

MAY 6, 2025

W2 – DECISION TO TREAT BILATERAL CATARACTS

CENTRAL INTAKE



Copy a Referral for Bilateral Cataract Procedures

For patients who are receiving cataract surgery for both eyes (i.e., bilateral), you have the option to copy the original / initial referral for the first eye to easily facilitate the referral process for the second eye. The copy referral option is **only** available from the workflow status of **Record Procedure** to **Completed Procedure**.

There are two workflows depending on when the booking package is received.

One Booking Package for Both Eyes

If one booking package is received for both eyes, then the second eye needs to be set to **Inactive** until the first eye is completed.

Individual Booking Packages for Both Eyes

If you get individual booking packages, then wait until the first eye is completed and you receive the booking package for the second eye. There is no need to set the referral to Inactive in this scenario.

Steps to Copy Referral

1. For referrals in the **Ready to Treat** status, click the **Record Procedure Request** button. Click **Update Status** on the **Action: Record Procedure Request** pop-up box.

The screenshot shows a 'Procedure Requested' form with the following details:

- Procedure Specialist:** Eastern Urban (Zone) and specialist_two, ophtha_eu, Dr. (Specialist)
- Procedure Priority:** P2
- Procedure Type:** Cataract - Local - First Eye (FE) (Type) and 24-Apr-2025 (Date Booking Package Received)
- Anesthetic Type:** Radio buttons for General Anesthetic and Local Anesthetic.
- Procedure Notes:** A large text input field.
- Workflow Status:** A box indicating 'Patient has a Workflow Status of Decision to Treat'.
- Workflow Buttons:** A row of buttons: 'Record Procedure Request' (highlighted with an orange arrow), 'Incomplete Booking Package', 'Inactive (W2)', and 'Cancel Referral (End)'. Above these buttons are 'Close', 'PDF', and 'Save' buttons.

2. At this point, the **Copy Referral** button is displayed (between PDF and Save buttons). Once this button is clicked, a **'Referral Copied'** message is displayed (top right corner) indicating the referral has been copied.

REMINDER

A referral can **ONLY** be copied once.

Procedure Requested

*Zone Procedure Specialist: Eastern Urban x v
*Specialist specialist_two, ophtha_eu, Dr. x v

*Priority Procedure Priority: P2 x v
*Date Booking Package Received 24-Apr-2025 x v

*Type Procedure Type: Cataract - Local - First Eye (FE) x v

Anesthetic Type: General Anesthetic Local Anesthetic

Procedure Notes

Workflow

- From the menu, select **Patient** to return to the **Patient Demographic Summary** page. The referrals table / list will include **two referrals** – one for the original, first eye referral and a second referral for the second eye. You can identify the copied referral by the “**c/f**” tag followed by the reference to **Referral ID** for the first referral.

BROOKS, VESTA_TPCHI

Patient Demographic Summary

Identifiers (Expiry Date)	Alternate Names	Sex / Gender	Date of Birth (Age)	Preferred Contact Method
MCP 189560869670 (01-Jan-2030)	BROOKS, VESTA_TPCHI (Legal)	Other	26-Mar-1956 (69 years)	

Address	Phone	Email
28 NASCOPIE BOULEVARD, GLOVERTOWN, Newfoundland and Labrador, Canada, A0G 2L0 (Client Registry - Postal)	709 589 5438 (Client Registry - Home)	
33 Terrace Crst, Waterloo, Ontario, Canada, N2L5C2 (Home)		

Referral Id	Referral Type	Status	Patient Type	Updated Date	Updated By
ci-0002705 (cf ci-0002705)	Ophthalmology	Attended Consult Appt.	Outpatient	24-Apr-2025	mandybull1
ci-0002705	Ophthalmology	Recorded Procedure Request	Outpatient	24-Apr-2025	mandybull1

- Click on the **Copied** referral from the list. This referral will be in an **Attended Consult** status.
 - If you receive a **booking package for both eyes**, you will need to make the second eye referral **Inactive (W1)**.
 - Click the **Inactive (W1)** button.
 - From the **Action: Inactive (W1)** pop up box, choose a **Reason Inactive** from the drop-down list; click **Update Status**.
 - If you receive the booking package for the **second eye after the first eye** is completed, you **do not** need to make the referral for the second eye **Inactive (W1)**.

The screenshot shows a 'Consult Appointment' form with the following details:

- Consult Specialist:** Eastern Urban (Zone), specialist_two, ophtha_eu, Dr. (Specialist)
- Consult Appointment:** 24-Apr-2025 (Date), Specialist's Office (Location)

Buttons: Close, PDF, Save

Workflow:

- Decision to Treat
- Refer to Subspecialty
- Medical Mgmt. (W1-End)
- Inactive (W1)** (highlighted with a red circle and an orange arrow)
- Cancel Referral (End)

5. Continue to manage each referral as necessary.

Key Reminders

Initial Referral (First Eye)	Copied Referral (Second Eye)
The Copy Referral button becomes available at the Procedure Requested section of the referral form.	The copied referral will be in the Attended Consult status.
A referral can only be copied once.	A copied referral will have a c/f number below the Referral ID as well as in the header section of CI.
	The first Decision to Treat and the Inactive Date on the Copied Referral (i.e., second eye) need to be the same as the date on the booking package.
	When the referral is ready to be moved from Inactive status to the 2 nd Decision to Treat , this date is the date of completion of the first eye procedure.
	The Accept for Procedure is the date of completion of the first eye procedure.
	Ready to Schedule and Schedule Procedure Appointment dates are the actual dates (and not the dates from the completion of the first eye).
	The Attend Procedure (Complete) is the date the completion of the second eye procedure.