

Chapter 22

Down-Referrals

This chapter—

- Explains the down-referral system
- Familiarizes the user with how and why to print a picking schedule, picking list, delivery confirmation list, labels, and address labels for a particular route

Working with Down-Referrals

What Is a Down-Referral System?

Down-referrals occur when a higher-level health care facility, such as a hospital, transfers all or part of a patient's care to a lower-level facility that is more convenient for the patient. The RxSolution down-referral module was developed to assist the pharmacist with—

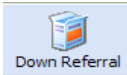
- Clinical and management reports
- Financial and logistic accountability
- Improved efficiencies in the dispensing process
- The ability to down-refer stabilized chronic clients back to their community primary health care facilities

Each appropriate patient is assigned to a down-referral clinic. Using the RxSolution down-referral function, these patients' prescriptions are automatically grouped by clinic; a courier distribution list is generated by the system; and for each repeat patient, the following are created—

- A prescription pick list
- A set of medication and address labels
- A picking schedule
- A delivery and collection checklist

Prescriptions are checked, packaged in cartons, sealed, grouped according to the down-referral centers, and then dispatched according to the courier distribution list.

How Do I Get to the Down-Referral Screen?

Click on the **Down Referral** button  found on the toolbar at the top of the screen.



Alternatively, click **Dispensing** on the menu and choose **Down Referral** from the drop-down menu.

What Does the Down Referral Screen Look Like?

The screenshot shows the 'Down Referral' screen with two main panels. The left panel, 'Route Selection Manager', contains a 'Filters' section with dropdowns for 'Select Route' (Extended EDL Clinics), 'Date from' (19/09/2011), 'Date Until' (24/09/2011), 'Clinics' (Top City EDL), 'Demander' (<All>), 'Post Status' (False), and 'Shipped Rx' (False). The right panel, 'Route Detail', has a header 'Drag a column header here to group by that column' and a table with columns: Date, RX #, P, Posted, Repeat, Repeat #, Items, Colla..., Collected, Picked, and Clinic. The table contains two rows of data for dates 22/09/2011 and 24/09/2011.

The **Down Referral** screen is divided into two parts—

- The **Route Selection Manager** is on the left.

Note: The routes themselves are created in the **Systems Setting** option, under the **Batch Route** tab. When a clinic is created in RxSolution, it can be assigned to a previously defined batch route.

This is a close-up of the 'Route Selection Manager' filters section. It includes dropdowns for 'Select Route' (Extended EDL Clinics), 'Date from' (19/09/2011), 'Date Until' (24/09/2011), 'Clinics' (Top City EDL), 'Demander' (<All>), 'Post Status' (False), and 'Shipped Rx' (False).

- The **Route Detail** is on the right.

This is a close-up of the 'Route Detail' table. The header row is 'Drag a column header here to group by that column'. The table has columns: Date, RX #, P, Posted, Repeat, Repeat #, Items, Colla..., Collected, Picked, and Clinic. The table contains two rows of data for dates 22/09/2011 and 24/09/2011.

Date	RX #	P	Posted	Repeat	Repeat #	Items	Colla...	Collected	Picked	Clinic
22/09/2011	R/11053661/4	BGG		5	4	1				Top City E
24/09/2011	R/11062218/4	MKHL		5	4	1				Top City E

Use the **Route Selection Manager** to set the filters for the down-referral system. Specify the following—

- The route name from the drop-down list
- The **Date from** and **Date Until** (i.e., the start date and end date)

- The clinic or all the clinics that fall under that route
- The demander or all the demanders from which the patient's prescriptions may originate
- The Posted Status
- The Shipped status

The route details give more information on each prescription that falls under the different filter details.

Using RxSolution to Manage Down-Referrals

How Do I Use the Route Selection Manager?

Filters	
Select Route	Extended EDL Clinics
Date from	19/09/2011
Date Until	24/09/2011
Clinics	Top City EDL
Demander	<All>
Post Status	False
Shipped Rx	False

The **Route Selection Manager** uses a filter-based system of five drop-down menus (see Table 17-1) to narrow the route details to view. The five filters are the route; the date from (start date); the date to (end date); the clinics; and the demander, which specifies from where the patient prescription originates.

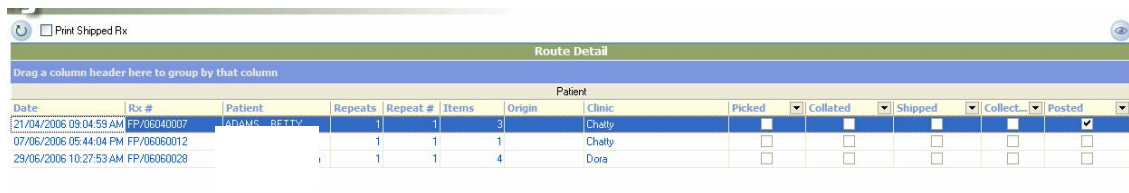
Table 22-1. Using Filters in the Route Selection Manager

Filter	Description
Select Route	Click on the Select Route drop-down menu to choose the route. This drop-down menu list is managed under Tools, System Settings in the main menu.
Date from	Click on the date selector to specify the start date (Date from) of the search. This date, which can also be typed in, marks the beginning of the range in which patient repeats for this route are due.
Date Until	Click on the date selector to specify the end date (Date Until) for the search. This date, which can also be typed in, marks the end of the range in which patient repeats for this route are due.
Clinics	Click on the Clinics drop-down menu to specify only one clinic selection or select <All> to display the route details of all the clinics that fall under the selected route. The clinics that appear on the drop-down list are only those clinics that fall under the selected route.

Filter	Description
Demander	Click on the Demander drop-down menu to specify the route details belonging to that selected demander. Choose the <All> option from the drop-down to display all the demanders that may fall under the selected clinic. The demander list in the drop-down comes from the system demanders that have been marked as dispensing demanders in the Demander module.
Posted Status	Click on the Posted Status drop-down menu to specify True or False if the prescription has been Posted or still carries an Active status.
Shipped Rx	Click on the Shipped Rx drop-down menu to specify True or False if the prescription has been marked as Shipped.

The information on the route detail on the right-hand side is refreshed each time a change is made to the filter options in the **Route Selection Manager**.

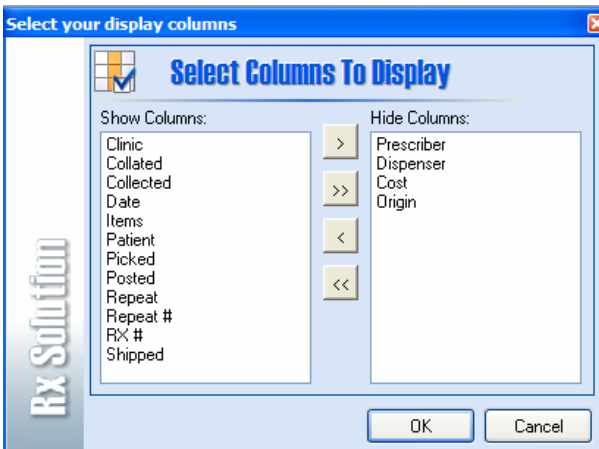
How Do I Use the Route Detail Grid?



Date	Rx #	Patient	Repeats	Repeat #	Items	Origin	Clinic	Picked	Collated	Shipped	Collect...	Posted
21/04/2006 09:04:59 AM	FP/06040007	ADAMS, BETTY	1	1	3		Chatty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
07/06/2006 05:44:04 PM	FP/06060012		1	1	1		Chatty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29/06/2006 10:27:53 AM	FP/06060028		1	1	4		Dora	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The information displayed on the **Route Detail** grid depends on the choices you made in the **Route Selection Manager** filter options. As on other screens in the program, you can select

which fields to display by clicking the eye icon , found at the top right of the screen. See chapter 3, “Understanding the Features and Navigation,” for more information.



The columns you can display are described in Table 22-2.

Table 22. Using the Columns in the Route Grid Detail

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Column	Description
Clinic	The clinic to which the dispensed prescription is sent
Collated	Place a check mark in the box if the medicine has been placed in a patient package, if it has been labeled with the address label, and if a copy of the prescription or pick list is attached to the patient's package
Collected	Place a check mark in the box when the delivery and collection checklist is returned from the down-referral institution and the list reflects that the patient has collected his or her prescription
Cost	The cost of the prescription
Date	The date the prescription is due to be picked up by the patient
Dispenser	The dispenser for the prescription
Items	The number of items on the prescription
Origin	The name of the location that the prescription originated from e.g. Asthma Clinic
Patient	The patient's name
Picked	Place a check mark in the box if the medication items have been picked by the Pharmacist or technician/assistant to dispense.
Posted	Indicates that the prescription has been posted
Prescriber	The prescriber for the prescription
Repeat	How many repeats (refills) are available for this prescription
Repeat #	The current repeat (refill) number
Rx #	The prescription number
Shipped	Place a check mark in the box when the collated patient prescriptions have been sent to the down-referral institution

How Do I Print Down-Referral Information?

The main purpose of the down-referral system is to be able to print helpful down-referral reports. The reports are picking schedule, picking lists, delivery and collection checklist, labels, and address labels. Click on the printer icon found on the top left-hand side of the **Down Referral** screen. A drop-down menu with all the report options will appear.



Down Referral

- Batch - Picking Schedule
- Batch - Picking Lists
- Batch - Delivery Confirmation List
- Batch - Labels
- Batch - Address labels
- Batch - Delivery Check List
- Batch - Batch summary List
- Batch - Product List
- Batch - Direction label, Address label and Trailer label

Picking Schedule

A picking schedule is a checklist to confirm that each item has been picked, authorized (posted), collated, and shipped to the down-referral institution.

Click on **Batch - Picking Schedule** to print the picking schedule for the route details that have been selected.

Picking Lists

A picking list is a list that shows the product items that need to be taken from the pharmacy stock to fill individual patient prescriptions. It is used to assist in physically collecting the stock from the shelves.

Click on **Batch - Picking Lists** to print the picking lists for the route details that have been selected.

Delivery Confirmation List

The delivery confirmation list is a summary report that is signed by the person who collects the prescriptions or who delivered the prescription for each clinic on the route. It is retained by the pharmacy.

Click on **Batch - Delivery Confirmation List** to print the confirmation list for the route details that have been selected.

Labels

Labels are the label printouts that are to be stuck on the individual medication packets. The label includes the patient name, prescription number, repeat number, directions, and the dispensing institution's name and address, in accordance with legislation.

Click on **Batch - Labels** to print the labels for the route details that have been selected.

Address Labels

The address labels display the down-referral institution name, the names of the patients, and their contact telephone and cell phone numbers.

Click on **Batch - Address Labels** to print the address labels for the route details that have been selected.

Delivery Check List

At the clinic, the nurse signs the delivery and collection checklist. The patient or caregiver also signs that he or she has received the medication. At the end of the delivery period, the form is returned to the pharmacy, together with any uncollected prescriptions. This form is used to monitor the number of patients at each down-referral clinic. At the last repeat visit, the patient is reminded of his or her next clinical assessment at the hospital.

Batch Summary List

This report is similar to printing a prescription, but it is a summary report to save paper.

Product List

This report summarizes which stock items need to be picked to be able to dispense all of the prescriptions.

Direction Label, Address Labels and Trailer Labels

This report prints all three labels