OnBase – Unable to Complete Referral Form receiving Patient Active alert

OnBase – Unable to Complete Referral Form Receiving alert

Purpose: Follow this procedure when a user reports issue with unable to complete the OnBase Admission and Transfer Form receiving Patient is already Active Alert for the Receiving Clinic or has a Scheduled Encounter for the Start Date at a different Clinic.

Required Information to be documented in each incident:

Contact NameContact NumberClinic / Facility NumberPatient NamePatient MRNReferring clinicReceiving clinicAnticipated Start Date at Receiving ClinicDetailed Description of the issue.Screen shot of the Error

Troubleshooting Process:

1. Confirm with user that the issue matches the issue reported.

2. Please document required information and troubleshooting details in the Incident.

3. Look in eCube Clinicals, for ALL VISITS (including closed) at Receiving Clinic, check that the FMS Discharge Assessment has been completed. Note: Just because a visit is closed, does not mean the Discharge Assessment has been completed. Check to ensure that discharges for each visit is completed.

If Discharge Assessment has not been entered, advise user to complete the assessment and then attempt to complete the Referral form again. This information refreshes quickly.

4. Check in eCube Clinicals for an open visit for a different clinic with the same start date. The user cannot complete the form for the same start date. Patients cannot have the same start date for multiple clinics. If needed, advise user to update start date or reach out to the clinics concerned for correct admit dates.

5. If user is still unable to complete the referral form, advise user to also contact PAS (Patient Admission Services) to check whether PAS has maybe already initiated the transfer on their end. In this case, the Referral form cannot be completed in OnBase and the transfer is not visible in OnBase for the Clinics.

6. Follow the resolution process.

7. If additional assistance is needed, follow escalation process.

Classification Requirements

Category

Software & Applications

Subcategory

Clinical Applications

Service

OnBase

Resolution Process

Please review/update Classification and provide customer with the Incident number for their reference prior to resolving.

Resolution Categorization

Resolution Code

Solved Remotely (Permanently)

Resolution Category

Software & Applications

Service

Clinical Applications

Escalation Process

Please review/update Classification and provide customer with the Incident number for their reference prior to escalating.

Assign the Incident to the Following Group

DTI-ADEX-DigitalPortals-SOP OnBase – L2

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