INTERNAL CLINICAL REFERRALS – UPDATE A REFERRAL STATUS & COMMENT

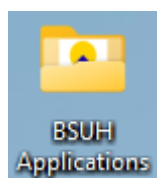Internal Clinical Referrals are managed within the Bamboo platform.

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

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.

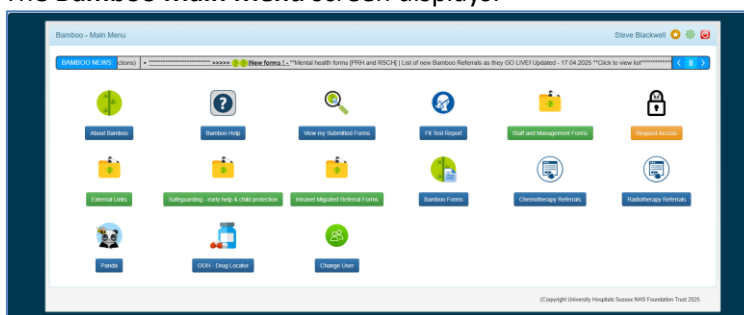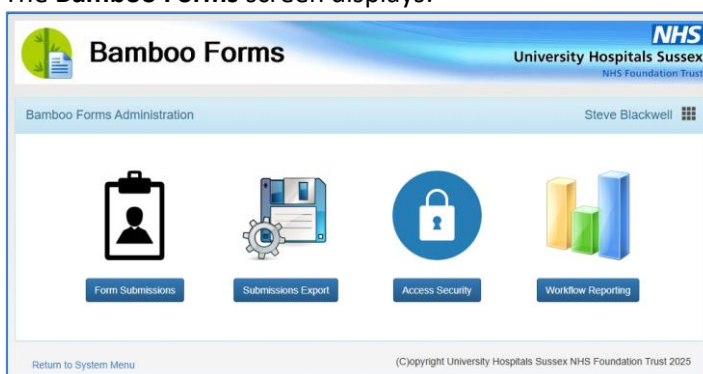|	
Double-click the **BSUH Applications** folder on your desktop 	The **File Explorer** window displays:
Double-click the **Bamboo** row 	The **Bamboo Main Menu** screen displays:
Click on the **Bamboo Forms** icon 	The **Bamboo Forms** screen displays:

Click on the **Form Submissions** button	The **Submissions** screen displays:
Form Submissions	

Select Form	To search for a single Referral Form type
EITHER Search	To search for a patient by their Medical Record Number (MRN)
OR 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:

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 	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:
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:

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

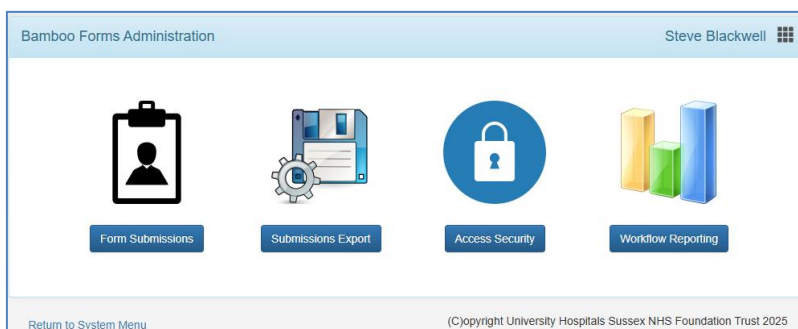|	
An **Are you Sure..?** pop-up message displays: **bambooouat.bsuh.nhs.uk says** Click OK if you are sure you want to change the status of this form ? OK Cancel	
If you want to proceed, click **OK**	The Current Status at the top of the window changes accordingly: **Current Form Status: Pending Preliminary 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:** 3755124 **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 BSUH\Steve.Blackwell	BSUH\Steve.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

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: