

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.



Referrals

1

The system will remember the tab you used on your last session and display that tab, by default.

forcals Questionnaire Manag	persent Indonand Performance	
		@ Print Workfast
e Referrals Dy 🔹 🖌	ced fillers Clear Fillers	Viewby 10 50 50 A
Source	Destination	Expand All
Christiana Care	Christiana Care	Assigned to
Nadorm, Maghal	Parterrai, Jermy	• Chause •
Referred: 1/12/2015 4:50 PM	Appt mane	LastUpdate: 1/12/2015 450 PM
Owistiana Care	Christiana Care	Assigned to
Nadoem, Maghal	heidt, rich	• Cleuse •
Referred: 12/23/2014 3:44 PM	Appt mote	LastUpdate: 12/23/2014 3:44 PM
Ovistiana Care	Christiana Care	Assigned to
	Christiana Care Source Orietiana Care Nodews, Maybal Carlored: 112/2015 4:50 PM Orietiana Care Robers, Maybal Gelered: 12/2016 3:54 PM Orietiana Care	Chiefers da Uy • Monocolfiders Cleve Fillers Secure Destination Oristiana Care Patrima d, innuy Galorest 11:20215 5:50 PM Additiona Care Destilana Care Nadaes, Magual Galorest 12:20205 5:34 PM Additiona Care Oristiana Care Oristiana Care Oristiana Care Oristiana Care Oristiana Care

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

Sent Referrals							
Sort Referrals By	A Order	¥ H	ter Referrals By 🔹 🔹 Advar	ced Filters Clear Filters	View	v by 10 20 50 100 All	
Patient Last Name Date of Birth	-		Source	Destination			
Source Location Source Provider	NOLAN		Christiana Care	Christiana Care		Assigned to	
Destination Location	8		Nadeem, Mughai	Referral, Jimmy 🔻		Choose	
Referral Status Referral Creation Date		۲	Referred. 1/12/2015 4:50 PM	Appt none		Last Update: 1/12/2015	
Last Updated Date Scheduled Date Patient Contacted Elso	NP		Christiana Care	Christiana Care		Assigned to	
MALE 446-82 DOB 88/23	1032		Nadeem Munhal	beldt rich		Choose	

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.

Sent Referrals						
Sort Referrals By V Order	Filte	r Referrals By		Advanc	ed Filters	Clear Filters
Showing 1.5 of 5	Nev	م ۷				
	In Progress			Destination		
COOPER, CRAIG NOLAN	App Nev	Appointments Scheduled New Messages			Christiana Care	
MALE Age 6 DOB 02/01/2008		Cancel Requested			Referra	al, Jimmy
Status: New	Car	Cancels to Acknowledge Canceled		PM	Appt: none	
	Cor	nplete				
	Ser	t as Direct Message	Г			
BENDER, WALTON P		Christiana Care			Christiana Care	
MALE 1/20 02 DOD 06/02/4022		Nadoom Muchal			boidt r	ich

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.

Sent Referrals								
Sort Referrals By	Y 0	order 🛛 🕈	Fitter Referrals I	by	Advanced Filters Cle	ar Filters		
Advanced Filters (Select From Provider	all th	at apply) To I	Provider		Referred From	Through	×	
Choose Provider	,		hoose Provider	v		5		
Sent From		Ser	rt To		Last Updated From	Through		
Choose Location	,	• 0	hoose Location			E	50	
Patient		Ass	Assigned To		Appointment From	Through	Through	
Patient Name		U	nassigned	w.		52	NED	
Show Just Out-of-Networ	k 🗎					Filter Referrals	Remove Filters	

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.

Referrats Sent Rotorrats	Received Rohmais Guestionnairo Management Indocend Preferences		
n Rokemais	Provider Favorites Staff Permiss Enable Notifications Email Addresses Click to Add	ions Notification Settings Notify when there is a: New Referral Status Change Information Change	2 NY NORM
	Days Of Week	Change	
	Click to Add		
	Specify Time Range Start Time Stop Time		