Managing the RECEIVED Referrals Worklist

The GLHC Command Center provides a ***Referrals Worklist*** as a way to access, organize and manage incoming and outgoing referrals. This Guide will focus on the R**eceived** referrals Worklist.

Accessing RECEIVED Referrals

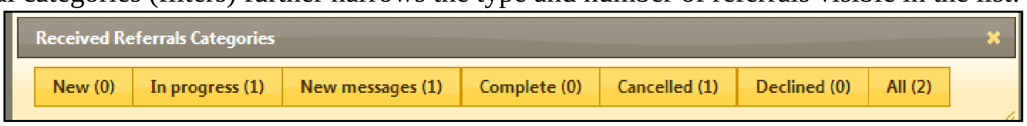
1. Log into the Command Center.
2. Click on the ***Referrals Worklist*** icon to display the Referrals Worklist.
3. Note: If your office has received a new referral it will be indicated on the ***Referrals Worklist*** icon with a red number.

Reviewing Received Referrals

There are various search options in the worklist: ***Search, Preferences, Print worklist, Sent referrals, Received referrals and My list.*** To review all received referrals, click on the ***Received referrals*** tab.

Filtering the Worklist by Category

Additional categories (filters) further narrows the type and number of referrals visible in the list:

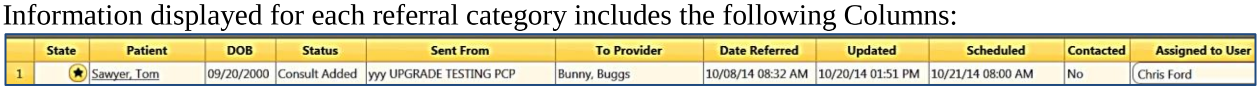


- **New** (Received referral, but no action taken)
- **In progress** (Accepted, Scheduled, Rescheduled, Consult added)
- **New messages** (New or current messages needing attention)
- **Complete** (Patient kept their appointment. No further action)
- **Cancelled** (Patient no-showed, chose another provider, etc.)
- **Declined** (Referral was not accepted from the start)
- **All** (Displays all of the above referrals)

Click any **category** to filter the referrals. The information in each category is further organized by various **columns** – see below.

Navigating the Referrals Worklist Columns

Information displayed for each referral category includes the following Columns:



	State	Patient	DOB	Status	Sent From	To Provider	Date Referred	Updated	Scheduled	Contacted	Assigned to User
1		Sawyer, Tom	09/20/2000	Consult Added	yyy UPGRADE TESTING PCP	Bunny, Buggs	10/08/14 08:32 AM	10/20/14 01:51 PM	10/21/14 08:00 AM	No	Chris Ford

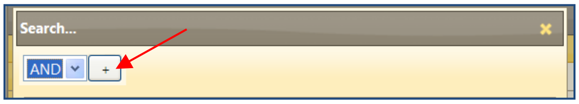
- **State** *(My List, New Communications, Requested Cancelations)*
- **Patient** (Last Name, First Name)
- **DOB** (Patient's date of birth)
- **Status** (Accepted, Declined, Scheduled, Cancelled, etc)
- **Sent From** (Name of Receiving Office/Location)
- **To Provider** (Name of Requested provider, if selected)
- **Date Referred** (Initial Referral date)
- **Updated** (Displays last date referral was updated)
- **Scheduled** (Displays date of appointment or rescheduled date if applicable)
- **Contacted** (Displays whether the patient is aware of the appointment)
- **Assigned to User** (Displays the name of the person the referral is currently assigned to. *This is optional and is explained later in this Guide.)*

Searching for a Specific Referral

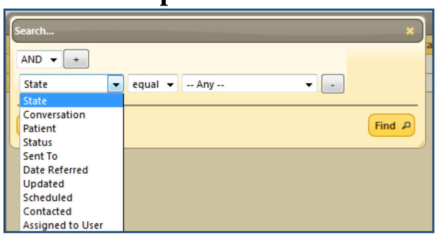
You can also find and display only specific referrals by using the *Search* function.

1. Click **Search**

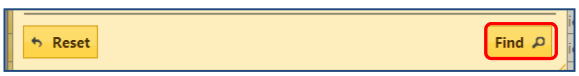
2. Click the **Add** icon to add criteria and filters to the search



3. Click the **dropdown arrow** to identify a specific search criteria.



4. You can further narrow your criteria by the two filter sections to the right of the desired criteria
5. Click the **Add** icon again to add additional criteria and filters to the search.
6. When all desired rules are added click **Find**.



7. If the results are satisfactory, click the **Close** icon of the dialog box to close it and return to the active folder with the filtered search results -or- click **Reset** to clear search rules and revert to all records in the active folder.

Reloading Grid

Click the **Reload Grid** icon in the bottom left hand corner of the screen to reload all records, clearing any search rules.

Navigating the "State" column

The State column provides alerts regarding a referral:

1. Star icon.

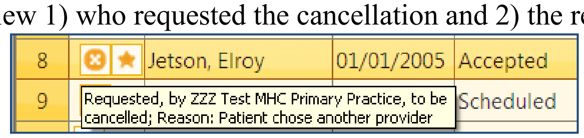
a. No color: Referral has not been assigned
b. Black Star: Referral assigned to you
c. Colored star: Referral assigned to another user

2. New Communication on patient icon

Notifies you that there is a new or open communication message.

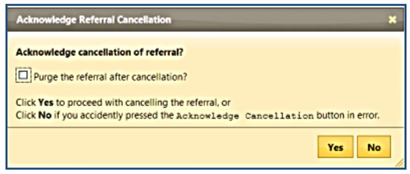
3. Requested Cancellation icon

Notifies you that the referral is awaiting cancellation acknowledgement from either office. Hover over the "x" to view 1) who requested the cancellation and 2) the reason.



To Acknowledge Cancellations

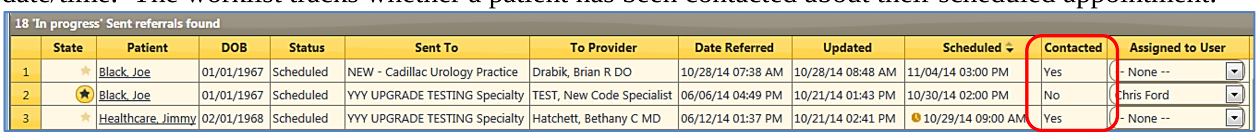
1. Click on the patient's name
2. Next to **Available Actions** select ***Acknowledge Cancellation***
3. Only ***purge*** the referral if it was sent in error.
4. Choose ***Yes*** to cancel or ***No*** to return to referral.



Refer to "*11. Cancelled Referrals*" Quick Reference Guide for more information.

Patient "Contacted" column

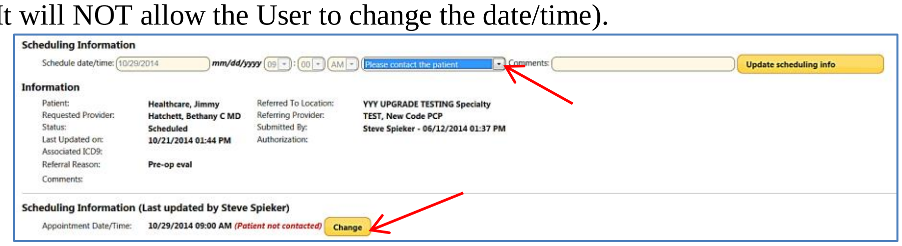
Although it is strongly recommended that the Receiving office contacts the patient with the appointment date/time. The worklist tracks whether a patient has been contacted about their scheduled appointment.



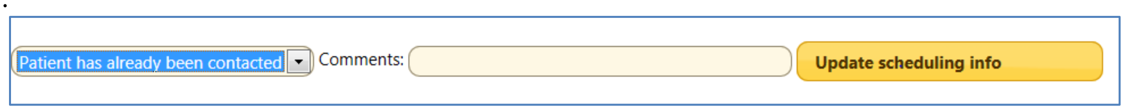
18 'In progress' Sent referrals found

	State	Patient	DOB	Status	Sent To	To Provider	Date Referred	Updated	Scheduled	Contacted	Assigned to User
1		Black, Joe	01/01/1967	Scheduled	NEW - Cadillac Urology Practice	Drabik, Brian R DO	10/28/14 07:38 AM	10/28/14 08:48 AM	11/04/14 03:00 PM	Yes	- None --
2		Black, Joe	01/01/1967	Scheduled	YYY UPGRADE TESTING Specialty	TEST, New Code Specialist	06/06/14 04:49 PM	10/21/14 01:43 PM	10/30/14 02:00 PM	No	Chris Ford
3		Healthcare, Jimmy	02/01/1968	Scheduled	YYY UPGRADE TESTING Specialty	Hatchett, Bethany C MD	06/12/14 01:37 PM	10/21/14 02:41 PM	10/29/14 09:00 AM	Yes	- None --

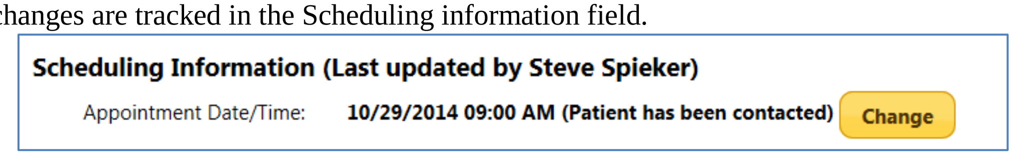
If the Receiving office does not contact the patient, a sender of a referral has the ability to **change the value for the Patient Contacted** field once s/he has contacted the patient with the appointment information. (It will NOT allow the User to change the date/time).



This is done by the Sending office changing the Contacted status and then selecting "Update scheduling info".



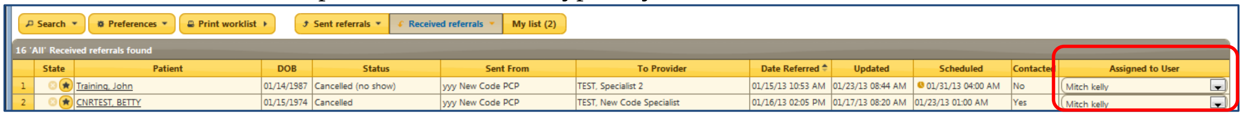
The system also tracks the User, Date and time the value was changed for both the Sender and Receiver's site. All changes are tracked in the Scheduling information field.



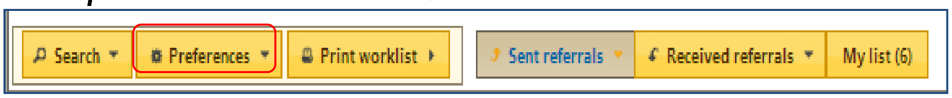
It also updates the status of **Contacted** from a "No" to a "Yes" in the Worklist for both the Sending **and** Receiving office.

Setting Preferences (Assigned to User)

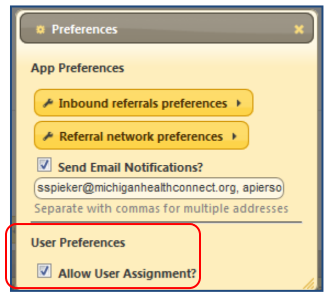
The MHC Referrals application includes a feature to assist offices that have multiple staff who work incoming referrals. This ***Assigned to User*** feature allows them to assign specific referrals to a staff member. Since this is an optional feature, it is typically hidden and not a viewable column.



If your office is using the ***Assigned to User*** feature and you are unable assign Referrals to yourself, select the ***Preferences*** tab as shown below.



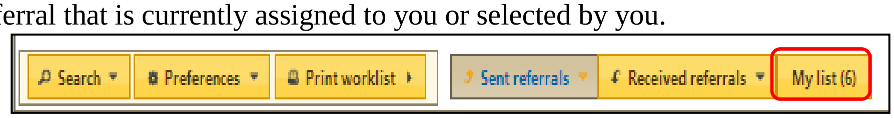
Check the box for "Allow User Assignment?" and then click on the "**x**" to close the screen.



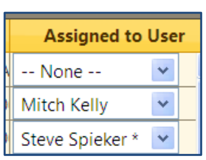
Note: You will be unable to assign referrals to another person without activating this feature.

Using My List

My List is a user-defined work list and can significantly assist in the workflow within your office. This feature not only allows you to assign Referrals to yourself, but you can assign ("hand off") the Referral to another person in your office to complete the next step of the referral. By clicking on this tab you are able to view any referral that is currently assigned to you or selected by you.



Referrals can be added to your personal list two ways:



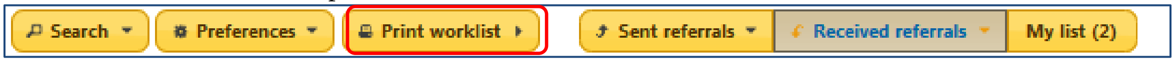
1. Under the ***Received referrals*** tab, click on the ***Assigned to User*** category. Select the referral you wish to assign to you. Select your name the dropdown menu.

2. To tag a referral for the ***My List*** display, click the **Star** icon next to the patient name, under the *State* heading. The star will appear dark black. You can also un-assign the referral to you by clicking again on the black star.

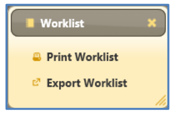
It is important to understand the specific workflow of your office if using either the ***My List*** or the ***Assigned to User*** functions. Please contact your Practice Manager or Referrals Super User for further information.

Printing your worklist

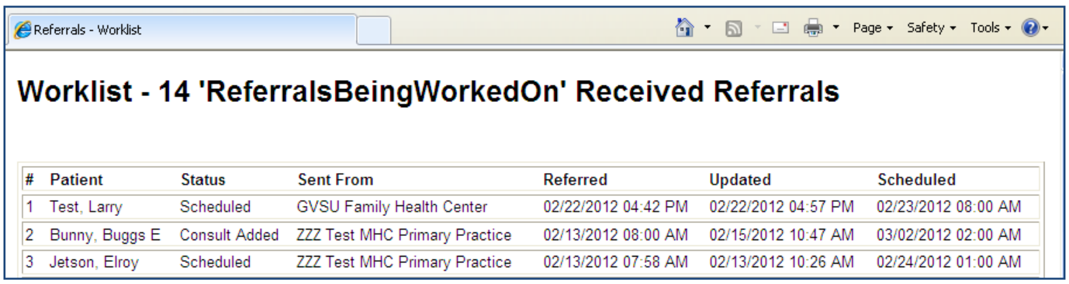
Click the **Print worklist** to print the viewable worklist.



You will have the option of Printing the Worklist in 1) a PDF document **(Print Worklist)** or 2) an Excel Spreadsheet (**Export Worklist)**.



Hint: Make sure that you have your worklist sorted prior to printing the worklist in a PDF format, as the printed document will display like a screenshot of of the worklist. The following printable screen will appear:



Worklist - 14 'ReferralsBeingWorkedOn' Received Referrals

#	Patient	Status	Sent From	Referred	Updated	Scheduled
1	Test, Larry	Scheduled	GVSU Family Health Center	02/22/2012 04:42 PM	02/22/2012 04:57 PM	02/23/2012 08:00 AM
2	Bunny, Buggs E	Consult Added	ZZZ Test MHC Primary Practice	02/13/2012 08:00 AM	02/15/2012 10:47 AM	03/02/2012 02:00 AM
3	Jetson, Elroy	Scheduled	ZZZ Test MHC Primary Practice	02/13/2012 07:58 AM	02/13/2012 10:26 AM	02/24/2012 01:00 AM

Refer to "16. *Creating Net Days from Referred to Scheduled" Quick Reference Guide* for more information and advanced option when exporting your worklist to an Excel spreadsheet.

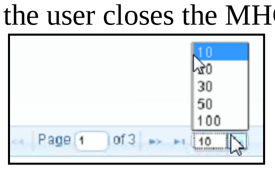
Changing the Appearance of the Referral Worklist

Items that are now under the control of the user include:

- Page Length
- Enhanced System Retention of Sorting/Filtering

Control the Number of Entries Displayed Per Page

You may control the number of entries that appear on a single page of the Referrals Worklist. Simply select the desired number of entries from the pick list at the bottom of the Worklist. Once set for a given user, this setting remains in effect even if the user closes the MHC session and logs back in at a later time.



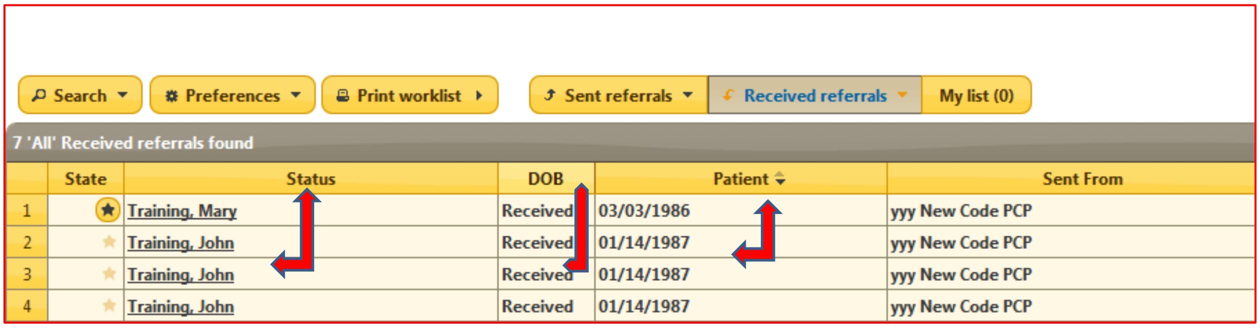
Enhanced System Retention of Sorting/Filtering

The Referrals Worklist now retains filtering and sorting actions to ease workflow and increase efficiency by not requiring users to constantly repeat the same sort/filter actions. Some settings are retained within a session, some are maintained across sessions.

The following table describes setting retentions:

Setting	Retained By
Page Length	User
Sort Order	User
Page Number	Session
Filtered Search	Session

NOTE: You can change the sort order of columns, but <u>DO NOT MOVE</u> COLUMNS. The header will move, but the column information will not move. Example below shows that "Status", "DOB" and "Patient" columns were moved. The header for each column moved, but the information below each header no longer matches the title:



Refer to **9. *Acting on RECEIVED Referrals*** for more information and advanced options on how to open and work a sent referral.