

# MyWai – Referral & Triage Incomplete Referral Progression

Accepted Referrals

30/04/2025

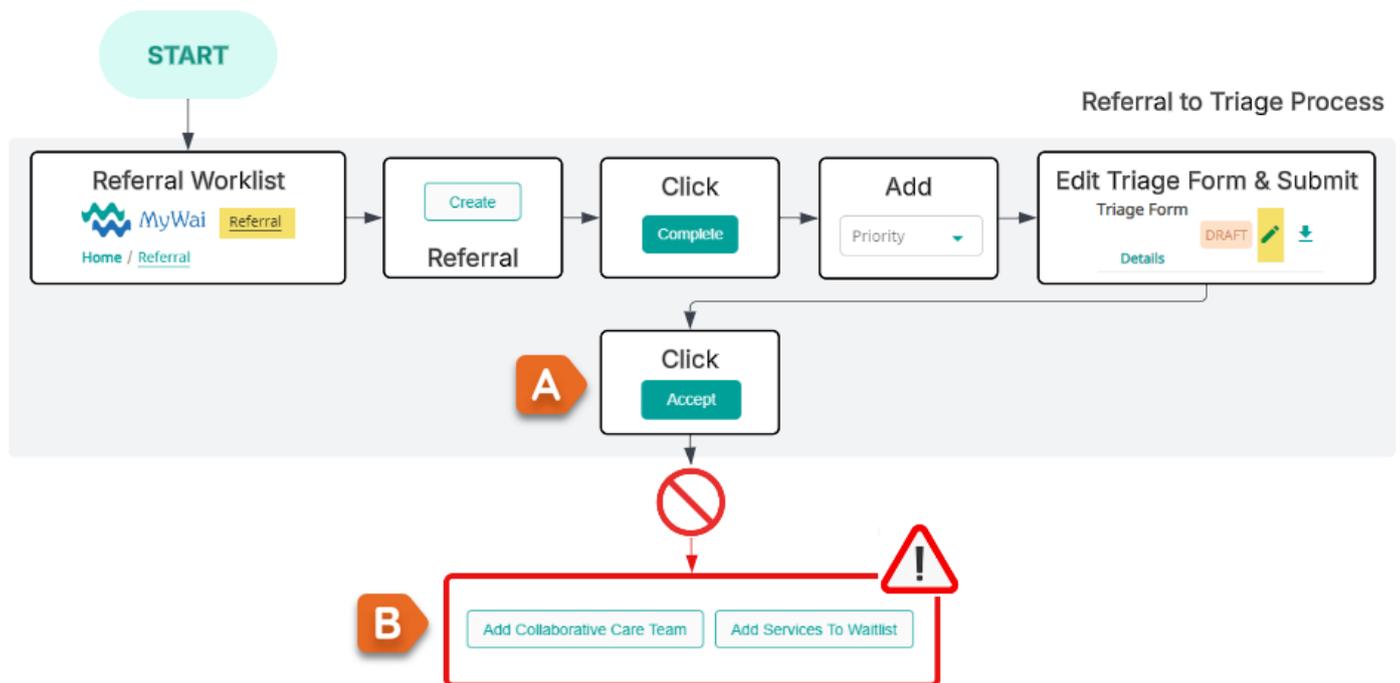
## Overview

This guide explains what to do when referrals are accepted but not progressed, leading to people not being actively managed.

### What is happening?

#### Incomplete Referral Progression

- A. A referral is accepted
- B. The step to either [Add Collaborative Care Team] OR [Add Services To Waitlist] is not being completed.



 When this happens, the person is not on an actively managed list for that service.

## What can be done?

1. Avoid this occurring in the first place by completing step B for all accepted referrals.
2. Use the following options to find those not progressed, for progression:

### Triage Worklist (new functionality)

- A. Click on Triage
- B. Status = Accepted
- C. Has Service = Without Service
- D. Referrals requiring progression will display, to progress click on the referral icon

The screenshot shows the MyWai Triage Worklist interface. The navigation menu includes 'Home', 'Active Worklist', 'Programme Worklist', 'Referral', 'Appointment Worklist', 'Inc', 'Triage' (highlighted with a red box and 'A'), 'MDT', 'Organisations', 'Tasks', 'Users', 'Audit Log', 'Notifications', 'ACC Claims', and 'Admin Pages'. Below the navigation, there are filters for 'Name', 'NHI', 'Status' (set to 'Accepted' with a red box and 'B'), 'Has Services' (set to 'Without Service' with a red box and 'C'), 'Priority', 'Location/Area', 'Service Requested', and 'Assigned to'. A table of referrals is displayed with columns: Alerts, Full Name, Referral Triage, Proposed Service Location, Referral Date Created, Service Requested, Status, Referred by, Priority, Triage Start Date, Status Reason, Assigned to, Preferred Contact, and Actions. One referral entry is visible with a red 'D' icon next to it, indicating it requires progression.

### Note: Dirty Data

You may have "dirty data" on your triage and referral worklists from Jade, where referrals were not processed through the necessary steps. To ensure that only relevant referrals remain on these lists, please progress or remove any outdated entries.

### MyWai Exception Reporting

You can use this option when you require an ability have an overall view or to export and print a list:

- A. Click on Admin Pages > Reporting
- B. Click on Referrals > the Overall Summary will display

The screenshot shows the MyWai Admin Pages Reporting interface. The navigation menu includes 'Home', 'Active Worklist', 'Programme Worklist', 'Appointment Worklist', 'Referral', 'Triage', 'MDT', 'Tasks', 'Notifications', 'ACC Claims', 'Admin Pages' (highlighted with a red box and 'A'), 'Clinic & Resource Set Up', and 'My Caseload'. Below the navigation, there are filters for 'Name', 'NHI', and 'Assigned to'. A list of reporting options is displayed with checkboxes and descriptions:

- Active Care Teams (Open Cases): Workload report showing individuals who are currently in care (i.e., have an active care team and are not discharged). Includes filters across various dimensions and allows drill-down to care team and person-level detail.
- NHI Compliance: This report shows recent changes to address and name details.
- Public Health Nursing Assessments: Provides a summary of selected PHN assessments and key related details.
- Referrals (highlighted with a red box and 'B'): This report provides an overview of referrals, including statistics on progression through triage, service delivery, and discharge from services. Only referrals created within the last two years are included.

- C. Click **Referral Lifecycle**
- D. Click **Accepted**
- E. Right-click on **No** (for referrals with enrolment)
- F. Hover over **Drill through**
- G. Select **Drill Through**

Referrals  
Reports > Referrals

Print Snapshot Full Screen Clear Filters

Referral Lifecycle  
Data refreshed at May 01, 2025 12:00

Referral Date: Last 90 days (2/1/2025 to 5/1/2025)

Referred to Organisation: All, Triage Priority for Referral: All, Referral Type: All, Triage Last Updated: 5/2/2023 to 5/1/2025, Enrolled in Services: All

Service Requested: All, Proposed Service Location: All, Referred By: All, Service Location: All

Referral Status: Completed (8,732), Total (8,732)

Triage Status: Not Available (750), New Triage (1,224), Action Required (78), Active (540), Redirected (14), Advice Given (157), Not Accepted (560), Accepted (8,732), Total (12,076)

Days Since Referral: 0-30 days (3,170), 31-60 days (5,248), 61-90 days (2,314), Total (8,732)

Referrals with Enrolment: No (1,238), Yes (7,500), Total (8,738)

Referrals with Enrolment in Program: No (1,238), Yes (7,500), Total (8,738)

Referrals with Assessment: Yes (1.7K), No (7.0K), Total (8.7K)

Referrals with Event: Yes (4.0K), No (4.7K), Total (8.7K)

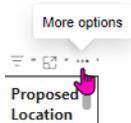
Referrals Fully Discharged: Yes (2.6K), No (6.1K), Total (8.7K)

MWR - Referral Report V1.0.5

Overall Summary Monthly Summary Person Detail Referral Lifecycle

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- H. The detail will display > go to the top right corner and click the **More options** icon



Note: this will appear once you hover over the corner

- I. Select Export data

Referrals  
Reports > Referrals

Print Snapshot Full Screen Clear Filters

Referral Detail  
Data refreshed at May 01, 2025 12:00

I want to see: Select all, Person Name, Person Dashboard UH, Gender, Age Group, Ethnicity

Person Name	Person Dashboard UH	Referral Date	Days Since Referral	Referral Status	Status Reason	Triage Priority for Referral	Propose Location
Whangarei					N/A		Whangarei
					N/A		Whangarei

Export data, Show as a table, Spotlight, Get insights, Sort descending, Sort ascending, Sort by