



Second Opinion Enterprise – Consultations

Specialist User Account

Specialist logs into the system.

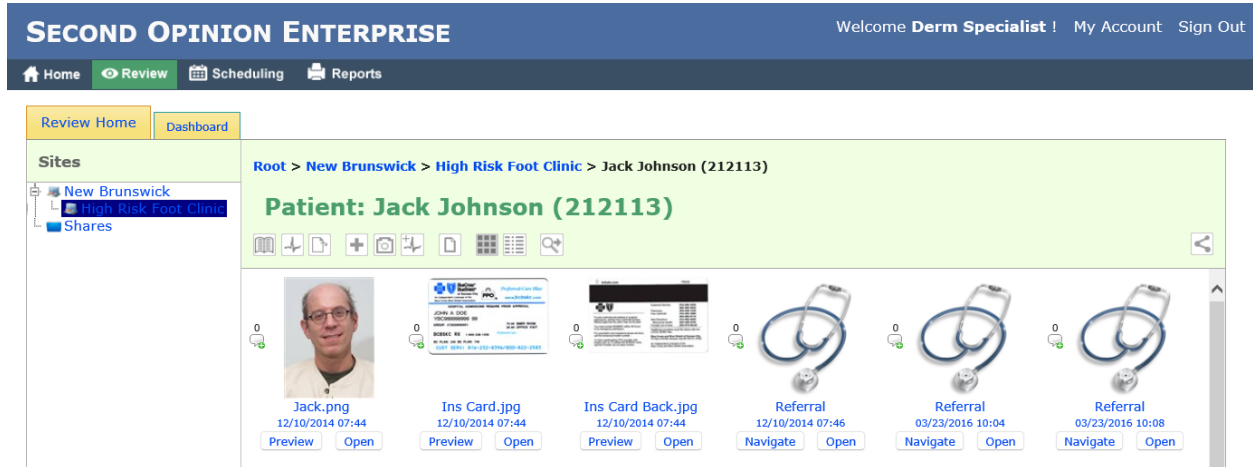
Once logged in, the specialist is taken to their *Dashboard*.

Specialist Dashboard

The *Referrals Assigned To Me* tab shows all of the Referrals assigned to the Specialist. There are quick links to the Patient folder as well as the specific Referral. The *My Consultations* section will have a consultation icon if there is a partial / not yet finalized Consultation for the Referral. Clicking on the icon will launch the Consultation form.

Patient Folder View

This view represents the top level of the Patient's Folder. All of the past and present Referrals that are accessible to the Specialist are viewable here.

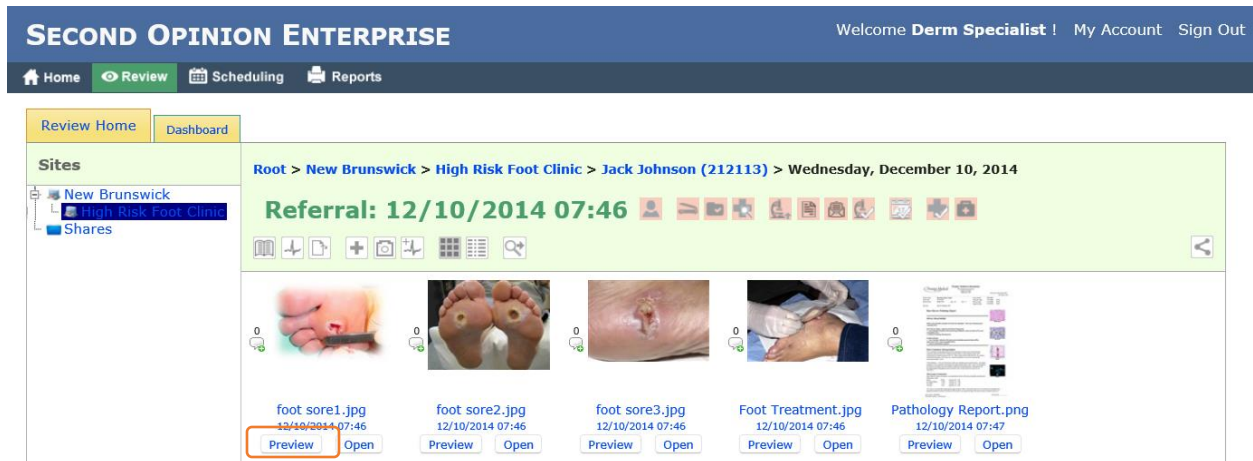


The screenshot shows the 'Patient: Jack Johnson (212113)' folder view. The breadcrumb trail is 'Root > New Brunswick > High Risk Foot Clinic > Jack Johnson (212113)'. The folder contains several items:

- Jack.png (12/10/2014 07:44) with Preview and Open buttons.
- Ins Card.jpg (12/10/2014 07:44) with Preview and Open buttons.
- Ins Card Back.jpg (12/10/2014 07:44) with Preview and Open buttons.
- Referral (12/10/2014 07:46) with Navigate and Open buttons.
- Referral (03/23/2016 10:04) with Navigate and Open buttons.
- Referral (03/23/2016 10:08) with Navigate and Open buttons.

Referral View

The Referral contains all of the relevant information / Documents relating to this particular case.

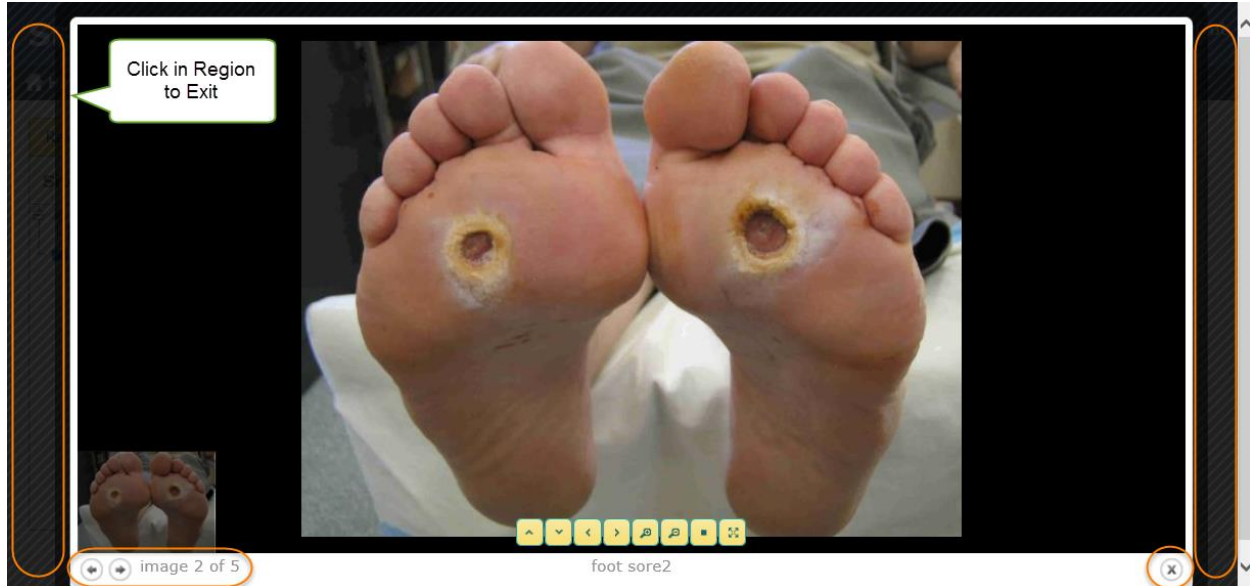


The screenshot shows the 'Referral: 12/10/2014 07:46' view. The breadcrumb trail is 'Root > New Brunswick > High Risk Foot Clinic > Jack Johnson (212113) > Wednesday, December 10, 2014'. The referral contains several documents:

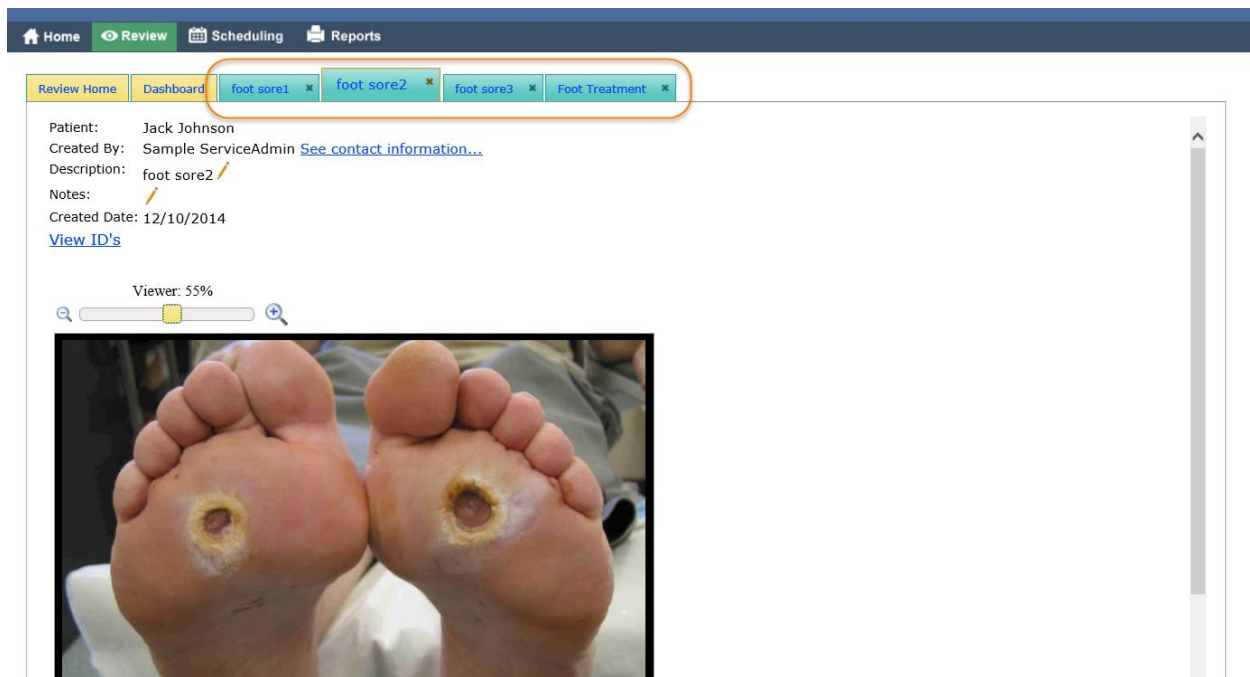
- foot sore1.jpg (12/10/2014 07:46) with Preview and Open buttons.
- foot sore2.jpg (12/10/2014 07:46) with Preview and Open buttons.
- foot sore3.jpg (12/10/2014 07:46) with Preview and Open buttons.
- Foot Treatment.jpg (12/10/2014 07:46) with Preview and Open buttons.
- Pathology Report.png (12/10/2014 07:47) with Preview and Open buttons.

The most efficient way to look at the Documents in a Referral is to click the *Preview* button associated with a Document. Clicking this button opens all of the images associated with a Referral.

When active, the preview window displays all of the images contained in the Referral. Each image can be easily looked at by clicking the *Next Image* button. When done previewing the images, click the left mouse button in one of the dark border regions or click the X button to exit.



Each Document contained in a Referral can also be opened one at a time by clicking the *Open* button related to a Document. Each document is opened in its own tab. All open tabs for the same Referral are color coordinated.



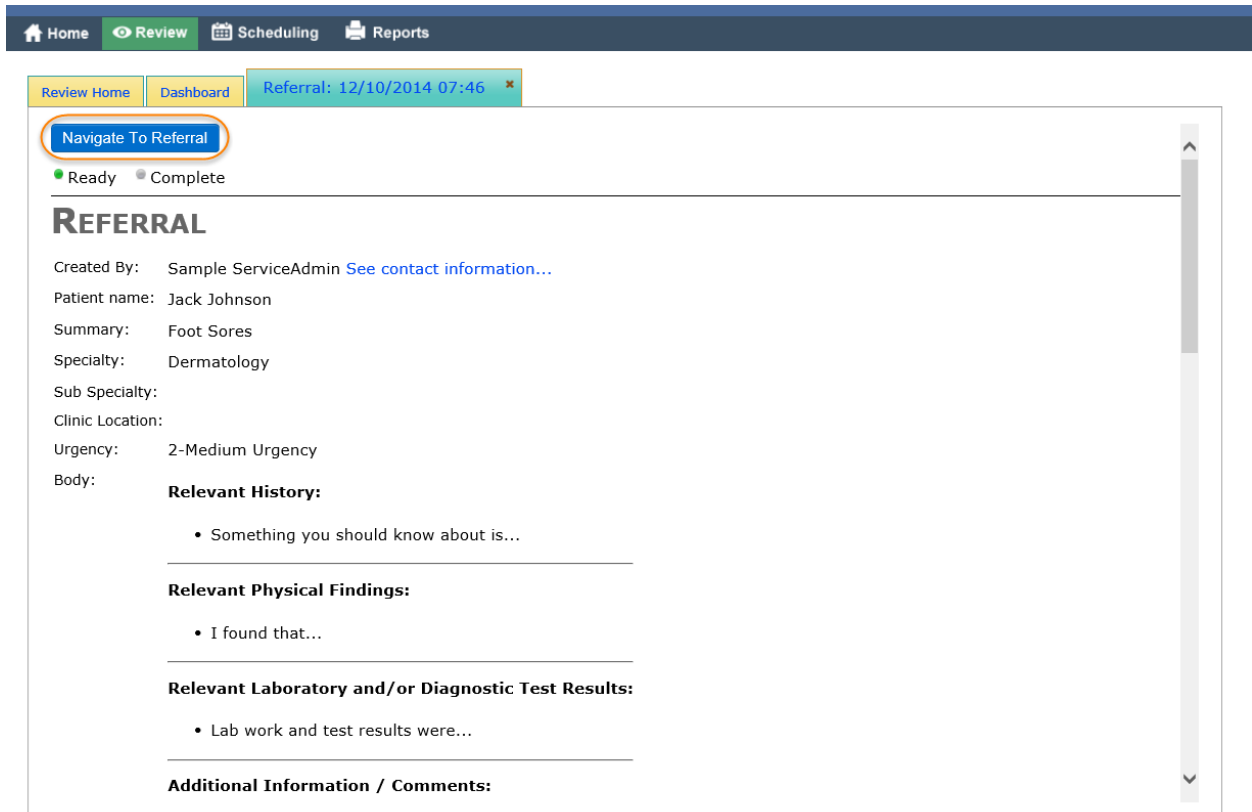
To look at the Referral form to see the details of the case, navigate to the Referral view and click the *Open Referral Record* icon.



Open Referral Record

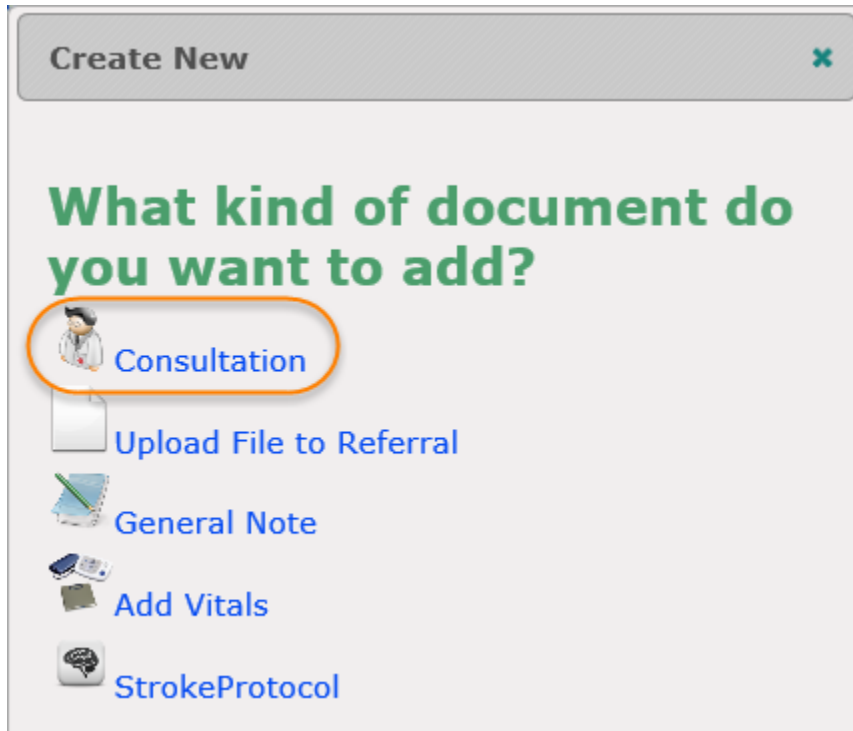


The *Navigate to Referral* button is a quick way to see the Documents contained in the Referral.



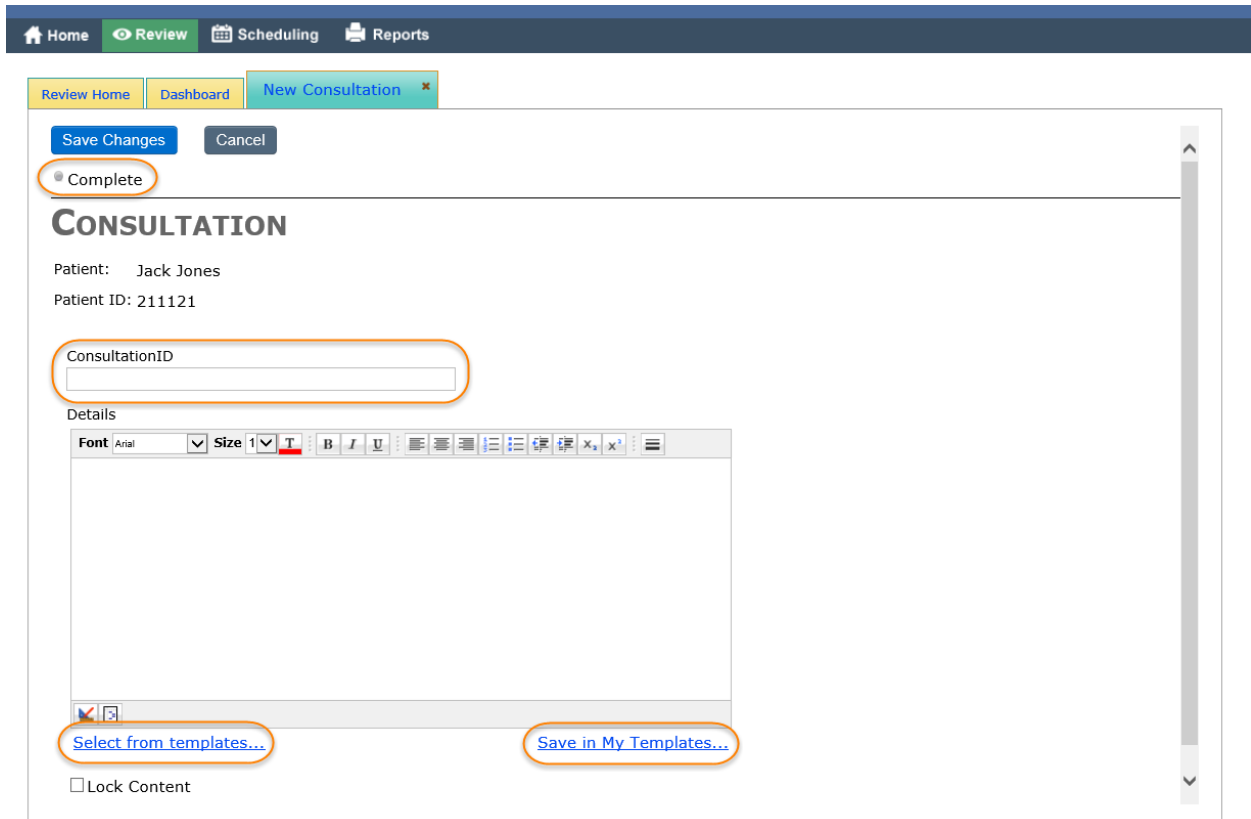
Create Consultation

To create a Consultation, navigate to the Referral View and click the *Add New Document* button and choose Consultation.



Note: If desired, other files such as treatment or education documents can be uploaded to a Referral by choosing *Upload File to Referral*. SOAP or General Notes can be added to the Referral by choosing *General Note*. To add a SOAP note, click the *Select from templates* below the Details section and choose the SOAP Note Template.

The Consultation form contains an optional Consultation ID field. This field can be used to tie the Consultation to a third party system or EMR record.



The Consultation details can be typed, pasted from another source or a Template can be inserted to pre-fill values. Clicking the *Select from templates* shows My Templates as well as the system wide Templates.

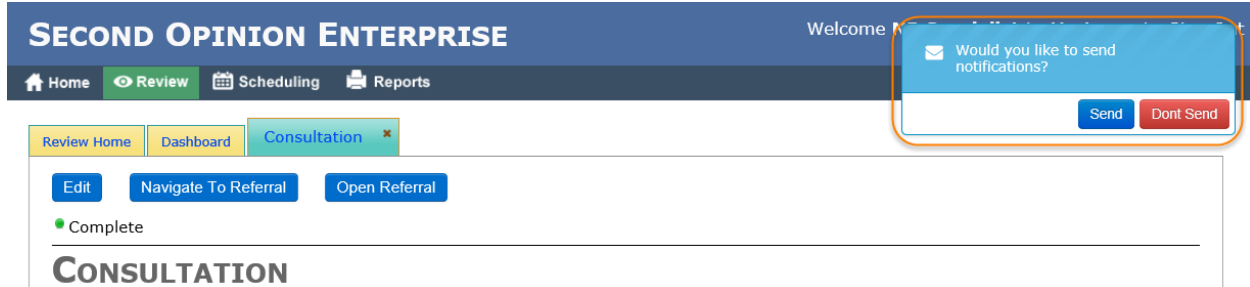


| Name | Specialty | Updated Date |
|----------------|-------------|--------------|
| Referral 1 | All | 03/23/2016 |
| Skin Eval Form | Dermatology | 03/23/2016 |

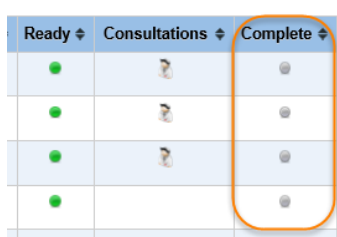
When the Consultation body is complete, it can be saved to My Templates so it can be recalled later for a Consultation of similar type. System wide Templates have to be added by an Administrator.

When the Consultation is Complete, click the *Save Changes* button and lastly click the *Complete* button.

Once the Consultation is marked Complete, notifications are sent to the owner of the Referral as well as the Site Coordinators of the medical specialty specified in the Referral. The Referral is then removed from the Dashboard and sent to History.



The Consultation can also be marked complete from the Specialist's Dashboard by clicking the *Complete* button next to the appropriate Referral.

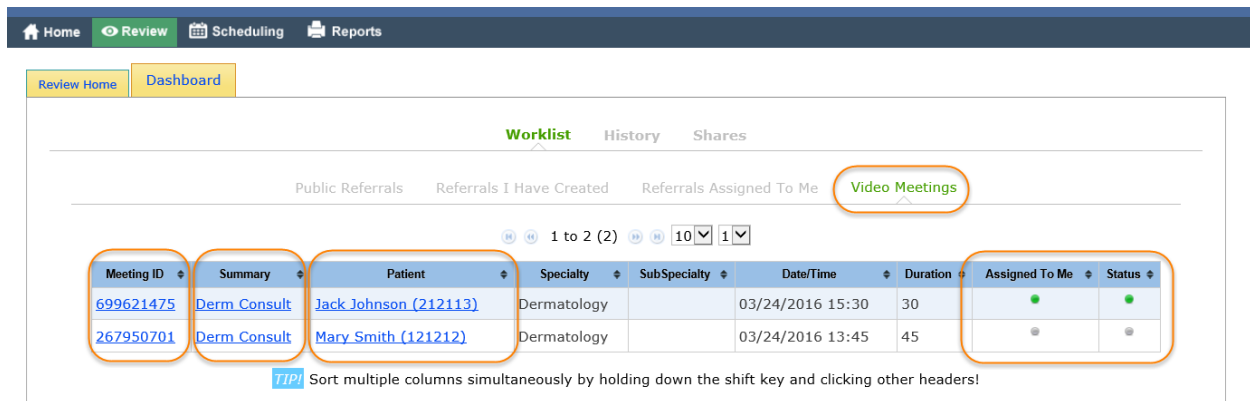


Until the Consultation is marked Complete, it is not visible in the Dashboard of the originating User or the Referral container.

Referral Appointments

To see if there are any scheduled video meetings for the Referral check the *Appointments* section in the Referral form, check the Specialist's Calendar or check the *Video Meetings* tab in the Dashboard.

The *Video Meetings* tab shows all video meetings scheduled for the day. There are quick links available to join or start the video meeting as well as links to the Referral and Patient folder associated with the meeting. There are also highlights that show whether the meeting is assigned to the current specialist and if the meeting is in progress (status).





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