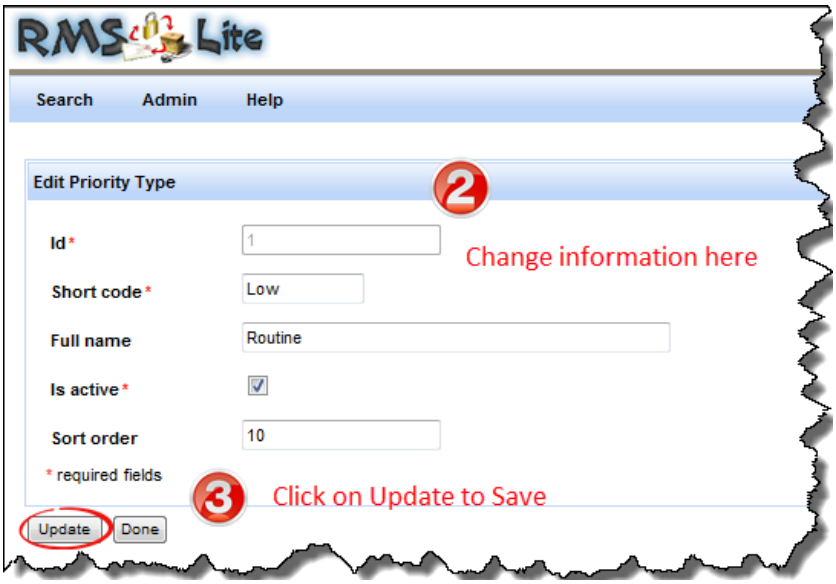
To change the priority type, follow the steps below:

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





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

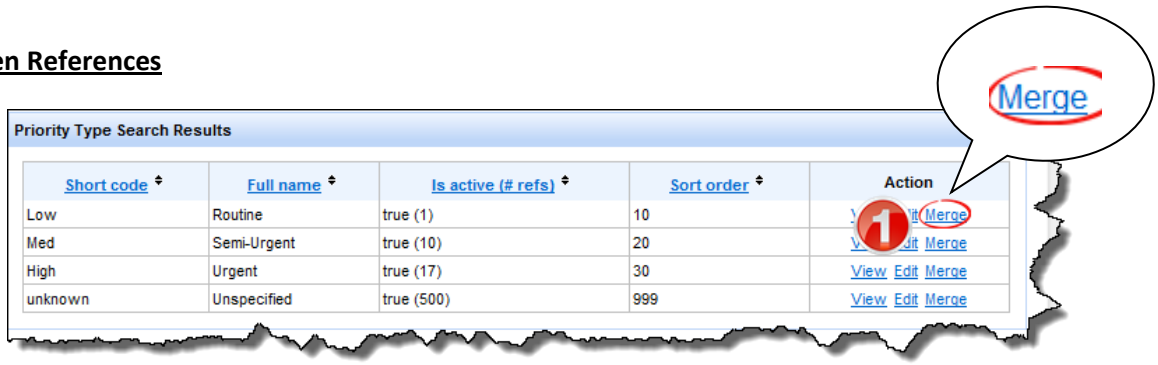
Fields for merging the priority type can be accessed by clicking on the **Merge** link against each priority details under the **'Priority Type Search Results'**.

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



7 New Administrator Menu Options

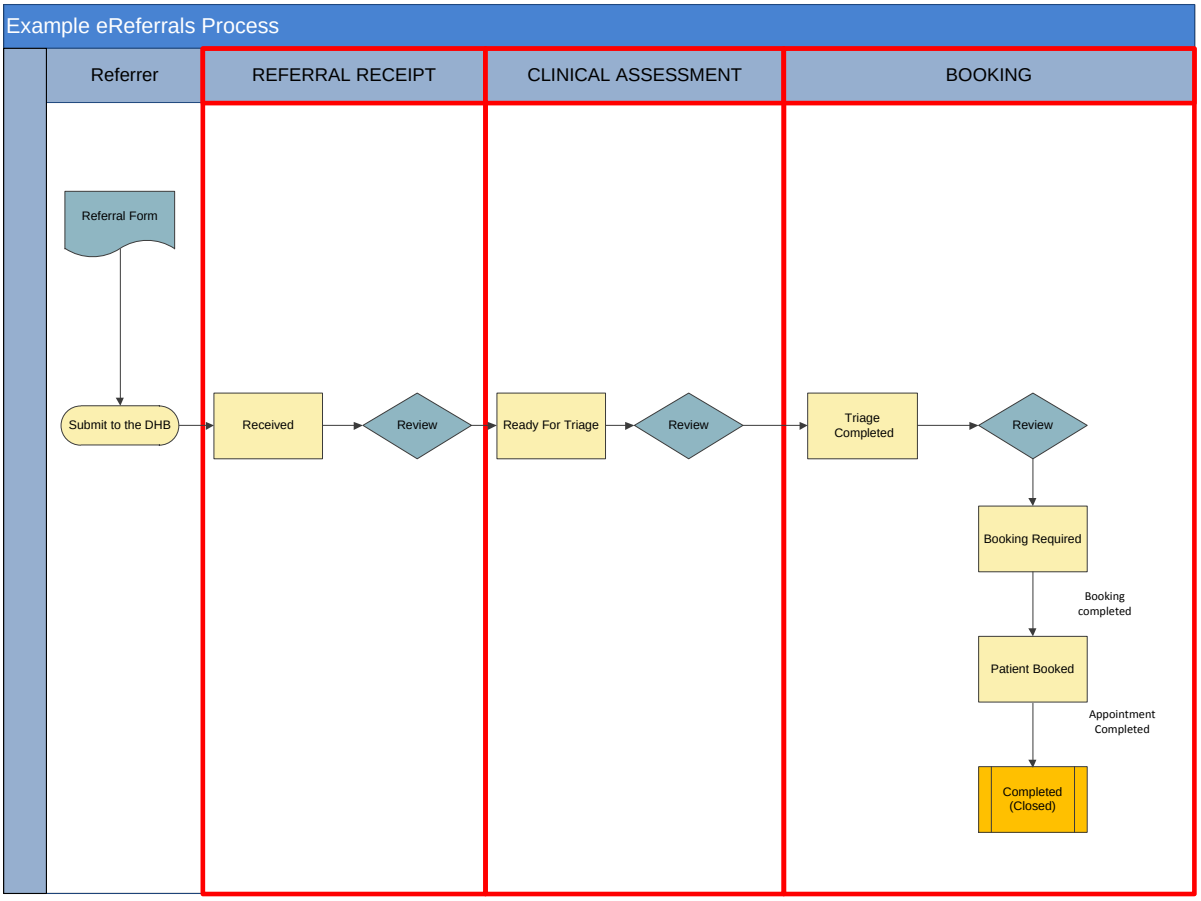
As part of an ePrioritisation upgrade in RMS Lite, sites can now configure their own eReferral management workflows, the user roles that access those workflows and the confirmations screen that appear when a transition step is confirmed. RMS Lite administrators can configure workflows by using the following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

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

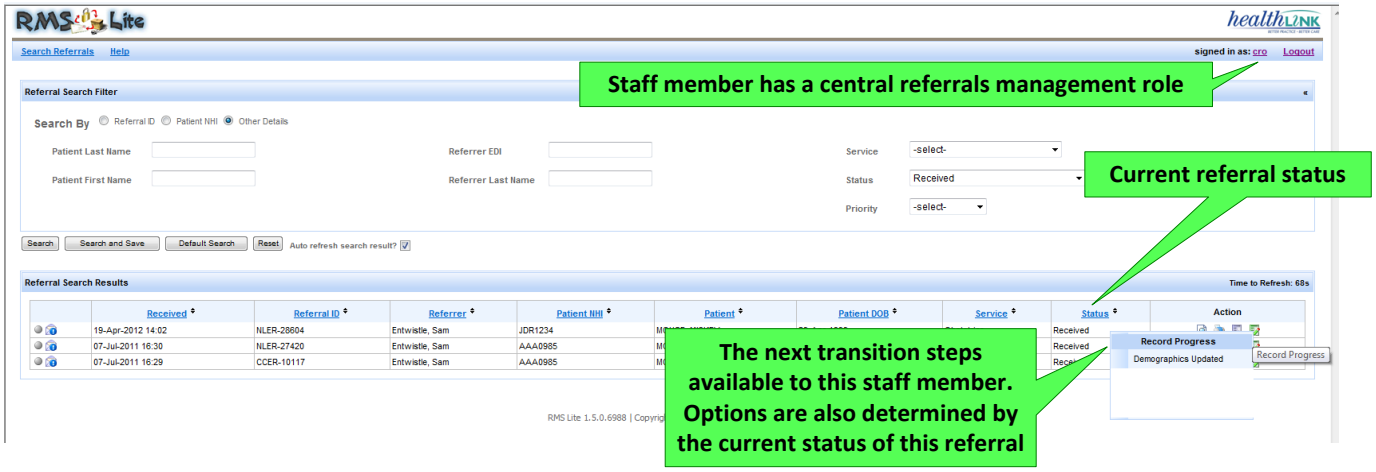
Please note: *This 'standard' scenario does not display variations to the workflow (i.e.: decline eReferral, acute referral printed, change of service etc….)*



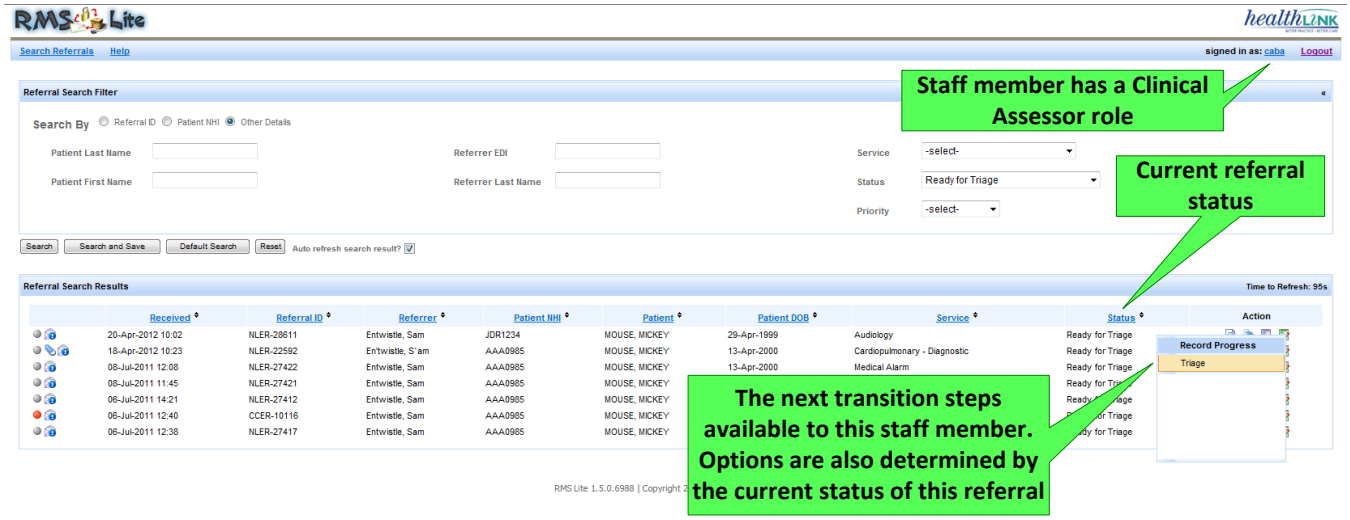
7.2 Transition Workflows in RMS Lite

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

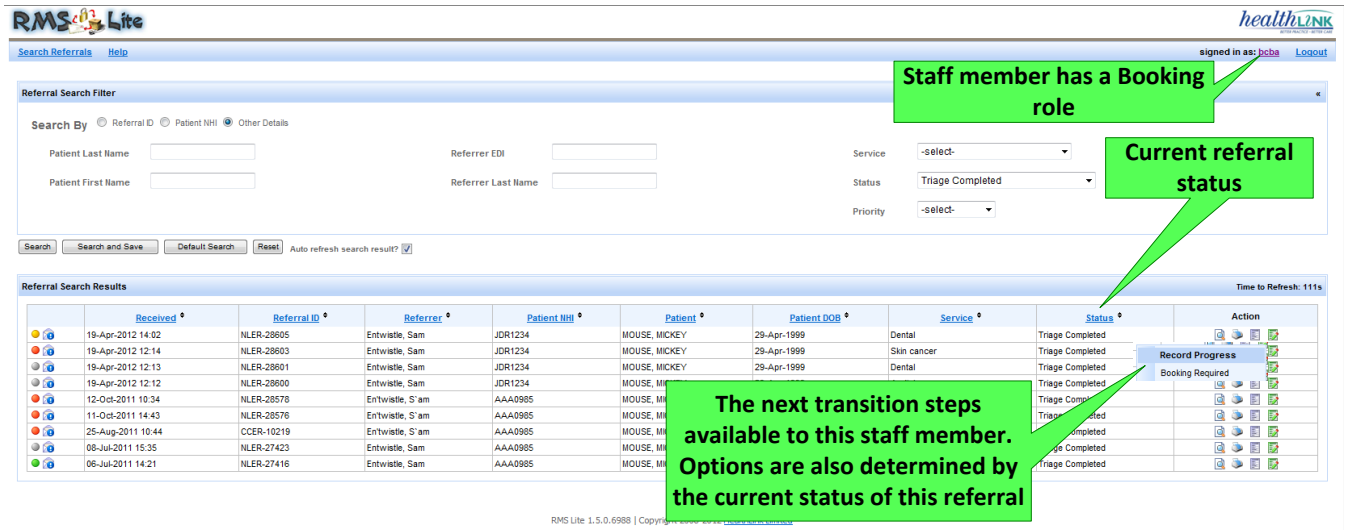
7.2.1 REFERRAL RECEIPT



7.2.2 CLINICAL ASSESSMENT



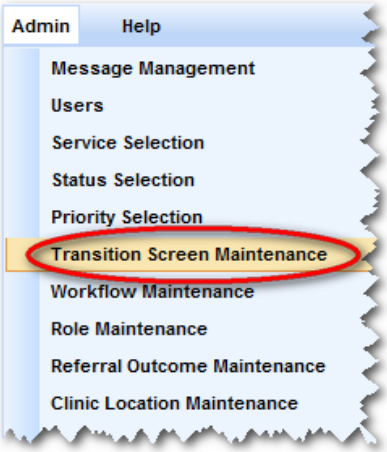
7.2.3 BOOKING



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: <u>This maintenance screen is newly added and is available from RMSLite 1.5 version</u>



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.

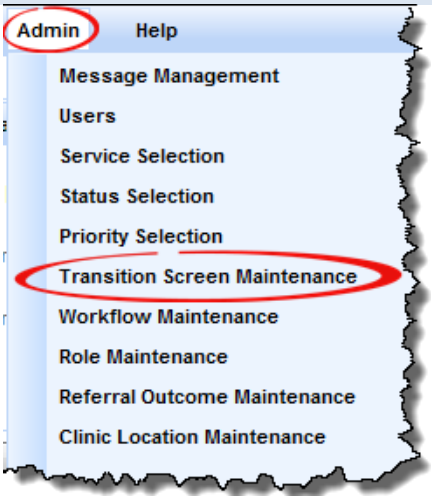
The current screen types currently available are:

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



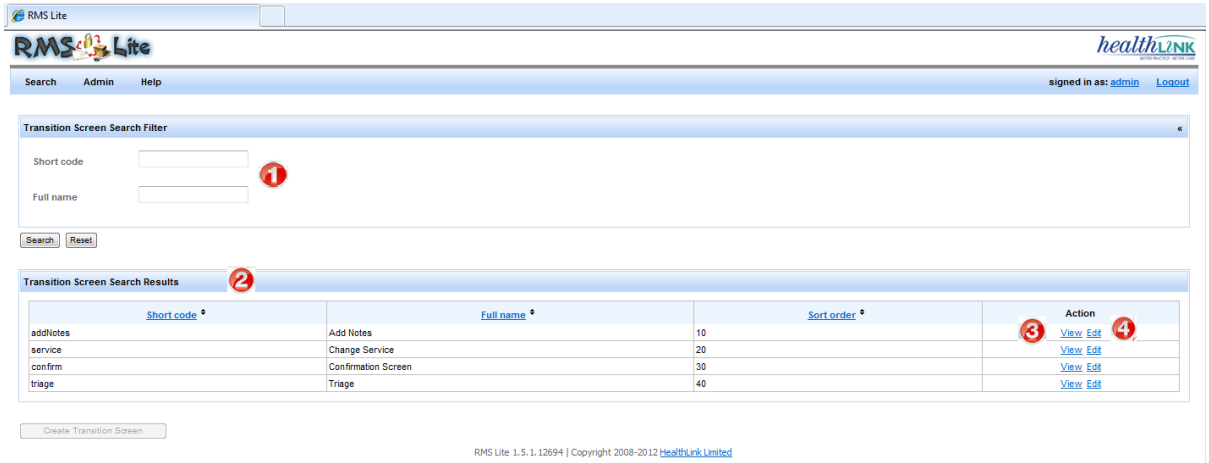
8.2 The Transition Screen Console

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.**

<u>Screen Reference</u>



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 **<u>Edit</u>** link against each Transition Screen details under the **'Transition Screen Search Results'**.

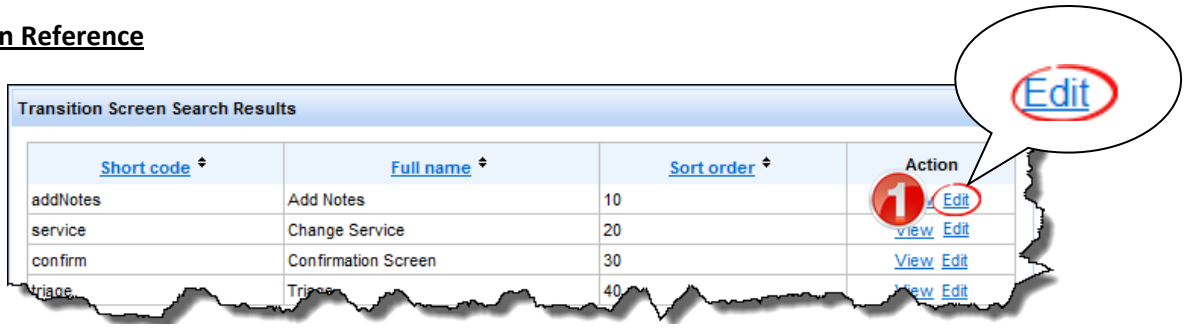
As the Transition Screens are 'hardcoded' into the RMS Lite application (i.e. can only be changed by a developer), existing screens can not be deleted and new screens can not be created by the RMS Lite administrator. Consequently some fields will be unavailable for editing or 'greyed out' on the screen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

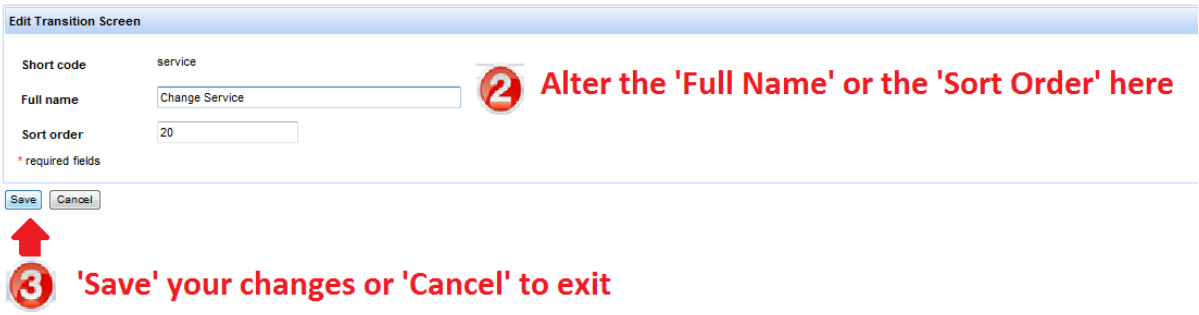
To alter the Transition Screen properties follow the steps below:

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

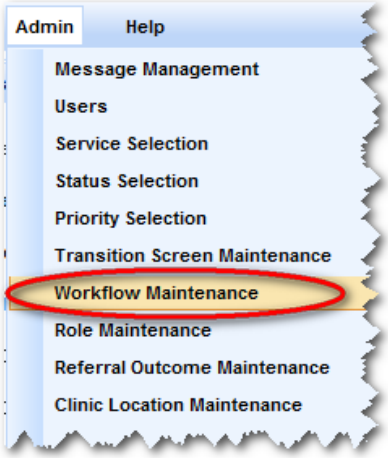
Screen Reference





9 Workflow Maintenance

NOTE: <u>This maintenance screen is newly added and is available from RMSLite 1.5 version</u>



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

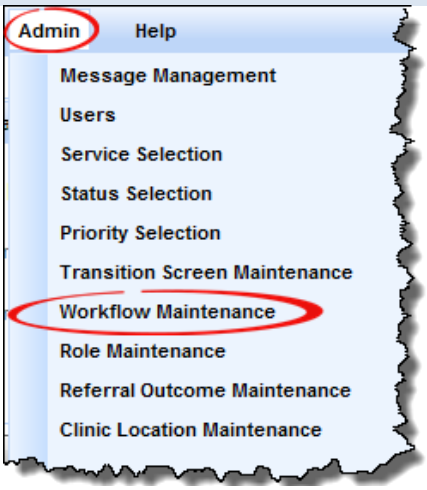
A workflow will configure:

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.

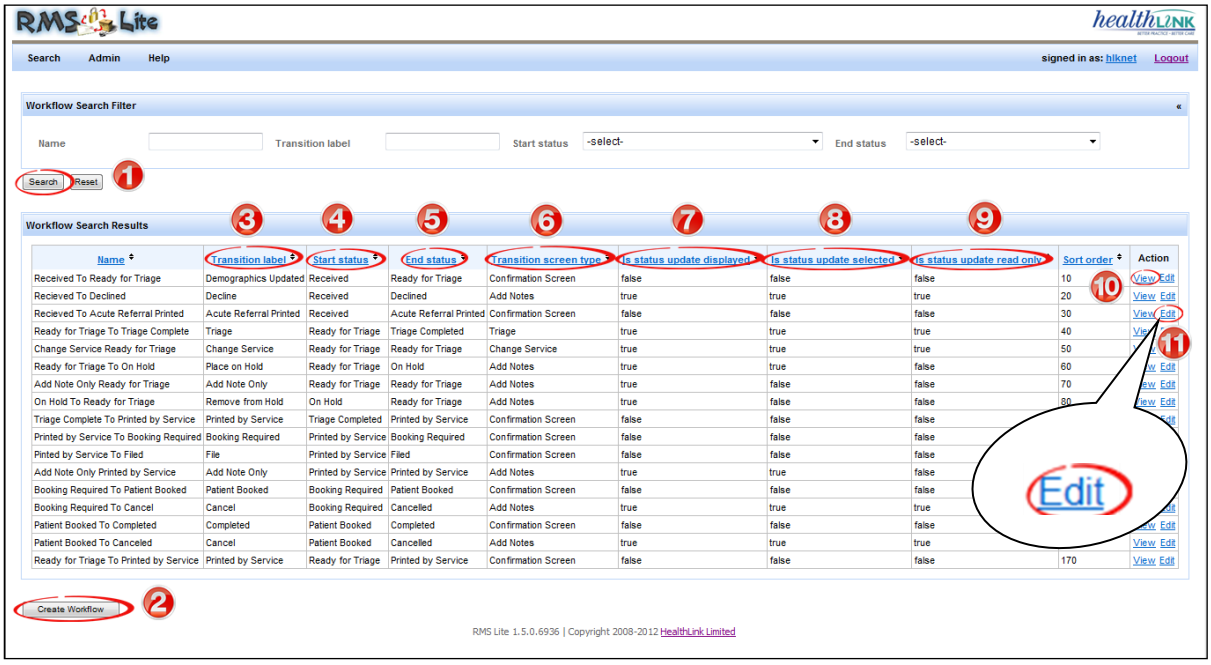
Each Workflow entry created has a name (for database identification/internal development use), Transition label (for the display shown on action buttons), start status (to indicate the start status of workflow for a referral), end status (to indicate the end status of referral after the action has been 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:



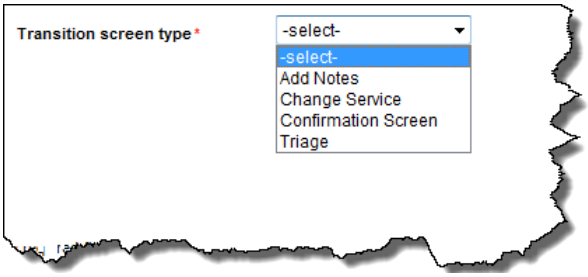
9.3 CREATING A NEW WORKFLOW

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

Steps

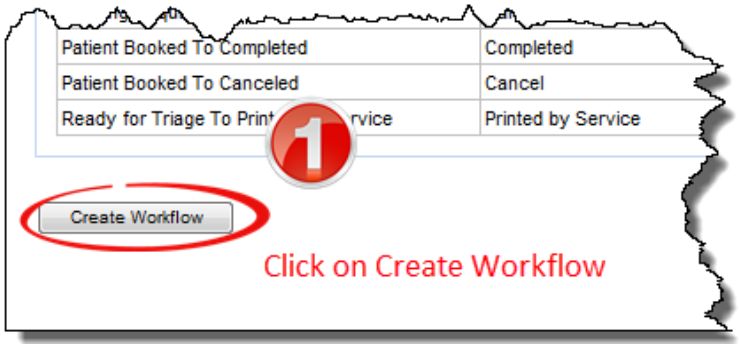
1	Click on the Create Workflow button at the bottom of the workflow Maintenance page
2	Complete the details under '**Add Workflow'** screen. Each Workflow entry created has: 1) A **Name** (for database identification/ for internal development use), 2) A **Transition label** (for the display label shown 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

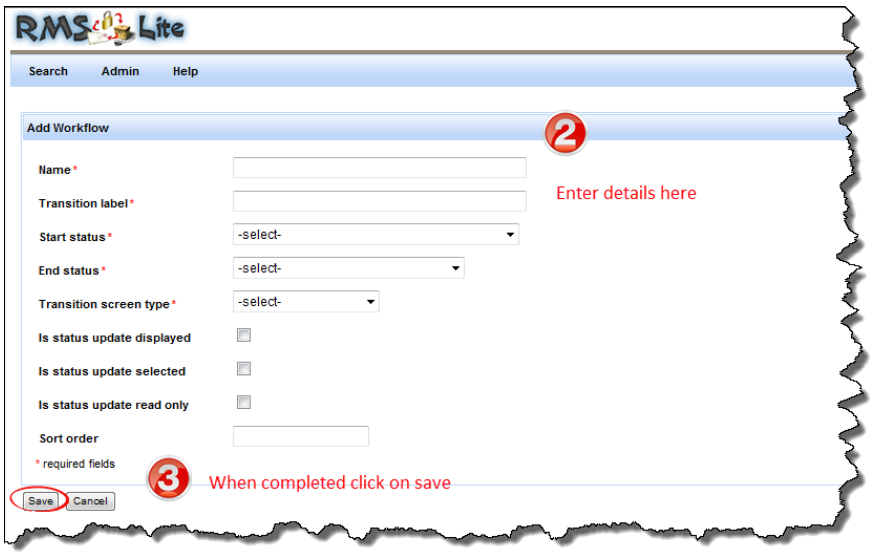
Note: Currently there are just four Transition screens developed to support the progress of workflow. They are Confirmation screen, Add Notes screen, triage screen and Change Service screen.



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

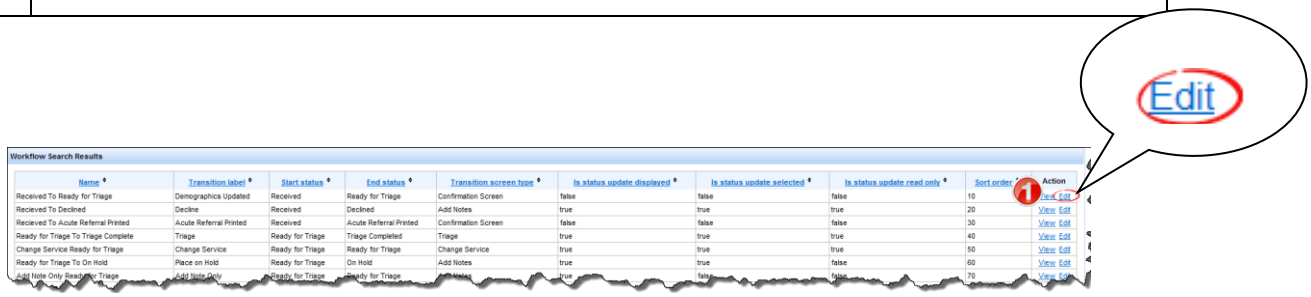
Use this feature if you wish to change workflow information. Fields for editing the workflow can be accessed by clicking on the **Edit** link against each workflow details under the **'Workflow Search Results'**.

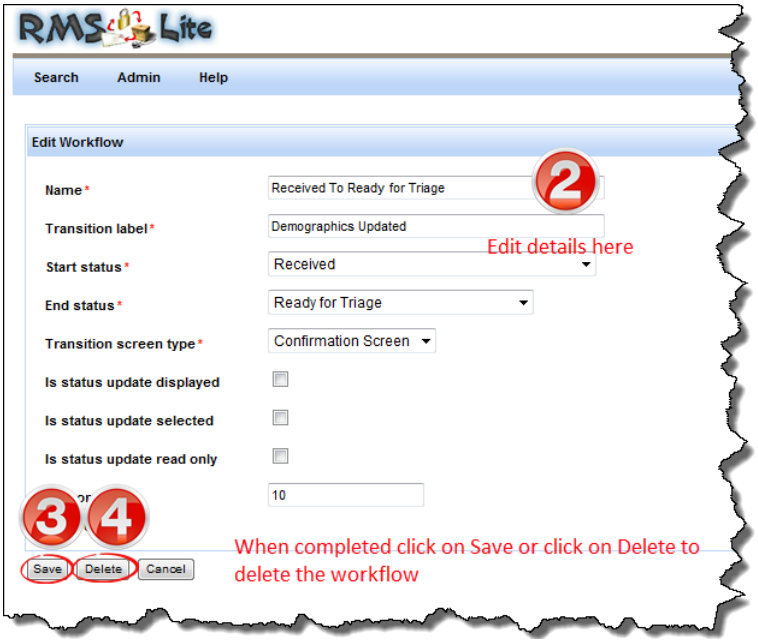
To change the workflow, follow the steps below:

Steps

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

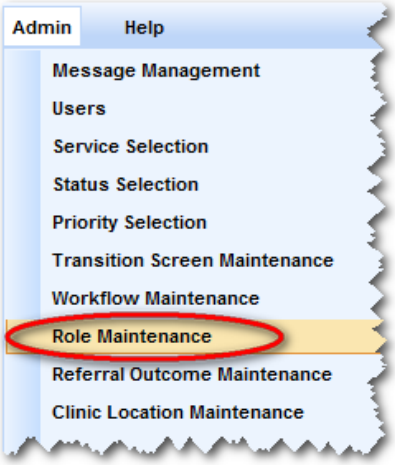
2	If required **change information** in the details section.
3	Once you've completed use the **Save** button to save the changes and return to the previous screen. If you wish to abort service creation click on the **Cancel** button
4	If you wish to delete the workflow click on the Delete button





10 Role Maintenance

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

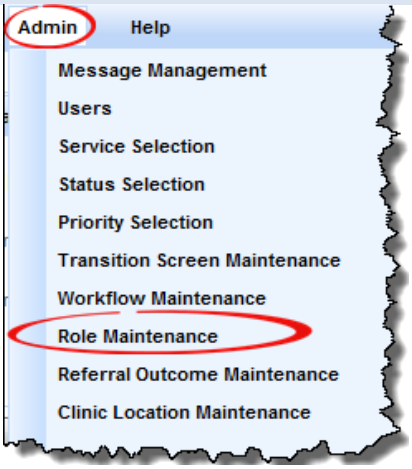


Use the 'Role Maintenance' option under the Admin menu to view, edit what workflow steps (specified in the previous section) are available to the roles assigned to RMS Lite users.

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

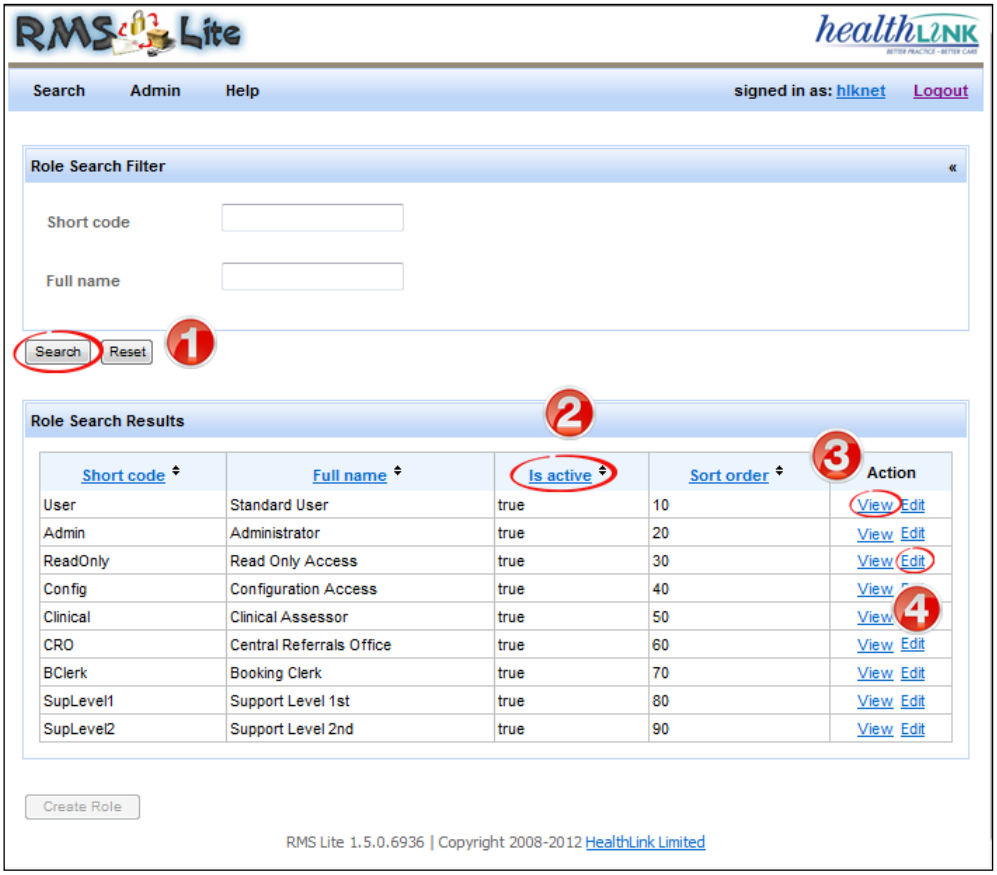
The Role maintenance Console allows you to view or edit the different workflows associated with a Role.

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:



10.3 UPDATING AN EXISTING ROLE TO ADD/CHANGE WORKFLOW

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

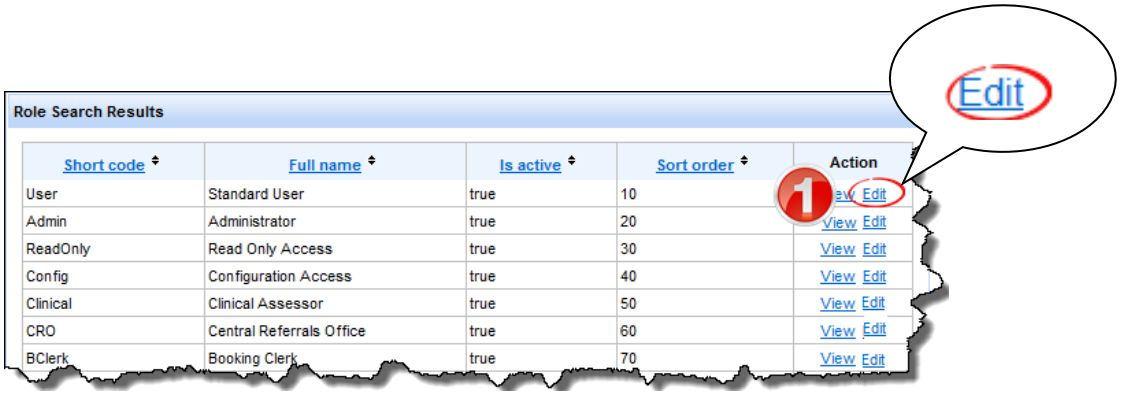
To **Edit a Role**, click on the **Edit** link against each role details under the 'Role Search Results'.

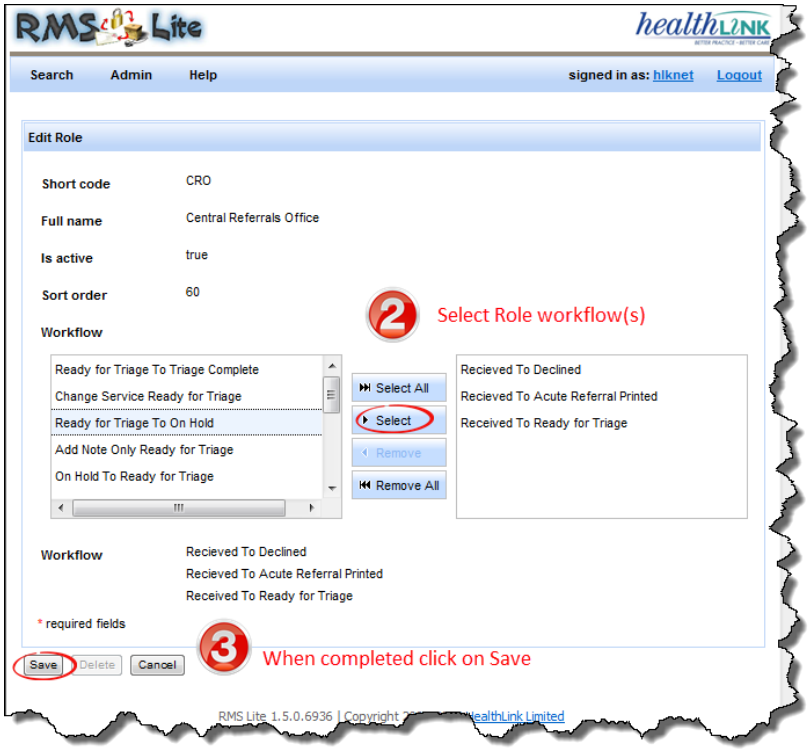
In version 1.5 of RMS Lite, the only roles that can utilise the workflow functionality are:
1. Clinical Assessor
2. Booking Clerk
3. Central Referrals Office

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

Steps

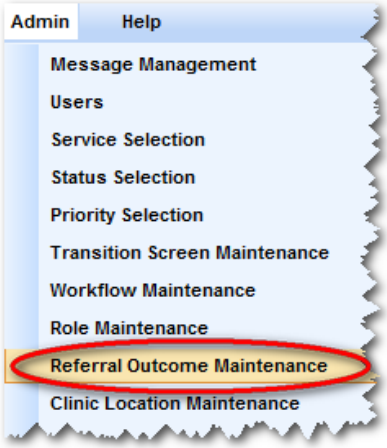
1	**Locate** the role within the 'Role maintenance console' search results list and click on **Edit**
2	If required **add/change workflow information** in the Edit Role screen. To specify the workflow • Select the appropriate workflow(s) within the available workflows list. To select a single workflow 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 Note: list action items can be used to add all workflows, single workflow, remove all allocated workflow or a workflow associated with a Role
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




RMS Lite
healthLINK
Search
Admin
Help
signed in as: hlknet
Logout
Edit Role
Short code
CRO
Full name
Central Referrals Office
Is active
true
Sort order
60
Workflow
2
Select Role workflow(s)
Ready for Triage To Triage Complete
Change Service Ready for Triage
Ready for Triage To On Hold
Add Note Only Ready for Triage
On Hold To Ready for Triage
Select All
Select
Remove
Remove All
Recieved To Declined
Recieved To Acute Referral Printed
Received To Ready for Triage
Workflow
Recieved To Declined
Recieved To Acute Referral Printed
Received To Ready for Triage
* required fields
3
When completed click on Save
Save
Delete
Cancel
RMS Lite 1.5.0.6936 | Copyright
HealthLink Limited

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.

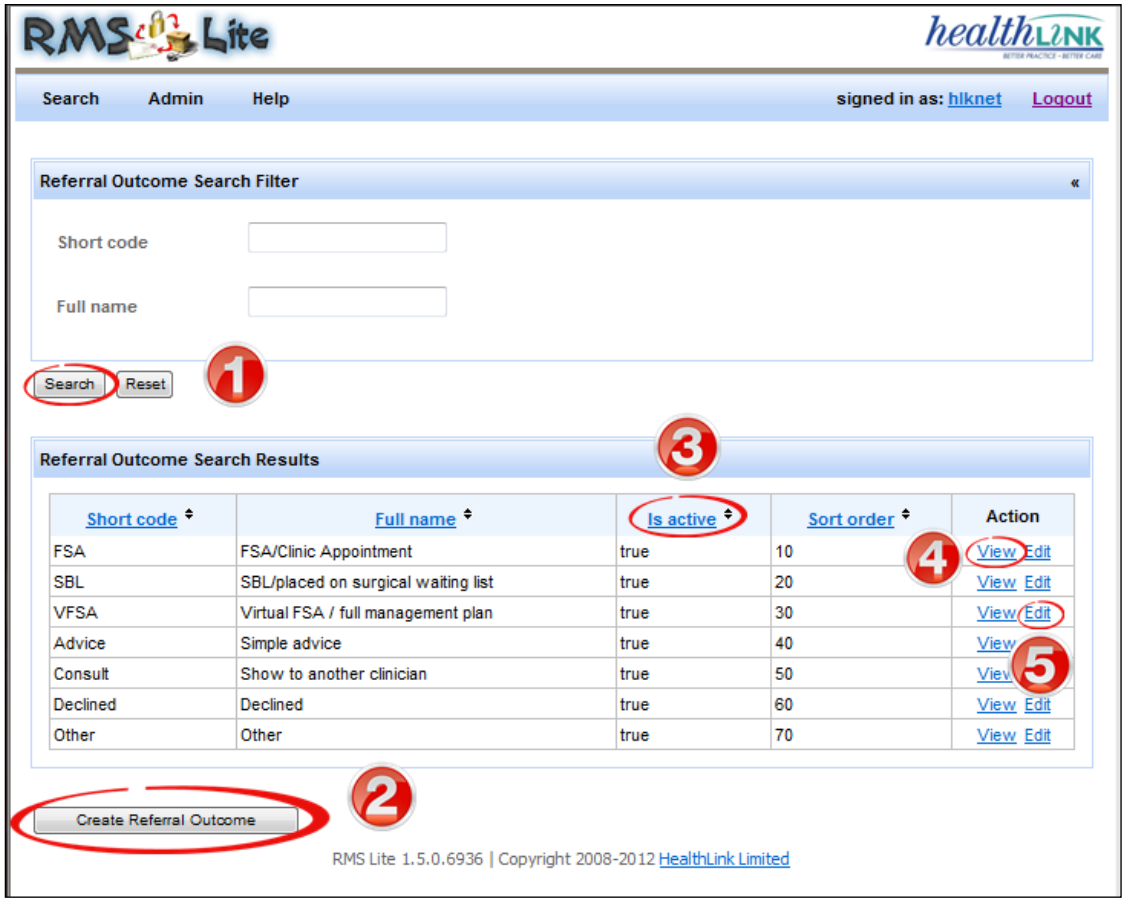
11.2 The Referral Outcome Console

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:



11.3 CREATING A NEW REFERRAL OUTCOME

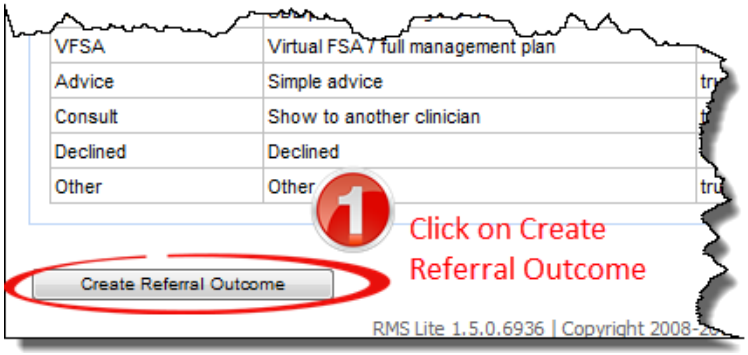
You can add a new Referral Outcome to RMSLite by completing the following steps:

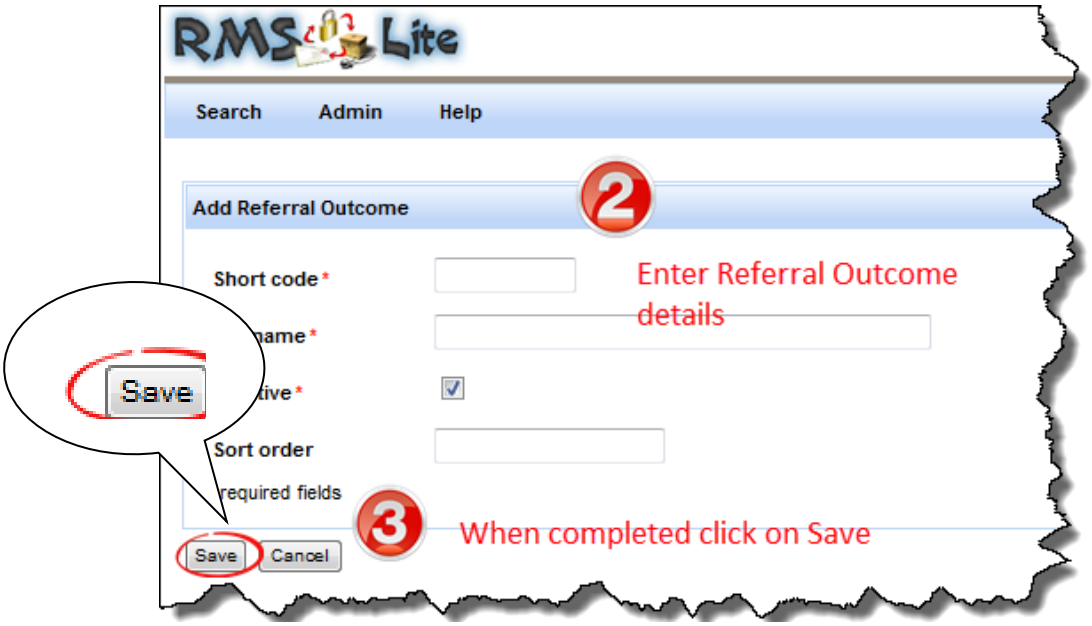
Steps

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: 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) assigned to it.
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.

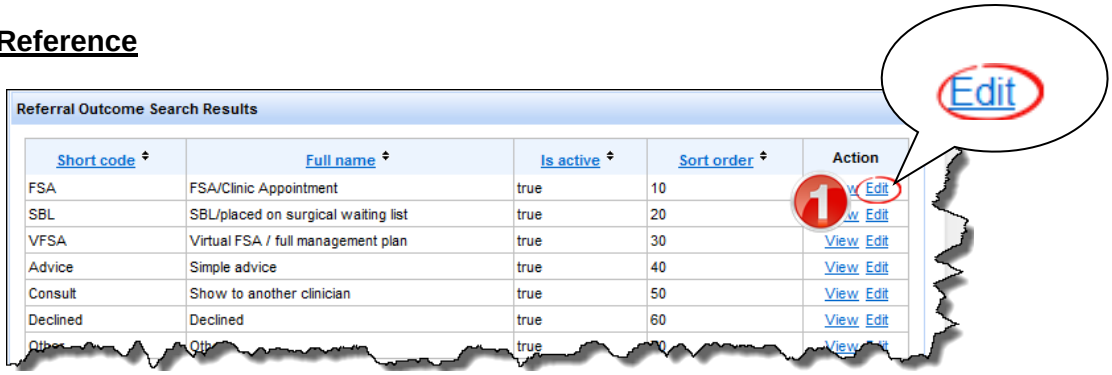
Fields for editing the Referral Outcome can be accessed by clicking on the **Edit** link against each 'referral outcome' details under the **'Referral Outcome Search Results'**.

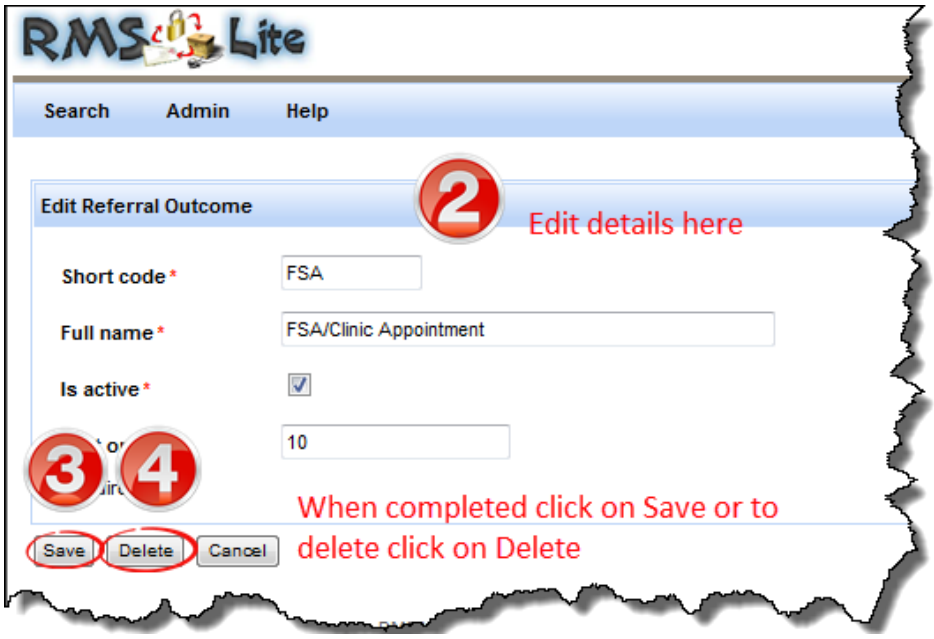
To change the referral outcome, follow the steps below:

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.

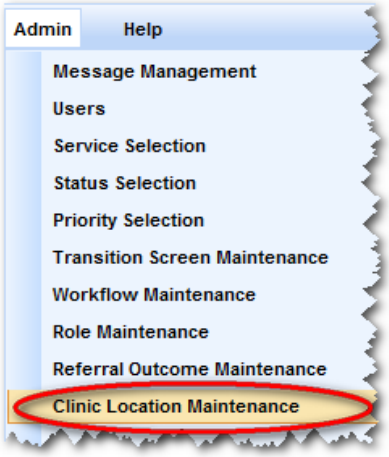
Screen Reference





12 Clinic Location Maintenance

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

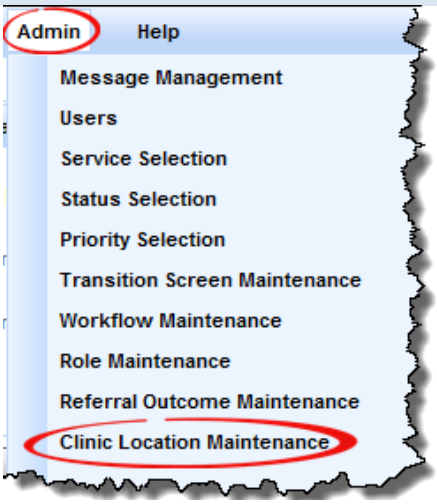


Use the 'Clinic Location Maintenance' option under the Admin menu to specify the coded Referral outcome field values available on the triage screen.

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.



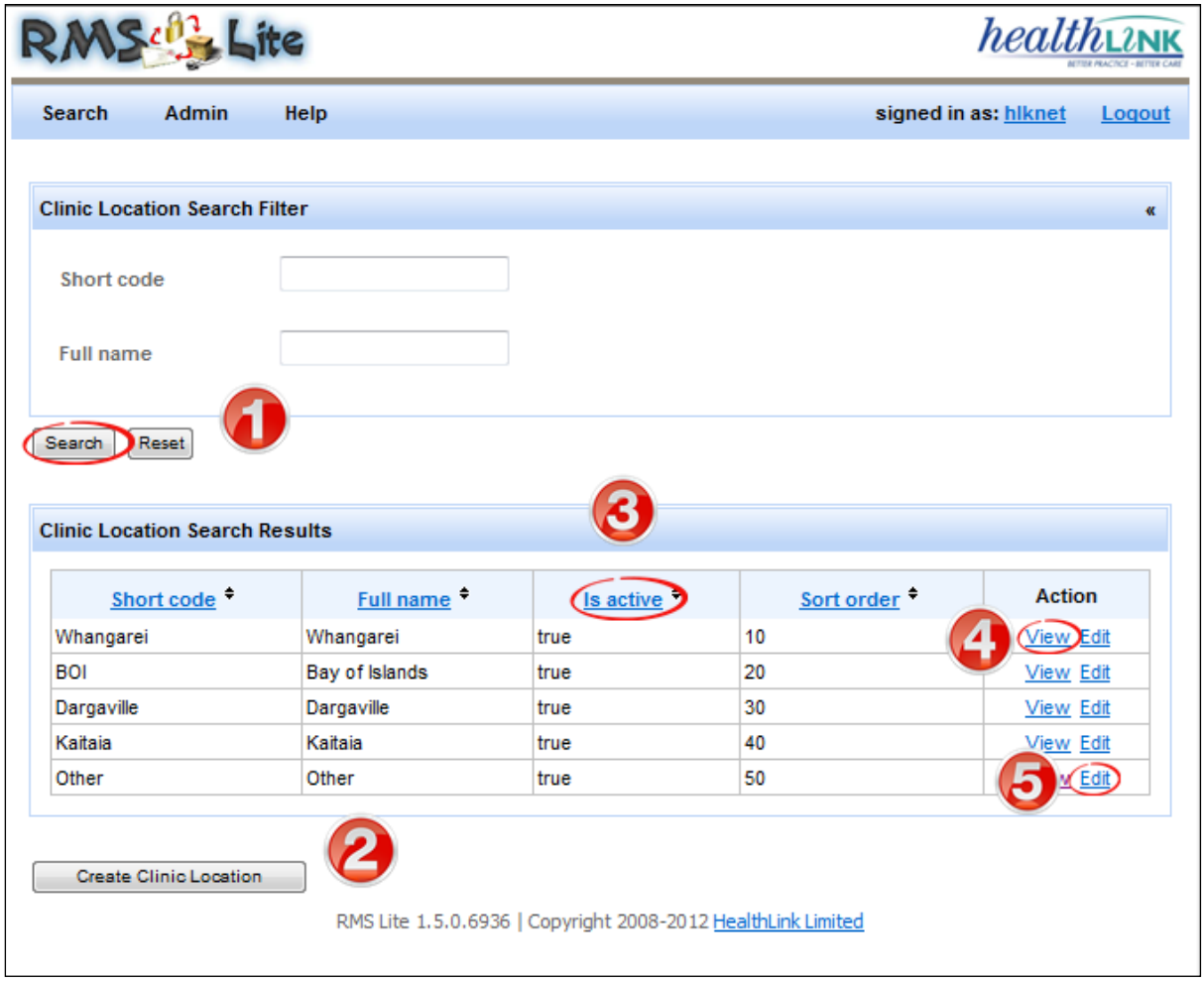
12.2 The Clinic Location Console

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:



12.3 CREATING A NEW CLINIC LOCATION

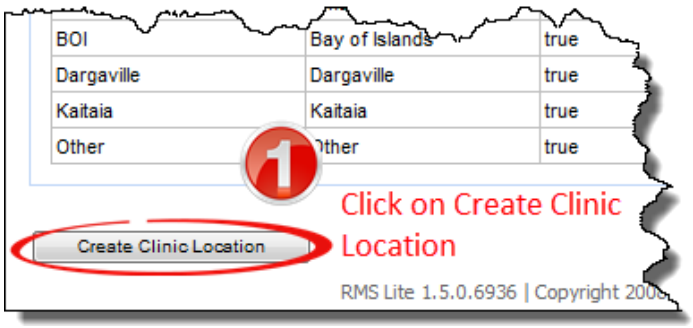
You can add a new Clinic Location to RMSLite by completing the following steps:

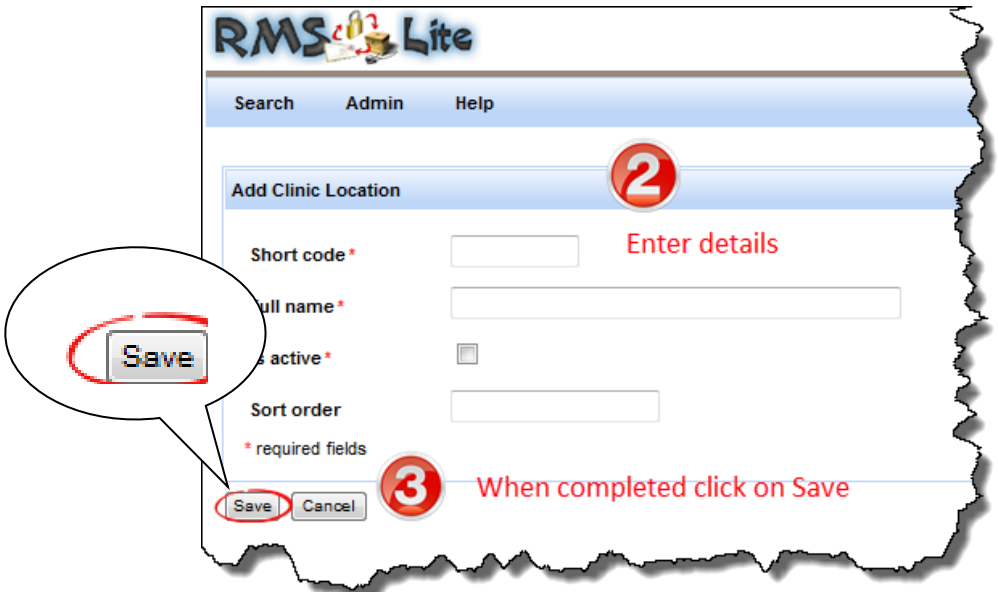
Steps

1	Click on the Create Clinic Location 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:

	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) assigned to it.
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.

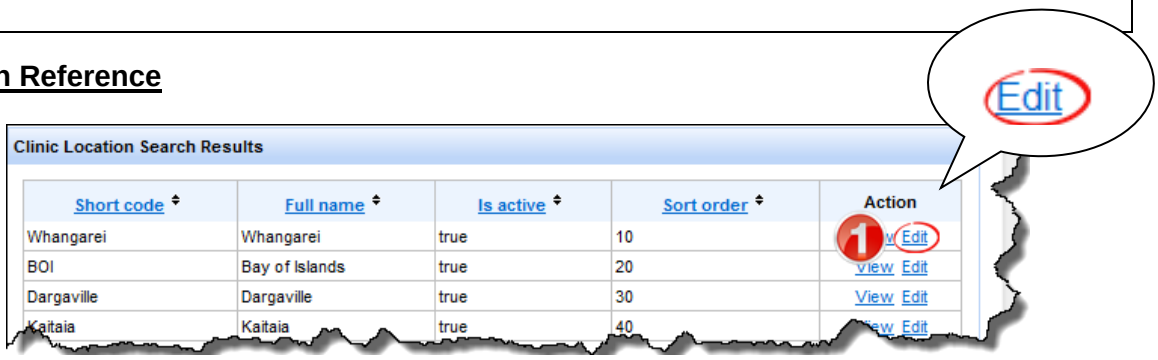
Fields for editing the Clinic Location can be accessed by clicking on the **Edit** link against each 'clinic location' details under the **'Clinic Location Search Results'**.

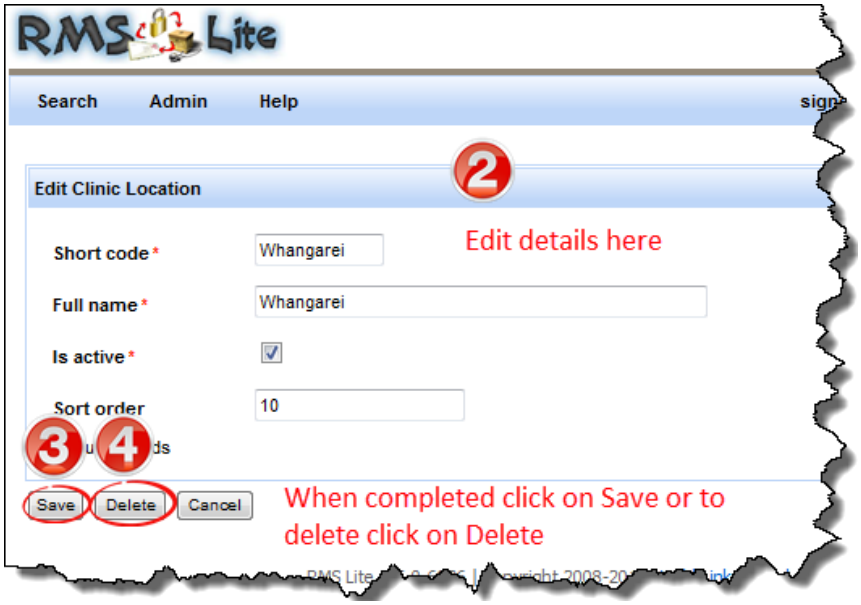
To change the clinic location, follow the steps below:

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





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