

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.
- 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.

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 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)!



× You have not entered a valid combinat	ion to s	earch on the fi	oreign system.								lloze	-
PHN	VIP	Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Addre	59
	2	No	Interpreter Required	9878263312	700001660	CSTSCHEMPI, N	ANCY	01-Jan-2012	5 Years	Female	2454	highgf
N:	2		Interpreter Required	9876874312	700003998	CSTSCHEMPI, PI	TE	02-Feb-2000	17 Years	Male	105 E	Kent
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- 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



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

φ.	Add/Modify Work Item
Task View Work Item Help 2 100 100 100 100	
Patient Name:	DOB: Encounter Type: MRN: Age: FIN:
	Document Type Search
Location:	Document type: Referral Other Subject:
Document type: Referral Other	Document alias:
Subject:	Results: Document type Subject Document Alias Peterse Other Abaging Patient Manifester R 7003
Priority: Routine	Referral Other Cocupational Therapy And Sp 6977 Referral Other Social Work Department Requ 1340 Referral Other Canadian Red Cross Help - He 6823
Specialties :	Referral Other Dietitian Referral 6668 Referral Other Transition Program Referral Form 1727 Referral Other Tentative Appointment Schedule 1028 Referral Other Nutrition Counseling Heterral 1730
Queue Routing :	Referral Other BC Psychosis Program Referral 1463 Referral Other Child and Adolescent Mental H 504 Referral Other Home Oxygen Program (HOP) 26 Referral Other Mental Health & Addiction (MH) 2726
Last Contact	Referral Other Nutrition Counselling Referral 4108
Referring physician:	Show all document types DK Cancel
Status: Available v Reason:	• 수 수 수 Page 1 of 1 또 또 전 간 은 은 2 1 1 1 등 등
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- 15. The Subject field will auto-populate with **Tentative Appointment Schedule**.
- 16. **Delete** the auto populated **subject name** and **enter** an appropriate name for the referral document (for example, **NST Request Form**)
- 17. Change the **Status** to Complete.
- 18. Select Performing Provider: Document, Scanned
- 19. 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.

0	Task Edit View Patient Chart Links Notifications Documentation Help
	i 🖾 Message Centre 🐝 Patient Overview 🐝 Ambulatory Organizer 🐝 MyExperience 🛓 Patient List Tracking Shell Perioperative Tracking 🕷 Dynamic Worklist 🕷 LearningLIVE 🖕
	🛱 CareConnect 🛱 PHSA PACS 🎕 VCH and PHC PACS 🎕 MUSE 🕏 FormFast WFI 🚽 🛱 Patient Health Education Materials 🕸 SHOP Guidelines and DSTs 🎕 UpToDate 🚽 🦠 Propo:: 0 🖕
	🖾 Tear Off 🕮 Exit 🏙 AdHoc 🔩 Communicate 🛛 📽 Result Copy 🗓 Related Records 🗃 Discern Reporting Portal 💽 iAware 🏭 Protocol Office Manager 🍢 Patient Protocol Manager 💡
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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.

P	Modify Patient Lists
Available lists:	Active lists:
	New OK Cancel

4. Select Location and then Next.



	Patient List Type	×
Select a patient list type:		
Assignment Assignment (Ancillary) CareTeam Custom Location Medical Service Provider Group Query Relationship Scheduled		
	Back Next Fin	ish Cancel

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

	Location Patient List	×
 *Locations Medical Services Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria 	- ⊠ <mark>□ Locations</mark> - ⊠ □ Locations Groups	
Enter a name for the list: (Limi	ted to 50 characters)	

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.



	Location Patient List
 *Locations Medical Services Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria 	 □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □
Enter a name for the list: (Limited to 50 characters) Back Next Finish Cancel

 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.

	Location Patient List	×
✓ *Locations [LGH Labor Medical Services Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria	CGH Emergency Department Hold CGH Endoscopy CGH Endoscopy CGH Endoscopy CGH Endoscopy Wait List CGH Endoscopy Wait List CGH Endoscopy Wait List CGH CLGH False Creek Private Surgical Centre CGP LGH Labour and Delivery CGP LGH Labour and Delivery CGP LGH Main OR CGP LGH Main OR CGP LGH Minor Treatment Room CGP LGH Morgue	~
Enter a name for the list: (L LGH Labour and Delivery	imited to 50 characters) Back Next Finish Cancel	

- 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**.



	Location Patient List	×
✓ *Locations [LGH Labo Medical Services ✓ Encounter Types [Reft Care Teams Relationships 1 Time Criteria Discharged Criteria Admission Criteria < >>	Pre-Inpatient Pre-Outpatient Pre-Outpatient in a Bed Pre-Outpatient OB Pre-Outpach Pre-Outpach Pre-Neturing Recurring Provider to Provider Recurring Recurring Provider to Provider Recurring Rec	^
Enter a name for the list: (L OB Referrals List	imited to 50 characters) Back Next Finah	4 Cancel

10. 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**.



11. 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.

Patien	t List											
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ob R Lgh	eferrals List	ry - Ref	erral									
1	Patient Name	Location	MRN	Encounter #	Age	DOB	Gende	Admit Date	Reason for Visit	t Attending Provid	er Encounter T	pe Medical Service Length
1	CSTMATTEST, SUSAN	LGH LD	700020067	700000200873	38 years	17-Jan-1980	Female		NST		Referral	Obstetrics
1	CSTMATTEST, BERYL	LGH LD	700020141	700000201016	40 years	14-Dec-1977	Female		Test		Referral	Obstetrics
2	CSTMAT, REFERRALTES	LGH LD	700020664	700000201036	36 years	12-Feb-1981	Male		pain		Referral	Obstetrics
	CSTMATTEST, MAUI	LGH LD	700008546	700000016442	40 years	14-Dec-1977	Female		induction		Referral	Obstetrics



Triage Referrals from Patient List

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

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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).

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

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scy kusk Hactors (0) issues							Cancel Pregn	ancy Close Pr
(0) stra	Current Pregnancy	Contact Info Demographics						
l Visits		EDD 17/01/18 (Authoritative	e)	Current Weight	sokg		Blood Type	4
None Other		EGA 41 Weeks, 6 Days Graveta/Party, CD P0/0.0.0.0		Pre-Preg Weight	70kg		Blood Type, Transcribed	A negative
sion History		Multiple Fetuses No, Singleton		DML	31kg/m2		Transcribed Andbody Screen	negative
		Easting Day						
rofile		record rise						
rafile 106		racing Past						
rofile 105 Hintenance	Pregnancy Risk Fa	actors (0) +						
rafle 105 Intenance Note	Pregnancy Risk Fa	actors (0) +						
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- 16. Notify the OB unit clerk/charge nurse of the decision (i.e., Accept/Reject/Additional information needed for request).
- 17. 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 <u>existing Referral</u> encounter.

C PHN:	VIP	Deceased /	Alerts	BC PHN	MBN	Name	e		DOB	Age
	2		nterpreter Required	9878171163	700002133	CSTS	CHTEST, NATE REP	REG	01-Jan-1980	37 Y
BN:	12	No		9878103913	700002315	CSTS	CHTEST, BARRY		01 Jan-1980	37 Y
1	2				700002337	CSTS	CHTEST, ALEXIS SO	HEDEXPERT	01-Jan-1990	27 Y
st Name	2			9878174628	700002376	CSTS	CHTEST, STHEATH	ER	22-Mar-1976	41 Y
schlast	2			9878173285	700002395	CSTS	SCHTEST, BJORN		01-Jan-1970	47 Y
SURES.	2	Yes		9876747739	700005708	CSTS	CHTEST, DECEASE	D	01-Jan-1980	37 Y
Name:	2	Yes		9876747721	700005709	CSTS	CHTEST, ZOMBIE		01-Jan-1980	37 Y
	2			9876714933	700006322	CSTS	SCHTEST, JRAC		07-Aug-1963	54 Y
B:	2			9876712894	7000063	CSTS	CHTEST, NATEREC	URRING	01-Jan-1980	37 Y
	2			9876708285	700006487	CSTS	SCHTEST, JOETRIAG	E	08-Sep-1964	53 Y
nder	2			9876504105	700007708	CSTS	SCHTEST, BABY		19-Jan-2017	10 M
	2	No		9876501955	700007784	CSTS	SCHTEST, ARLENE		18-Oct-1965	52 Y
and the second	2			9876487704	700007915	CSTS	CHTEST, ABIGAIL		06-Nov-1994	23Y
stal/Zip Code:	•									•
y Phone Number.	Facil	ity	Encounter #	Visit #	Enc Type	e	Med Service	Unit/Clinic	Room I	Bed Es
	⊴ ∎ι	GH PF Lab	700000010025	70000001007	9 Referral		Respirology	LGH PF Lab		
counter #	SIL	GH RAN	700000010367	70000001042	9 Pre-Outp	atient	Neurology	LGH RAN		18
	3 L	GH RASC	700000010581	70000001064	3 Pre-Outp	atient	Neurology	LGH RASC		22
	311	GH RASC	700000010586	70000001064	8 Pre-Outp	atient	Neurology	LGH RASC		25
C#	J.	GH RASC	700000010621	200000001068	3 Pre-Outp	atient	Neurology	LGH RASC		25
	SIL	GH RASC	700000010634	70000001019	Fre-Outp	atient	Neurology	LGH RASC	10 10	25
torical MRN:	1.570	GH RAN	700000016357	70000001635	7 Referral		Neurology	LGH RAN		
	3	GH RAN	700000010906	700000001096	8 Pre-Outp	atient	Neurology	LGH RAN		02
	311	GH Breath Pro	g 700000015761	70000001576	1 Pre-Outp	atient	Respirology	LGH Breath Pro	9	30
Search <u>R</u> eset	31	GH OCC MDC	700000013593	70000001366	0 Pre-Outp	atient	Infectious Diseases	LGH OCC MDC		16
	311	GH RAN	700000016124	700000001612	4 Outpatier	nt	Neurology	LGH RAN		06
MPI Search	SIL	GH OCC Unive	r 700000013265	70000001333	2 Outpatier	nt	Cardiology	LGH OCC Univ	er	08
	SIL	GH OCC Unive	r 700000013169	700000001323	6 Outpatier	nt	Cardiology	LGH OCC Univ	er	07-
	4	-	24	211.						

- 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.

0		Pers	on Search						×
④ X You have not entered a valid combination	tion to search on the forei	gn system.						Close	
BC PHN:	VIP Denated Ale	ts BC PHN 9876488326	MBN 700007891	Name CSTSCHEMPL BANDY	DOB 06-Nov-1977	Age 40 Year	Gender s Female	Address 900 E. 29th Av	A
MRN:									2
Last Name:									
Cstschempi									
rist Name.									
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Postal/Zip Code:	< Each	Encounter #	16-2 #	Enc Turne	Mad Canara	_	Heit/Cleric	Room	>
Any Phone Number	LGH Breath Prog	7000000017170 7000000017139	7000000017	172 Outpatient 141 Pre-Outpatient	Respirology Neurology		LGH Breath	Prog	
Encounter #:	LGH Rehab OP	700000015175 700000016785	700000015	175 Pre-Outpatient 785 Pre-Outpatient	Occupational 1 Medical Imagin	Therapy Ig	LGH Rehab	o OP maging	
Visit #	LGH Vasc Access	700000016931	7000000016	333 Pre-Outpatient	Vascular Surge	sty	LGH HAN LGH Vasc A	Access	
Historical MRN:	LGH Rehab OP	7000000015484 7000000016096	7000000015	484 Pre-Recurring Pre-Recurring	Occupational 1 Medical Oncol	, Therapy ogy	LGH Rehat	OP	
	JLGH RAN	700000013132	70000001	135 Referral	Neurology		LGH RAN		
Search Reset	SILGH Chemo	700000015242	7000000015	5242 Referral	Medical Oncol	ogy	LGH Chemo	00	
MPI Search	<	/00000015/35	70000001	0730 Fieterral	Uccupational	nerapy	Lun Henat	OUP.	>
THE EXPERIMENT.			10.00	1			2008		
			OK	Cancel	Preview	A	dd Person	Add Enco	sunter

- 6. The EMPI window will briefly launch.
- 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.



8. 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.

			Pre-Register Outpatien	t		
fedical Record Number: 700007891	Encounter Number: 700000013132	Last Name: CSTSCHEMPI	First Name: RANDY	Middle Name:	Preferred Name:	Previous Last Name:
laiden Name:	Date of Birth: 06-Nov-1977	Age: 40Y	Gender: Female v	BC PHN: 9876488326	Pre-Reg Status: Incomplete	Images
ALERTS Patient Information	on Encounter Information Insura	nce Insurance Summary Additi	onal Contacts			
Encounter Type: Pre-Outpatient OB	Medical Service:	Reason for Visit: reason for visit	Referral Source:	Referral Status: Accepted		í
- Location Facility: LGH RAN	Building:	Unit/Clinic:	Accommodation Reason:	Patient Accom Requested:	Accom Form Signed:	
Care Providers Attending Provider:	Primary Care Provider (PCP):	PCP Verified?:	Referring Provider: Baggoo, Alan Kieth, ME			
 Patient Privacy Visitor Status: 	v					
Comment Comment:						<u></u>
Previous Comments:						~
						Ŷ
— Account Data ———						
						Complete Cancel

- 9. Click Complete button and the Document Selection window pops-up.
- 10. 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

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



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

 Discharge Information — 				
Discharge Disposition:		Discharge Date:	Discharge Time:	
No Further Service	•	04-Dec-2017	 <mark>10:18</mark>	

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