

Patient Scheduling – Internal Referral with Triage

The Internal Referral with Triage process is initiated when a Provider/Clinician enters a referral order in PowerChart. The referral order will automatically generate a request that will fall onto the selected clinic's "Future Requests" queue.

The clerk in the receiving clinic will find the new referral on their Request List, create an encounter and move them to a "Triage List" queue until they receive instruction from the Triaging Provider/Clinician.

Follow the steps below to process an internal referral that needs to be triaged.

Open the Future Requests List

Open the clinic's future requests list to find the request for scheduling an appointment.

1. Click on the **Request List Inquiry** icon located in the Toolbar to open the **Schedule Inquiry** window.



- 2. Select the below fields and click on **Find** to open your clinic's Future Request list queue:
- Inquiry: Request List by Location (auto-defaults)
- Request List Queues: Future Requests
- Location Type: Ambulatory
- Location: your clinic's name

Request List		
Inquiry:		
Request List by Local	tion	~
Request List Queues:		
Future Requests		¥
Location type:		
Ambulatory(s)		~
Location:		
LGH RAN		~
Find	Clear	Close



3. All appointment requests that meet the search criteria are displayed.

Request List by Location -						- 🗆 🛛		
Task Edit View Help								
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Name:						Ре	rson Comments:	
MRN:			DOB:					
			Age:					
Request List		MRN	Person Name	Appointment Type	Order	Priority	Received Date	Requested Date
	-11	700001007	CSTPRODSCH, TESTKG	RAN New	Referral to Neurology	Urgent (less than 1 month)	03-Aug-2017 - 12:04	03-Aug-2017 - 0
Inquiry:		700006727	CSTMATTEST, TESTUSER	RAN New	Referral to Neurology	Routine	10-Oct-2017 - 10:37	10-Oct-2017 - 00
Request List by Location	1	700006640	CSTAMBTEST, JAMIE	RAN New	Referral to Neurology	Emergent (less than 1 week)	21-Nov-2017 - 16:05	21-Nov-2017 - 0
		700008318	AMBTEST, DEMO	RAN New	Referral to Neurology	Urgent (less than 1 month)	27-Nov-2017 - 15:15	27-Nov-2017 - 0
Request List Queues:	-11	700005017	CSTSCHEMPI, MICKEY	RAN New	Referral to Neurology	Emergent (less than 1 week)	04-Jan-2018 - 10:11	04-Jan-2018 - 00
Future Requests	·	700002761	CSTSCHDEMO, STHEATHER	RAN New	Referral to Neurology	Emergent (less than 1 week)	11-Jan-2018 - 09:57	11-Jan-2018 - 00
Location type:								
Ambulatory(s)								
Location:								
LGH RAN	7H							
	-11							
L								
Find Clear Close		<						>

Link a Request to a Referral Encounter and send it to Triaging Provider

After finding the request, add a referral encounter, update referral status to send it to the Triaging Provider.

1. Right-click on the request and select Modify.

MRN	Person Name	Appointment Type	Order
700001007	CSTPRODSCH, TESTKG	RAN New	Referral to Neurology
700006727	CSTMATTEST, TESTUSER	RAN New	Referal to Neurology
700006640	CSTAMBTEST, JAMIE	RAN New	Referal to Neurology
700008318	AMBTEST, DEMO	RAN New	Referal to Neurology
700005017	CSTSCHEMPI, MICKEY	Confirm	
700002761	CSTSCHOEMO, STHEATHEF	Contact	
		Modify	1
		Reschedule	di
		Hold	

2. Select the **Set Enc** button on the Modify window.

Person Name	MRN	Home Phone	Enc Type	Encounter Number	VIP	P
CSTSCHDEMO, STHEATHER		(604)123-4567				
·						
						View Modify Set Enc



8		Encounter	Selection		?	×
Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	^
700000005330	Pre-Outpatient			LGH RASC	LGH RASC	
700000004971	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP	1
700000004881	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP	
700000004868	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP	1
700000004819	Pre-Outpatient			LGH Trauma	LGH Trauma	
700000004772	Pre-Outpatient			LGH Ped Asthma	LGH Ped Asthma	1
700000004729	Pre-Outpatient			LGH RASC	LGH RASC	
700000004650	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog	1
700000004610	Pre-Outpatient			LGH RASC	LGH RASC	
700000004608	Pre-Outpatient			LGH IROP	LGH IROP	1
700000004587	Pre-Outpatient			LGH IROP	LGH IROP	
700000004535	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog	
700000004534	Pre-Outpatient			LGH Breath Prog	LGH Breath Prog	
700000004490	Pre-Outpatient			LGH PF Lab	LGH PF Lab	
700000004488	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog	
<					>	,
Modify	Add Enc]		ОК	Cancel	

3. Select the Add Enc button on the Encounter Selection window.

4. Select **Referral Management** conversation from the Available Conversations list and click **OK**.

8	Available Conversations	×		
Please s	Please select the conversation you would like to use:			
Referral	Management	¥		
		ОК		

- 5. Select the appropriate Facility Name in the Organization window and click OK.
- 6. The **Referral Management** conversation window opens up. Complete the mandatory fields in **Encounter Information** tab:
- Encounter Type: Referral (pre-populated)
- Medical Service: Select one from the list
- Referring Provider: Select one from the list



- 7. Complete the mandatory fields in Referral Info tab and click Complete:
- Referral Received Date: Date the request was received
- Referral Status: Ready for Triage

NOTE: Selecting "Referral Status to Ready for Triage" drops the patient to the Triaging Provider's Dynamic Worklist in the PowerChart to review.

- 8. Click **OK** to close the **Referral Management** window.
- 9. Click the **Details** tab in the **Modify** window and complete the mandatory fields. Click **OK**.
- Referring Provider: copy and paste the Ordering Provider's name
- Interpreter required: select one from the available options

Seneral	Summary	Details	Orders	Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Booking Notes	
Reason	For Visit:									
dddddd	bbbbbbbbbbb									
Ordering	Provider:									
TestUse	r, Neurologist	Physician, M	MD							9
Referrin	g Provider:									
										9
Referral	Received Da	te:								
12-Dec-	2017									
Priority:										
Routine										
*interpre	ter Required?									
Languag	e:									
										8
Special II	nstructions:									
								_		
								Г	ОК	Cancel



Move the Request to the Triage List Queue

Once the request is sent to the Triaging Provider, move the request to the Triage List queue.

1. Right-click on the Request and select **Move Request** to open the Modify Request window.



2. In the "**Modify Request**" window, select the Future Requests in the Selected Request List section and click the **left arrow** . This will remove the Request from the current list.

🕅 Modify Request				? 💌
Name: CSTPRODS	CH, TESTKG	BC PHN: 9878393779	Gender: Female	Person Comments:
Preferred Name:	MRN: 700001007	DOB: 01-Nov-2016	Language:	Location:
Disease Alert: None	Process Alert: None	Age: 13 Months	Interpreter Required:	Preferred Phone: (778) 123-4
E-♥ CSTPRODSCH, TESTKG ⊕-ጭ RAN New (Book)	Request List General Request List General Request List: All Request Lists: Appointment Reviews Cancellation List Reschedule Requests Triage List Waitlist MI BD Initial Queue MI CT P1 MI CT P2 MI CT P3 	iested Action Details Scheduling Criteria	A Notification	OK Cancel

- CLINICAL*SYSTEMS TRANSFORMATION Our path to smarters seamless care
- 3. Select **Triage List** to move the Request to (from the "All Request Lists" section) and click the **right arrow**.



4. Click OK to move the request to the Triage List.

Manage Multi-Patient Task List in PowerChart

The patient will remain on the Triage List until the Triaging Provider/Clinician reviews the referral and decides if/when the patient will be seen. The Scheduling Clerk will be notified of the 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).



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.

	Name Name	Medical Record Number	Location	Task Description
10	CSTPRODSCH, STBYTESTTWO	70000092	LGH WoundOston	Referral to Ostomy-
	CSTSCHDEMO, STHEATHER	700002761	LGH RAN	Accept Referral

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).**

		Chart Done	
		Chart Done (Date/Time).	-
		Chart Not Done	
	III Name	Quick Chart	
10	CSTPRODSCH, STBYTESTTWO	Chart Details / Modify	5
	CSTSCHDEMO, STHEATHER	Unchart	
		Ad Hoc Charting	
		Reschedule This Task	

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

P Accept Refer	ral (Chart Done) - CSTSCHEMPI, RANDY
Date/Time:	01-Dec-2017
Performed by:	TestUser, ClerkAdvanced-Sch
	OK Cancel

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

0-01-				
	10	Name	Medical Record Number	Lo
10		CSTPRODSCH, STBYTESTTWO	70000092	LG
1	1	CSTSCHDEMO, STHEATHER	700002761	LG

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





Completing a Request from Request List

1. When you are ready to schedule an appointment for the patient, go to the clinic request list queue and open **Triage List** queue.

Request List	
Inquiry: Request List by Location	-
Request List Queues: Triage List	•
Location type: Ambulatory(s)	•
Location: LGH RAN	-

2. Find the request and right-click on it to select **Complete Request**.

		Add New Appointment			
Request List			ion MRN Person Name		
		Book	700000659	CSTSCHYURI, ST-ONE	Complete Request
Request List by Location		Book	700000659	CSTSCHYURI, ST-ONE	Modify Request
		Book	700000659	CSTSCHYURI, ST-ONE	Move Request
		Book	700001007	CSTPRODSCH, TESTKG	Cancel Request
Request List Queues:		Book	700006727	CSTMATTEST, TESTUSE	Cancel Request
Future Requests	-	Book	700007575	SPIEGEL, SPIKE	Restore Request
	E	Book	700006640	CSTAMBTEST, JAMIE	Cabadada
Location type:		Book	700008318	AMBTEST, DEMO	Schedule
Ambulatory(s)	-	Book	700007891	CSTSCHEMPI, RANDY	Inquiry
Location:					Notifications
LGH RAN					Superbill

- 3. Click **OK** to close the "Future Requests/Appointment" window.
- 4. The appointment request moves to the **WIP** area.
- 5. From this point, any of the scheduling methods can be used to complete the booking. However, **Suggest** is recommended because the date range will default to the dates entered by the ordering Provider.
- 6. Once the appointment is scheduled in a pending status, click on the **Confirm** button.
- 7. Confirm the appointment details and click **OK**. The window will close and the confirmed.



Updating Referral Encounter to Pre-Register Outpatient

1. With the Referral Encounter worklist open, right-click on the patient name and click **Pre-Register Outpatient** to open the conversation.

STSCHEMPI, RANDY	06-NOV-2017	Accept	ted	
STPRODSCH, TESTKG	09-NOV-2017	Rea	Discharge Encounter	
			Pre-Register Outpatient	
			Referral Management	
			Encounter Summary	

- 2. The EMPI window briefly launches.
- 3. Click **Encounter Information** tab to select Pre-Outpatient in **Encounter Type** drop-down list and update **Referral Status** to Accepted.
- 4. Click the **Complete** button and the "Document Selection" window pops-up.
- 5. Click **OK** to close the "Document Selection" window.
- 6. The Referral encounter drops off the Referral Encounter Worklist.

Related Topics

Related Positions

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

Key Words

- Orders to Scheduling
- Internal Referral Triage
- Referrals coming via PowerChart