

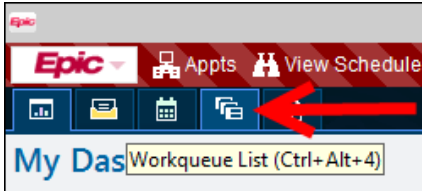
# Tip Sheet 1: Getting Started with Referral Scheduling WQs

## Epic Clinical Referrals

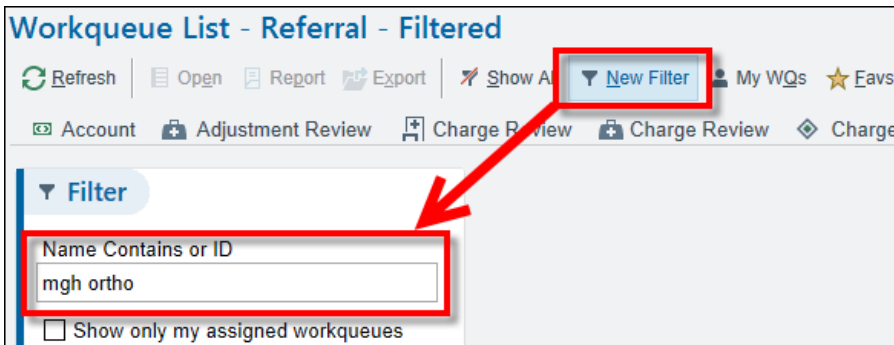
When a provider or staff places an ambulatory referral order for a patient, a referral record is generated for that patient. Based on routing rules, the referral will fall to a specialty workqueue for scheduling. Generally, routing is based on the name of the ambulatory referral order and the location requested in the order.

## Accessing Referral Scheduling Workqueues

1. Click the Workqueue List tab (you can also access via **Epic > Scheduling > Workqueue List**).



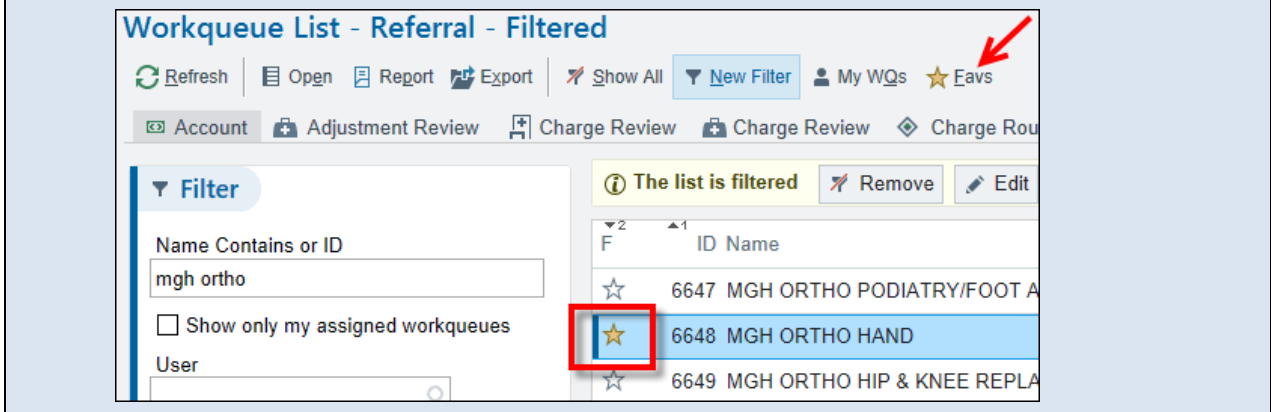
2. Click the **Referral/Authorization** tab.
3. To easily find your department's workqueue(s), click **New Filter** on the toolbar.
4. In the **Name Contains or ID** field, type the name/keyword for the workqueue or the ID#.



5. Click **Apply**.

**TIP:** To easily find this workqueue again, click the **Star** icon. In the future, you can then click **Favs** on the toolbar to view only your favorited workqueue(s).

- To see all workqueues again, click **Show All** on the toolbar.



6. Double-click the workqueue to open.

## Customizing Referral Workqueues

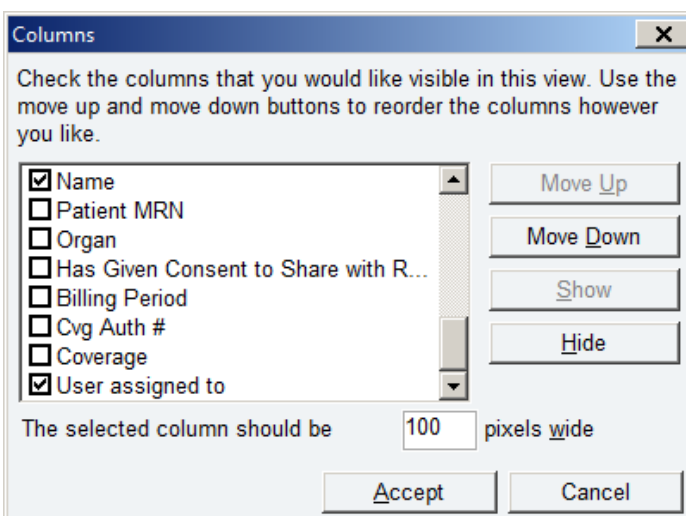
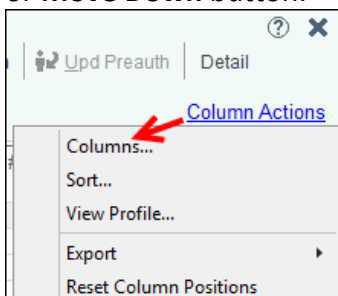
The referral workqueue view can be customized easily to prioritize the order of the referral information and see what's most useful to you for scheduling. The system saves your last display setting so any adjustments you make will hold when you enter the work queue again.

The suggested view for your workqueue is listed below. These are the names of the workqueue columns in the order they should appear left to right.

- \* **Name**
- \* **Spoken Language**
- \* **Phone number**
- \* **Mobile Phone**
- \* **Benefit Plan** (insurance coverage)
- \* **Start Date**
- \* **Sched Status**
- \* **Priority**
- \* **User assigned to**
- \* **Referred by Provider**
- \* **Referred by Dept**
- \* **Referred-To Provider**

The [Column Actions](#) link on the top right of the workqueue gives you options to sort and/or hide the columns to configure the suggested view or adjust according to your preferences.

- To control which columns display and in what order, click on **Columns...** You can hide the columns you don't want to see by un-checking the box beside them.
- You can order the columns by selecting the column name in the list and clicking on the **Move Up** or **Move Down** button.



**TIP:** You can easily change the order of the columns in the workqueue by clicking on the column heading and dragging it over to where you want it to appear.

Patient MRN	Name	Language Sp...	Phone Number	Mobile Phone	Priority	Procedure Name ^	Sched Status	Referred-To Provider
7264258	TEST,AMY	Romanian		617-243-6000	Within 2 wee...	Ambulatory referral to MGH Occupational T...	Called 1x	
90030107	TEST,ALYSE				Within 1 month	Ambulatory referral to MGH Physical Therapy	Ready to Schedule	
40000528	GOODNER,T...	English	617-555-1221	857-307-5555	Within 1 month	Ambulatory referral to MGH Physical Therapy	Ready to Schedule	

- In addition to hiding or ordering columns, you also have the option of sorting the referrals by multiple criterion. To do this click on **Sort...** under [Column Actions](#).

**Sort** [X]

Sort by  

 Ascending  
 Descending

Then by  

 Ascending  
 Descending

Then by  

 Ascending  
 Descending