Managing the SENT 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 **Sent** referrals Worklist.

Accessing SENT 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.
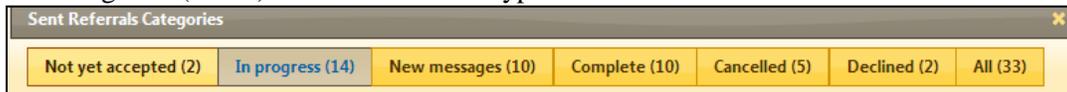
Reviewing Sent Referrals

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

Filtering the Worklist by Category

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

- **Not yet accepted** (Sent 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:
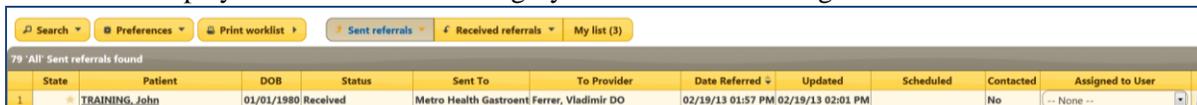
	State	Patient	DOB	Status	Sent To	To Provider	Date Referred	Updated	Scheduled	Contacted	Assigned to User
1		TRAINING, John	01/01/1980	Received	Metro Health Gastroent	Ferrer, Vladimir DO	02/19/13 01:57 PM	02/19/13 02:01 PM		No	-- None --

- **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 To** (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.)*
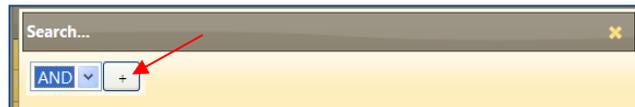
Searching for a Specific Referral

You can also find and display only specific referrals by using the *Search* function. There are various search options in the worklist:
Search, Preferences, Print worklist, Sent referrals, Received referrals and My list.
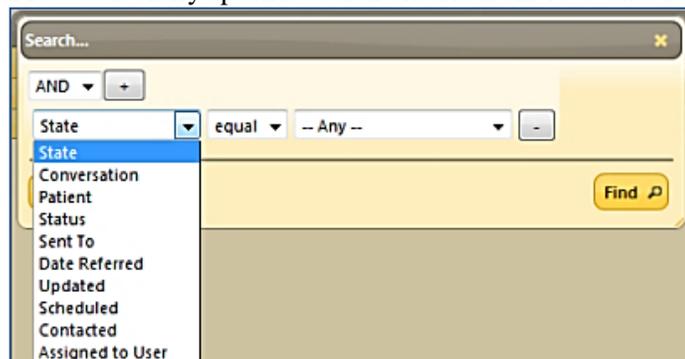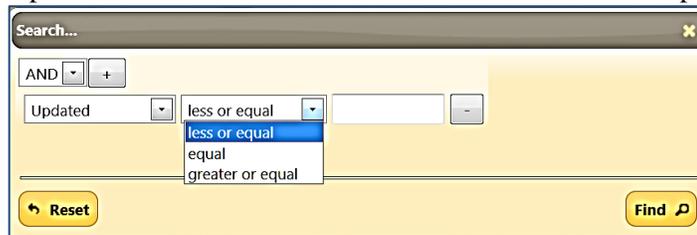
1. Click **Search**

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

3. Click the **dropdown arrow** to identify specific search criteria from 10 available options.

4. Some of the available options will also have other available filters within that option. See below:

5. You can further narrow your criteria by the two filter sections to the right of the desired criteria

6. Click the **Add** icon again to add additional criteria and filters to the search.

7. When all desired rules are added click **Find**.

8. If the results are satisfactory, click the **Close (x)** icon of the dialog box at the top Right Hand of the Search screen 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.
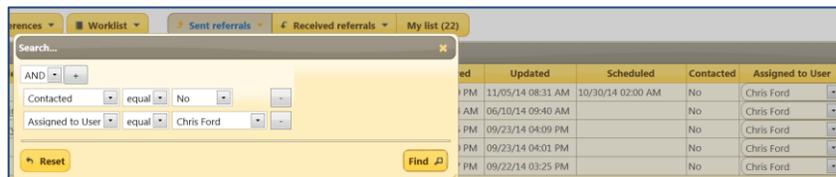
You may also add additional criteria to further narrow your list. Simply add the criteria and select **Find** again.

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 the User that there is a new or open communication message.

3. **Requested Cancellation icon**
   Notifies the User 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

Both sending and receiving are able to cancel a referral. These cancellations MUST be acknowledged by the other office to change a Cancelled status.

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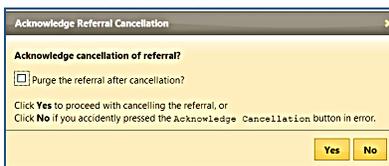
Refer to "*11. Cancelled Referrals*" Quick Reference Guide for more information.

Patient "Contacted" column

The worklist tracks whether a patient has been contacted about their scheduled appointment.

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 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 GLHC 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, click on the *Preferences* tab to use this feature.

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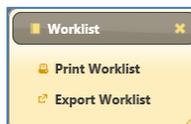
Hint: Make sure that you have your worklist sorted prior to printing the worklist in a PDF format, as the printed document will display like a screenshot of of the worklist. The following printable screen will appear:

#	Patient	Status	Sent To	Referred	Updated	Scheduled	Contacted	Assigned User
1	Training, John	Cancelled (no show)	YYY New Code Specialty	01/15/2013 10:53 AM	01/23/2013 08:43 AM	01/31/2013 04:00 AM	No	Steve Spieker
2	CNRTEST, BETTY	Cancelled	YYY New Code Specialty	01/16/2013 02:05 PM	01/17/2013 08:21 AM	01/23/2013 01:00 AM	Yes	Office Administrator
3	CNRTEST, BETTY	Accepted	ZZZ Test MHC Specialty Clinic	01/17/2013 07:52 AM	01/17/2013 08:07 AM		No	Mitch kelly
4	Test, Mary	Received	ZZZ Test MHC Primary Practice	01/17/2013 07:55 AM	02/19/2013 02:11 PM		No	

Worklist - 21 'All' Sent Referrals

Exporting to Excel: The following information is captured when exporting your Worklist:

State	Patient	DOB	Status	Sent To	To Provider	Date Referred	Updated	Scheduled	Contacted	Assigned to User

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 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, this setting remains in effect even if the user closes the session and logs back in at a later time.


Enhanced System Retention of Sorting/Filtering

The Referrals Worklist 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:
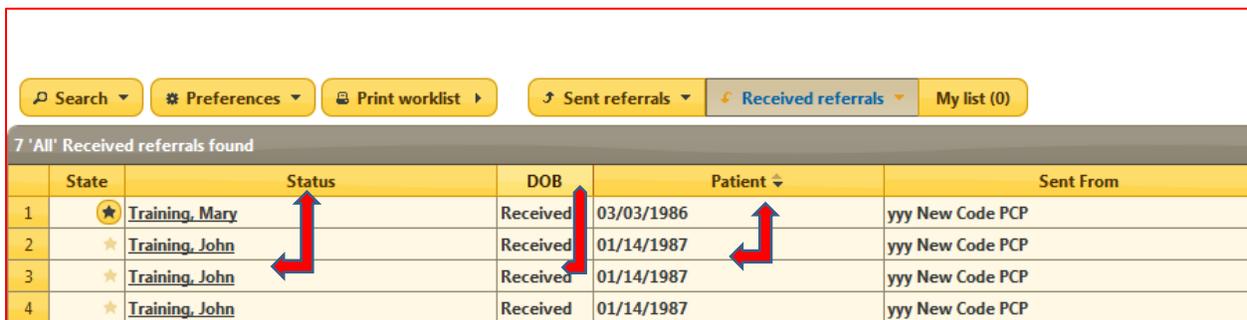
Refer to **7. *Acting on SENT Referrals*** for more information and advanced options on how to open and work a sent referral.