Patient Scheduling – External Referral with Triage

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

The clerk in the receiving clinic will find the new referral on their WQM Queue, link it to a patient/encounter and index it to send the referral to the Triaging Provider. Once the referral is reviewed, the clerk will be notified of the decision via a task on their Multi-Patient Task List. At this point, the referral can be scheduled, waitlisted or rejected based on instructions from the Triaging Provider

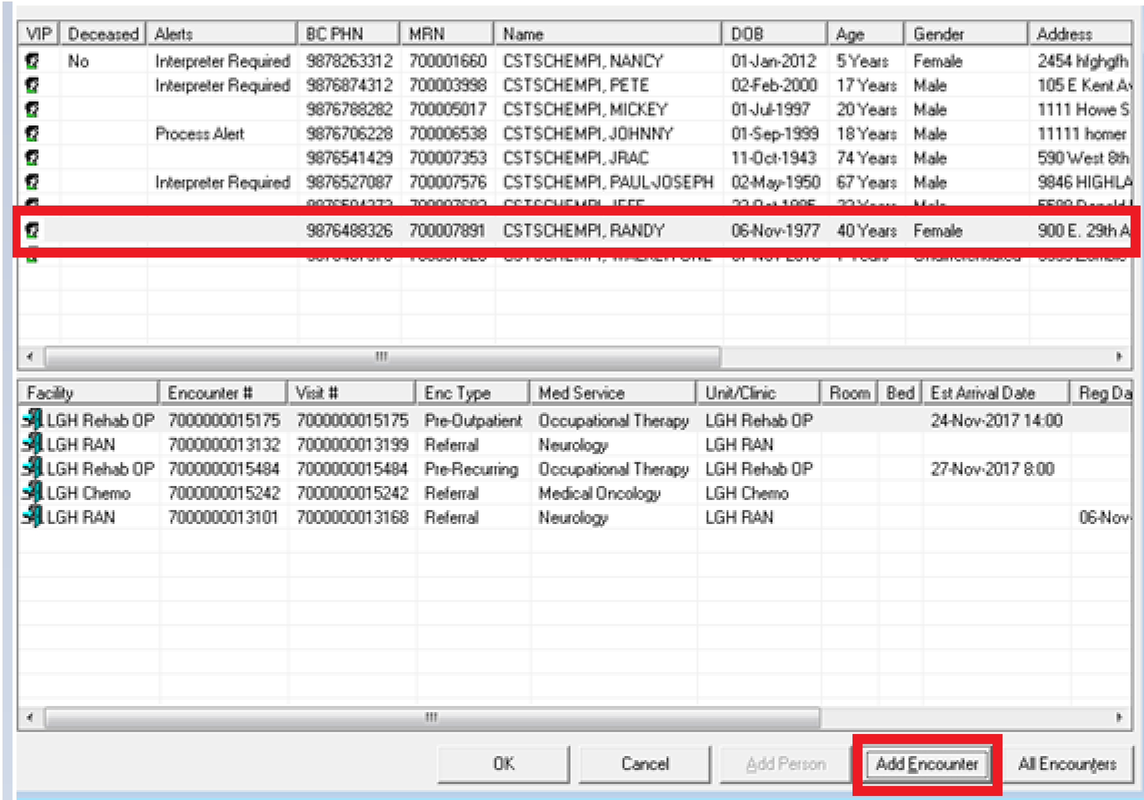
Follow the steps below to process an external referral that requires triaging.

Process a Referral in Work Queue Monitor (WQM)

NOTE: Open the clinic's queue in WQM to find new referrals sent via fax.

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. In the "Add/Modify Work Item" window, click on the **Select Patient** icon .
5. Search for the patient by entering the **PHN** then click **OK** (if you do not have a PHN, search by partial Last Name and First Name or Date of Birth and Gender).

6. If you have found the correct patient, click only **ONCE** on their name to select, then click **Add Encounter.**



NOTE: The patient may already have an existing encounter that is appropriate for this document to be attached to. For instance, if the information is arriving after the original referral package was received, there may already be a Referral encounter. If an appointment was already booked, there could be a Pre-Outpatient encounter. In this case, you would select an existing encounter from the Encounter list and click **OK**.

7. Enter the clinic in the “Facility Name” in the 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**: Select an option from the list
   - **Reason for Visit**: Add a reason for visit
   - **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. The “Referral Management” window opens with an Encounter Number and Visit ID.

13. Click **OK** to close the “Referral Management” window.

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

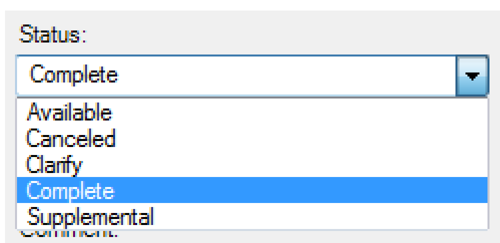
Index a Document in WQM

All documents received in WQM must be indexed with an appropriate Document Type and Status so they are stored appropriately in the Patient’s chart.

1. If sufficient information is provided to link the document to a patient/encounter, it is appropriate to “**Complete**” the document. This will take it off the queue and save it in the patient’s chart.

2. In order to complete indexing, enter the below fields in “**Add/Modify Work Item**” window and click **OK**.

   - **Document Type**: Choose the appropriate option from the list
   - **Status**: “Complete”
   - **Performing Provider**: Document, Scanned



NOTE: Contact Records Management if you have indexed to a wrong encounter or patient or forgot to select “document, scanned” for Performing Provider.

Complete Triage Request in PowerChart

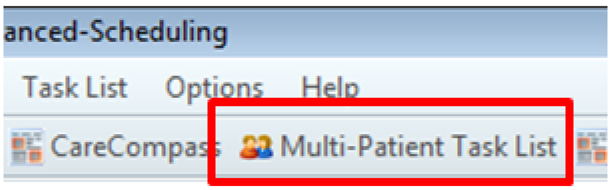
1. The Triaging Provider will find the patient on their Dynamic Worklist (in PowerChart) when the encounter is set to “Ready for Triage” by the clerk.

2. The Provider will view the scanned referral form and additional information in the chart and notify the clerk of their decision (Accept / Reject / Additional Information Request) by entering an order.

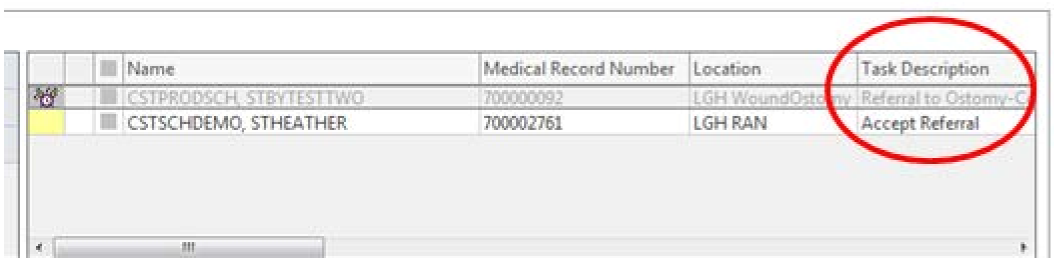
Manage Multi-Patient Task List in PowerChart

The Scheduling Clerk will be notified of the Triaging Provider's decision via an Accept/Reject/Information Request order. When the order is entered, it will drop a task to the clerk's Multi-Patient Task List (MPTL) in PowerChart.

1. Log onto **PowerChart**.
2. Find **Multi-Patient Task List** icon on the Toolbar and click on it.



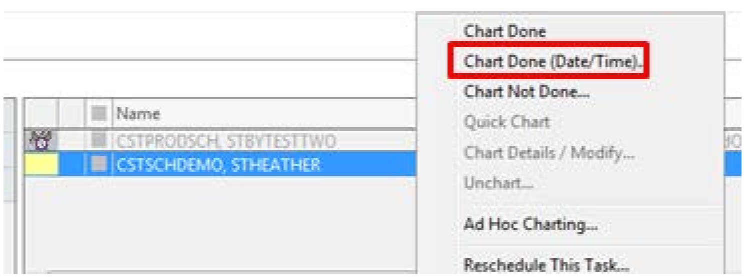
3. A list of patients who have been triaged will appear. The "**Task Description**" column will indicate which order was submitted by the Triaging Provider/Clinician.



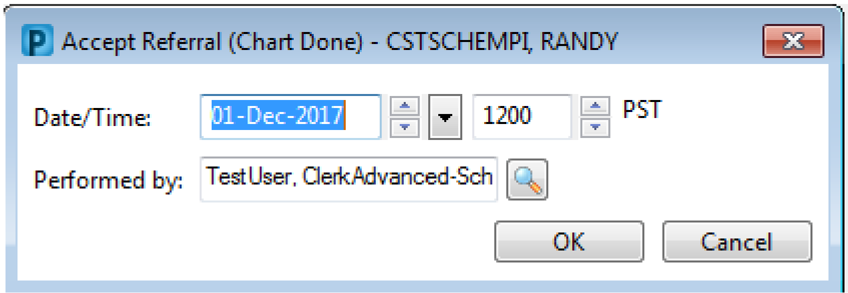
4. There are three types of tasks that will be displayed on the MPTL:

	Accept Referral	Reject Referral	Referral Information Request
Order placed in PowerChart (Provider)	When a Provider places an Accept Referral Order in PowerChart, an Accept Referral task is generated in MPTL.	When a Provider places a Reject Referral Order in PowerChart, a Reject Referral task is generated in MPTL.	When a Provider places a Referral Information Request Order in PowerChart, a Referral Information Request task for missing information is generated on the MPTL.
Next Step (Scheduler)	Based on the accept referral order, the scheduler can either book an appointment or add the patient to the waitlist.	Based on the reject referral order, the scheduler will follow-up with the Referring Provider (clinic dependent) and discharge the referral encounter with an applicable discharge disposition.	Based on the referral information request order, the scheduler will follow-up with the Referring Provider or patient to get the missing information. When the new information is received, it must be indexed to the same patient/encounter in WQM and the Referral Status must be set back to "Ready for Triage."
Referral Status auto update	When a Provider places an "Accept Referral" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto updates the Referral Status to "Accepted."	When a Provider places a "Reject Referral" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto-updates the Referral Status to "Rejected."	When a Provider places a "Referral Information Request" Order in PowerChart, the patient drops off the Provider's Dynamic Worklist and the system auto-updates the Referral Status to "Pending."

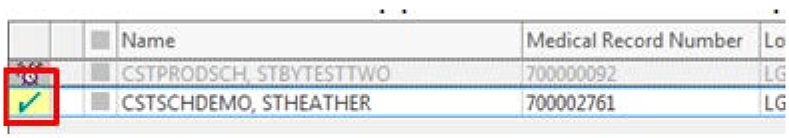
5. Once you are done completing any of the above "Next Steps," right click on the task that you just completed on MPTL and click on **Chart Done (Date/Time)**.



6. Click on **OK** button on the Referral (Chart Done) window to complete a task.



7. A Check mark appears next to the "complete" task.



8. Click on the **Refresh** button to make the task drop off the MPTL.

Schedule the Appointment in SchApptBook

1. When you are ready to schedule an appointment for the patient, open the Scheduling application and click on the **Appointment** tab.

2. The first few fields for the required information appear in the window. You may begin to schedule the appointment.

   NOTE: Mandatory fields are marked with red asterisks (*) meaning you will need to complete these fields in order to move to the next step in scheduling an appointment

3. Click the **Ellipsis** button beside the Person name field and search for the patient based on the Person Search guidelines.

4. Select the Patient and the **Referral Encounter** and click **OK**.

5. Click **OK** to close the "Future Requests/Appointment" window.

6. Fill out the remaining fields in the Appointment tab (aka Accept Format fields) and click on the **Move** button.

7. The appointment request moves to the **WIP** area,

8. From this point, any of the scheduling methods can be used to complete the booking.

9. Once the appointment is scheduled in a pending status, click on the **Confirm** button.

10. Confirm the appointment details and click **OK**. The window will close and the appointment will be confirmed

Update Referral Encounter to Pre-Register Outpatient in PMOffice

1. Log into **PMOffice** and open the **Referral Encounter worklist**.

2. Right-click on the patient name and click **Pre-Register Outpatient** to open the conversation.

3. The EMPI window briefly launches.

4. Click **Encounter Information** tab to select Pre-Outpatient in **Encounter Type** drop-down list and update **Referral Status** to Accepted.

5. Click **Complete** button and the “Document Selection” window pops-up.

6. Click **OK** to close the “Document Selection” window.

7. The Referral encounter drops off the Referral Encounter Worklist.

Related Topics

Related Positions

- Scheduling Clerk
- Scheduling Manager
- Unit Clerk
- Ambulatory Nurse

Key Words

- Work Queue Monitor
- WQM
- Multi-Patient Task List
- External Referral Triage
- Referrals coming via Fax
- Process Referrals in WQM
- Triage Referrals
- Update Referral status in PMOffice
- Referral Encounter worklist