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.

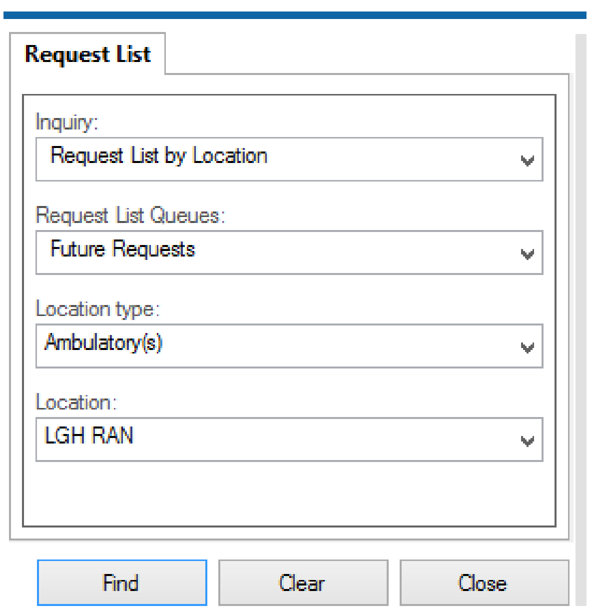
Open the Future Requests List

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

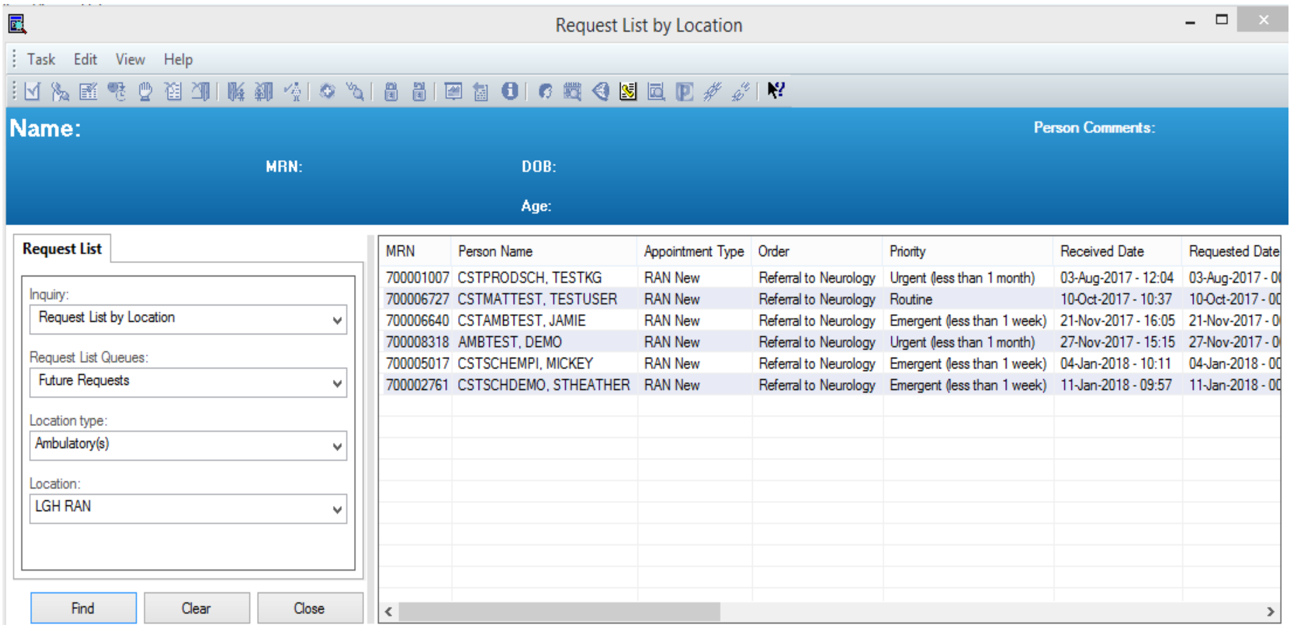
1. Click on the **Request List Inquiry** icon located in the Toolbar to open the **Schedule Inquiry** window.

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



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

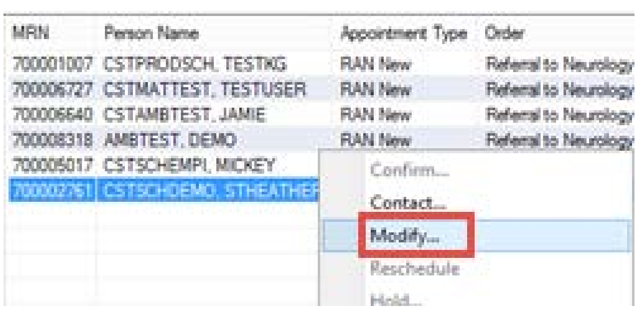


MRN	Person Name	Appointment Type	Order	Priority	Received Date	Requested Date
700001007	CSTPRODSCH, TESTKG	RAN New	Referral to Neurology	Urgent (less than 1 month)	03-Aug-2017 - 12:04	03-Aug-2017 - 0
700006727	CSTMATTEST, TESTUSER	RAN New	Referral to Neurology	Routine	10-Oct-2017 - 10:37	10-Oct-2017 - 0
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
700005017	CSTSCHEMPI, MICKEY	RAN New	Referral to Neurology	Emergent (less than 1 week)	04-Jan-2018 - 10:11	04-Jan-2018 - 0
700002761	CSTSCHDEMO, STHEATHER	RAN New	Referral to Neurology	Emergent (less than 1 week)	11-Jan-2018 - 09:57	11-Jan-2018 - 0

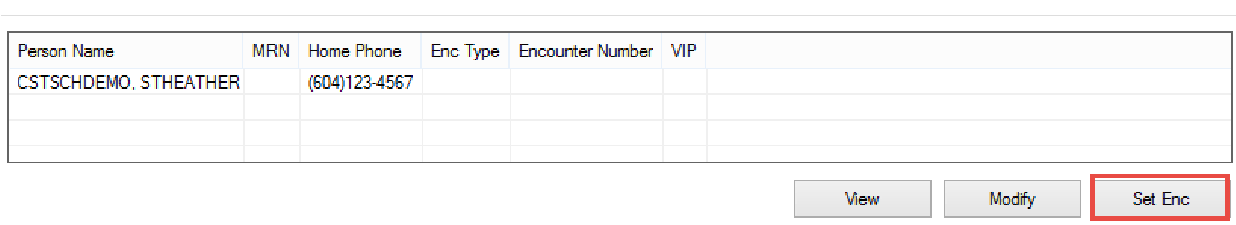
Link a Request to a Referral Encounter and send it to Triaging Provider

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

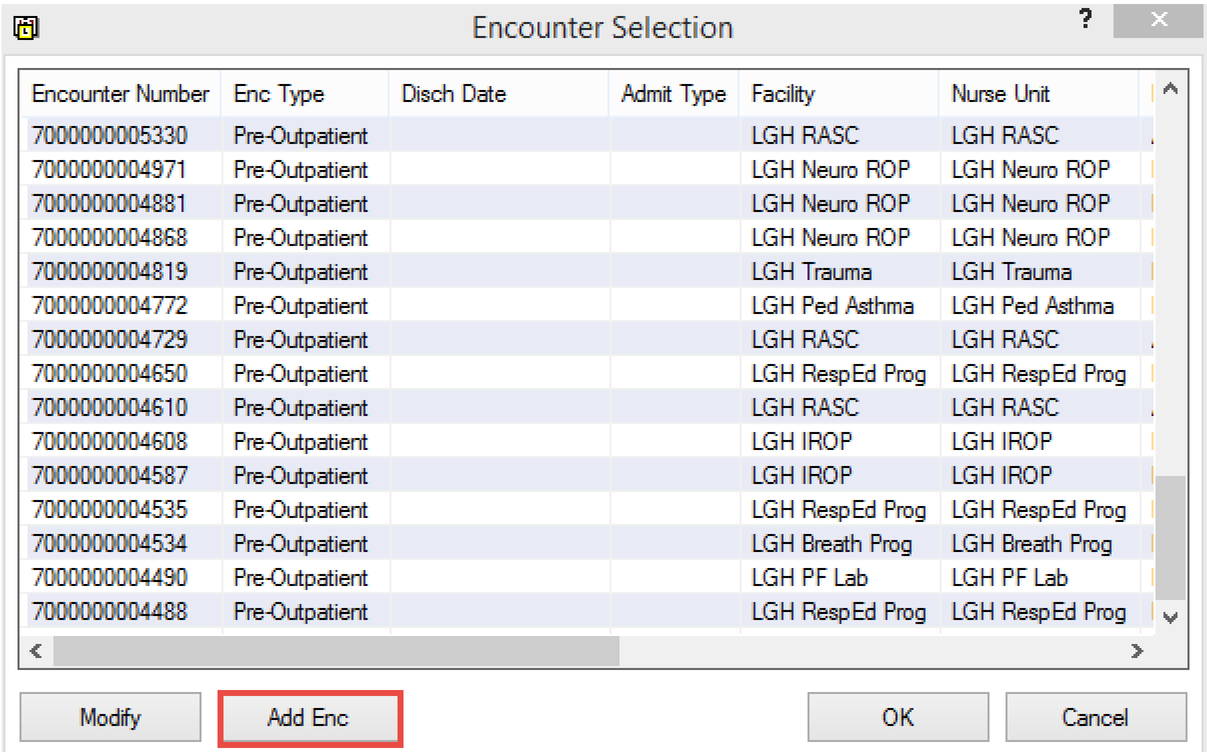
1. Right-click on the request and select **Modify**.



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

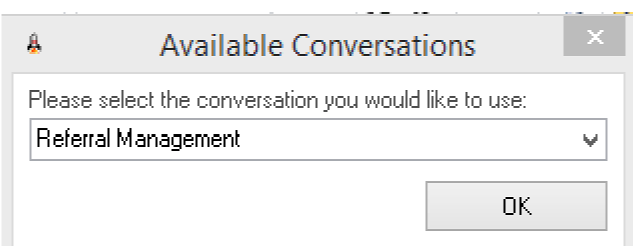


3. Select the **Add Enc** button on the Encounter Selection window.



Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit
7000000005330	Pre-Outpatient			LGH RASC	LGH RASC
7000000004971	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP
7000000004881	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP
7000000004868	Pre-Outpatient			LGH Neuro ROP	LGH Neuro ROP
7000000004819	Pre-Outpatient			LGH Trauma	LGH Trauma
7000000004772	Pre-Outpatient			LGH Ped Asthma	LGH Ped Asthma
7000000004729	Pre-Outpatient			LGH RASC	LGH RASC
7000000004650	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog
7000000004610	Pre-Outpatient			LGH RASC	LGH RASC
7000000004608	Pre-Outpatient			LGH IROP	LGH IROP
7000000004587	Pre-Outpatient			LGH IROP	LGH IROP
7000000004535	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog
7000000004534	Pre-Outpatient			LGH Breath Prog	LGH Breath Prog
7000000004490	Pre-Outpatient			LGH PF Lab	LGH PF Lab
7000000004488	Pre-Outpatient			LGH RespEd Prog	LGH RespEd Prog

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



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**:

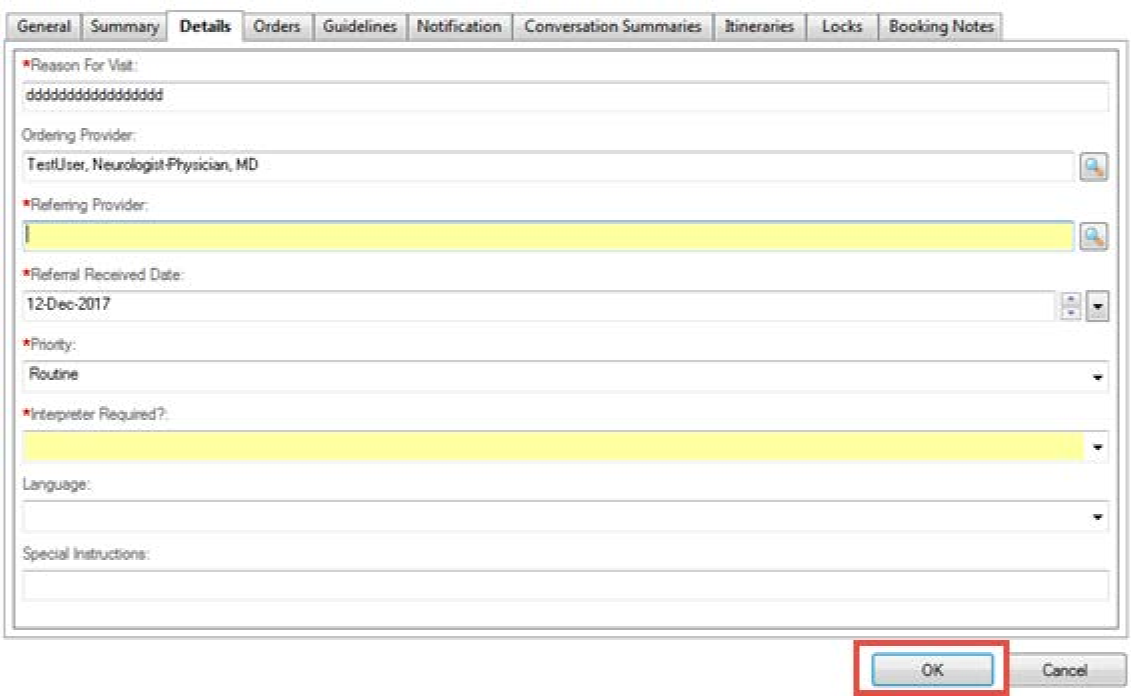
- **Referral Received Date:** Date the request was received
- **Referral Status:** Ready for Triage

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**.

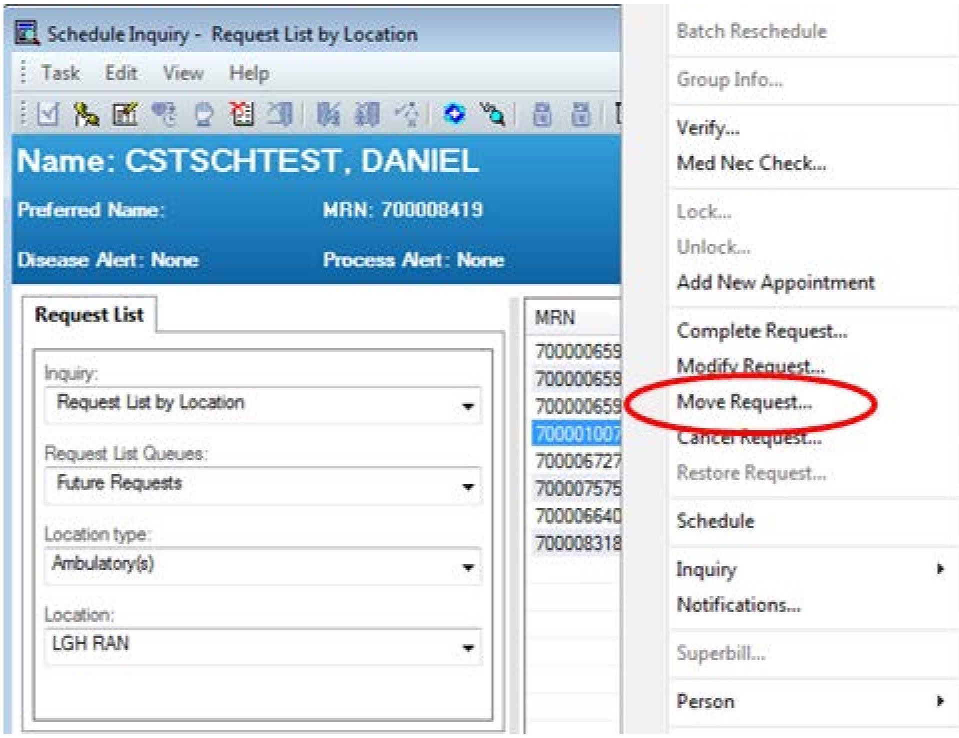
- **Referring Provider:** copy and paste the Ordering Provider's name
- **Interpreter required:** select one from the available options



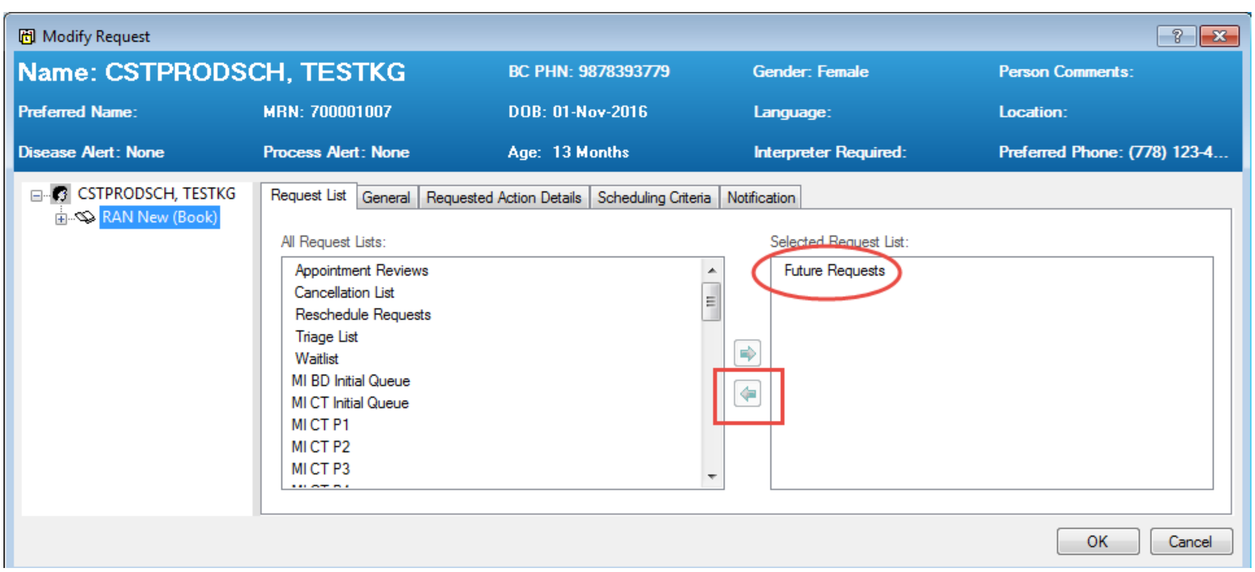
Move the Request to the Triage List Queue

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

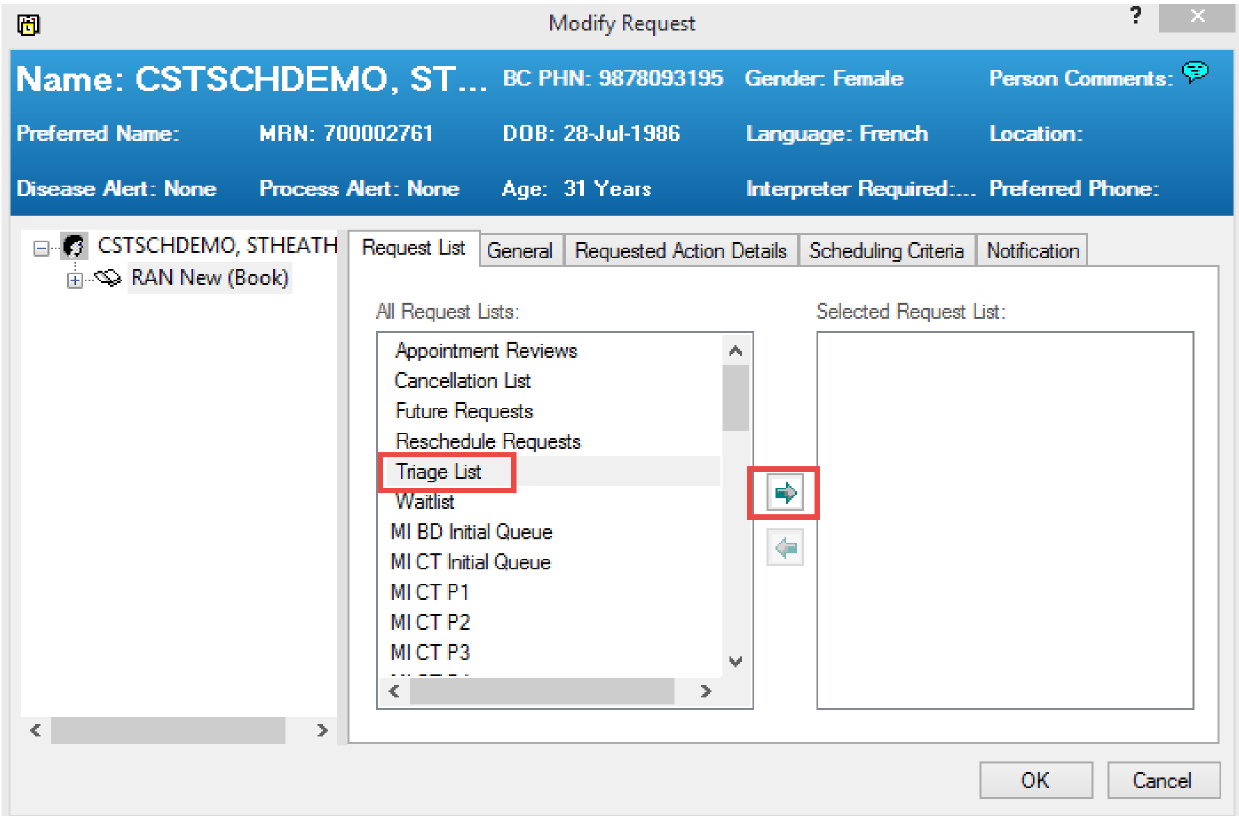
1. Right-click on the Request and select **Move Request** to open the Modify Request window.



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.



3. Select **Triage List** to move the Request to (from the “All Request Lists” section) and click the **right arrow** .



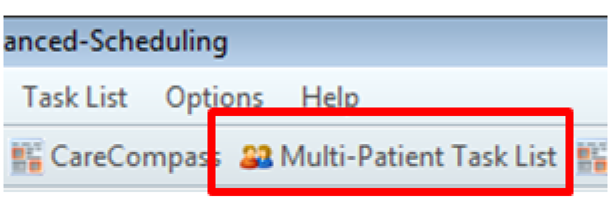
4. Click **OK** to move the request to the **Triage List**.

Manage Multi-Patient Task List in PowerChart

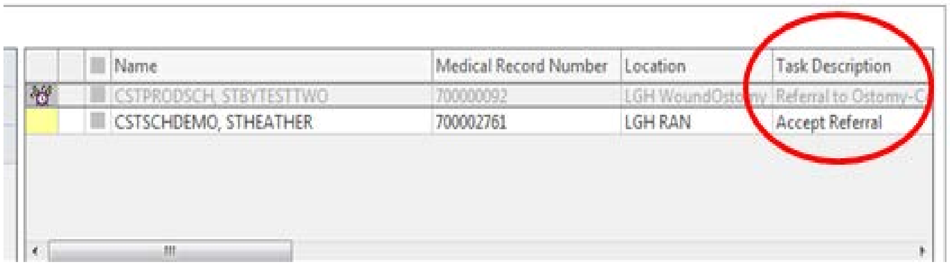
The patient will remain on the Triage List until the Triaging Provider/Clinician reviews the referral and decides if/when the patient will be seen. The Scheduling Clerk will be notified of the decision via an Accept/Reject/Information Request order. When the order is entered it will drop a task to the clerk’s Multi-Patient Task List (MPTL).

1. Log onto PowerChart. 

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



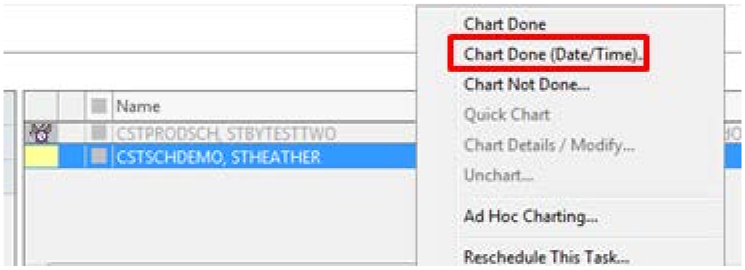
3. A list of patients who have been triaged will appear. The "**Task Description**" column will indicate which order was submitted by the Triaging Provider/Clinician.



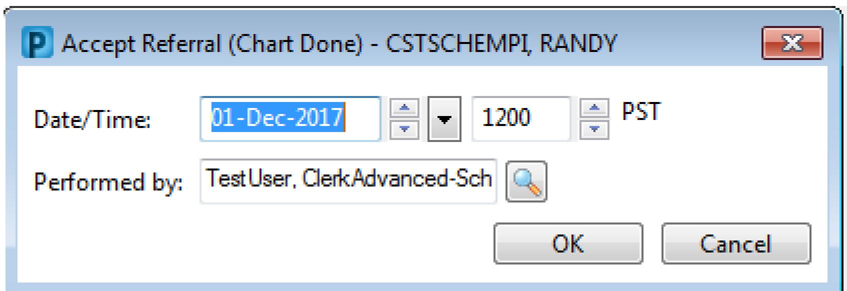
4. There are three types of tasks that will be displayed on the MPTL:

	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."

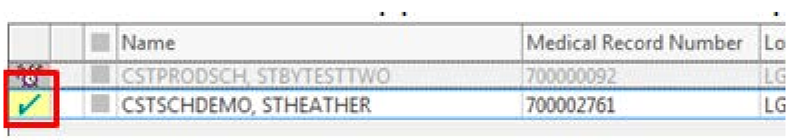
5. Once you are done completing any of the above “Next Steps,” right click on the task that you just completed on MPTL and click on **Chart Done (Date/Time).**



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



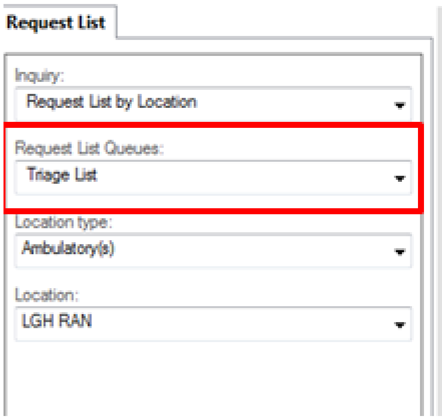
7. A Check mark appears next to the “complete” task.



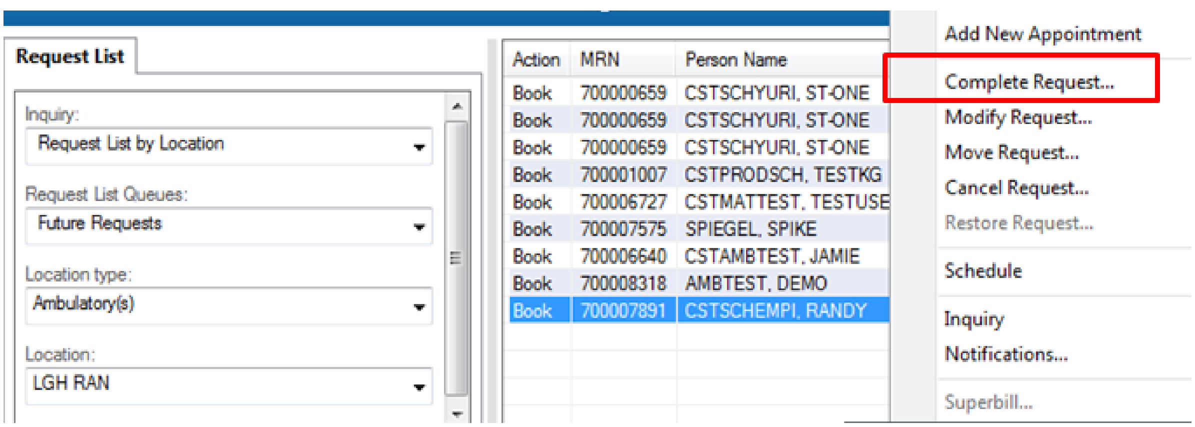
8. Click on the **Refresh** button to make the task drop off the MPTL.

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.



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



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.

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