S – POST-SERVICE DISCUSSION

This demonstrates post-service dialogues between the facility and referring HCP.

After the test or procedure has been completed, the technician updates the Request's thread (status is "Service Today") indicating that the test or procedure was carried out uneventfully. He checks "Service Conducted" and Saves.

The Request becomes pink-banded on the facility secretary's Manage Requests screen, indicating that there is a specific task for her to perform: uploading the report once it is available. The Request's status is now "Service Conducted" and will appear on two of the facility secretary's tabs: "Service Conducted" tab and "For Secretary's Attention" tab.

She opens the Request, selects her reply from the "canned responses" dropdown, attaches the report and unchecks the "For Secretary's Attention" box. When she Saves, an email notification is generated for the referring HCP's office and the Request status becomes "Post-Consult Discussion".

Here is the email notification: {see video}. The referring HCP reviews the thread and downloads the report. If there are any concerns, the referring HCP replies in an update, with specific questions directed to the services manager. She checks the "For Service Manager's Attention" box and clicks Add Reply. The Request status remains Post-Service Discussion.

Checking the "For Service Manager's Attention" box brings the Request to the service manager's attention in the following ways: The Request is now blue-banded on the service managers Manage Requests screen. More important, it now also appears in the service manager's "Waiting for My Reply: tab, in the subcategory "Post-Service Discussion". We recommend that the service manager works through the tabs at least twice daily as a standard workflow, so the referring HCP's concerns will definitely be discovered and addressed on the day it is received.

The service manager opens the Request, reads the updated post and responds by attaching the reference document requested by the referring HCP and by including answers to her questions in the "Update this Request: field. He Saves. This generates an email notification to the referring HCP. The Request status remains Post-Service Discussion.

The referring HCP's staff clicks the link in the email notification, log into the facility's Portal and reads the service manager's post. The referring HCP reviews the thread, downloads the attached reference document and then updates, this time with a question for the facility secretary. She leaves the "For Service Manager's Attention" box unchecked in order to direct her reply to the secretary. She clicks Add Reply.

The status remains Post-Service Discussion. The Request appears in the facility secretary's "Waiting for Secretary's Reply" tab, in the "Post-Service Discussion"

subcategory. She opens the Request, answers the referring HCP's questions in the update, and clicks Save. An email notification is generated for the referring HCP's office.

As a result, the referring HCP reads the facility secretary's new post. This back and forth dialogue between referring HCP and facility can go on for as long as necessary.

Once the referring HCP is satisfied that the communication is complete, she has her staff create a PDF of the entire thread and adds it to the patient's EMR or paper records. All downloaded documents are similarly added to the patient's medical record. The staff finally checks the "Yes. I have printed the request" box, and clicks "Close this Request". The status changes to "Copy and Close" and the Request is displayed in red on the facility secretary's Manage Requests screen. She creates a PDF of the entire thread for her office's patient medical record, checks the "Yes. I have printed the request" box and clicks "Delete". The Request is deleted from the Portal's database and no longer appears on anyone's Manage Requests screen.