Managing referrals begins with the Sent and Received Referrals worklist. The Referrals worklist displays all referrals sent to and from the practice and specific details for each. From the worklist, users can add attachments, process the Referral and update the status. Referrals appear on the worklist once created and remain as they are processed and throughout status changes. As a reminder, make sure your notification feature is properly set up so that the "referrals coordinator" or designated individual is notified when a new referral or update occurs.

Access the Worklist

Log in and click on the Referrals icon to display the Referrals Worklist.

If there are new unread referrals on the Received Referrals list, the number of new referrals will appear on the Referrals icon.
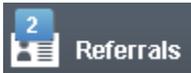
The system will remember the tab you used on your last session and display that tab, by default.
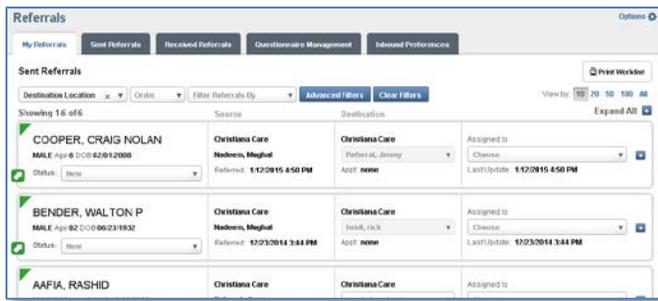
Click on the desired tab to navigate between the My Referrals, Sent Referrals, Received Referrals, Questionnaire Management, and Inbound Preferences tabs.

Viewing the Worklist

The Referrals Worklist is organized into three lists: My Referrals, Sent Referrals and Received Referral. Each list can be found by clicking on the correct tab at the top of the Referrals work screen.

Sorting the Worklist
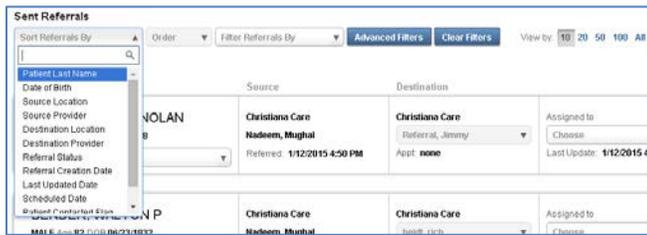
The Worklist can be sorted by the following options:

- Patient Last Name
- Date of Birth
- Source Location
- Source Provider
- Destination Location
- Destination Provider
- Referral Status
- Referral Creation Date
- Last Updated Date
- Scheduled Date
- Patient Contacted Flag
- Assigned User

To sort, click any option from the Sort Referrals By dropdown (Patient, Date of Birth, Source Location, etc.)

The user also controls the number of referrals displayed 10, 20, 50, 100, or All.

The Sort By selection is retained when the user navigates elsewhere within the same session and when the user logs out and logs back in.

Filtering the Worklist

Filters allow you to further narrow the number of referrals visible in the Worklist.
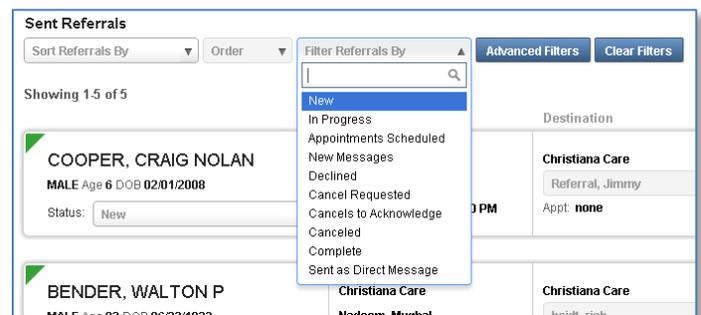
Using the Referrals Worklist

The Worklist can be filtered by selecting one of the following options:

- New
- In Progress
- Appointments Scheduled
- New Messages
- Declined
- Cancel Requested
- Cancels to Acknowledge
- Canceled
- Complete
- Sent as Direct Message

The Filter Referrals By selection is retained when the user navigates elsewhere, both within the same session, and when the user logs out and logs back in.

Advanced Filters

Advanced filter options enable a user to apply multiple filters at the same time, getting a very specific list view.
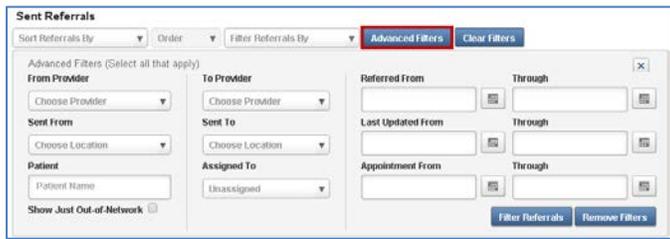
Click the **Advanced Filters** button to view all possible filter options and combinations. Select all of the filters that apply. Options include:

- From Provider
- Sent From
- Patient
- To Provider
- Sent To
- Assigned To
- Referred From/Through
- Last Updated From/Through
- Appointment From/Through

Click the **Filter Referrals** button to continue or **Remove Filters** to clear selections.

The advanced filter results may be refined even further by marking the show out of network referrals box, if appropriate.

Note: Advanced filter selections are not retained when the user navigates elsewhere within the same session, or when the user logs out and logs back in.

Updating the Referred to Provider

The Destination practice may update the referral to reflect the provider that will actually be seeing the patient. Select the desired referral from the Received Referral list and the currently selected Destination Provider displays. The user is able to search for and select another provider using the same steps as when the provider was selected originally.

The referral questions are not adjusted to reflect the new provider's questions. They will remain as they were first entered by the Source practice. The Source practice will be able to view the new provider and the Referrals Worklist will be updated to show the newly selected provider. **Providers can only be assigned when the referral is in the "new" status.**

Updating Referral Status

The referral recipient MUST mark status complete after completing the referral loop. After marking complete the referral is considered complete and no further adjustments can be made to the referral.

Notifications

Notifications allow the "referrals coordinator" or designated individual to be notified via email when a new referral or update occures. Notifications can be customized under the options icon on the top right. An active email account is required.