

Maternity – External Referral with Triage

The **Maternity - External Referral with Triage** process is initiated when a Provider/Clinician faxes a referral form to the OB clinic. The faxed referral form will automatically generate an item in **Work Queue Monitor (WQM)** which will be routed to a specific queue for review.

The OB Clerk/OB Nurse in the receiving clinic will locate the new referral in their **WQM Queue**, link it to a patient/encounter and index it before forwarding it to the Triaging Provider. Once the referral is reviewed, the OB Clerk/OB Nurse will be notified of the decision. At this point, the referral can be scheduled for an appointment or rejected depending on the instructions from the Triaging Provider.

Follow the steps below to process an external referral that requires triaging for an OB Clinic.

Processing a Referral in WQM

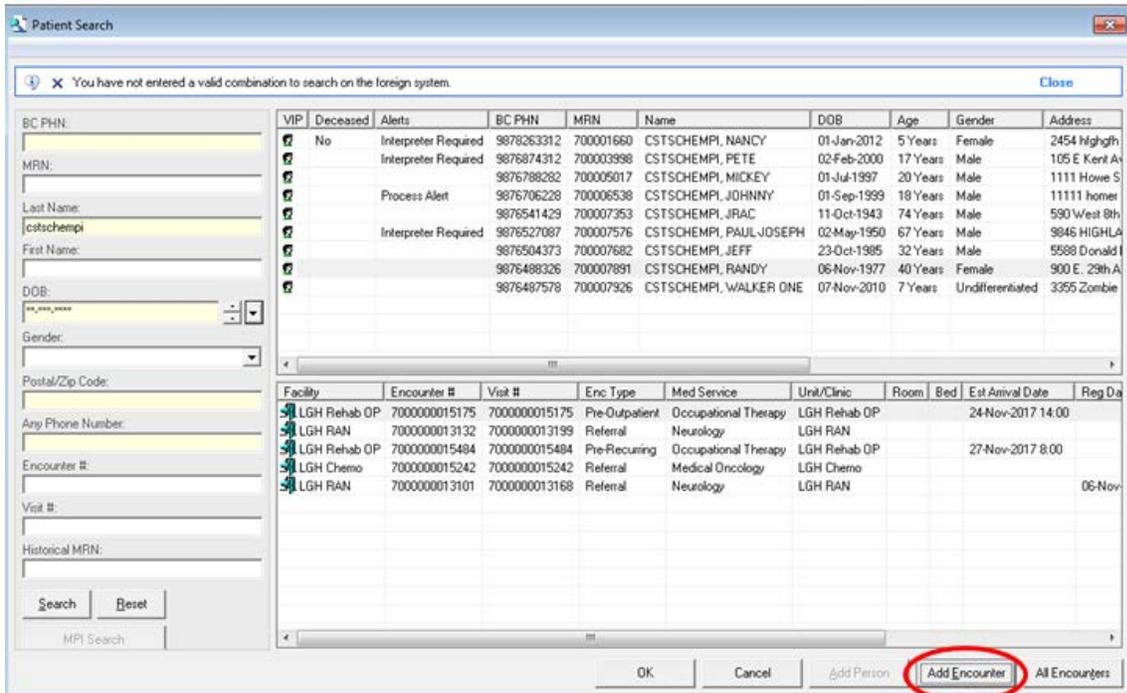
1. Log into **CDIWorkQueueMonitor** .
2. Click on the appropriate clinic queue/tab.
3. Double-click on the appropriate row in the queue to open the **Add/Modify Work Item** window.
4. Click on the **Select Patient** icon.
5. Search for the patient according to the search guidelines.
6. If you have found the correct patient, click only **ONCE** on their name to select, then click **Add Encounter** to create a new **Referral** encounter (the Referral Management conversation will automatically open).

NOTE: The patient may already have an existing encounter that is appropriate for this document to be attached to. For example:

- If information is arriving after the original referral package was received (such as an addendum), there may already be a Referral encounter.
- If an appointment was already booked, there could be an appropriate Pre-Outpatient OB (for NSTs, ECVs, iron sucrose infusions or outpatient Betamethasone injections) or a Pre-Outpatient in a Bed (for inductions; Est. Arrival Date will be the booked induction date) encounter.



In these cases, you would select the **appropriate existing** encounter from the Encounter list. **DO NOT** select the patient's **pre-registration encounter** (Pre-Outpatient in a Bed with the patient's EDD as the Est. Arrival Date)!

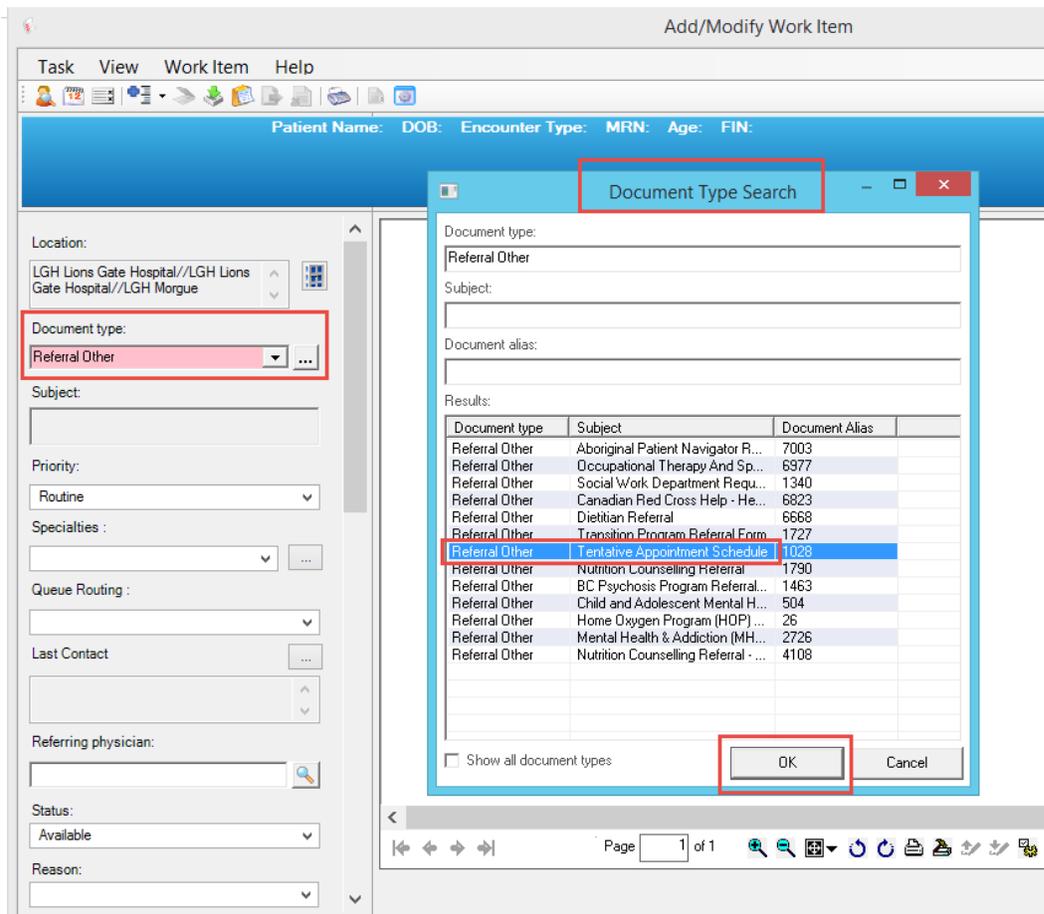


7. Enter the “**Facility Name: Lions Gate Hospital**” in Organization window and click **OK**.
8. The EMPI window briefly launches to open the “**Referral Management**” conversation window.
9. Click the **Encounter Information** tab to complete the below mandatory fields:
 - **Encounter Type:** Referral (auto-defaults)
 - **Medical Service:** Obstetrics
 - **Reason for Visit:** Add a reason for visit (for example, NST)
 - **Referring Provider:** Select a Referring Provider
10. Click the **Referral Info** tab to complete the below mandatory fields:
 - **Referral Received Date:** Type **T** for today’s date
 - **Referral Status:** Select Ready for Triage
11. Click the **Complete** button to close the **Referral Management** conversation.
12. Click **OK** to close the **Referral Management** window.

NOTE: Notify Triaging Clinician/Provider of referral(s) to be triaged

13. In order to complete indexing, enter the below fields in **Add/Modify Work Item** window.
 - **Document Type:** Referral Other

- The **Document Type Search** window opens. Select **Tentative Appointment Schedule** and click **OK**.



- The Subject field will auto-populate with **Tentative Appointment Schedule**.
- Delete** the auto populated **subject name** and **enter** an appropriate name for the referral document (for example, **NST Request Form**)
- Change the **Status** to Complete.
- Select Performing Provider: Document, Scanned
- Click **OK** to complete indexing the referral document to the patient's chart.

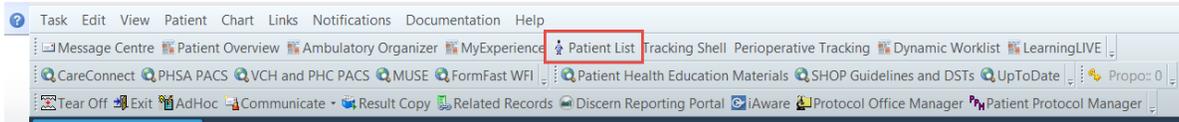
Triage a Referral by a Triaging Provider/Clinician

Create a Patient List for Referrals

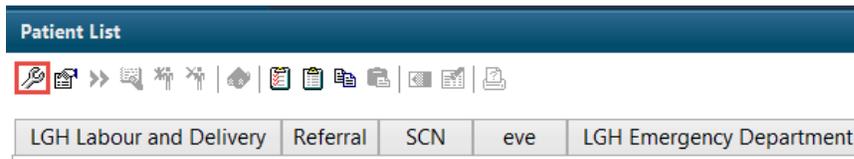
In order to view referral encounters created for triaging outpatient OB activities (i.e., NSTs and inductions), you will need to create a **Location Patient List** in **PowerChart** that is also filtered by

Encounter Type (Referral). If you are logging in for the first time, you will need to create the Patient List by following the below steps (otherwise, refer to move to Step 12):

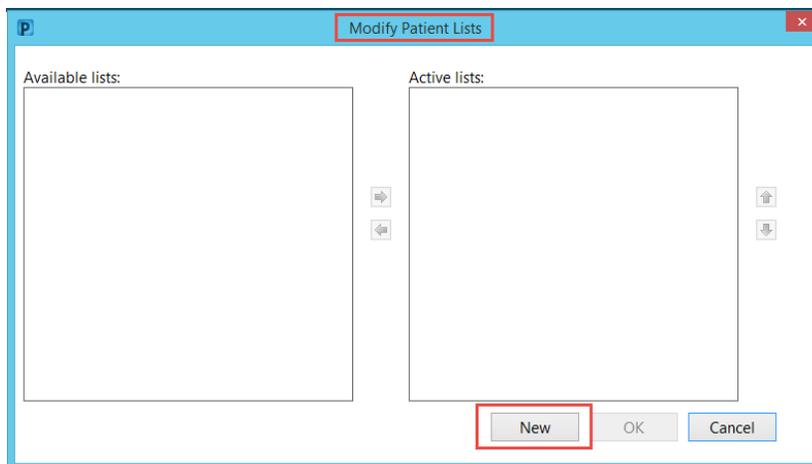
1. Select **Patient List** from the Action **Toolbar**.



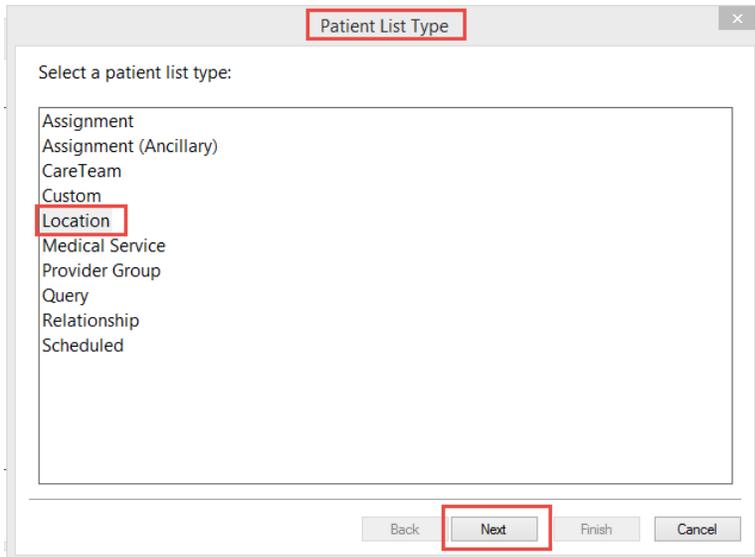
2. Select the **Wrench** icon from the **Patient List** page. The **Modify Patient Lists** window opens.



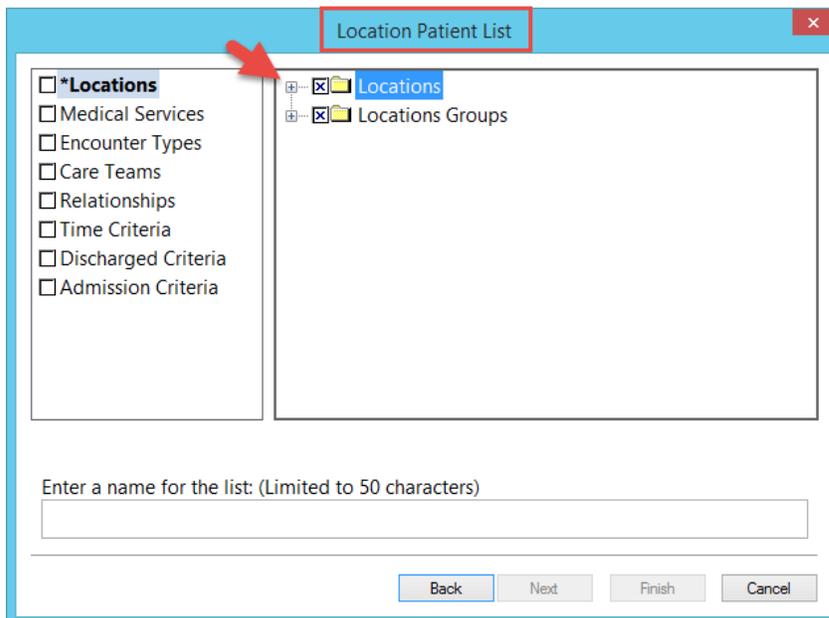
3. Select **New**. The **Patient List Type** window opens.



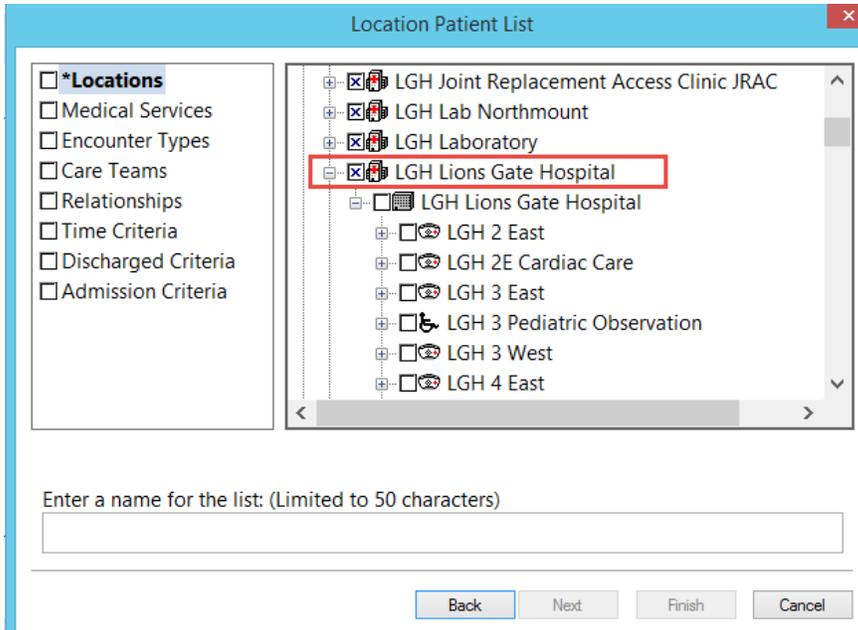
4. Select **Location** and then **Next**.



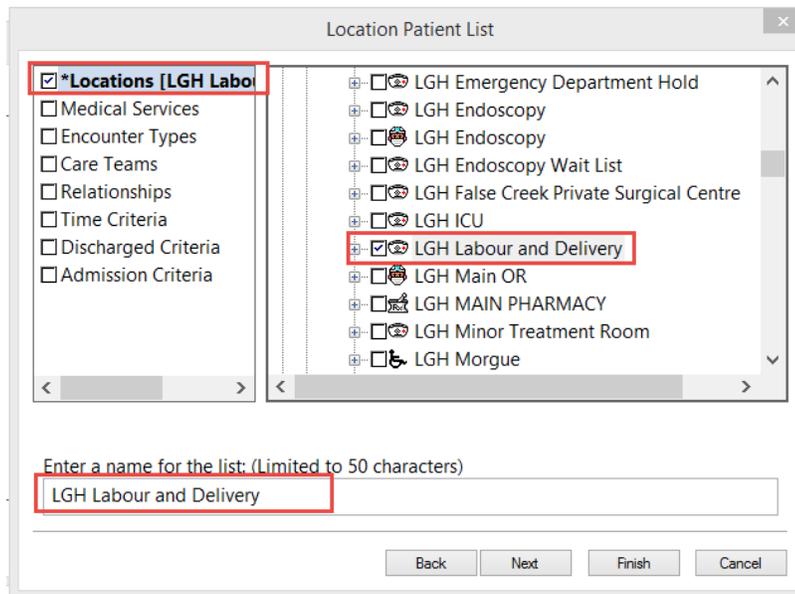
5. The **Location Patient List** window opens. Click on the + sign beside **Locations** to expand the list of available locations.



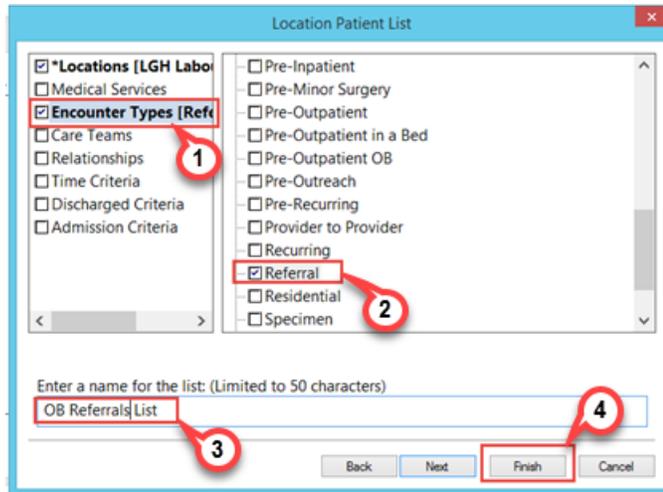
6. Scroll down to find your facility (for example, LGH Lions Gate Hospital) and then click the + sign to further expand to view the list of units.



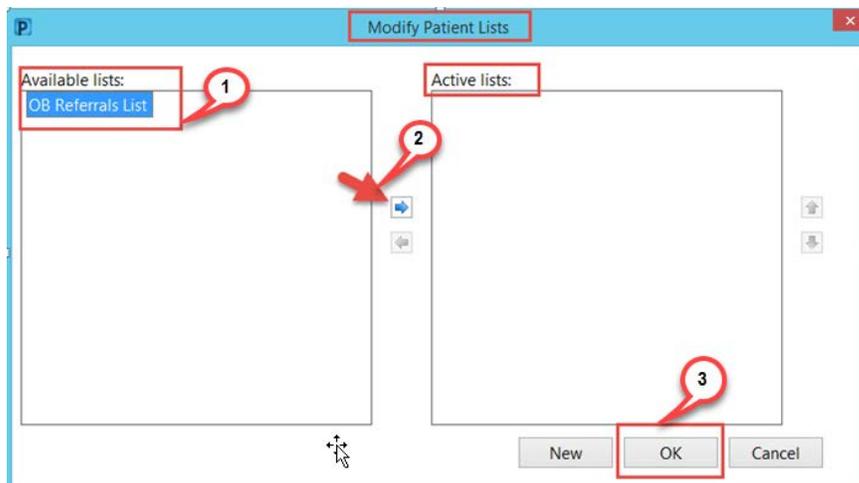
7. Select the appropriate unit (for example, LGH Labour and Delivery) by clicking on the box. The selected unit's name will appear on the left beside ***Locations**. It will also auto populate as the name of the list.



8. Next, click on **Encounter Types** to add the encounter filter. A list of encounter types will appear to the right. Scroll down and select **Referral**. Referral will now appear next to Encounter Types on the left.
9. In the **Enter a name for the list field**, delete the auto populated location name and enter a name for your referral list (for example, OB Referrals List). Click **Finish**.



- You will return to the **Modify Patient Lists** window with your newly created **Patient List** under **Available lists**. Highlight your newly created Patient List and click the blue arrow to move it over to the **Active lists** section. Click **OK**.



- The **Modify Patient List** window closes and you will return to the **Patient List** page. Your newly created Patient List filtered by unit (LGH Labour and Delivery) and encounter type (Referral) will appear. All referral encounters created for the selected location will auto populate into this Patient List.

Patient List

OB Referrals List

LGH Labour and Delivery - Referral

Patient Name	Location	MRN	Encounter #	Age	DOB	Gender	Admit Date	Reason for Visit	Attending Provider	Encounter Type	Medical Service	Length
CSTMATTEST, SUSAN	LGH LD	700020067	7000000200873	38 years	17-Jan-1980	Female		NST		Referral	Obstetrics	
CSTMATTEST, BERYL	LGH LD	700020141	7000000201016	40 years	14-Dec-1977	Female		Test		Referral	Obstetrics	
CSTMAT, REFERRALTES	LGH LD	700020664	7000000201036	36 years	12-Feb-1981	Male		pain		Referral	Obstetrics	
CSTMATTEST, MAUI	LGH LD	700008546	7000000016442	40 years	14-Dec-1977	Female		induction		Referral	Obstetrics	

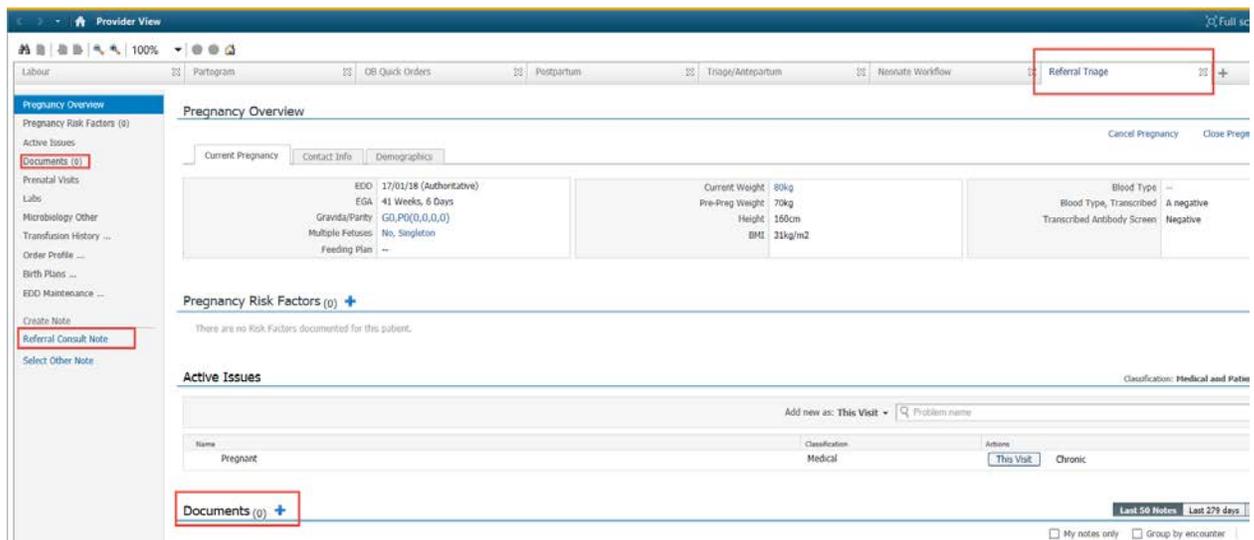
Triage Referrals from Patient List

- In PowerChart, select the appropriate **Patient List** to view the Referral encounters to be triaged.



NOTE: In order to view all referral encounters, the Triaging Clinicians/Providers as well as the OB Clerks and OB Nurses involved in triaging NSTs and inductions will first need to create a **Location Patient List** filtered by location (e.g., LGH Labour and Delivery) and Encounter Type (Referral).

- From the Patient List, open the **patient’s chart**.
- Navigate to the **Referral Triage** workflow tab and review the indexed referral document in the Documents component. Review other components as needed.
- If the referral triage decision needs to be documented, document the decision (free text) in the **Referral Consult Note** (Dyn Doc).



- Notify the OB unit clerk/charge nurse of the decision (i.e., Accept/Reject/Additional information needed for request).
- Notify Referring Provider of decision if needed (Triaging Clinician/Provider can send the Referral Consult Dyn Doc Note with the documented decision to the referring Provider).

Process Accepted Referrals

When a Referral is accepted, the Triaging Provider/Clinician will notify the Clerk or OB Nurse (site dependent), the Clerk will then schedule an appointment.

Schedule an Appointment

1. Refer to the **Appointment Scheduling** section in the User Manual to book an appointment. Use any of the three scheduling methods to move to the next step.

NOTE: When performing the Person Search, **select the patient AND the Referral encounter** before clicking **OK**. By doing this the appointment will be linked to the existing Referral encounter.



The screenshot shows the 'Person Search' interface. On the left, there are search filters for BC PHN, MRN, Last Name, First Name, DOB, Gender, and Postal/Zip Code. The main area contains two tables. The top table lists patient records with columns for VIP, Deceased, Alerts, BC PHN, MRN, Name, DOB, and Age. The bottom table lists encounter records with columns for Facility, Encounter #, Visit #, Enc Type, Med Service, Unit/Clinic, Room, Bed, and Est A. A red box highlights the 'OK' button at the bottom of the window. Red arrows point to the patient 'CSTSCHTEST, NATE REFRIG' in the top table and the corresponding 'Referral' encounter in the bottom table.

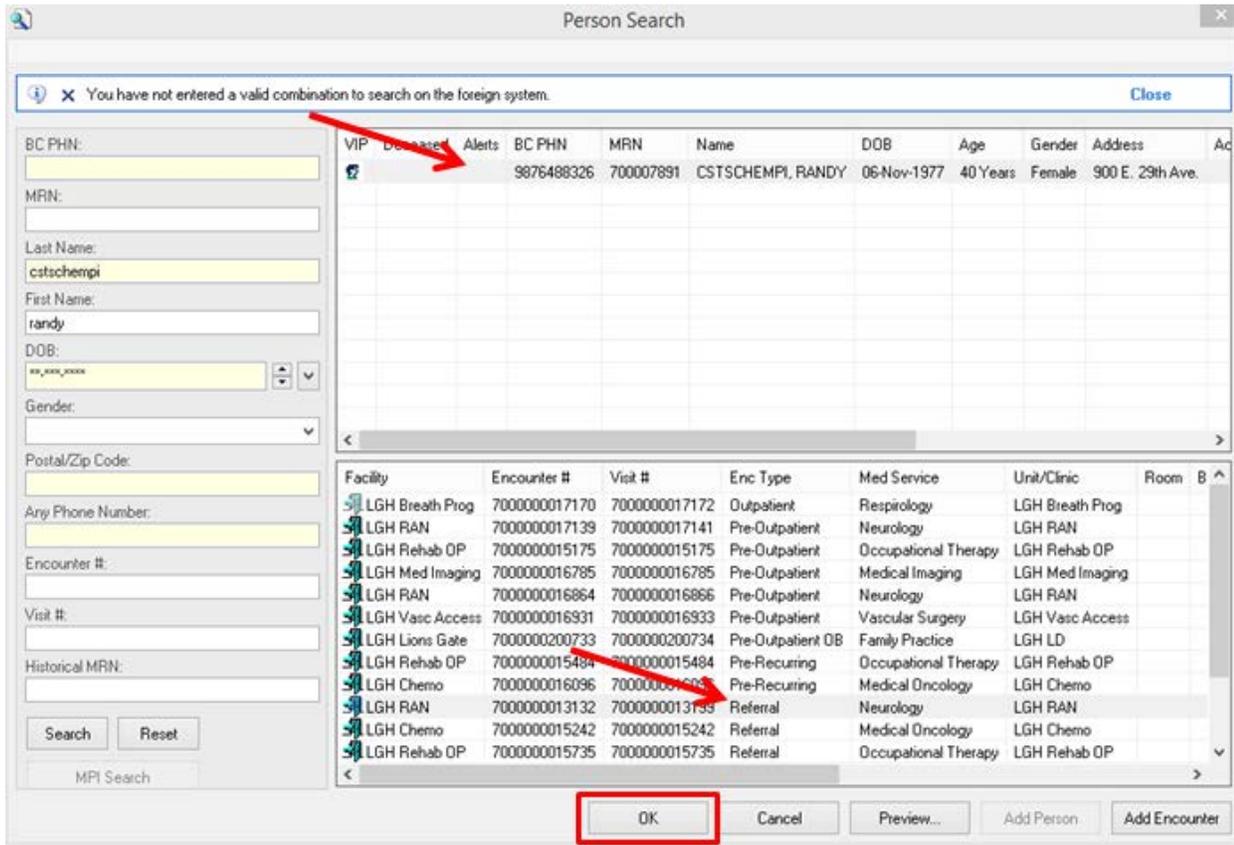
2. When the appointment is scheduled in a **Pending** state, click on the **Confirm** button.
3. Click **OK** on the **Confirm** window.



NOTE: Since the appointment is already linked to the Referral encounter, the **Encounter Selection** window will **not** open.

Change Referral Encounter to Pre-Register Outpatient

4. Open the **Pre-Register Outpatient** Conversation. Search for the **Person**.
5. Select the **patient** AND the **Referral** encounter. Click **OK**.



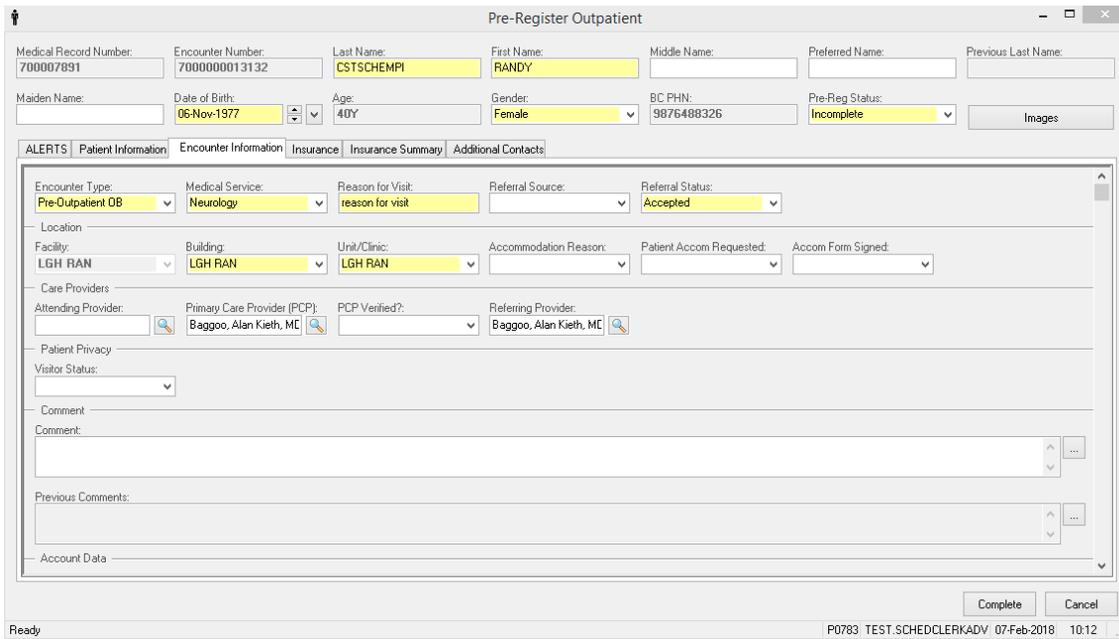
6. The EMPI window will briefly launch.
7. Click **Encounter Information** tab to select the appropriate **Pre-Register Outpatient encounter** (Pre-Outpatient in a Bed or Pre-Outpatient OB) in Encounter Type drop-down list and update **Referral Status** to Accepted.

NOTE:



1. **Pre-Outpatient in a Bed** is for inductions.
2. **Pre-Outpatient OB** for NSTs, iron sucrose infusions, ECVs, and outpatient betamethasone injections.

- The Referral encounter drops off your **Referral Patient List** (refer to Create a Patient List for Referral Triage in the previous section if you need to create your referral patient list) since it is no longer a referral encounter.



- Click **Complete** button and the **Document Selection** window pops-up.
- Click **OK** to close the **Document Selection** window.



NOTE: It is vital to update the encounter to an appropriate **Pre-Outpatient** encounter so it can be checked in appropriately when the patient arrives for his/her appointment.

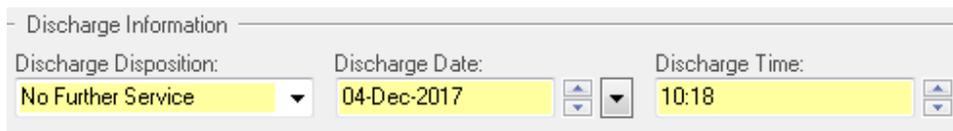
Process Rejected Referrals

When a Referral is rejected the Triaging Provider/Clinician will notify the OB Clerk/OB Nurse (site dependent), the Clerk/OB Nurse will notify the Referring Provider (clinic dependent) and **discharge** the Referral encounter (using the **Discharge encounter Conversation**).

Discharge Referral Encounter

- Open the **Discharge Encounter Conversation** and search for the **Person**.
- Select the **patient AND the Referral encounter**. Click **OK**.

3. Update **Referral Status, Discharge Disposition, Discharge Date** and **Discharge Time**.



4. Click **Complete** to complete the discharge and close the window.

Process Additional Information Required Referrals

When Triaging Provider/Clinician requests for any additional information, the Clerk/OB Nurse will follow up with the Referring Provider or patient to get any missing information. When the new information is received, it must be indexed to the same patient/encounter in **WQM**.

Process Additional Documents in WQM

1. Additional information should be sent in via fax so an electronic version can be linked to the patient's chart. If the additional information is received on paper, you will need to scan that paper document to a patient's chart to get the document into **WQM**.
2. When the requested information is received in **WQM**, link that document to the existing Referral encounter.
3. Complete indexing the document in **WQM** with the appropriate Document Type (select Referral Other and change the subject name to reflect the document).

Related Positions

- OB Clerk
- OB Nurse
- OB Unit Clerk

Key Words

- Maternity Referral Triage
- OB Referral Triage
- Patient List set up
- Referral processing for maternity clinic
- Work Queue Monitor for OB clinic
- WQM