

## Patient Scheduling – External Referral without Triage

The **External Referral without Triage** process involves receiving a new referral on a WQM queue, booking or wait-listing the request in SchApptBook (depending on clinic practice) and completing the indexing of the document in WQM with the appropriate encounter.

Follow the steps below to process an external referral that does not need to be triaged.

### Open a Document 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. If the patient can be scheduled right away, refer to the steps in **Option A** below. If the patient has to be added to a waitlist, refer to the steps in **Option B** below.

### Option A: Schedule an Appointment

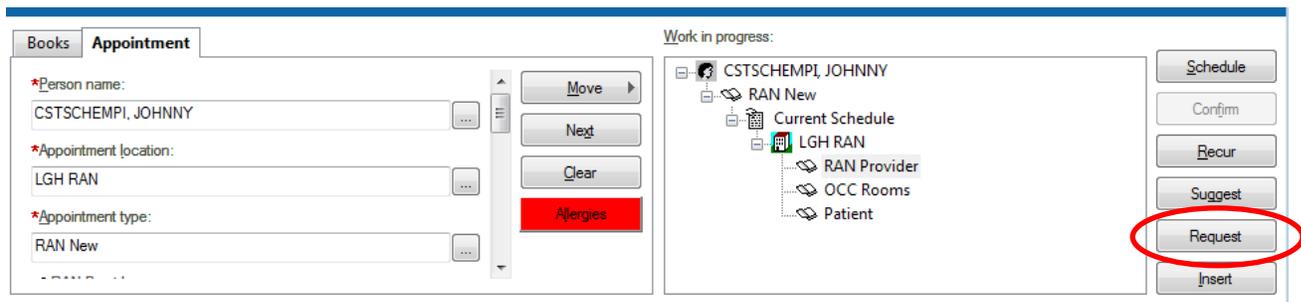
1. Log into **SchApptBook**.
2. Search for the patient according to the search guidelines and then click **OK**.
3. Select the correct patient and then click **OK**.
4. Select a **Facility Name** in Organization window. Click **OK**.
5. The EMPI window briefly launches.
6. Click **OK** to close the Future Requests/Appointments window.
7. After the patient name moves to the Person Name field, complete the rest of the Accept Format mandatory fields. Click the **MOVE** button.
8. Once the appointment moves to the WIP area, use any of the three scheduling methods (reference: [Foundational – Appointment Scheduling](#)) to move the appointment to a “**pending**” state.
9. Click the **Confirm** button and click **OK** in the Confirm window.
10. Click on the **Add Enc** button and create a **Pre-Register Outpatient** encounter. Click **Complete** to finish.

11. Click **OK** to close the Document Selection window.
12. Click **OK** to close the Pre-Register Outpatient window.
13. Go back to **CDIWorkQueueMonitor** to refer to the referral.
14. With the referral open in the **Add/Modify Work Item**, click on the **Select Patient** icon.
15. 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).
16. If you have found the correct patient, click only **ONCE** on their name to select, then select the existing “**Pre-Register Outpatient**” encounter from the Encounter List and click **OK**.
17. Complete indexing by completing the below fields and click **OK**:
  - **Document Type**: Choose the appropriate option from the list
  - **Status**: Complete
  - **Performing Provider**: Document, Scanned

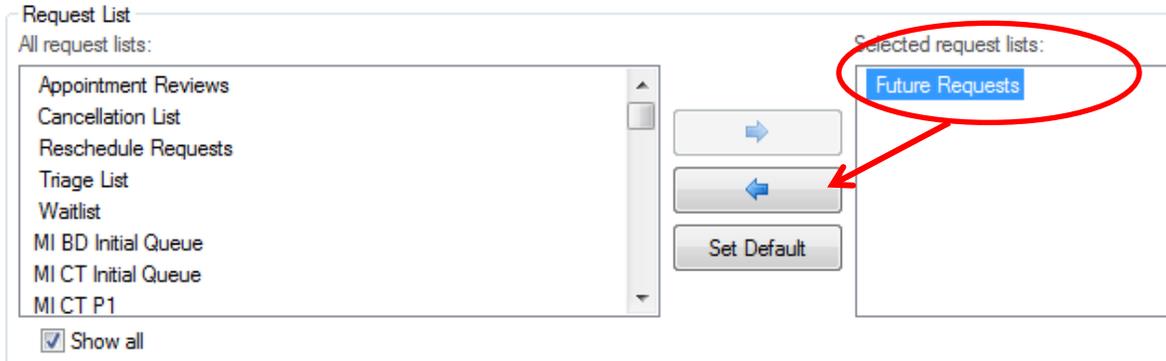
## Option B: Add Patient to the Waitlist

1. With the referral open in the **Add/Modify Work Item** in WQM, click on the **Select Patient** icon.
2. Search for the patient, according to the search guidelines.
3. Select a **Facility Name** in Organization window.
4. The EMPI window briefly launches to open the **Referral Management** conversation window.
5. 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
6. Click the **Referral Info** tab to complete the below mandatory fields:
  - **Referral Received Date**: Type “T” for today’s date
  - **Referral Status**: Select an appropriate status from the list
7. Click the **Complete** button to close the “Referral Management” conversation.

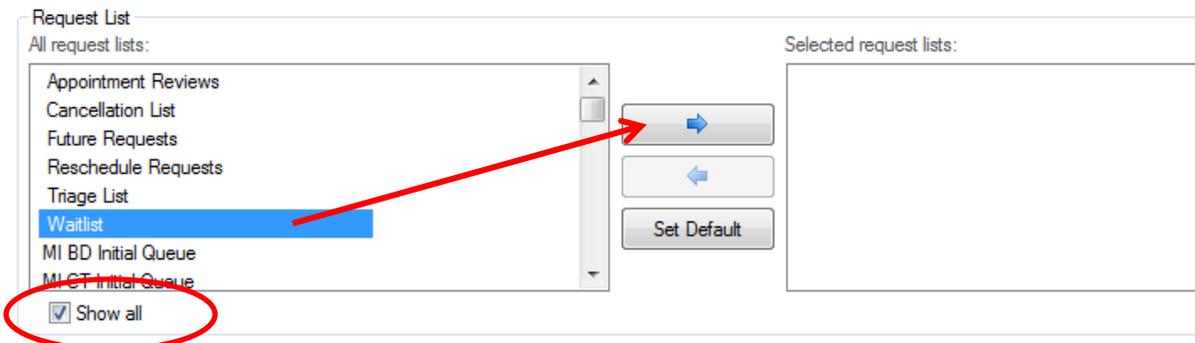
8. Click **OK** to close the “Referral Management” window.
9. In order to complete indexing, enter the below fields in **Add/Modify Work Item** window and click **OK**.
  - **Document Type:** Choose the appropriate option from the list
  - **Status:** Complete
  - **Performing Provider:** Document, Scanned
10. Log into **SchApptBook**.
11. Search for the patient according to the search guidelines and then click **OK**.
12. Select the correct patient and then click **OK**.
13. Select a **Facility Name** in Organization window. Click **OK**.
14. The EMPI window briefly launches.
15. Click **OK** to close the Future Requests/Appointments window.
16. After the patient name moves to the Person Name field, complete the rest of the Accept Format mandatory fields. Click the **MOVE** button.
17. Click on the **Request** button to open the “Request for Book” window.



18. In the Request List section, the “Future Requests” queue will default into the “Selected Request Lists” window. Select the “**Future Requests**” list and use the left arrow to remove it from the selected list.



19. To add the patient to **Waitlist** request list, ensure the “Show all” checkbox is selected (at the bottom of the window) and scroll through the list to select the Waitlist.



20. Once the **Waitlist** is selected, click the right arrow  to move it into the “Selected request lists” box.

21. Click **OK**.

## Related Topics

## Related Positions

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

## Key Words

- External Referral without Triage
- Referral no triage
- Waitlist a referral