



## **Guide for Users of RIVIAM's Digital Immunisations Service**

How to: Triage Consents

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17<sup>th</sup> August 2021

v0.1

## 1 Introduction

This guide explains how to Triage consents on the RIVIAM Digital care platform. It starts out explaining the different triage queues and where to find them. Then it covers how to carry out triage of the different queues, and how to manage the triage process. This includes recording any discussions about a specific patient, and moving that patient along in the workflow - either to another triage step, to be ready to immunise or to decline consent.

For the best experience using the RIVIAM Digital Care platform, please use the latest versions of Chrome, Edge, Safari or Firefox.

## 2 Overview of the Triage Options

When consents come into RIVIAM, they are routed into different queues, depending on the answers to various questions in the eConsent form.

The rules governing how consents are routed are similar across immunization programmes, but there can be differences, usually driven by the clinical policies of a given immunization team.

In most Immunisation programmes you would find the following triage queues. The checks start with the top rule and work through to the bottom:

Queue Name	Conditions
DoB Triage	If the patient DoB falls outside the range of the expected school year group to be immunised
Relationship Triage	If the parent relationship falls into specific categories that the Immunisation Team want to validate
Clinical Triage	If any of the patient history questions relating to underlying conditions or allergies are set to Yes
Duplicate & Conflicting Consents Triage	If two people submit the same consent for a child, the referrals go into the duplicate consent queue. If the consents are different, the referrals are flagged as conflicting.
Demographic Check	This is triggered where the data entered on the eConsent form doesn't match information provided up front by the Immunisation Team. Typically this would be address and NHS number.
Ready	If none of the rules above have been triggered, the patient is ready to be immunized.

Figure 1 – Triage types

### NOTES

- In programmes where no patient demographic data has been provided up front, the demographic check status is equivalent to Ready. If a second record then comes in for that child, then the referral would be put into either the duplicate or conflicting consents queue.
- Not all consent statuses are visible in either the clinical spreadsheet or the RIVIAM app. The following table indicates what is visible on what platform.

<b>Consent Status</b>	<b>Appears on clinic sheet</b>	<b>Appears on mobile App</b>
Consent given	Yes	Yes
Consent not given	Yes	Yes
Conflicting consents	No	No
Declined (clinically or by service)	No	No
Declined (out of cohort)	No	No

### 3 The Triage Process

The following flow diagram shows the process to follow when carrying out Triage activities.

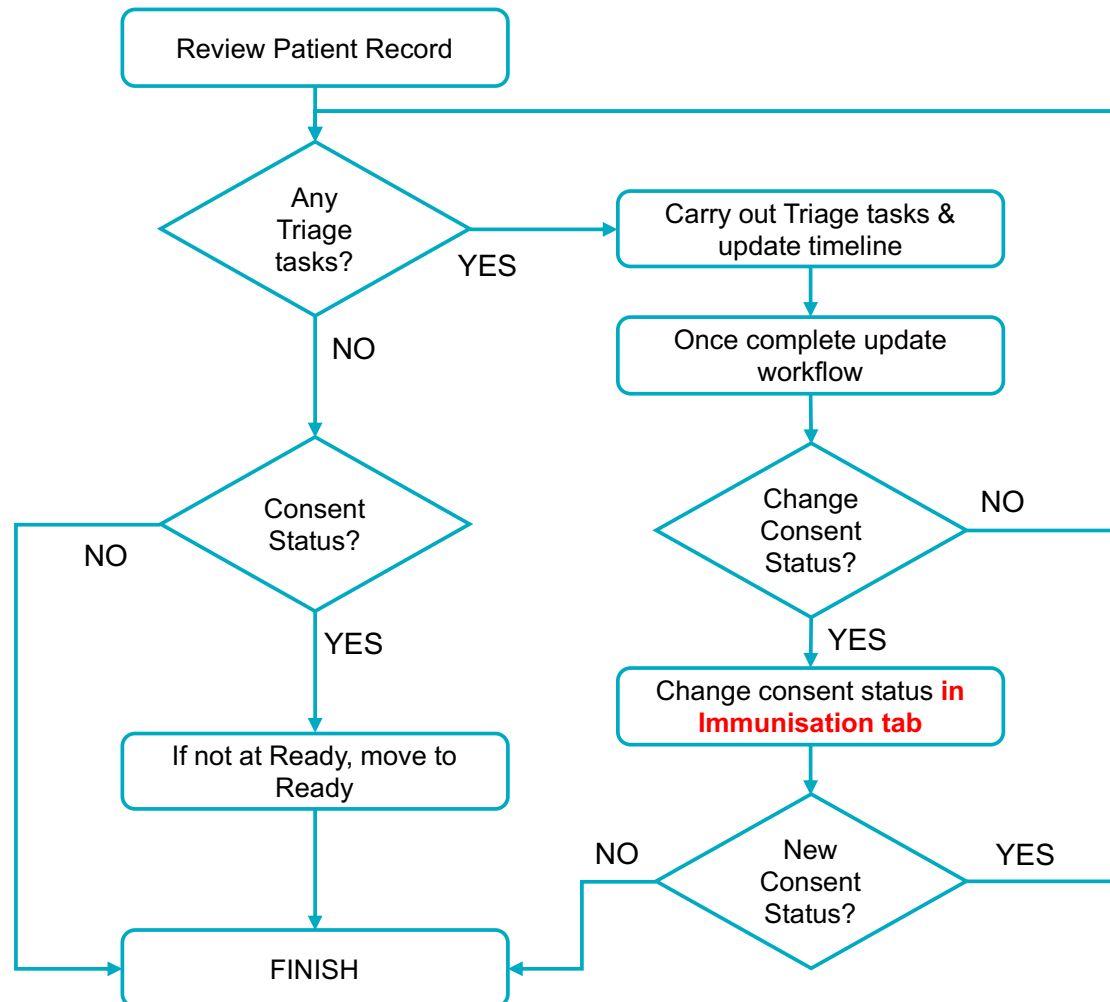


Figure 2 – Triage process

The process is quite straightforward – if an initial check indicates Triage is needed, you work through that triage, and once complete, check for any more. You keep working thorough until all triage has been completed. As you go through the triage you are able to record any details, which appear on the patient timeline.

If at any point your triage checks require that the consent status needs to be changed, this **MUST BE DONE** in the Immunisations tab. Changing consent status here automatically updates the workflow.

## 4 Where to find who needs Triage

There are two views that clinicians will use when looking at which patients need to be triaged.

### 4.1 Programme view

To see what the triage queues are and how many people are in them, you start by going to the referrals dashboard

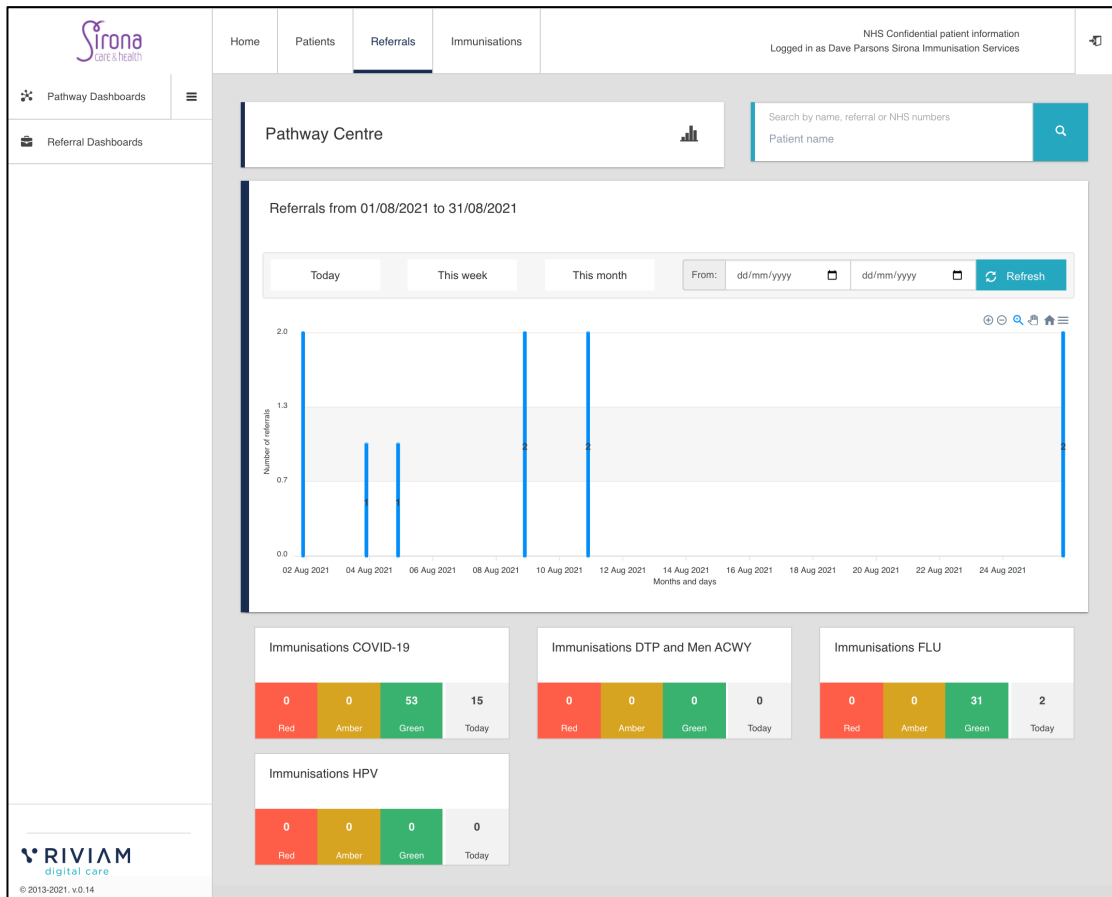


Figure 3 – Triage programme view

From here you click on the Red/Amber/Green (RAG) chart for a specific programme, and this takes you to a view of the queues for that programme.

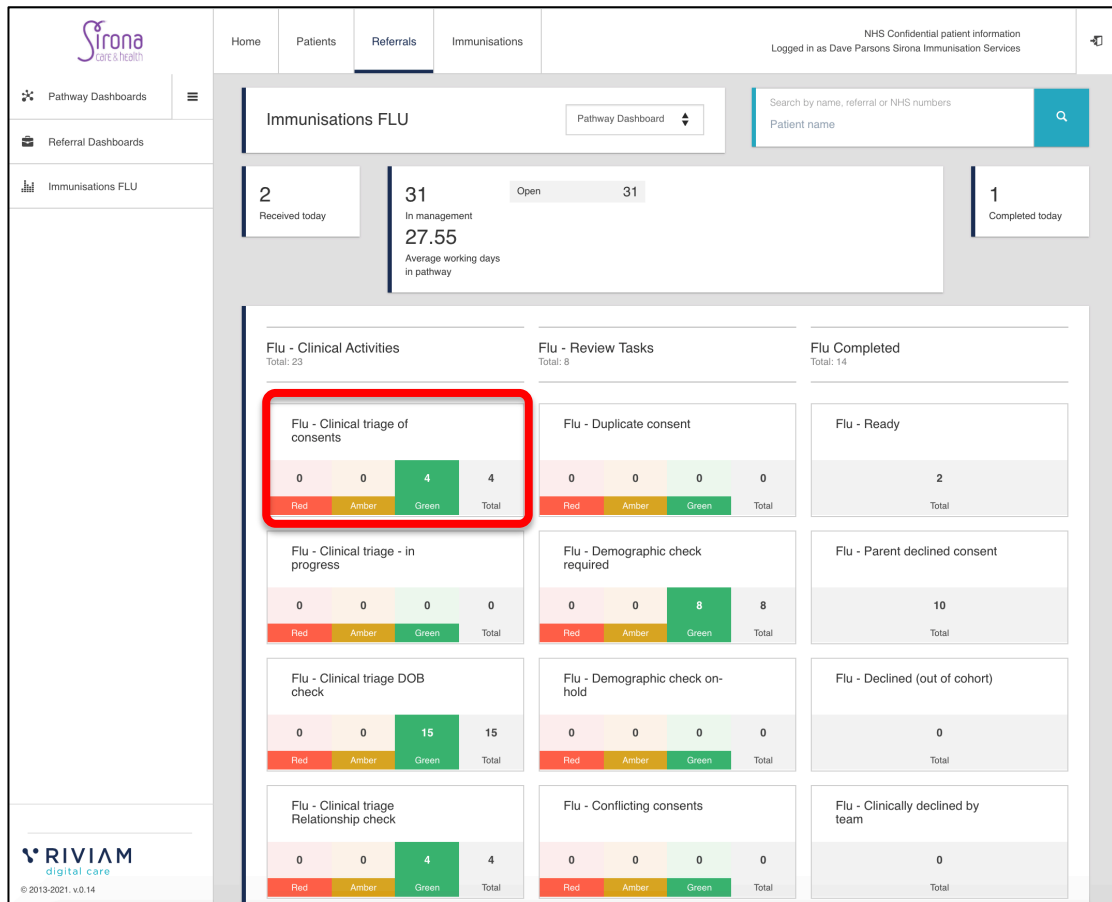


Figure 4 – Triage types by programme

Here you can see the number of outstanding patient records that need to be triaged by each triage category. If you click on a particular triage category (as indicated in the above diagram) you get details of the patients to be triaged.

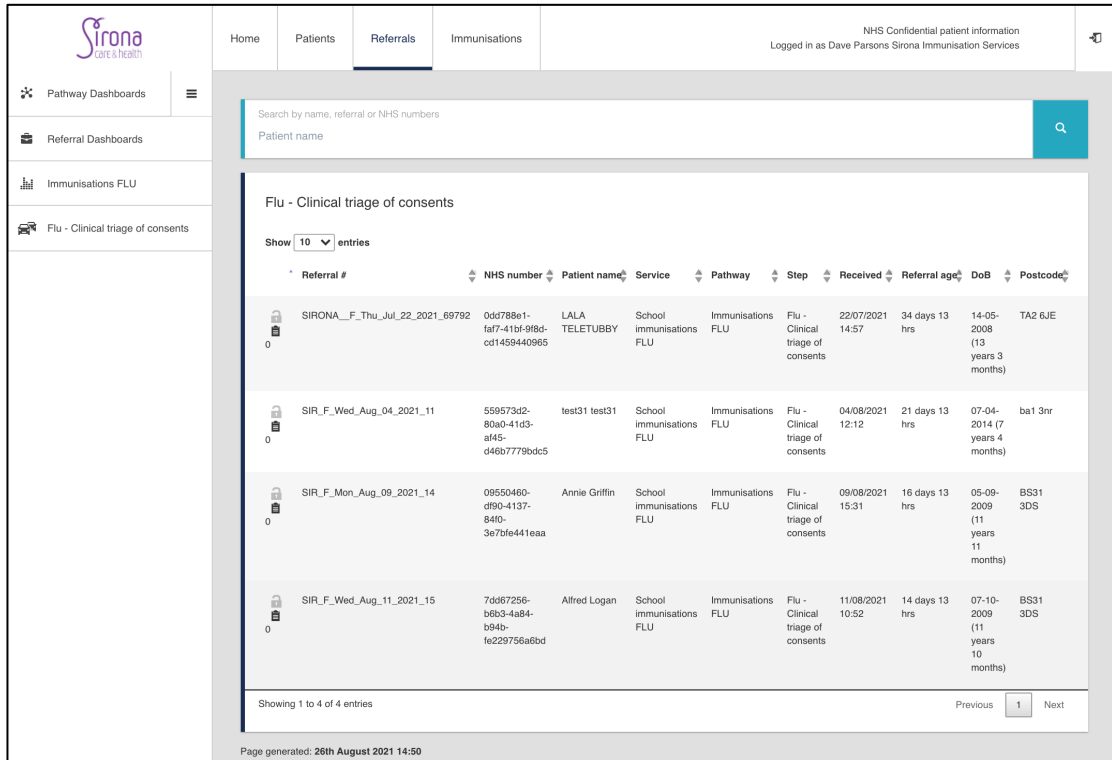


Figure 5 – Patients needing triage by specific Triage type

## 4.2 Clinic View

When a specific clinic is due, you can access the triage status from the Immunisations dashboard.

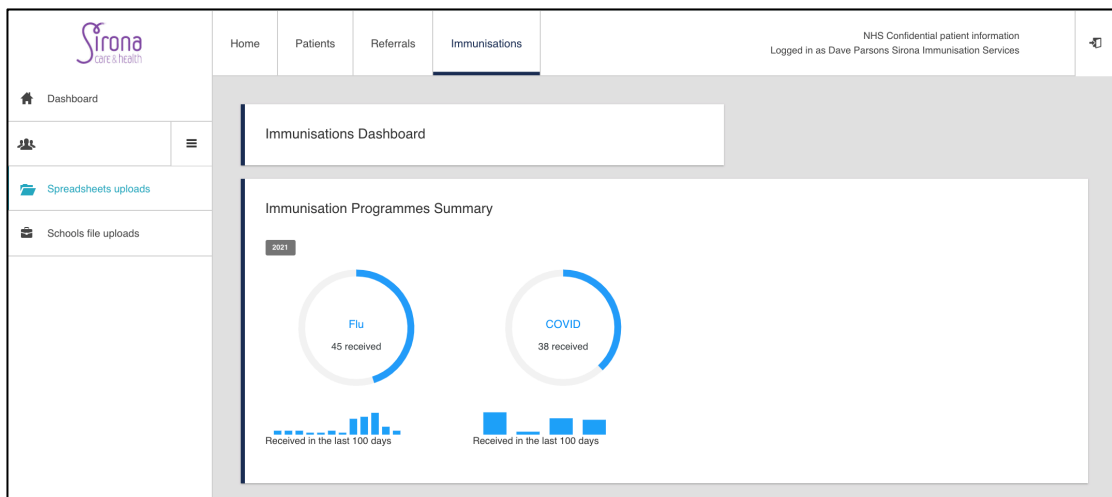


Figure 6 – Immunisations view by programme

Here you click on the programme of interest, which takes you to the clinics within that programme.



School name	Postcode	Consents	% returned	Hub	School upload link
Andalusia Academy Bristol	BS2 0BA	3		consent	<a href="#">link</a>
BR102 Bristol Year 11 C.O. Include, Unit 6, the Old Malt House		1		consent	<a href="#">link</a>
Bristol Brunel Academy	BS15 1NU	3		consent	<a href="#">link</a>
Bristol Grammar School	BS8 1SR	7		consent	<a href="#">link</a>
Christ The King Catholic Primary School, Thornbury	BS35 1AW	4		consent	<a href="#">link</a>
King's Oak Academy	BS15 4JT	20		consent	<a href="#">link</a>
Kings' Forest Primary School	BS15 4PQ	3		consent	<a href="#">link</a>
Oasis Academy Long Cross	BS11 0LP	1		consent	<a href="#">link</a>
The Dolphin School	BS6 5PT	2		consent	<a href="#">link</a>
The Ridings Federation Winterbourne International Academy	BS36 1JL	1		consent	<a href="#">link</a>

Figure 7 – View of schools/clinics within a programme

Then you click on the specific clinic, and in the **Consents Received** tab, if you search on “triage”, you see which patients need what type of triage.

Consent type	Last name	First name	School year	Immunisations: Imms Type	Consent	Outcome	Current step
Primary	Nguyen	Vuong		Flu	✓	○	Flu - Clinical triage DOB check
Duplicate	Nguyen	Vuong		No vaccination records			Flu - Clinical triage DOB check
Duplicate	Nguyen	Vuong		No vaccination records			Flu - Clinical triage DOB check
Duplicate	Nguyen	Vuong		No vaccination records			Flu - Clinical triage DOB check
Primary	Nguyen	Vuong		Flu	✓	○	Flu - Clinical triage DOB check
Primary	ParentTest2	ParentTest2		Flu	✓	○	Flu - Clinical triage Relationship check

Figure 8 – Patients needing triage within a specific school/clinic

## 5 How to update the timeline

As the clinician assesses the patients triage needs, and undertakes any follow up activities, they need to make sure that they update these in the patients timeline.

Let's use clinical triage as an example, and refer back to the patients needing triage from Fig. 5

Referral #	NHS number	Patient name	Service	Pathway	Step	Received	Referral age	DoB	Postcode
SIRONA_F_Thu_Jul_22_2021_69792	0dd778e1-faf7-411f-98b-dcd1459440965	LALA TELETUBBY	School immunisations FLU	Immunisations FLU	Flu - Clinical triage of consents	22/07/2021 14:57	34 days 13 hrs	14-05-2008 (13 years 3 months)	TA2 6JE
SIR_LF_Wed_Aug_04_2021_11	559573d2-80a0-41d3-af45-d46b7779bd5	test31 test31	School immunisations FLU	Immunisations FLU	Flu - Clinical triage of consents	04/08/2021 12:12	21 days 13 hrs	07-04-2014 (7 years 4 months)	ba1 3nr
SIR_LF_Mon_Aug_09_2021_14	09550460-d950-4137-9460-3e7bfe441eaa	Annie Griffin	School immunisations FLU	Immunisations FLU	Flu - Clinical triage of consents	09/08/2021 15:31	16 days 13 hrs	05-09-2009 (11 years 11 months)	BS31 3DS
SIR_LF_Wed_Aug_11_2021_15	7dd67256-b6b3-4a84-b940-fe229756a6bd	Alfred Logan	School immunisations FLU	Immunisations FLU	Flu - Clinical triage of consents	11/08/2021 10:52	14 days 13 hrs	07-10-2009 (11 years 10 months)	BS31 3DS

If we select the first patient, we see the following details:

**Referral type: Consent** (Primary)

**Green** This referral is 34 days 16 hours old

**Immunisations FLU** timeline: Received (22-07-2021 14:57:00) to Now (26-08-2021 17:36:49)

**Actions:** Record an event (highlighted), Progress to next step, Reassign pathway

**Immunisations Summary:** School Age Flu Vaccination 2021/22, School: The Dolphin School

Figure 9 – Patient record requiring clinical triage

To update the timeline, you first click on the record an event button on the right hand side, which pulls up the following dialogue box:

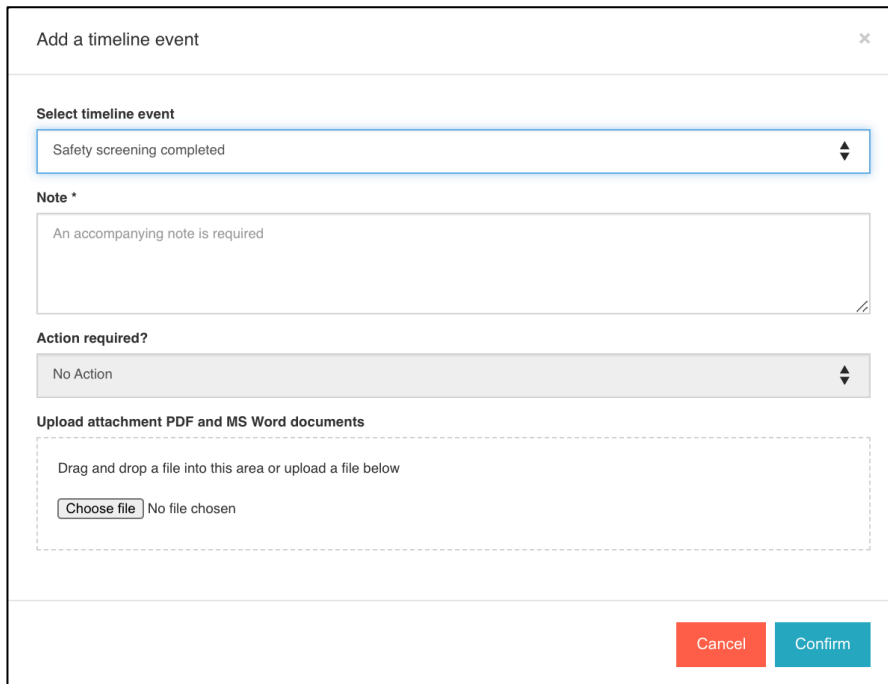


Figure 10 – Dialogue for recording an event

If you click on **Select Timeline Event**, it provides a number of options:

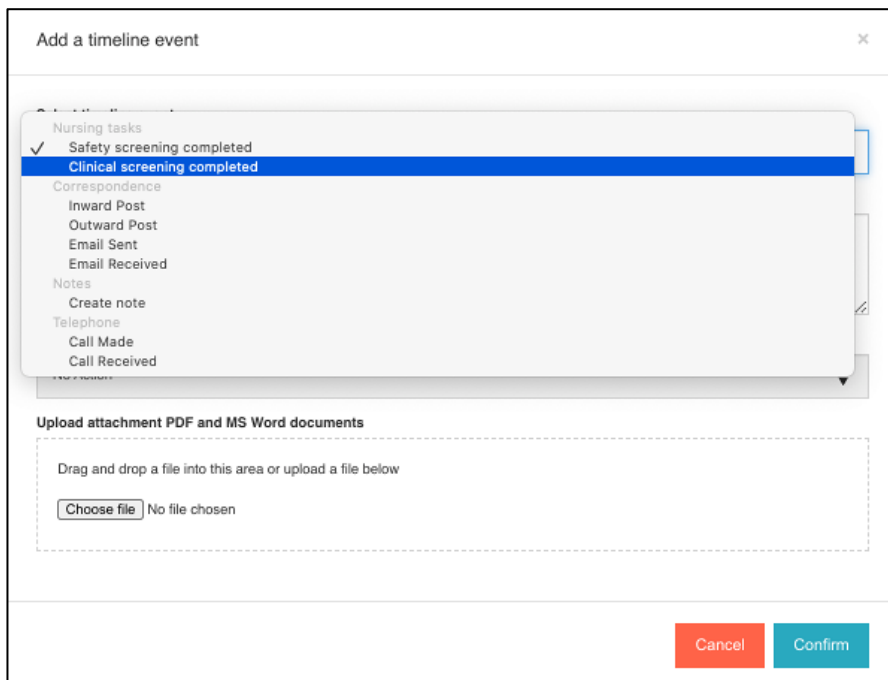


Figure 11 – Selecting event type

You select the appropriate task, then add in relevant notes:

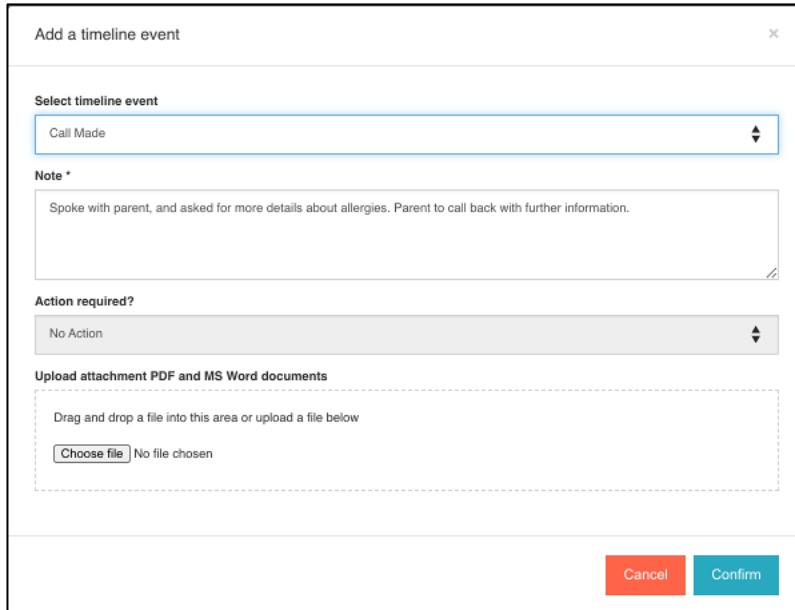


Figure 12 – Completed event update – ready to confirm

Press confirm which then updates the timeline on the patient record

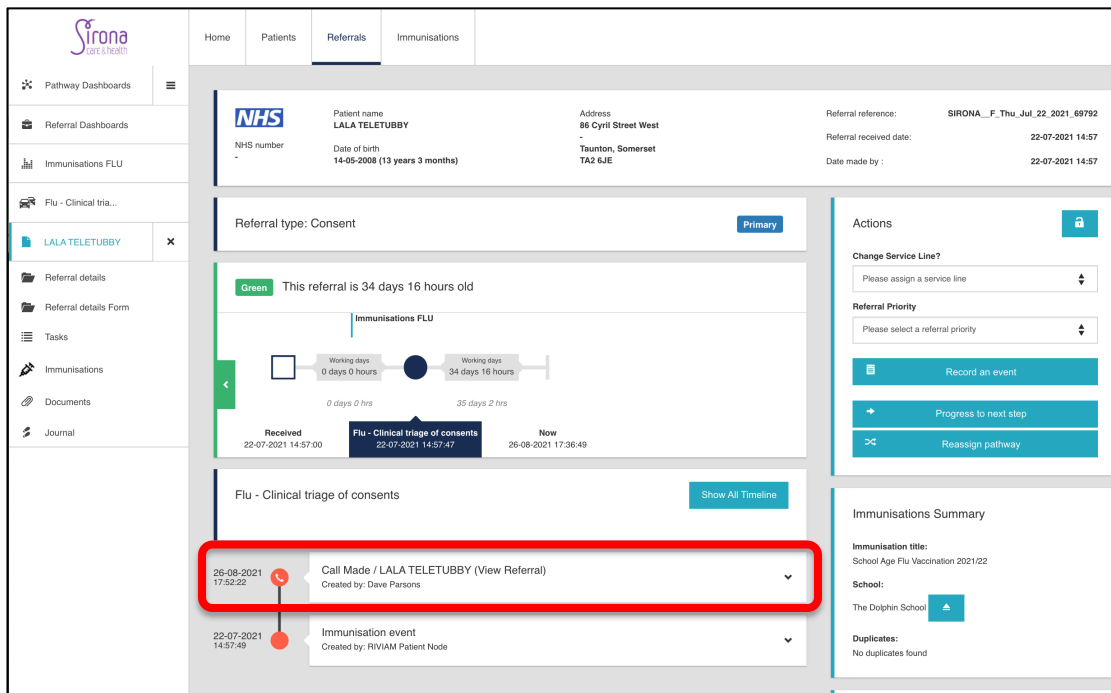


Figure 13 – Updated patient timeline

## 6 How to update the workflow

When you want to progress to the next step (either a step within the current triage, another triage, or to show that the patient is ready for immunization), there are two ways to do this.

1. If you also **need to change consent status (from YES to NO, or NO to YES)**, then you need to follow the instructions in section 7.
2. Otherwise, carry on and follow the instructions in this section.

The starting point is selecting the patient, and we will use the same patient example as in section 5. Having selected the patient record from the triage queue, we see the following details:

The screenshot displays the RIVIAM digital care interface for a patient named LALA TELETUBBY. The interface includes a navigation menu on the left, a top navigation bar with tabs for Home, Patients, Referrals, and Immunisations, and a main content area. The main content area shows patient details, a referral type of 'Consent', and a timeline for 'Immunisations FLU'. The timeline shows a 'Received' event on 22-07-2021 at 14:57:00, followed by a 'Flu - Clinical triage of consents' event on 22-07-2021 at 14:57:47, and a 'Now' event on 27-08-2021 at 09:58:52. The 'Progress to next step' button is highlighted with a red box. The interface also includes an 'Actions' panel with options like 'Record an event', 'Progress to next step', and 'Reassign pathway'. The 'Immunisations Summary' panel shows the immunisation title 'School Age Flu Vaccination 2021/22' and the school 'The Dolphin School'. The 'Clinical Outcomes' panel shows 'This referral has no outcome assigned'.

Figure 14 – Patient timeline requiring a workflow update

We want to show that clinical triage is in progress – so first you click on the **Progress to Next Step** button, which brings up the following screen.

Confirm next step ✕

To move this referral onto the next step in the process, select from the steps below.

Move forwards	Move backwards	General
Flu - Clinical triage - in progress	Flu - Duplicate consent	<b>Allocated to Programme</b> Consents that have been successfully allocated
Flu - Demographic check required	Flu - Demographic check required	<b>Flu - Ready</b> Consent has been demographic checked
Flu - Duplicate consent	Flu - Outcome processed	<b>Flu - Parent declined consent</b> The parent has declined consent
	Flu - Clinical triage Relationship check	

Please describe why you have made this decision:

In dialogue with parent to gain further details about medical conditions

Cancel
Confirm

Figure 15 – Workflow update options

You then click on the desired stage you want to move to – you can move forwards or you can move backwards. Having selected the option (indicated by the blue button in the above picture), you should also put in some notes as to why you have made this decision. Pressing confirm updates the patient referral timeline:

The screenshot shows the RIVIAM digital care interface for a patient named LALA TELETUBBY. The patient's details include NHS number, date of birth (14-05-2008), and address (86 Cyril Street West, Taunton, Somerset TA2 6JE). The referral type is 'Consent' and is marked as 'Primary'. The timeline shows the referral is 35 days 9 hours old and is currently in the 'Flu - Clinical triage - in progress' stage. The timeline includes events such as 'Received' (22-07-2021 14:57:00), 'Call Received / LALA TELETUBBY (View Referral)' (27-08-2021 09:39:31), 'Call Made / LALA TELETUBBY (View Referral)' (28-08-2021 17:52:22), and 'Immunisation event' (22-07-2021 14:57:49). The 'Immunisations Summary' section shows the title 'School Age Flu Vaccination 2021/22' and the school 'The Dolphin School'. The 'Clinical Outcomes' section shows 'This referral has no outcome assigned' and an 'Assign referral status' dropdown menu.

Figure 16 – Updated patient timeline

## 7 How to change consent

Changing consent status needs to be carried out differently, to ensure the timeline is also updated. Making this change from the Immunisations tab ensures that any workflow status updates are automatically completed.

Depending on what is discovered during the triage process, you could need to change consent from YES to NO. This could be for a number of reasons:

- The child falls outside of the demographic requirements – not in the specified cohort due to geography or age
- The child cannot be immunized due to medical reasons
- The parent decides to withdraw their consent

You may need to change from NO to YES, which could be because the parent decides to provide their consent

### 7.1 Conflicting Consents

One key use case which would require a consent change is that of conflicting consents – where one parent/guardian has consented YES, and the other has consented NO. These situations are identified from the eConsent forms and routed into the Conflicting Consents queue.

If a second consent is received for a child, with a different consent status, RIVIAM will mark the immunisation record as 'Conflicting consents' and move to the 'Conflicting consents' workflow step. A timeline event will be created against the new referral to say 'Parent has changed consent status from the previous consent they submitted. No vaccination record has been created because it is on the existing consent reference (existing referral reference number)'.

A timeline event will also be created against the existing referral linked to the vaccination record 'Parent has submitted a new consent with a different consent status. The new consent is in the Flu - Conflicting consents queue for review'.

As this is the most complex consent change example, we will use it to walk through the process. Other scenarios will follow the same process, but be easier as you will be dealing with a single patient record.

### 7.2 Step 1: Find the consent in the “conflicting consents” queue

If the consent is in this queue, it means that a second consent (with a different consent status) for the same child has been received.

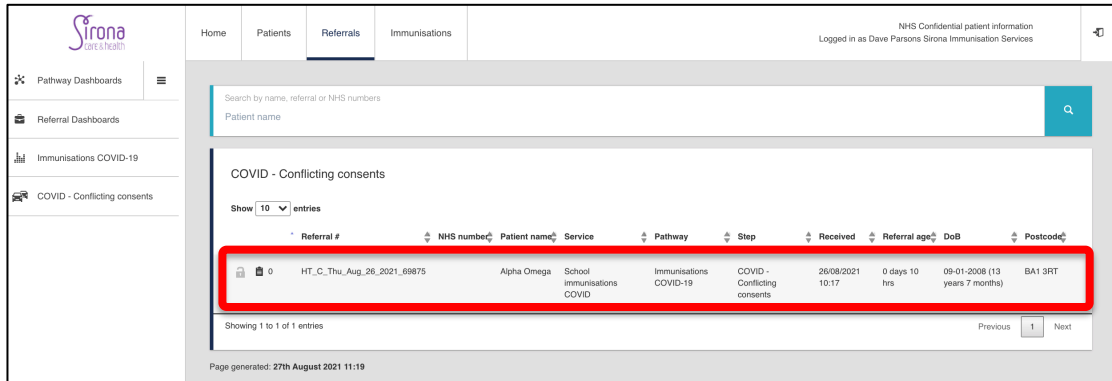


Figure 17 – Conflicting Consents Triage Queue

### 7.3 Step 2: Select the consent to change

Select the duplicate consent for that child which will be the consent with the vaccination record - this record is created when the first consent is received. The record showing under the Conflicting consents queue is “xx-69875” but this has no vaccination record.

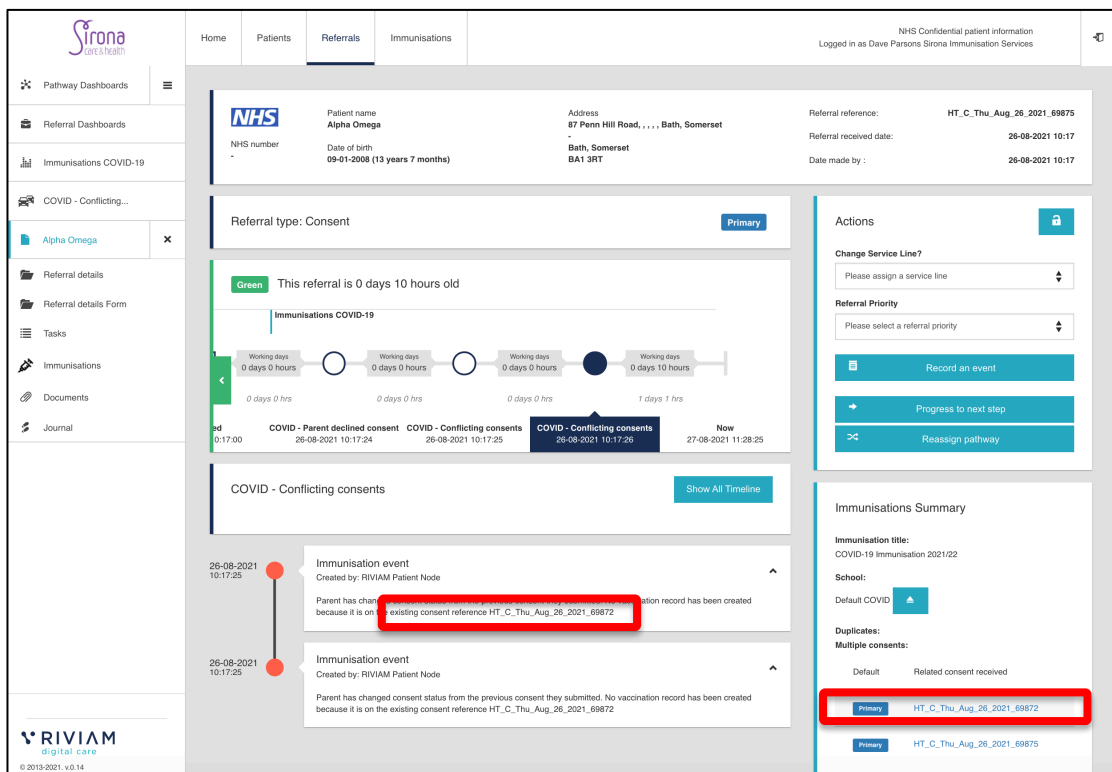


Figure 18 – Referral record for second (conflicting) consent

The record we need to update is “xx-69872” – identified in the timeline notes. There is a link in the bottom right to this record. Clicking on it brings up the relevant patient record.



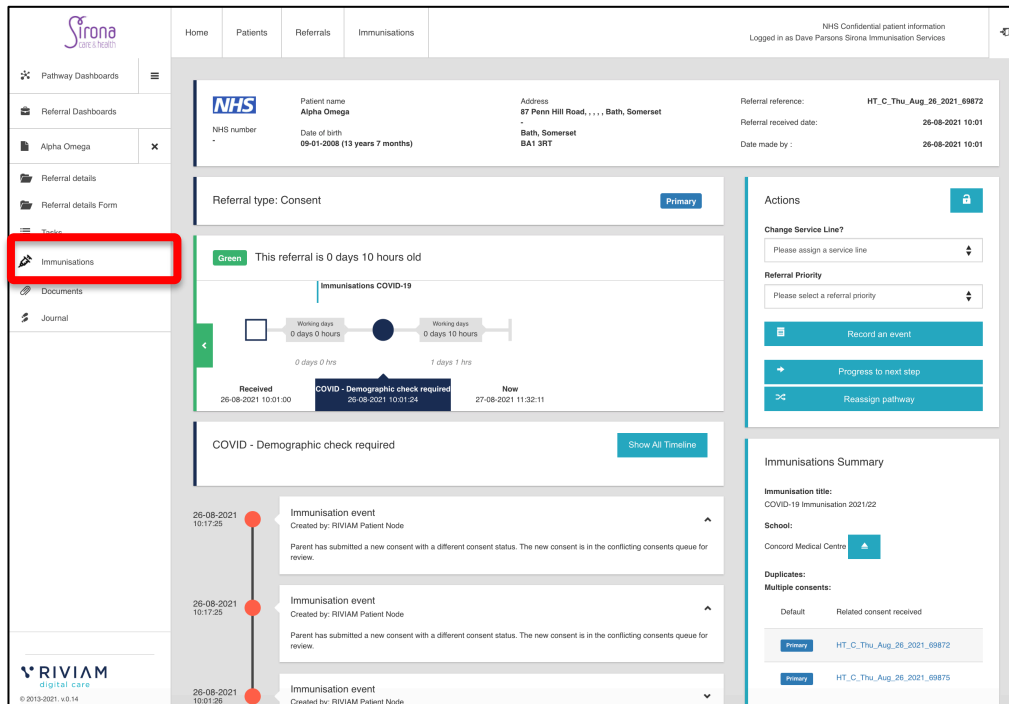


Figure 19 – Primary referral that has vaccination record

Under the Immunisations tab (accessed in the left hand menu bar), the timeline event will show 'Parent has submitted a new consent with a different consent status. The new consent is in the Conflicting consents queue for review' and the vaccination table will show 'Conflicting consents' under the consent status column as shown below:

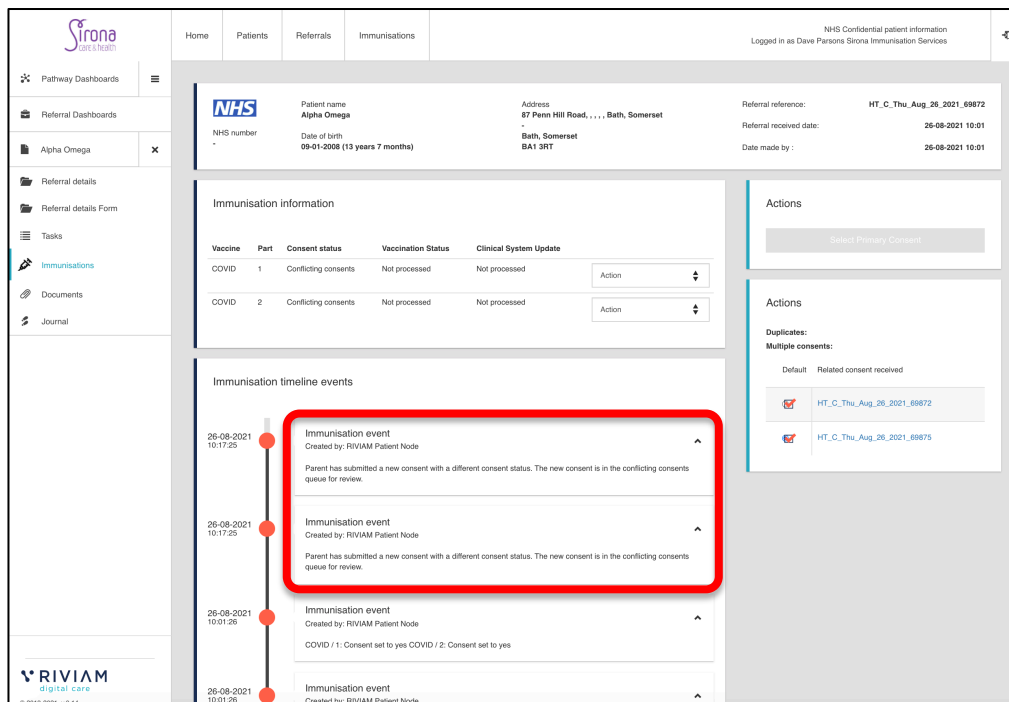


Figure 20 – Immunisations tab for primary referral record

## 7.4 Step 3: Select the 'Change consent status' button

Select the 'Action' dropdown next to the vaccination table and click on 'Update consent status' as shown below –

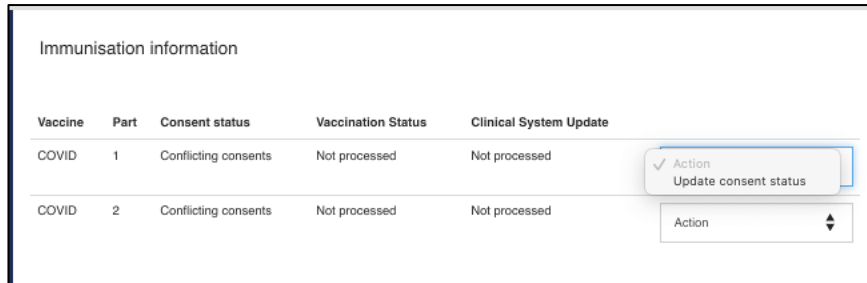


Figure 21 – Changing consent dialogue box

## 7.5 Step 4: Select consent status, workflow step and explain reason

You will then need to choose the relevant consent status - Consent given, Consent not given, Declined (clinically or by service) or Declined (out of cohort).

Then select the workflow step to allocate the consent to (e.g. COVID - Declined by service) – the steps available will vary depending on the status chosen in the first drop down. Finally add a reason why the consent is being changed and click **Confirm**.

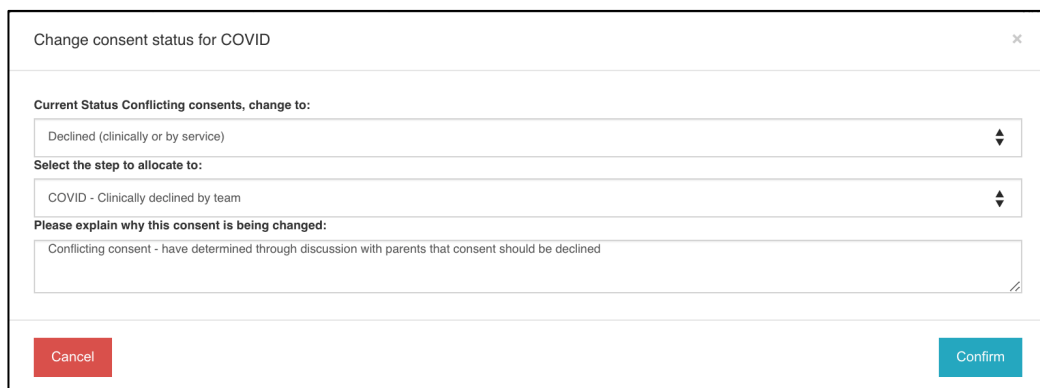


Figure 22 – Updating Consent status

If (as with COVID), there are two vaccination steps, you need to repeat these actions for the other vaccination.

## 7.6 Step 5: Check the vaccination table and timeline event have updated

Check the timeline event has updated to say 'Consent has been changed for the following reason: Clinically declined test' and the vaccination table has updated e.g. 'Declined (clinically or by service).'

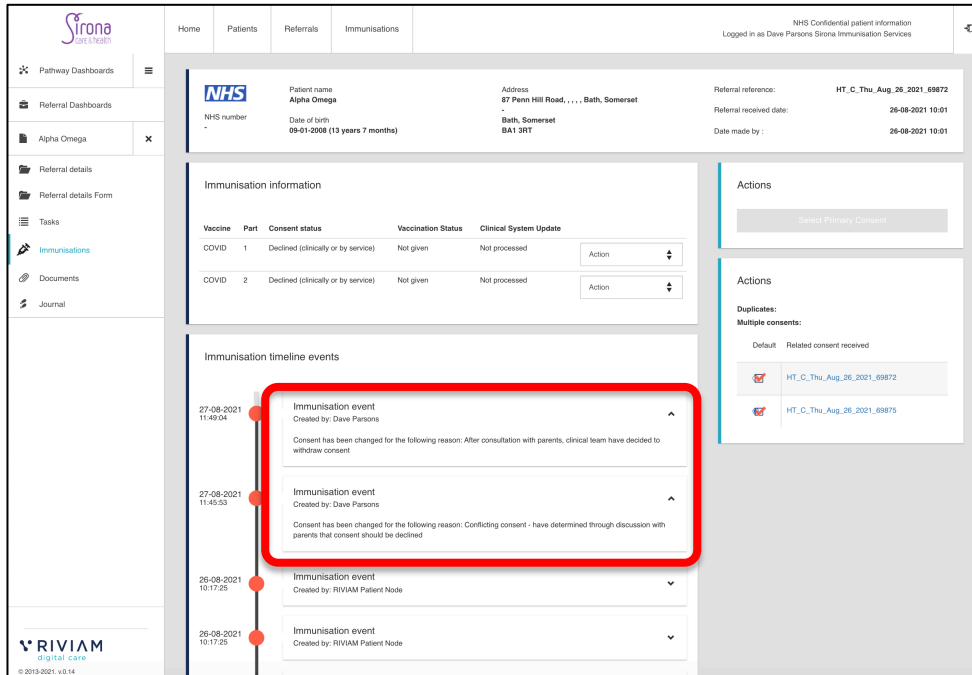


Figure 23 – Updated Immunisations record

Check the consent has moved to the new workflow step e.g. Declined by service

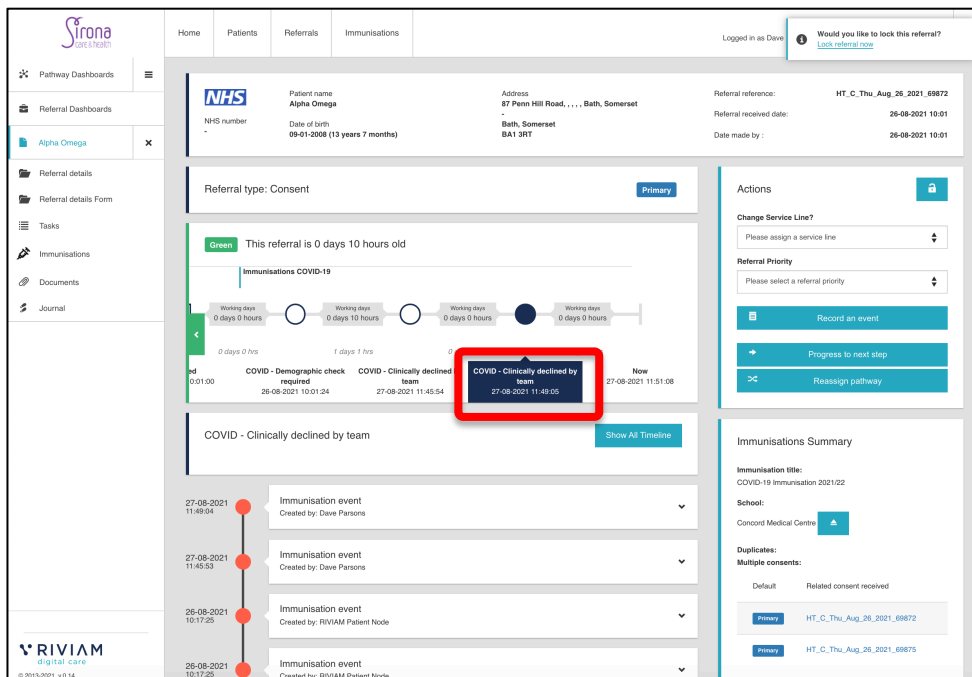


Figure 24 – Updated referral timeline

**To note:** Both consents will be updated to be in the selected workflow step. Both consents will now have the same consent status, this will be shown on the vaccination record against the main consent.

## **8 You've completed the *How To: Triage Consents***

Congratulations, you have completed the how to guide on Triaging Consents in the RIVIAM Digital Care platform.