Referral Status Management and Addendum Release Notes

eReferral 2.3.0

Linda Hefford - Version 1.2

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Document History

Document History			
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1.0	05 January 2016	Linda Hefford	Initial creation
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1.2	09 February 2016	Tom Nowak	Changes/corrections and approval

Contents

1. Overview

1.1 Document Purpose

This document provides the release notes for *Referral Status Management and Addendum* to be available with the EREF-2.3.0 release of the HealthLink eReferral Form V2 platform. It covers the new features, defect fixes and known issues.

1.2 Background and overview of *Referral Status Management and Addendum*

'Referral Status Management & Addendum' gives ARDHB's eReferrals system (CareConnect) the ability to provide detailed information about the status of GP referrals to GPs (Referral Status Management), This goes beyond the current status messaging capability and it allows the GP to respond by submitting an Addendum Form in order to provide updated information or to respond to a triage request from the DHB.

1. The *Status Management Screen* is a prerequisite for use of *Addendum*. It enables the GP to select the original referral for which the Addendum applies in a patient context, so that it can be handled with integrity within the Concerto workflow. (ARDHB patient management). Using *Referral Status Management*, all GPs at the same facility can see every referral and update sent for a particular patient.

2. HealthLink has created a new (simple) *Addendum* form to allow addition of information to an existing referral. The *Addendum* form can be accessed by a button for each referral listed by the Orion Referral Management System WebService in the 'Status Management Table'. The form will load the initial referral data from the home page, pre-load validation of the appropriate information and also allow both on-screen and printable views of the data. As the Addendum is related to the original referral, there is also a process to add a suffix to the original referral ID.

3. On submission of the *Addendum* form the data within the form is transformed by the HealthLink eReferrals gateway into an appropriate HL7 message for submission to the Orion Referral Management System. Any errors encountered are detailed to the user prior to submission completion.

1.3 Related Documents

Quick Start - Referral Status Management and Updates.pdf should be referenced in relation to this document in a user context .This quick start guide can also be referenced by a user from within eReferrals by accessing the Help function.

2.   Installation

No changes are required at the client. All issues addressed by the release are applied at the HealthLink Form Server

2.1   Client Installation

No changes are required to the GP practice systems. The issues addressed by the release are applied at the HealthLink Form Server.

Please note: parked forms in the GP system will need to be submitted ahead of the release as after the release they will fail due to "reason for referral" not matching the new release values. HealthAlliance will include in site communications ahead of the release.

2.2   Software Requirements

Table 1 provides an overview of the software environments supported by the solution

EMR Systems	EMR with HISO 10014.2 interface
Web Browser	Microsoft Internet Explorer 9.0 or later. Compatibility View may need to be enabled if difficulties are being experienced with running certain Forms on Internet Explorer
HMS Client Minimum HMS Version	HMS 6.6.3.3102
HMS Client Recommended HMS Version	HMS 6.6.3.3550 (faster attachment preview)
Operating System	Windows XP, Windows 2003 Server, Windows Vista (32 and 64 bit), Windows 2008 Server (32 and 64 bit), Windows 7 (32 and 64 bit), Windows 2008 R2 Server
Java[1] Runtime Environment	1.5.0

Table 1: Software Requirements for Addendum in association with EREF-2.3.0

[1] On non-MacOS machines, the HMS 6.6.2 Client installs its own copy of the Java Runtime Environment. This Java Runtime Environment can only be used by the HMS 6.6.2 Client itself and does not interfere with any existing Java installations (i.e. it neither uses nor modifies them). On MacOS machines, the HMS 6.6.2 Client relies on the operating system's automatic distribution mechanism to use the latest patch level of JRE 1.5.0.

2.3   Upgrade Paths to *Referral Status Management and Addendum* EREF - 2.3.0

This release upgrade is applied at the HealthLink forms server. *Please ensure that your system is meeting the software requirements of the solution (see section 2.2 for details).*

2.4   Release dependencies

- HealthLink eReferrals 2.3.0 QA2 and above
- HealthLink Homepage 4.2.21.26847 and above
- Orion RMS 2.2.6 and above

3. New Features/ Improvements

The following table provides an overview of the main features related to *Referral Status Management and Addendum*

No	Feature Description	JIRA ID
	CareConnect *Referral Status Management and Addendum* with eRef 2.3.0	
1	• Develop the HealthLink WebService Client to integrate with the Orion RMS WebService	**EREF-2918**
2	• Update WebService client and external data source to work with updated Orion RMS WebService o Orion made changes to the WebService to allow query by a practice identifier as per original specification and also added the priority code and priority description to the response. This required an update of the existing HealthLink WebService client and external data source to work with the new service.	**EREF-3087**
3	• Create a Referral Status Management Table - a web page mapped to the response data from the Orion WebService which also supports the launching of the Addendum form in eReferral o Display the status summary from a call to the Orion Web Service to collect the current and historical status of all referrals; ▪ Allow access to the status summary table from the HealthLink homepage; ▪ The Status display should default to show the 'active' referrals but will have the capability to show or access 'historical' referrals; ▪ The records displayed in the status summary can be sorted on the columns displayed; ▪ Users are able to view the primary referral record in HTML.	**EREF-2920**
4	• Creation of CareConnect: Addendum Form o A new service provider is required to serve the Addendum form. This includes the following task: ▪ New service provider in Forms Configuration ▪ New Addendum Form template ▪ Include Original HTML in Printable View ▪ Users can create an addendum to an active referral in patient and referral context and submit to the DHB currently holding the referral; • A warning message should be displayed if the referral is no longer active; • The acknowledgement message should be clearly identifiable as one for a referral addendum (e.g. "Addendum Sent and Acknowledged on DD/MM/YYY at HH.MM"); • The submitted addendum should be tied back to the original referral and displayed together.	**EREF-2921**
5	• Addendum Form - Assign Incremented Referral ID o The referral ID will be comprised of the same number (business transaction ID) as the primary eReferral and then version and/or message ID e.g. -AR-18699 (new) -AR-18699:01 (addendum 1) -AR-18699:02 (addendum 2)	**EREF-2924**
6	• Addendum Form - Printable View enhancement o Once the Addendum is submitted it will be bundled with the original referral and displayed in single view.	**EREF-2925**

7	• Addendum Form – "Referred For" changes
	    o The referral addendum form replaces some of the workflows already built into the Referral Launch Page. In order to streamline the process there was an update of the 'Referred for' values
	
	The following text is displayed below the 'Referred for' dropdown field within the CareConnect landing page:
	
	Update Referral
	Click here to view referral status or provide additional information for an existing referral.
	Reasons for update:
	    • Review of priority
	    • Response to information request
	    • Referral cancellation
	    • Other referral update
	The following options are available for 'Standard Services' CareConnect Addendum function:
	    • Outpatient appointment
	    • Specialist Advice Only
	    • Investigation/Test Only
	    • Other Clinical Assessment
	The following options are available for 'Radiology Services' CareConnect addendum function:
	    • Investigation/Test Only
	The following options are available for 'Acute Admission Services' CareConnect addendum function:
	    • Acute Assessment
		EREF-2926

8	• Addendum Form - Enhancement to pre-validation on load o When loading any form for the service provider that serves the Addendum Form, we need to do validation prior so that the mandatory fields without a corresponding view item on the JSP (for patient, referrer etc.) are populated.	**EREF-2922**
9	• Route update to support addendum form o The route has to be updated to support the new concepts from addendum form	**EREF-2923**
10	• CareConnect: Launch page home link o A link will be placed on the CareConnect Launch page to the Home Page in order to take the user back to the Home Page to access the Status Management Table and create addendums.	**EREF-2927**
11	• Enhance HealthLink homepage to support tab for Addendum – displaying of tab has access control at HealthLink based on EDI	**EREF-2932**
12	• "More" option on the comments field of the Referral Status Management table o Where the referral comments presented to the user in the Referral Status Management table reaches three lines (approx. 80 characters) a '...more' option should be provided at the end of the displayed comments to indicate to the user that there is more information available for them to view.	**EREF-3085**
13	• Single click to open referral o Users should be able to open and view a full referral record by single-clicking anywhere on the referral row in the Referral Status Management table	**EREF-3084**
14	• Display of Priority and Priority Description in the Referral Status Management table o A 'Priority' column will be added to the Referral Status Management table grid between the current Status and Comment columns. This will show the current priority of a referral based on the 'Priority Code' value returned by the getReferral Web Service response.	**EREF-3086**
15	• Capability to receive referral history to the Referral Status Management table	**EREF-3120**