

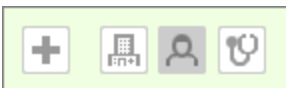
Second Opinion Enterprise – Referrals

Referrals / Encounters Overview

Referrals or Patient Encounters can be added to any Patient folder. This Referral / Encounter is a container that includes associated documents. In the case of a Referral, the documents contained in the Referral are everything that is clinically relevant to the particular case. The documents may be forms, pictures, video clips, PDF files, notes, etc. Referrals can be assigned to a particular Specialist that is associated to the Site, it can be assigned to be Public or left unassigned. They can also be shared with a User that is not associated with the referring Site. An example of this would be an external Specialist.

The User's Dashboard is used to manage and access open Referrals. The Dashboard is also used to look at historic cases that have been marked as complete.

Creating a Patient Folder



Create New Patient, View Sites, View Patients, View Referrals

The first step in creating a new Referral is to create a new Patient folder or open an existing one.

There are three parts to a Patient folder, the Profile (demographics info), the Root of the folder, then the Referral / Encounter object(s).

Patient: Joe Smith (13221)

Joe.png
3/13/2014 8:17:18 PM
[Preview](#) [Open](#)

Ins Card Back.jpg
3/13/2014 8:18:40 PM
[Preview](#) [Open](#)

Ins Card.jpg
3/13/2014 8:18:40 PM
[Preview](#) [Open](#)

Referral
3/13/2014 8:24 PM
[Navigate](#) [Open](#)

Below is a sample of a completed Referral. It contains the associated Referral documents and a completed Consultation.

Referral: 3/13/2014 8:24 PM

foot sore1.jpg
3/13/2014 8:25:13 PM
[Preview](#) [Open](#)

foot sore2.jpg
3/13/2014 8:25:14 PM
[Preview](#) [Open](#)

foot sore3.jpg
3/13/2014 8:25:14 PM
[Preview](#) [Open](#)

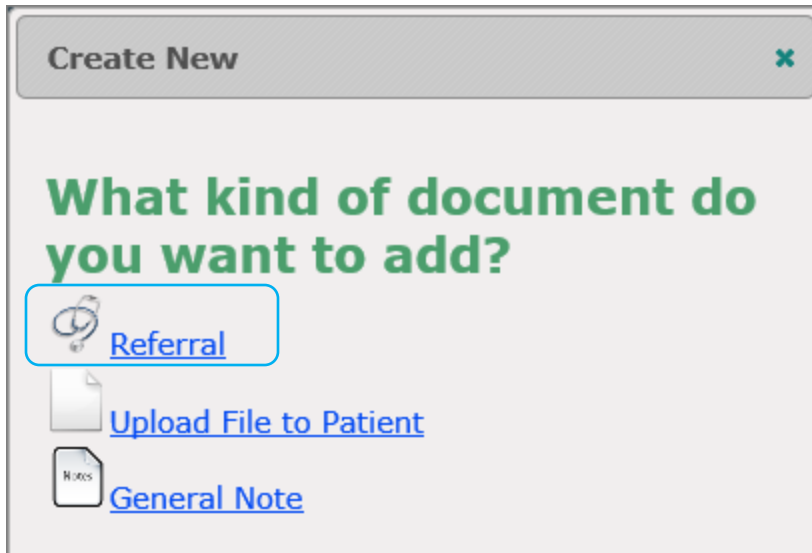
Foot Treatment.jpg
3/13/2014 8:25:15 PM
[Preview](#) [Open](#)

Consultation
3/14/2014 10:06:23 AM
[Open](#)

Once you have a Patient folder open, click the *Add Document* button and choose Referral.

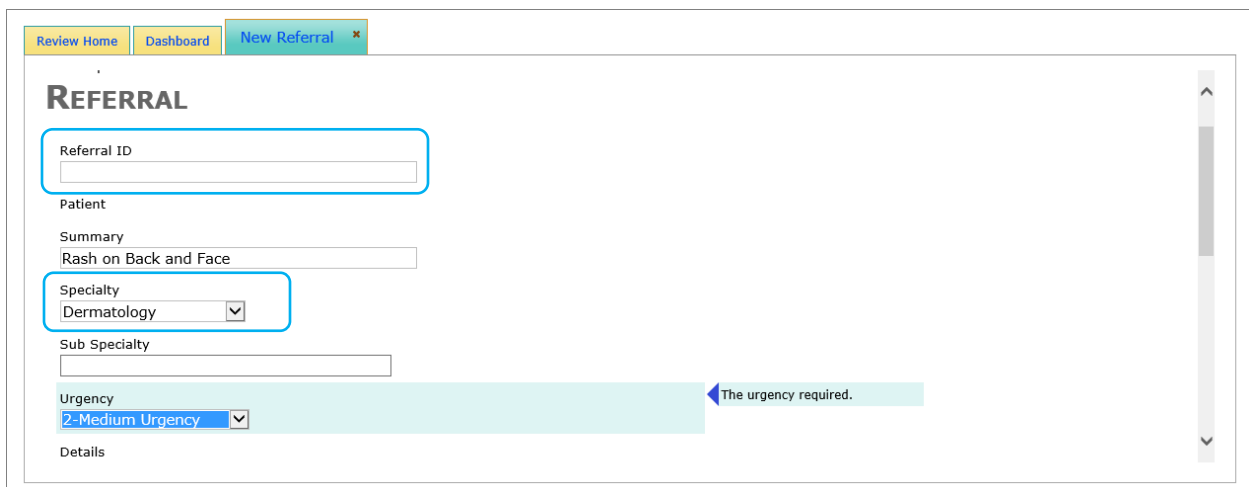


Add document Patient folder



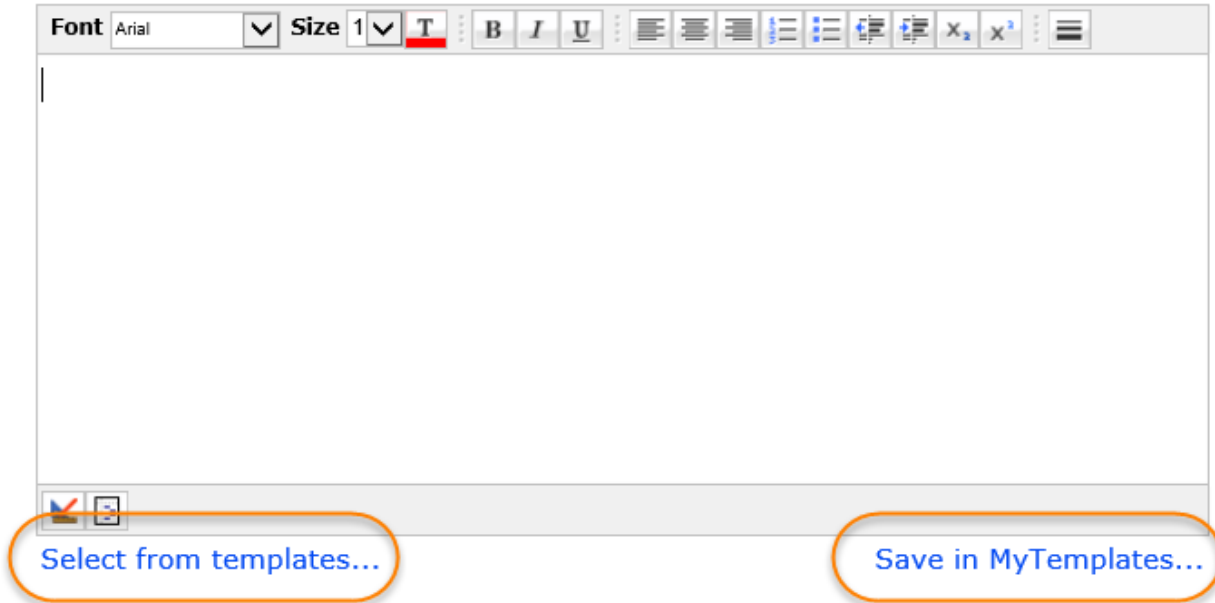
The Referral ID is an optional field that allows for a secondary Referral ID if desired.

The Specialty field is mandatory. The list that comes up is managed by the System. Specialties can be added or removed by request. Sub Specialties are managed by Users. Simply type in any desired Sub Specialty.



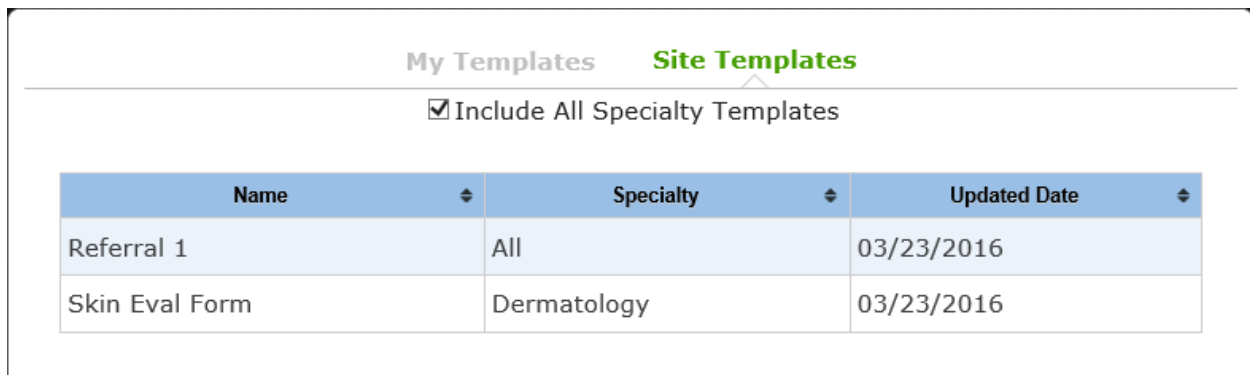
The Referral details can be typed, pasted from another source or a Template can be inserted to pre-fill values. When the Referral body is complete, it can be saved to My Templates so it can be recalled later for a Referral of similar type. System wide Templates have to be added by an Administrator.

Details



The screenshot shows a rich text editor window. The toolbar includes options for font (Arial), size (1), bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, and zoom in/out. At the bottom of the editor, two buttons are highlighted with orange ovals: "Select from templates..." on the left and "Save in MyTemplates..." on the right.

Clicking the *Select from templates* shows My Templates as well as the system wide Templates.



The screenshot displays a template selection interface. It features two tabs: "My Templates" and "Site Templates", with "Site Templates" currently selected. Below the tabs is a checkbox labeled "Include All Specialty Templates" which is checked. A table below lists the available templates.

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

Once a Referral Template is selected, the contents of the Template are inserted into the Referral Body. From here the body text is edited to be specific for this particular Referral. When finished, the body text can then be saved into My Templates so it can be reused in the future.

Font Arial **Size** 1 **T** **B** **I** **U** [List Bullets] [List Numbered] [List Indent] [List Outdent] [List Undo] [List Redo] [List Print] [List Refresh] [List Close]

Relevant History:

- Something you should know about is...

Relevant Physical Findings:

- I found that...

Relevant Laboratory and/or Diagnostic Test Results:

[Select from templates...](#)

[Save in MyTemplates...](#)

Doctors are then assigned to the Referral. If a Referral is not assigned, it will be classified as Unassigned and Coordinators of the system will be notified so they can assign it to the appropriate Specialist(s). Once a Specialist has reviewed the contents of the Referral, they can create a Consultation, re-assign the case to a different Specialist or un-assign themselves from the case. Coordinators for the specific medical specialty selected in the Referral and the User who created the Referral are notified each time the state of the Referral changes. It is up to them to manage the Referral through the entire process.

Select Specialists to Assign

- [-] Specialists
 - Public
 - [-] **Dermatology**
 - NB Specialist
 - ttty ttty
 - Derm Specialist
 - [-] Oncology
 - [-] Other
 - Specialist Account
 - Derm Specialist
 - [-] Podiatry



The last part of the Referral is the *Scheduling an Appointment* section. Depending on the specific protocols of your site, appointments can be made now, later, or by the Site Coordinator.

If creating an appointment, a Specialist is selected and the calendar for that Specialist is displayed. Appointments are color coordinated.

SECOND OPINION ENTERPRISE Welcome **Katie Katie** ! My Account Sign Out

Home Review **Scheduling** Reports

Review Home Dashboard Referral: 12/10/2014 07:46

Edit Navigate To Referral

Ready Complete

Schedule an appointment

Specialist:*

today < > 03/24/2016 **March 24, 2016** Month Timeline Month Timeline Week Timeline Day

Specialist	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
NB Specialist							title	title			Patient		

If the selected Specialist does not have any availability, a different Specialist can be selected or one can browse to a different day. To create an appointment, click anywhere in the availability section (green highlight) and the *Add Appointment* dialog box will appear. To pre-fill an estimated meeting time, move the mouse to the desired start time, click the left mouse button and drag it to the desired end time.

SECOND OPINION ENTERPRISE Welcome **Katie Katie** ! My Account Sign Out

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Specialist:*

today < > 03/24/2016 **March 24, 2016** Month Timeline Month Timeline Week Timeline Day

Specialist	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
Derm Specialist													

For appointments associated with a Referral, the Patient and Referral are referenced. The type of meeting being scheduled is also selectable. Additional attendees can also be added to this appointment. These attendees can be Users defined in the system or external participants. To be a participant of a meeting, all that is required is a valid email address. Notification emails and/or SMS text messages are sent to all participants.

Add Appointment

Patient:
 Johnson, Jack (212113) ▼

Referral:
 Foot Sores ▼

Appointment Title
 Derm Consult

Appointment Description
 Treatment of Ulcers ▲▼

Appointment Date: *
 03/24/2016

Appointment Time: *
 15:30 - 16:00 PDT

Video Meeting: *
 None
 Zoom Meeting
 Other

Attendees:

Edit Appointment

Specialist: *
 Derm Specialist ▼

Patient:
 Johnson, Jack (212113) ▼

Referral:
 Foot Sores ▼

Appointment Title
 Derm Consult

Appointment Description
 Treatment of Ulcers ▲▼

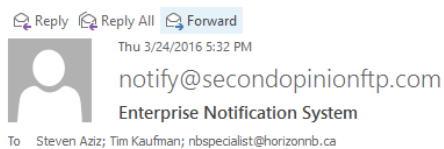
Appointment Date: *
 03/24/2016

Appointment Time: *
 15:30 - 16:00 PDT

Video Meeting: *
 None
 Zoom Meeting
<https://telemarque.zoom.us/j/699621475>
 Other

Attendees:

Email and Text Notifications

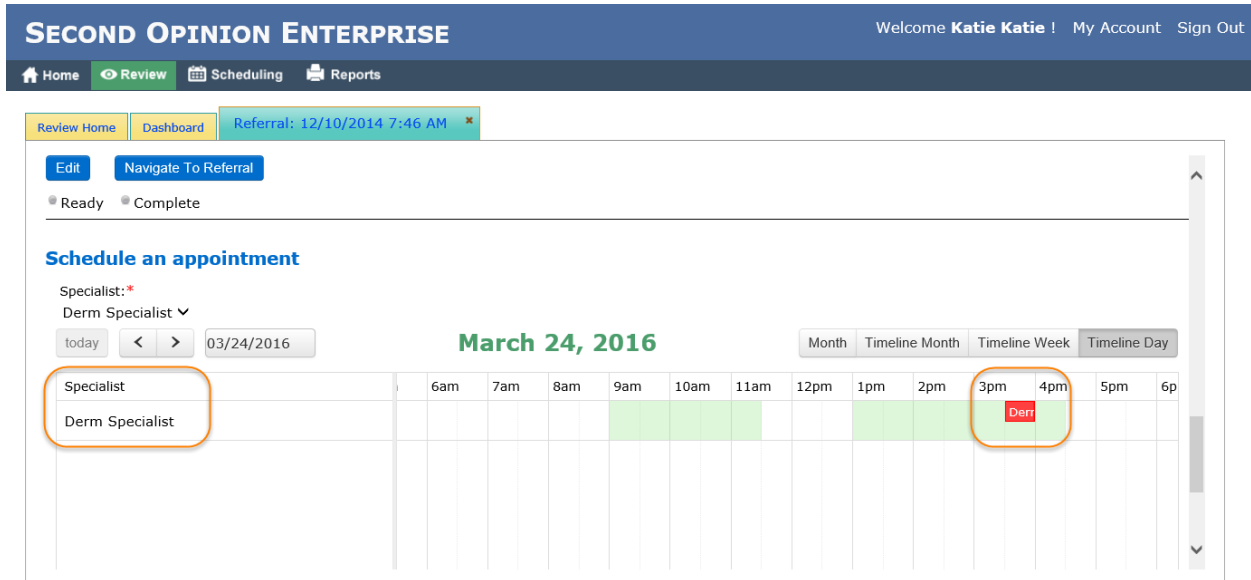


A new or updated appointment has been scheduled.

Date: 03/24/2016
 Time: 11:30
 Duration: 30 Minutes
 Attendee(s): nbspecialist@horizonnb.ca, steve@sotelemed.com, timk@sotelemed.com
 Meeting: Zoom <https://telemarque.zoom.us/j/614577853>

If you have questions or need more information please contact:
 Sample ServiceAdmin
 Mobile: 310-555-5555
admin@secondopinion.net

The scheduled appointment for this Referral is colored red.



SECOND OPINION ENTERPRISE Welcome **Katie Katie** ! My Account Sign Out

Home Review **Scheduling** Reports

Review Home Dashboard Referral: 12/10/2014 7:46 AM

Edit Navigate To Referral

Ready Complete

Schedule an appointment

Specialist: *
Derm Specialist

today < > 03/24/2016

March 24, 2016

Month Timeline Month Timeline Week Timeline Day

Specialist	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
Derm Specialist										Derm			

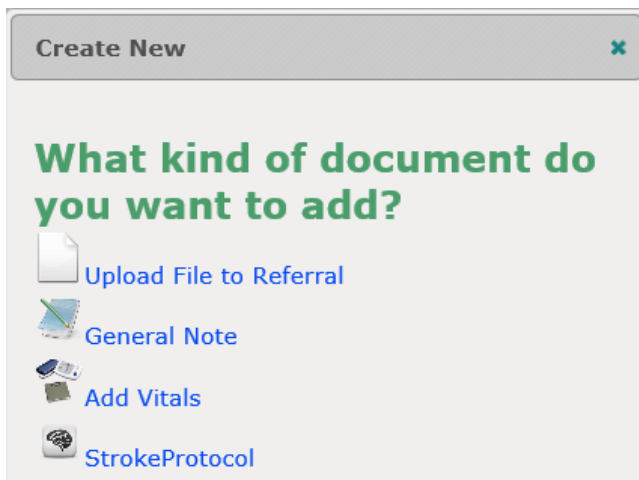
The Referral is then saved and opened in a new tab.

Once the Referral has been opened, content can be added. Files can be uploaded, forms added, images captured directly from imaging devices or medical scopes and vital signs captured from devices or manually entered. To capture images from local devices, the MultiMedia Manager capture engine add-in must be installed on the local computing device. To capture vitals from local devices, the Vital Sign Manager add-in must be installed on the local computing device. Currently these add-ins only support devices running the Windows operating systems.



Add New Document, Launch Capture Engine, Launch Vital Sign Engine

Clicking the *New Document* icon launches the new document window.

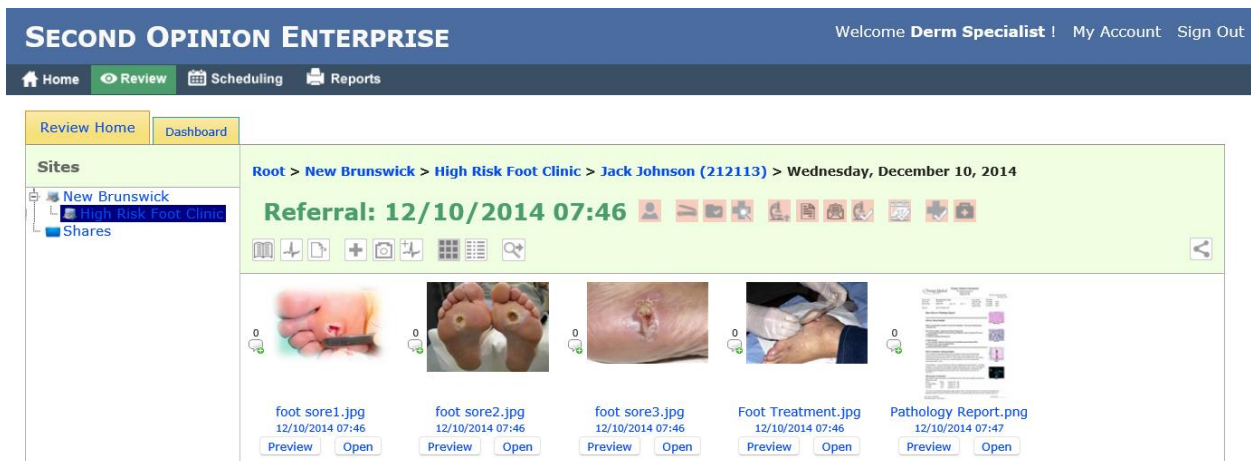
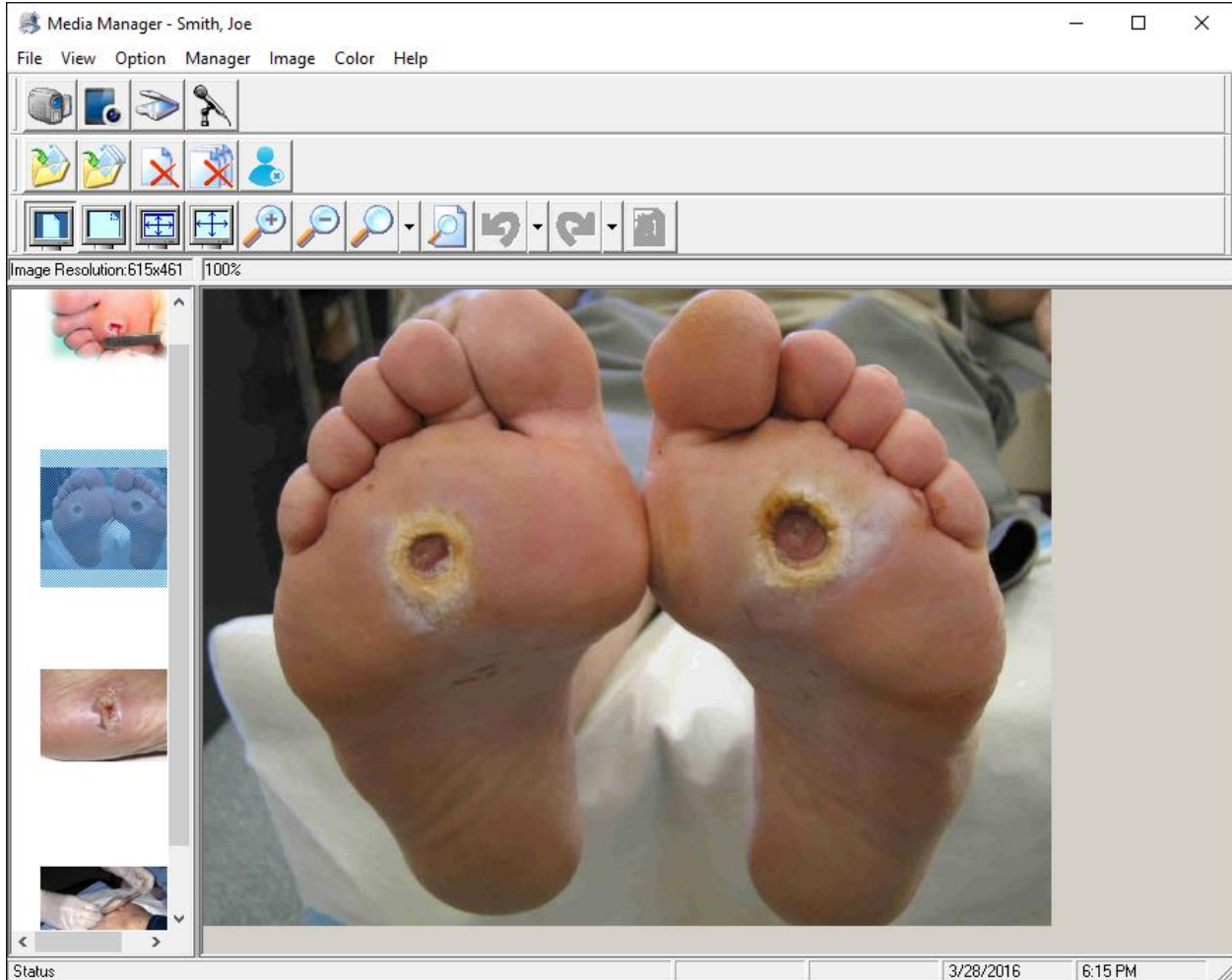


Create New x

What kind of document do you want to add?

- Upload File to Referral
- General Note
- Add Vitals
- StrokeProtocol

Clicking the *Launch Capture Engine* icon launches the MultiMedia Capture Engine. Once the images and/or video clips are accepted, they are automatically uploaded to the specific location where the *Launch Capture Engine* icon was clicked.

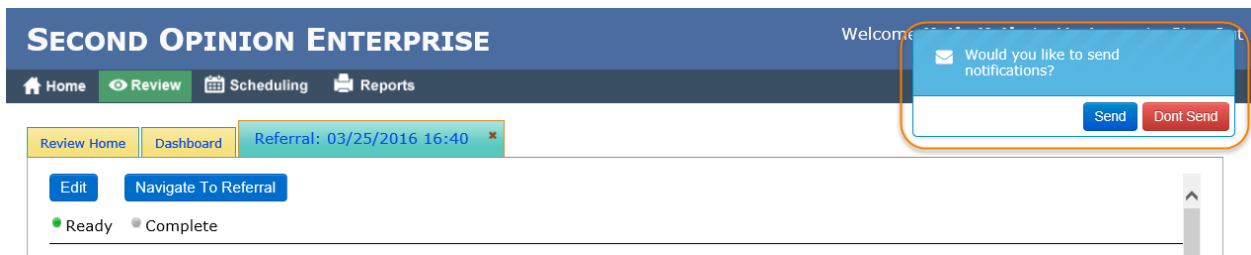


Once a Referral is complete and ready for the Specialist, it has to be marked Ready. The Referral does not show up on the Specialist’s Dashboard until it is marked Ready. Click the tab of the open Referral or click the *Open Referral Record* icon and click *Ready*.

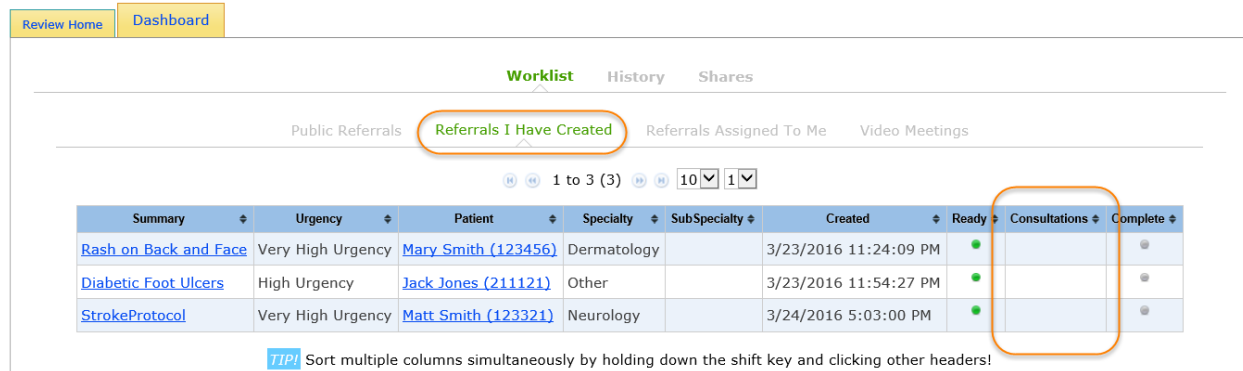


Open Referral Record




Once the Referral is marked Ready, notifications will be sent to the Coordinator and the Specialist(s), if one is assigned.



The User’s Dashboard is used to efficiently manage all open and historic cases.



When a Consultation has been created by the Specialist, the User who created the Referral and the Site Coordinator will be notified and the Dashboard view updated.

Ready	Consultations	Complete
<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input type="checkbox"/>

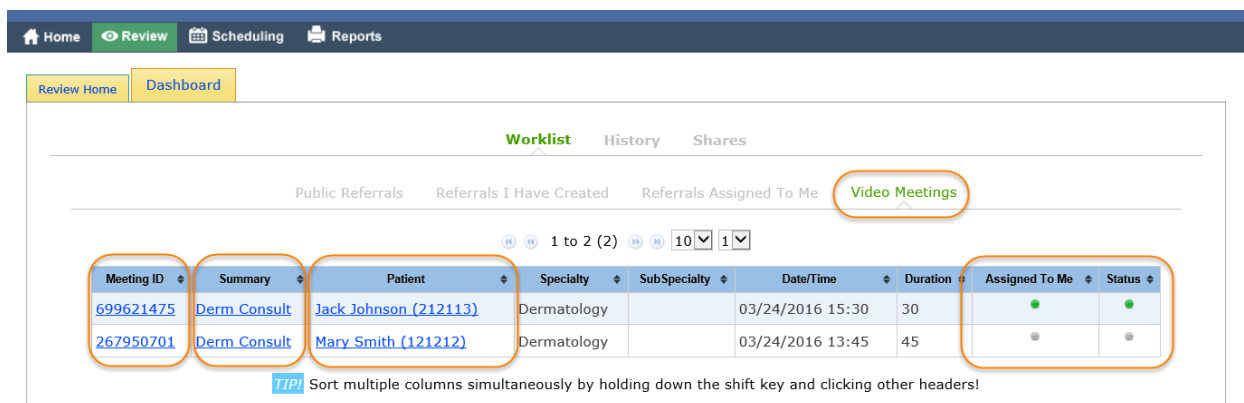
After reviewing the Consultation, the User may wish to ask the Specialist clarification questions, send the case to another Specialist or Complete the case. If a video meeting is scheduled, any questions can be discussed at that time.



Once the Referral is marked Complete, it is removed from the Dashboard and sent to History section of the Dashboard.

	Ready	Consultations	Complete
	●	👨	●
M	●	👨	●
AM	●	👨	●
AM	●	👨	●

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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For More Information or Technical Support Give Us a Call

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