

## INTERNAL CLINICAL REFERRALS – UPDATE A REFERRAL STATUS & COMMENT

Internal Clinical Referrals are managed within the Bamboo platform.

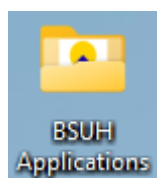
To update a Referral's Status and Status Comment, you need to access the Bamboo Forms application, whether you are a Panda user or an Affinity user.

The following Statuses are used to stage the Referral through the process:

Pending Review	Pending Preliminary Investigations	Rejected	Accepted	Completed
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**Note:** On staging a Referral you can only select a Stage above or below the one it is on e.g. if Rejected, you can only select Pending Preliminary Investigations or Accepted and so on.

Double-click the **BSUH Applications** folder on your desktop



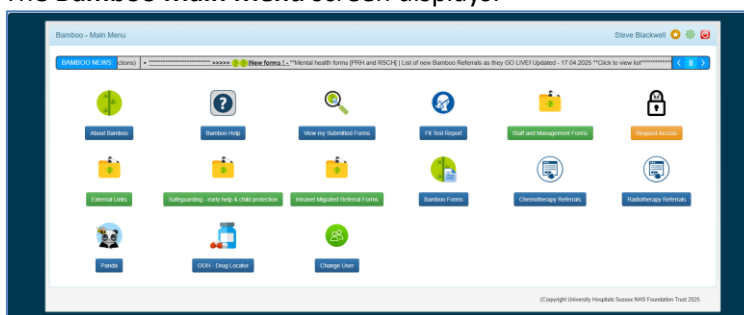
The **File Explorer** window displays:

Name	Date modified	Type	Size
Bamboo	09/02/2024 17:21	Shortcut	3 KB
Careflow Connect Web	23/05/2023 14:08	Shortcut	2 KB
CFC Business Continuity	09/02/2024 17:21	Shortcut	3 KB
CMM EPMA East	09/02/2024 17:21	Shortcut	3 KB
Dendrite intellect	16/04/2024 13:53	Shortcut	3 KB
Estates-Log a Call	20/01/2025 09:38	Shortcut	3 KB
Flow Manager	13/03/2023 12:21	Shortcut	3 KB
FSI Login	20/01/2025 09:38	Shortcut	3 KB
G2 Patient Letter Finder	10/05/2023 23:35	Shortcut	3 KB
Medusa	09/02/2024 17:21	Shortcut	4 KB
Patienttrack	09/03/2022 15:39	Shortcut	3 KB
Prescription Tracking System	09/02/2024 17:21	Shortcut	4 KB
PRH Navenio	09/02/2024 17:21	Shortcut	3 KB
RCViewer	14/02/2024 14:41	Shortcut	2 KB
Real Time Bed State	15/02/2024 10:09	Shortcut	3 KB
R-Roster Web	09/02/2024 17:21	Shortcut	3 KB
RSCH Navenio	09/02/2024 17:21	Shortcut	3 KB
SpeechReport Administration	15/02/2024 09:52	Shortcut	3 KB
Symphony	14/02/2024 14:47	Shortcut	3 KB

Double-click the **Bamboo** row



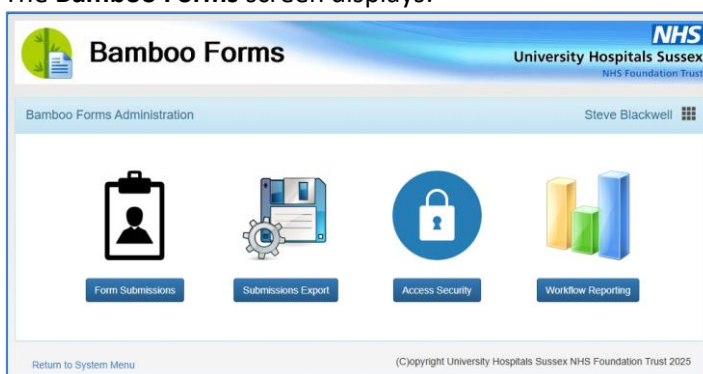
The **Bamboo Main Menu** screen displays:



Click on the **Bamboo Forms** icon



The **Bamboo Forms** screen displays:



Click on the **Form Submissions** button

**Form Submissions**

The **Submissions** screen displays:

Select Form	To search for a single Referral Form type
<b>EITHER</b> Search	To search for a patient by their Medical Record Number (MRN)
<b>OR</b> Filter	To filter by the current Status of the Referral Form

Multi-site forms offer a filter by Hospital Site and/or Ward before clicking the Filter Results button:

**Note:** you can combine these search terms to reduce your results:

Record	Patient Details	Hospital	Referring Clinician	Created date	Live Location (if inpatient)	Last Update	Created by & basic comments	Actions
ID: 142 Status: Pending Preliminary Investigations	First Name: Pathology Last Name: Test-Patient MRN: 3755124 NHS: 999 054 6999	RSCH	Name: Steve Blackwell Role: IT Trainer Ward Contact: x64669 Ward	26/06/2025 14:36:56		26/06/2025 16:27:25 BSUH/Steve Blackwell	BSUH/Steve Blackwell Comments: THIS REFERRAL IS FOR IT TRAINING GUIDE SCREENSHOTTING	[Edit] [Download] [View Form] [Status]

It is possible from this screen to click on the Patient's ID to open up their record. It is also possible to create a New Referral for the selected form, with the **New Form** button, if helpful.

There are 4 options available once you have found the Referral you were looking for:

**Add Note** - add a comment without viewing the form

**Print/Email** - generates a PDF which can then be printed or emailed

**View Form** - for a view only copy of the form with the ability to Add/View Comments and change the Status of the Referral

**Change Status** - will only offer you valid options dependent on current Status

Whilst you can update the Referral Status from the list, it is best practice to action this from within the Form itself, with the **View Form** button.

## View the Referral

Click the **View Form** button

View Form

The **Form** window displays the Current Status at the top:

At the bottom of the window, you have the option to select the next Status you want to stage the Referral to and also to add free text Comments to add context for the staff who are viewing the Referral's progress in Panda or Affinity.

You can add Comments at any time.

## Add Comments from within the Form

Click the **View/Add Comments** button, bottom-left



The Comments sidebar opens on the right:

Comments are added automatically by the System to display the latest Status as well as manually by the user.

**Note:** you may need to scroll down the Comments sidebar to read the latest note.

Click into the **Comments** box, type the required note then click **Save Comments**

Save Comments

The Comment has now been added:

Dietetics - Adult Inpatient Dietitian Referral (RSCH, PRH, WOR, SRH), MRN: 3755124

Creation Details	Notes
BSUHSteve.Blackwell 26/06/2025 14:36:56	Pending Review
BSUHSteve.Blackwell 26/06/2025 15:07:25	Oh I forgot to say we were considering using Nutrilis Clear but haven't got any in stock.
BSUHSteve.Blackwell 26/06/2025 15:59:48	Pending Preliminary Investigations
BSUHSteve.Blackwell 26/06/2025 16:27:25	THIS REFERRAL IS FOR IT TRAINING GUIDE SCREENSHOTTING
BSUHSteve.Blackwell 27/06/2025 09:59:26	Use Referral notes to add context to the status you are going to or have already recorded, so the Referrer can understand the reasoning.

Save Comments

Close

Click the **Close** button, if you are not going to change the Status of this referral

Close

You are returned to the Referral list results underneath:

Select Form: Dietetics - Adult Inpatient Dietitian Referral (RSCH, PRH, WOR, SRH) New Form

Search: 3755124 Search Filter: Pending Review Records: 1

Hospital: RSCH View Filter results

Record	Patient Details	Hospital	Referring Clinician	Created date	Live Location (if Registered)	Last Update	Created by & basic comments	Actions
ID: 142 Status: Pending Preliminary Investigations	First Name: Pathology Last Name: Test Patient MRN: 3755124 MNH: 999 054 6999	RSCH	Name: Steve Blackwell Role: IT Trainer Ward Contact: s44699 Ward	26/06/2025 14:36:56		27/06/2025 09:59:26 BSUHSteve.Blackwell	BSUHSteve.Blackwell Comments: Use Referral notes to add context to the status you are going to or have already recorded, so the Referrer can understand the reasoning.	View Form Update

## Change Referral Status from within the Form

Before or after you change a status, you have the opportunity to add Comments, to add further context to your decision and, crucially, before you close the window:

View/Add Comments

Click the appropriate Status button for the Referral stage you need

Pending Preliminary Investigations

Rejected

Accepted

Completed

An **Are you Sure..?** pop-up message displays:

**bamboouat.bsuh.nhs.uk says**

Click OK if you are sure you want to change the status of this form ?

OK

Cancel

If you want to proceed, click **OK**

The Current Status at the top of the window changes accordingly:

**Current Form Status: Pending Preliminary Investigations**

**Note:** On **Accepting** a Referral, the **Completed** Status button becomes active.

Accepted Completed

On **Rejecting** a Referral, you must comment why and an email with all the Referral's commentary is sent to the Requester:

**Action Required -**

A comment is required before we can change the status of this form -

Save Comment and Change Status

Cancel

If you are selecting the Status of **Completed**, do include the completion details in the Comments.

Click the **Close** button

Close

You may find the Referral drops off this view on the next refresh of the browser screen.

Don't worry, though, as when you change the Filter, to match the status you chose, it will display then.

The latest comment will display against Created by and Basic Comments field of that Referral:

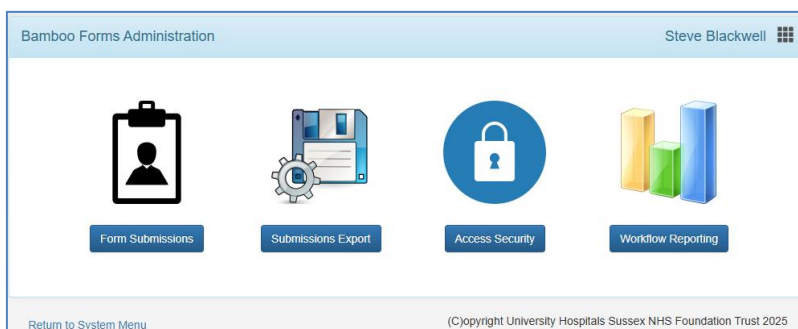
Record	Patient Details	Hospital	Referring Clinician	Created date	Live Location (if Inpatient)	Last Update	Created By & basic comments	Actions
ID: 142 Status: Completed	First Name: Pathology Last Name: Test-Patient MRN: 3758124 NHS: 999 054 6959	RSCH	Name: Steve Blackwell Role: IT Trainer Ward Contact: x64669 Ward	26/06/2025 14:36:56		27/06/2025 10:09:30 BSUHSteve.Blackwell	BSUHSteve.Blackwell <b>Comments:</b> Use Referral notes to add context to the status you are going to or have already recorded, so the Referrer can understand the reasoning.	<a href="#">View Form</a>

If you stage a Referral to the wrong Status, simply find it and stage it back to the correct Status and add a Comment to explain the error. You may need to stage more than once to get to the correct Status.

Click the **Bamboo Forms Menu** text, bottom-left

Bamboo Forms Menu

The **Bamboo Forms Administration** screen displays:



Click the **Return to System Menu** text, bottom-left

Return to System Menu

The **Bamboo Main Menu** screen displays:

