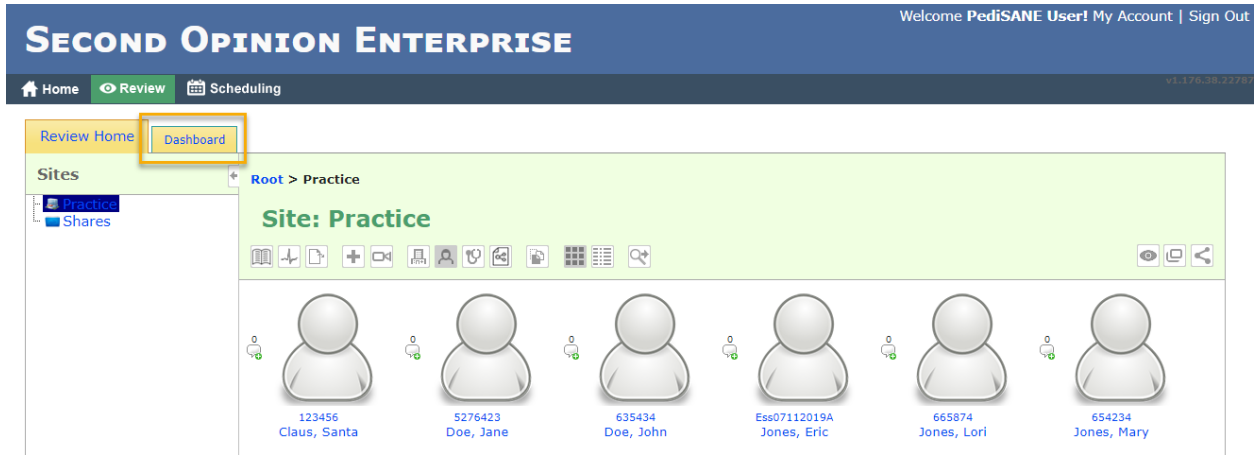


# Viewing and processing Patient Referrals

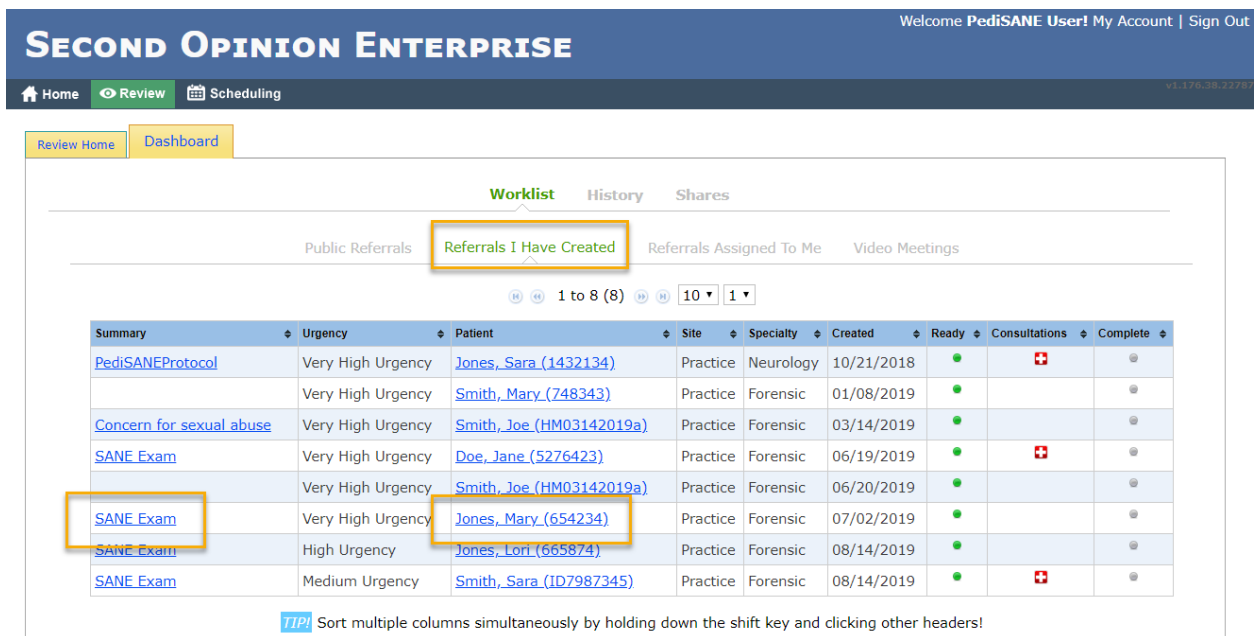
## Description

All Images and Video Clips uploaded during a session are stored together in a Patient Referral. All Patient Referrals can be viewed and managed in the Dashboard. Users who will be managing Referrals for others, need to have the Coordinator Privilege. **Click** on the **Dashboard** tab to show the Dashboard.



## Dashboard – Locate a Referral

To assign a Referral you have created to a Specialist you must first locate the Patient and open the Referral you wish to assign. You can do this by navigating to the Patient and Referral using the Review Page or by clicking on **Referrals I Have Created** on your dashboard and selecting the appropriate Referral.



## Coordinating Referrals for Others

When logging into the Enterprise Portal with a User account that has the Coordinator privilege, all Patient Referrals that have not been assigned to a Specialist are viewable by **choosing the Unassigned Referrals** section. Both the **Summary** and the **Patient** columns contain links to that portion of the Patient Upload.

The screenshot shows the 'Unassigned Referrals' section of the worklist. A table lists various referrals with columns for Summary, Urgency, Patient, Site, Specialty, Author, Created, My Consultations, and Remove. Two rows are highlighted with orange boxes: one for 'SANE Exam' by Moore, Cynthia and another for 'SANE Exam' by Jones, Larry.

Summary	Urgency	Patient	Site	Specialty	Author	Created	My Consultations	Remove
	Very High Urgency	<a href="#">Smith, Lisa (BC02192019)</a>	Bristol County CAC	Forensic	<a href="#">Moore, Cynthia</a>	02/13/2019		⊘
<a href="#">SANE Exam</a>	Very High Urgency	<a href="#">Jones, Larry (Ess08212019A)</a>	Essex County CAC	Forensic	<a href="#">Aznavoorian, Kristine</a>	08/21/2019		⊘
	Very High Urgency	<a href="#">Jones, Sara (1432134)</a>	Practice	Neurology	<a href="#">ServiceAdmin, Sample</a>	12/18/2018		⊘
	Very High Urgency	<a href="#">Smith, Mary (748343)</a>	Practice	Forensic	<a href="#">ServiceAdmin, Sample</a>	10/22/2018		⊘
	Very High Urgency	<a href="#">Smith, Mary (748343)</a>	Practice	Forensic	<a href="#">User, PediSANE</a>	01/08/2019		⊘
<a href="#">Concern for sexual abuse</a>	Very High Urgency	<a href="#">Smith, Joe (HM03142019a)</a>	Practice	Forensic	<a href="#">User, PediSANE</a>	03/14/2019		⊘
<a href="#">SANE Exam</a>	Very High Urgency	<a href="#">Smith, Joe (HM03142019a)</a>	Practice	Forensic	<a href="#">Aznavoorian, Kristine</a>	05/08/2019		⊘
	Very High Urgency	<a href="#">Smith, Joe (HM03142019a)</a>	Practice	Forensic	<a href="#">User, PediSANE</a>	06/20/2019		⊘
<a href="#">Patient Visit</a>	High Urgency	<a href="#">Claus, Santa (123456)</a>	Practice	Other	<a href="#">Palmer, Krisan</a>	05/14/2019		⊘
<a href="#">SANE Exam</a>	Very High Urgency	<a href="#">Jones, Mary (654234)</a>	Practice	Forensic	<a href="#">User, PediSANE</a>	07/02/2019		⊘

**TIP:** Sort multiple columns simultaneously by holding down the shift key and clicking other headers!

## Referral Content - Make Public

By default, all information created and saved within a Patient folder is marked Private. If you are assigning a Referral to a Specialist that can only view Public information, then the information you wish reviewed must be marked Public. **Click the Show/Hide Public Private Status** button.



**Show/Hide Public Private Status**

The screenshot shows a patient referral page for a 'SANE Exam: 07/10/2019 12:28'. The page displays a grid of images related to the exam, including a 'PediSANE Form' and several photos of skin rashes. A red box highlights the 'Show/Hide Public Private Status' icon in the top right corner of the image grid.

When the show status is active a **Red** (Private) or **Green** (Public) dot will appear next to each items being displayed. Users with the View Public privilege will only be able to see content that is set to Public. Clicking on the dots will toggle between **Private** and **Public**.



## Assign a Specialist

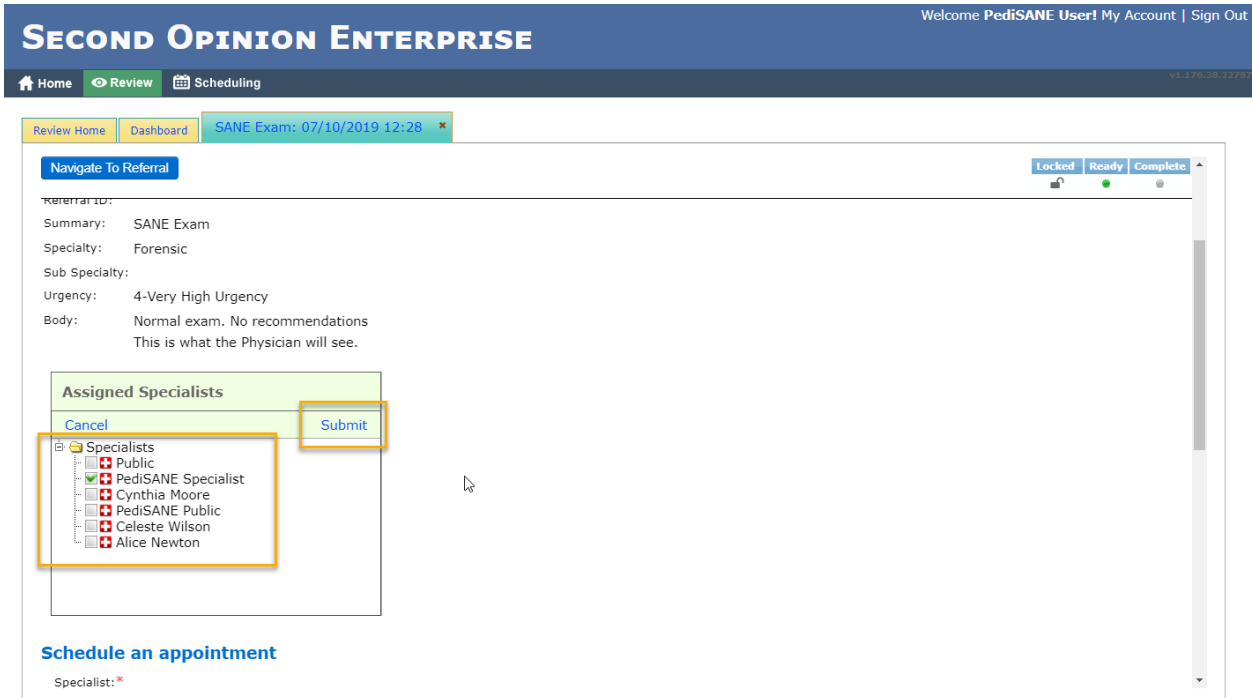
Once the Referral is open, to assign a Specialist, **Click the Open Referral Record icon.**



**Open Referral Record**

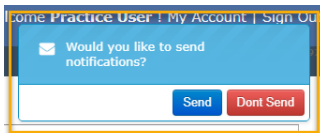


Next, scroll down to the **Assigned Specialists** section of the form and **Choose** the desired **Specialist(s)**, then **Click Submit**.



The screenshot shows the 'SECOND OPINION ENTERPRISE' interface. At the top right, it says 'Welcome PediSANE User! My Account | Sign Out'. Below the header is a navigation bar with 'Home', 'Review', and 'Scheduling' options. The main content area shows a referral form for 'SANE Exam: 07/10/2019 12:28'. The form includes fields for 'Summary', 'Specialty', 'Sub Specialty', 'Urgency', and 'Body'. The 'Assigned Specialists' section is highlighted with a green box and contains a list of specialists with checkboxes: 'Public', 'PediSANE Specialist' (checked), 'Cynthia Moore', 'PediSANE Public', 'Celeste Wilson', and 'Alice Newton'. A 'Submit' button is highlighted with a blue box. Below the list is a 'Schedule an appointment' section with a 'Specialist:' label.

Once submitted, you can choose to **Send** or **Don't Send** notifications to the selected Specialist(s).



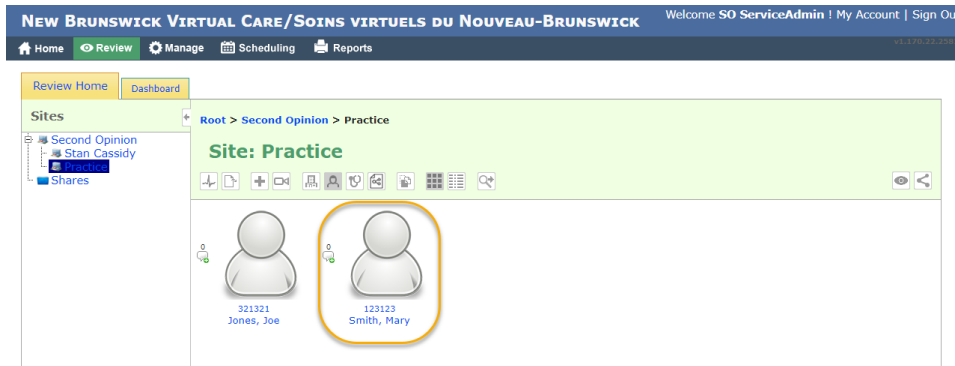
The screenshot shows a notification dialog box with the text 'Would you like to send notifications?' and two buttons: 'Send' and 'Dont Send'.

## Navigating Patient Folders – Review Home

The Review Home page contains a list of all Patient folders that you have access to. You can look for the Patients by Lastname or you can expand the Smart Find feature and type in just about any information that may be contained in that Patient folder. Once found, clicking on the Patient icon will open the folder.



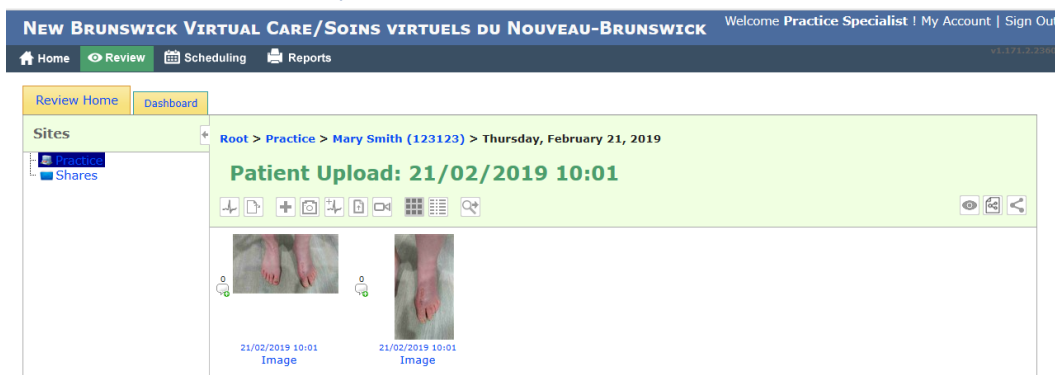
## Patient Folders Level



## Patient Folder



## Patient Referral / Uploads





(This page is intentionally left blank)

For More Information or Technical Support Give Us a Call

Second Opinion Telemedicine Solutions, Inc.

20695 S. Western Ave., Suite 200

Torrance, CA 90501

310-802-6300

[www.sotelemed.com](http://www.sotelemed.com)

[corp@sotelemed.com](mailto:corp@sotelemed.com)

